



## Tyler Parks and Recreation

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*User Guide*  
*2018.5*

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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.

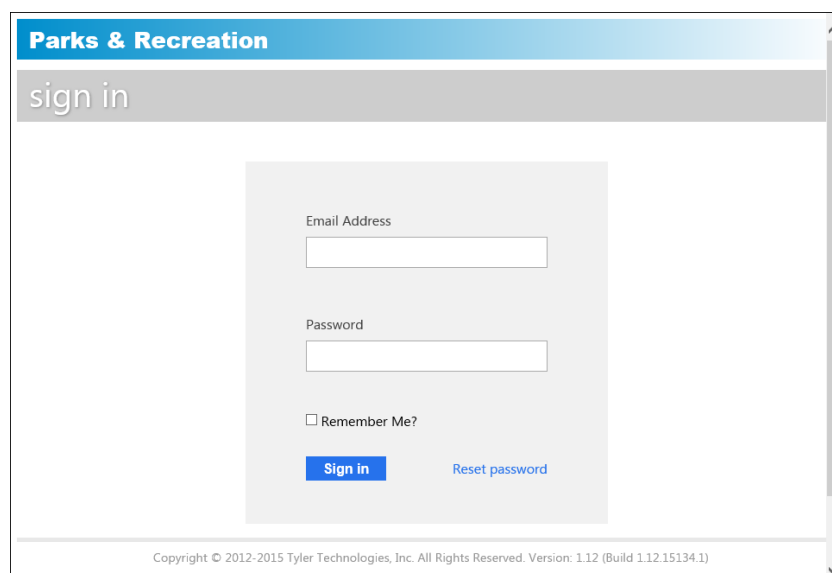
When you access the Administration pages for Tyler Parks and Recreation, the My Home, Parks & Rec, and Administration tabs are available. The Parks & Rec tab provides the contact, class, expense, rental, and report pages that your Parks and Recreation personnel use to manage programs and activities.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

# Overview

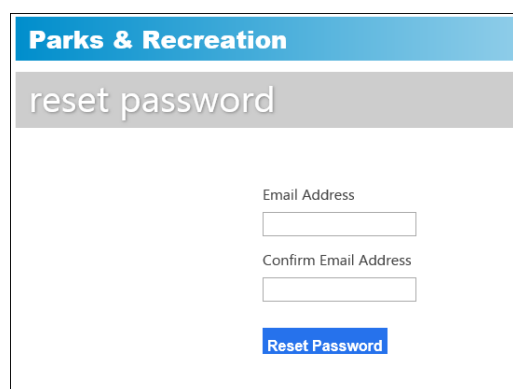
The Tyler Parks and Recreation application includes many common options and procedures. These common items provide efficiencies for you, as once you are familiar with an option or process, it is the same throughout the remainder of the application. This section of the user guide describes these common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

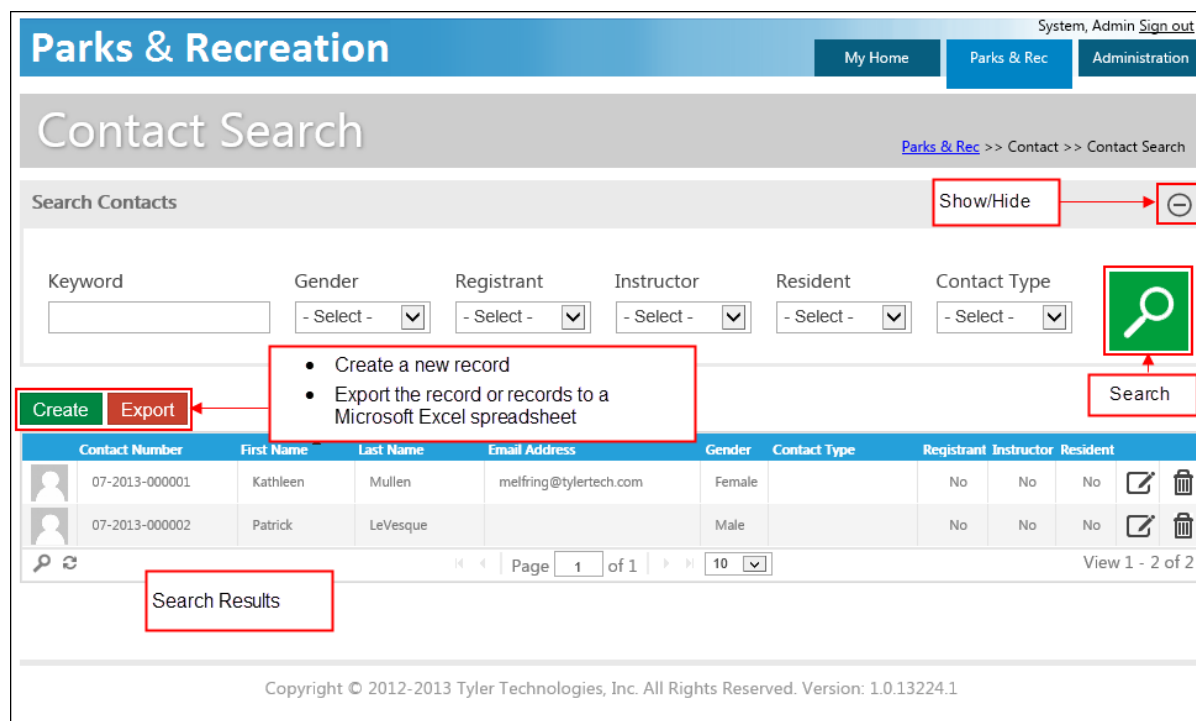
**Parks & Recreation**
Admin, ParksRec Sign out
 My Home Parks & Rec Administration

**Team Search**
[Parks & Rec](#) >> Team >> Team Search

Search Teams
 Keyword
 Team Type
 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		
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		

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





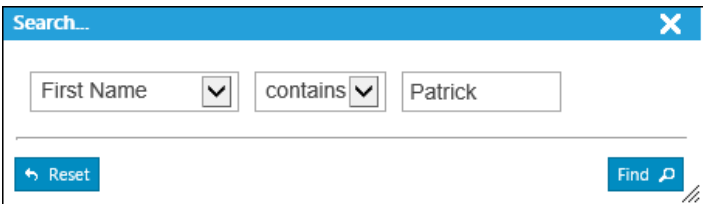


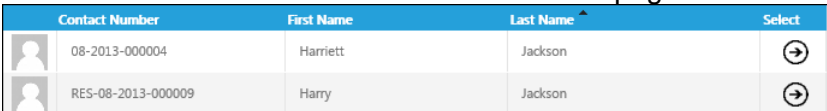


Search Results

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## Button Options

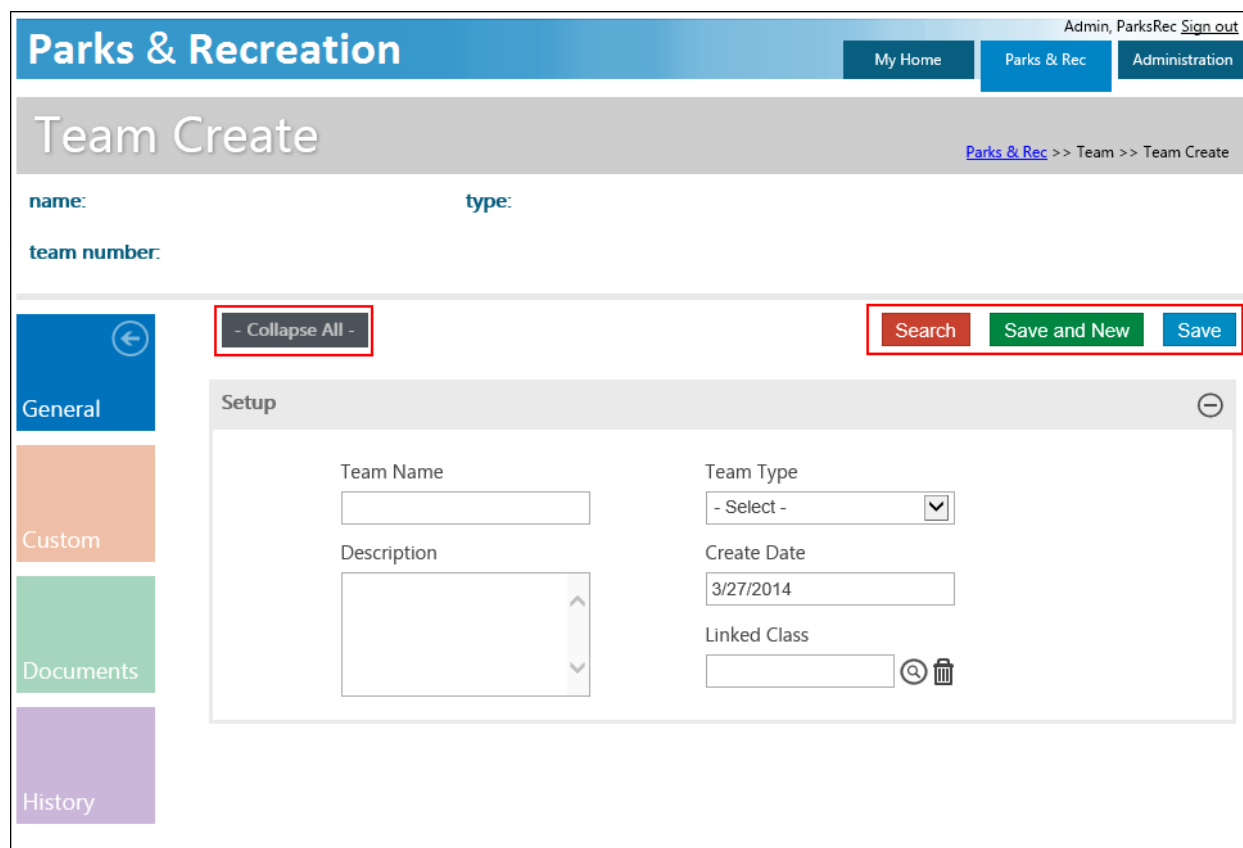
Search results and detail pages provide multiple options for completing a process or maintaining data. Often the options are indicated by buttons. The following table provides a brief description for each option:

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 page.
	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 page. 
 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.



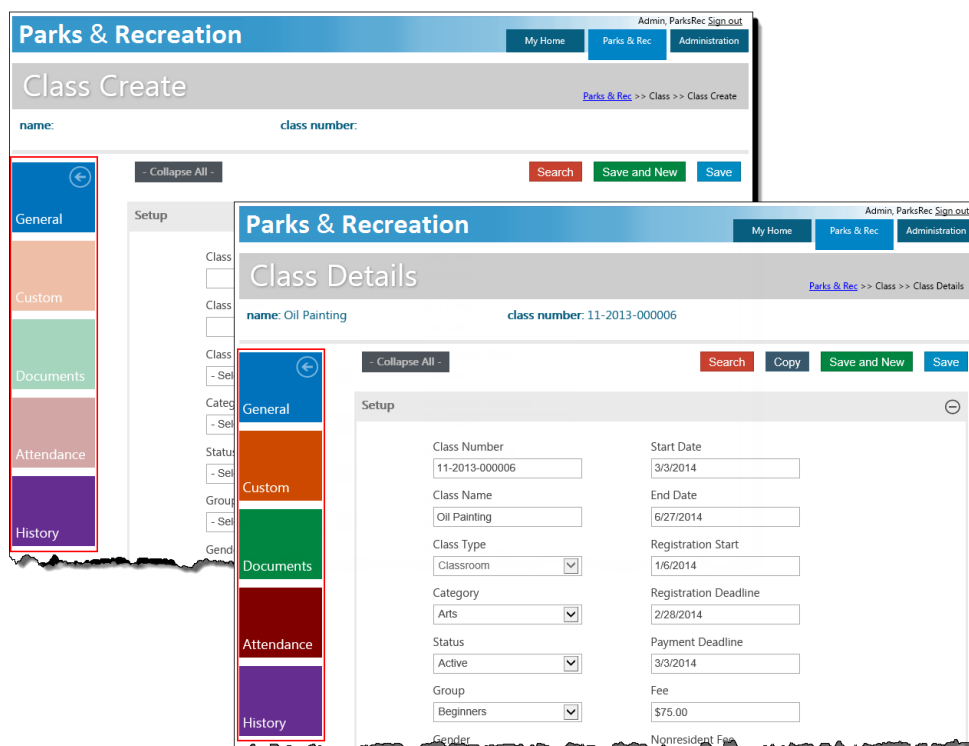
## Program Options

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:

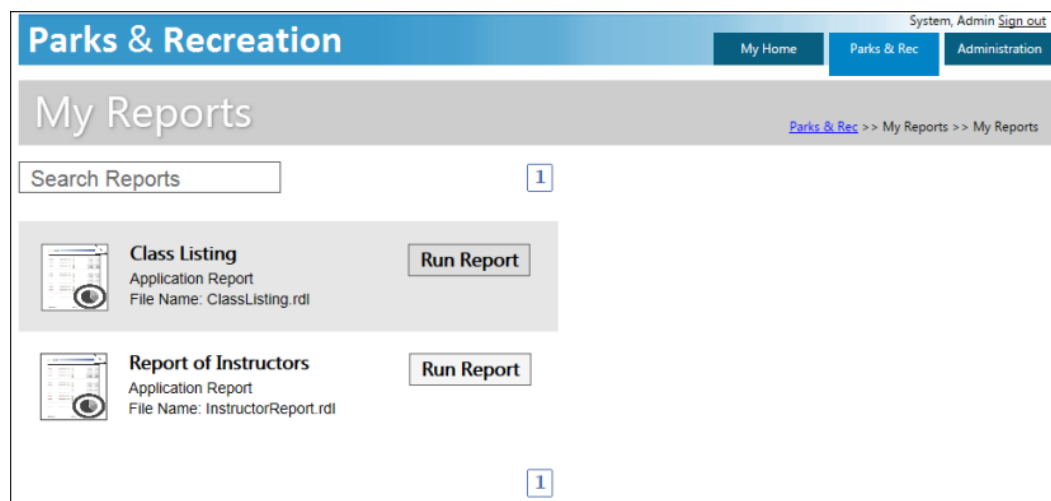
- **General**—Provides the core details for the selected record. This is the active option when you display a page.
- **Custom**—Provides access to custom field data. Custom fields are created using the **Custom Fields** option and assigned using the **Custom Fields Layout** options.
- **Documents**—Provides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

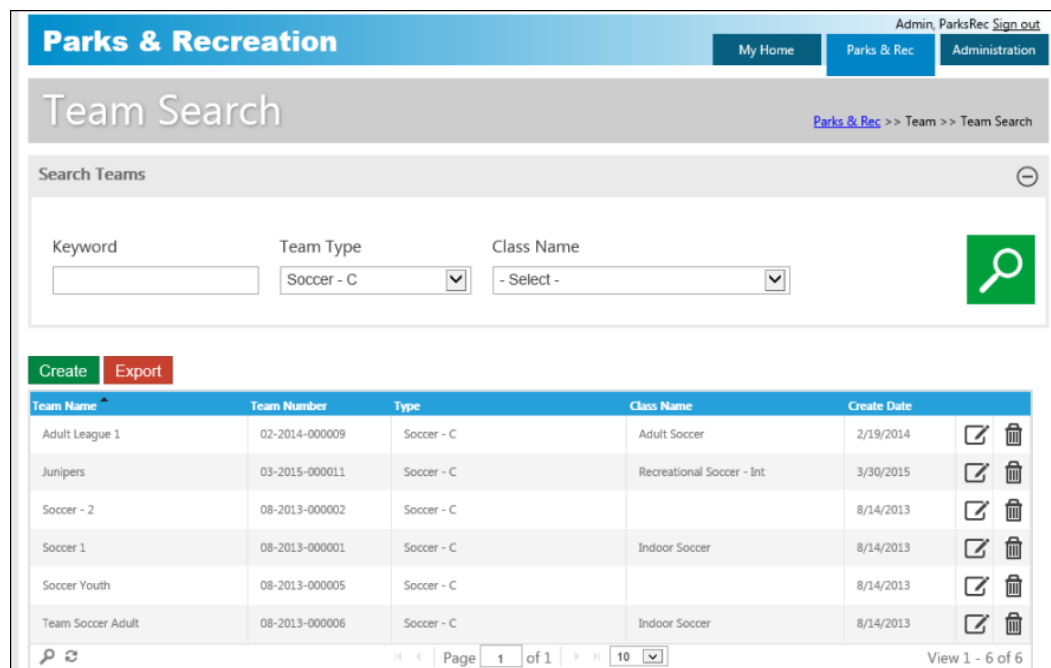
[Run Report](#)

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

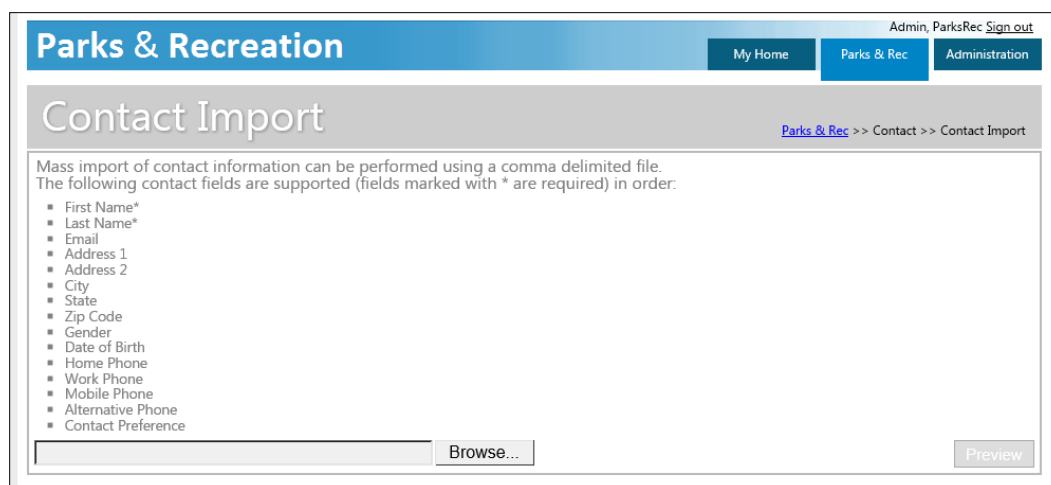
[Create](#) [Export](#)

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 1 of 1](#) [10](#) [⌵](#) View 1 - 6 of 6

## Import

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



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

My Home Parks & Rec Administration

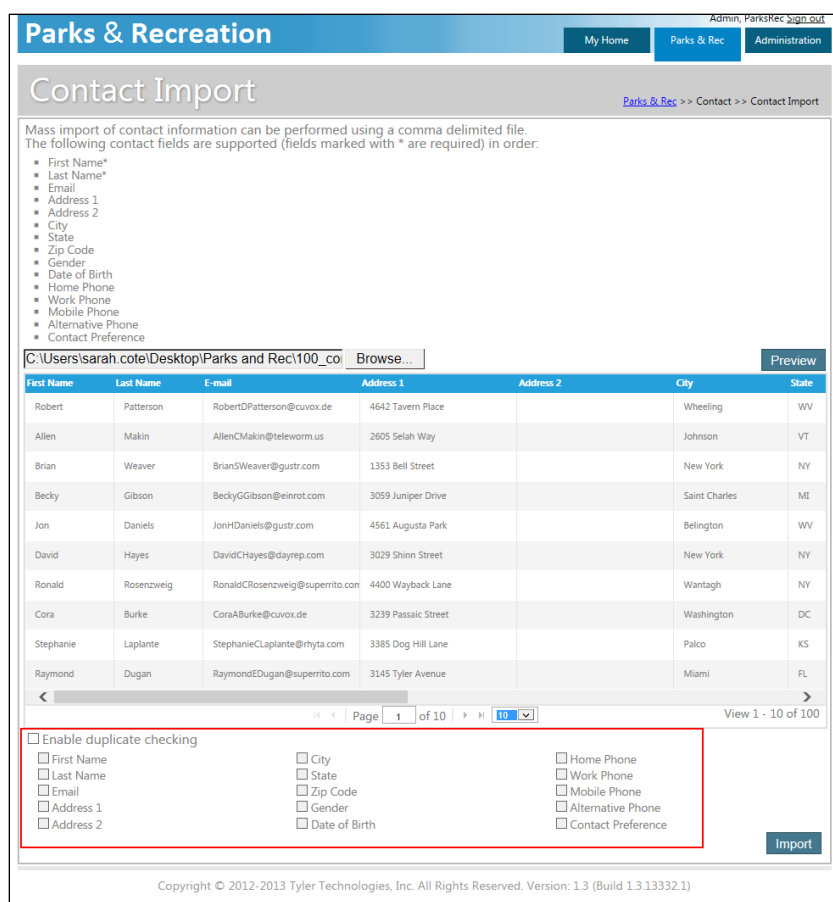
### Contact Import

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

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

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

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



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

My Home Parks & Rec Administration

### Contact Import

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

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

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

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

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

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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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Page

1

of 11

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10

View 1 - 10 of 101

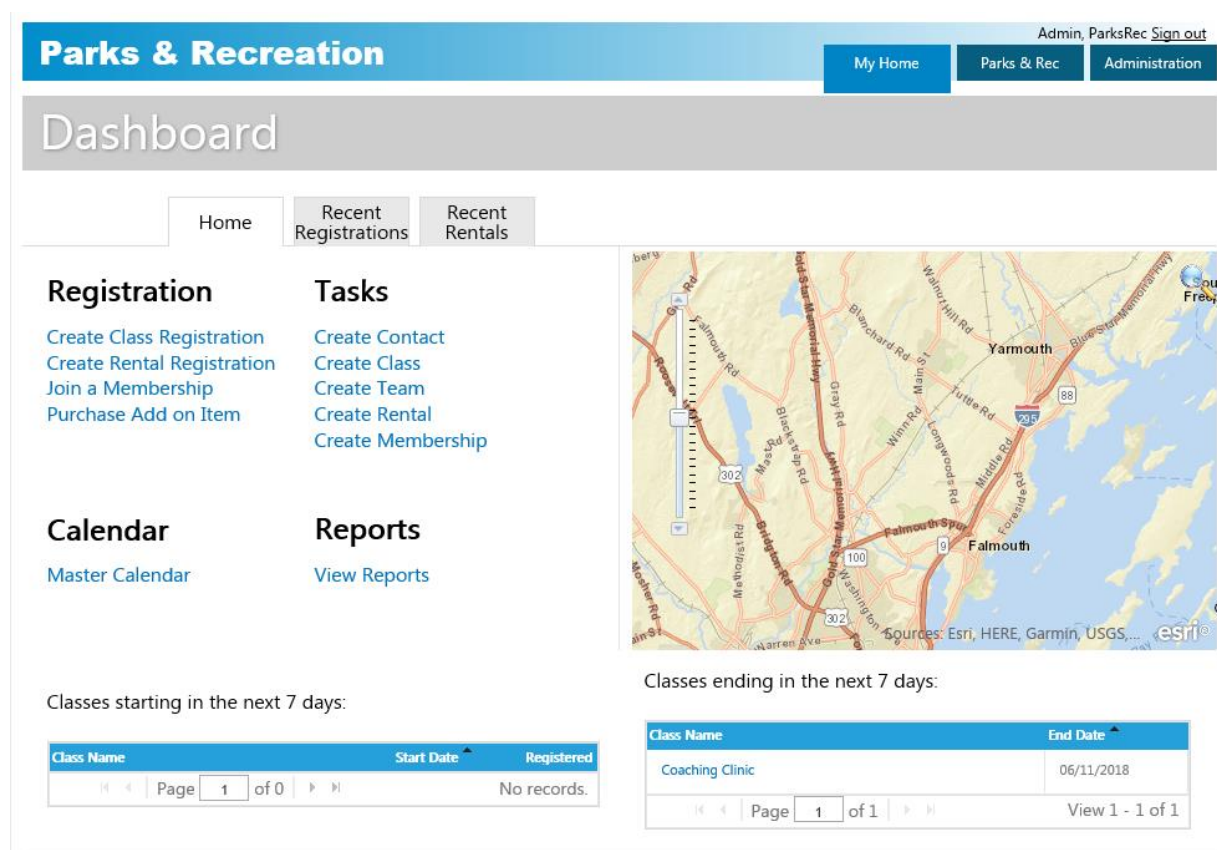
Import Summary

- 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](#)

### Tasks

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

### Calendar

[Master Calendar](#)

### 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

Page 1 of 0 View 1 - 1 of 1

**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.)

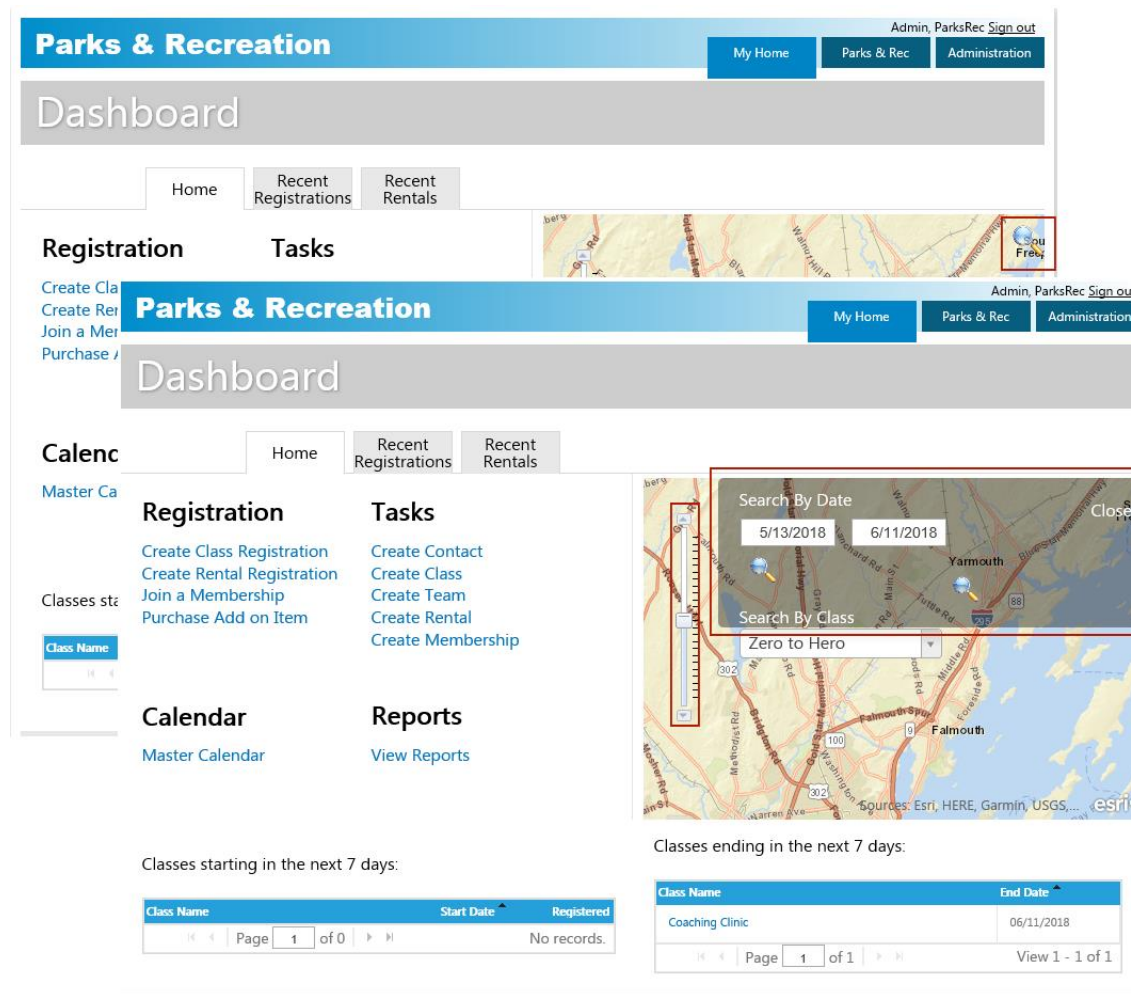
## Home Tab

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 Tyler Parks & Recreation dashboard. The top navigation bar includes 'Parks & Recreation', 'My Home', 'Parks & Rec', and 'Administration'. The main content area is divided into several sections:

- Registration**: Includes links for 'Create Class Registration', 'Create Rental Registration', 'Join a Membership', and 'Purchase Add on Item'.
- Tasks**: Includes links for 'Create Contact', 'Create Class', 'Create Team', 'Create Rental', and 'Create Membership'.
- Calendar**: Includes a 'Master Calendar' link.
- Reports**: Includes a 'View Reports' link.

The activity map is displayed on the right side of the dashboard. A search overlay is visible on the map, showing the following options:

- Search By Date**: A date range selector with '5/13/2018' and '6/11/2018' entered.
- Search By Class**: A dropdown menu with 'Zero to Hero' selected.
- Search**: A button to execute the search.

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
My Home
Parks & Rec
Administration
Admin ParksRec Sign Out

Parks & Rec

Contact
Search
Create
Report
Import

Class Registration
Create
Pending

Class
Search
Create
Report

Rental Registration
Search
Create
Approvals

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
ACH Processing
AR Export
Search

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:

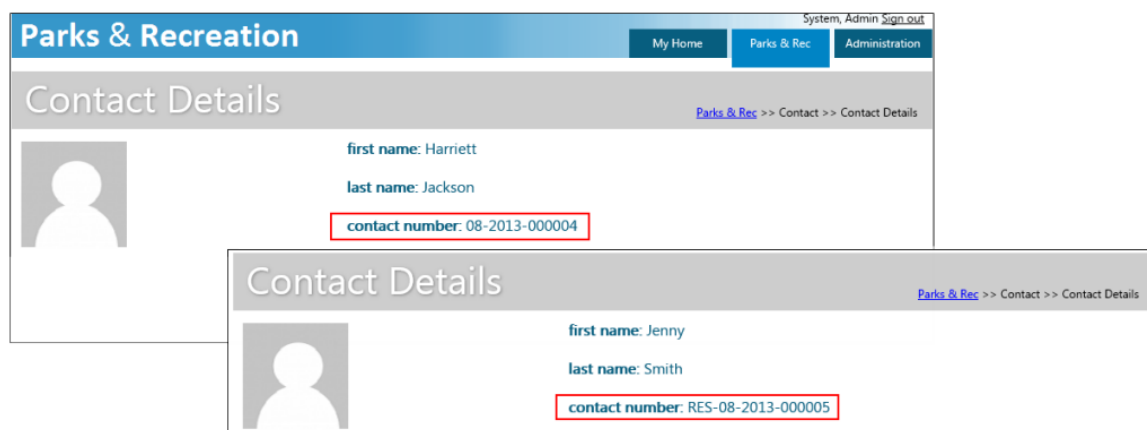


Category	Description
Contact	Defines contacts associated with the Parks and Recreation programs. Contacts can be participants, instructors, or staff.
Class	Manages the specific details for a class offering, including type, status, registration details, fees, available times, and so on.
Team	Defines teams 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 <b>Administration</b> 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

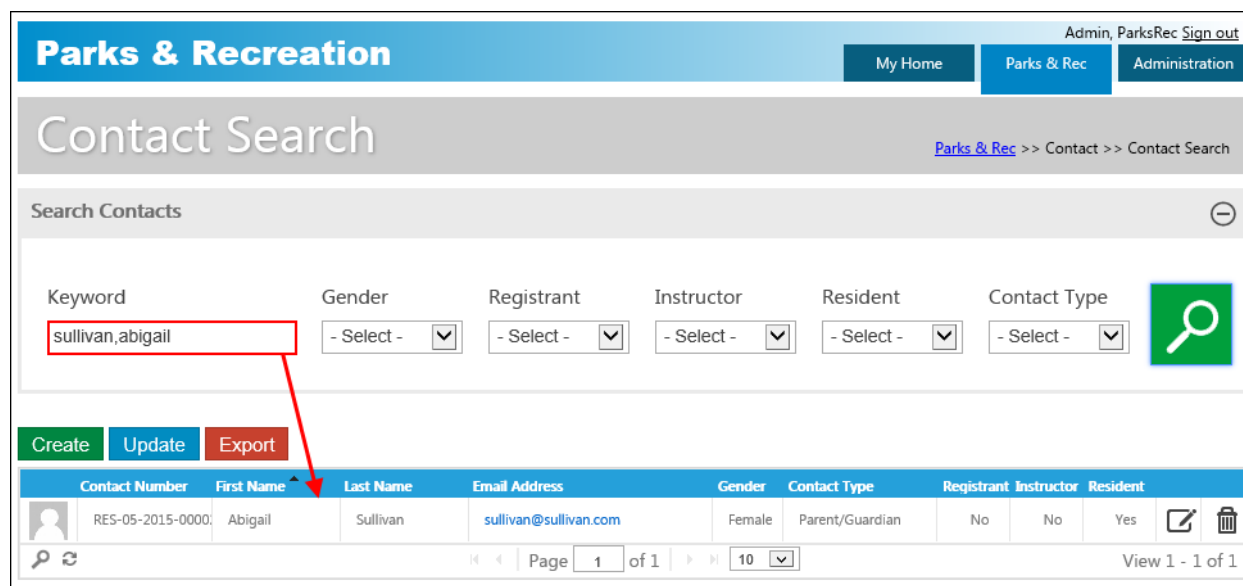
Contacts are the individuals associated with the Parks & Recreation activities, including participants, instructors, and item or facility renters. When citizens register for activities using the portal, contact records are created. Within your organization, personnel can create contact records for instructors, 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* Unspecified	Home Phone 254-824-7442
First Name* Aaron	Work Phone 
Middle Name 	Mobile Phone 
Last Name* Kurtz	Alternative Phone 
Gender Male	Alternative Mobile Phone 1 
Contact Type - Select -	Alternative Mobile Phone 2 
Date of Birth (mm/dd/yyyy)* 10/21/1982 Age: 35	Email Address emailaddress@email.com
<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 
-----------------------------	----------------

The same email address may be used for a contact who also is an administrative user; the passwords, however, may not be the same.

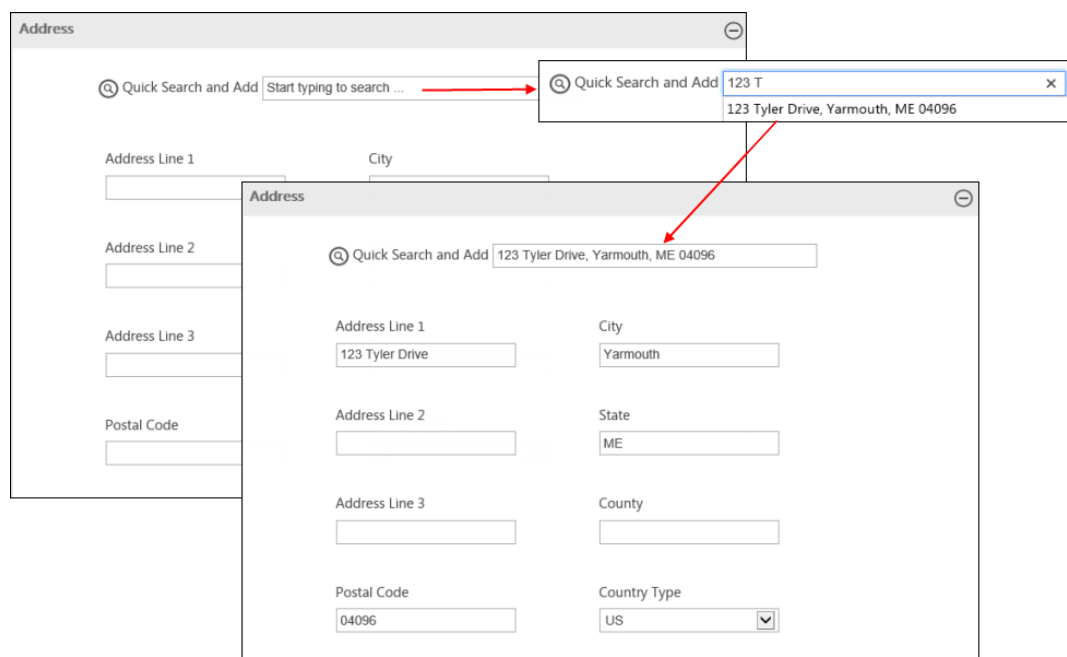
Resident requirements are verified according to the resident city or county entered in the System Settings program. When you create a contact record, the program verifies the value of the city or county; if the information entered matches the value of the *Resident City or Resident County* field in System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

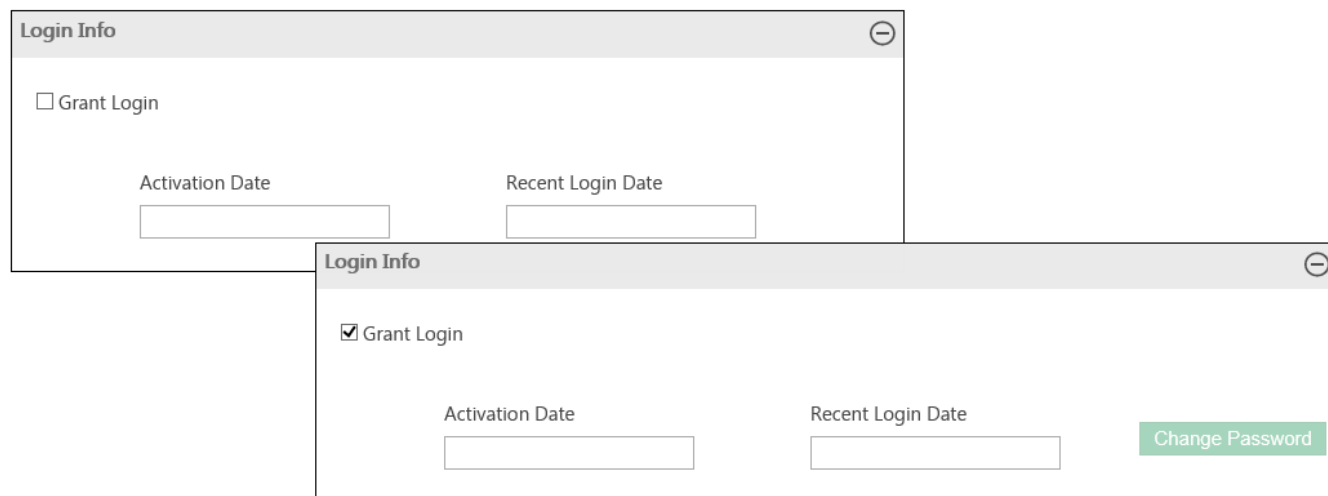


The screenshot shows the 'Address' form with a 'Quick Search and Add' field. A red arrow points from the search field to the 'Address Line 1' field. The search field contains '123 T' and a dropdown menu shows '123 Tyler Drive, Yarmouth, ME 04096'. Another red arrow points from the dropdown menu to the 'Address Line 1' field, which now contains '123 Tyler Drive'. The 'City' field contains 'Yarmouth'. The 'State' field contains 'ME'. The 'County' field is empty. The 'Postal Code' field contains '04096'. The 'Country Type' field is a dropdown menu with 'US' selected.

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:



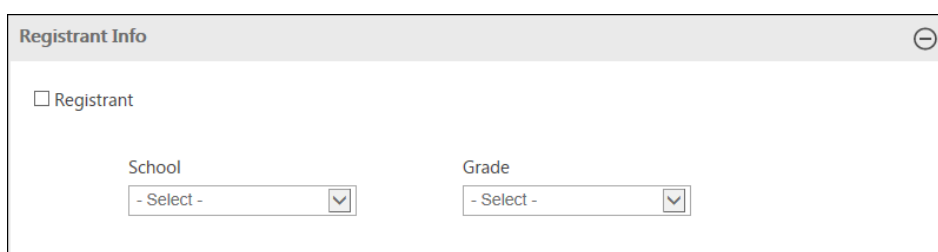
The image shows two overlapping screenshots of the 'Login Info' form. The top screenshot shows the form with the 'Grant Login' checkbox unchecked. Below it, there are two text input fields labeled 'Activation Date' and 'Recent Login Date'. The bottom screenshot shows the same form but with the 'Grant 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 labeled 'School' with '- Select -' and another labeled 'Grade' with '- 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 -

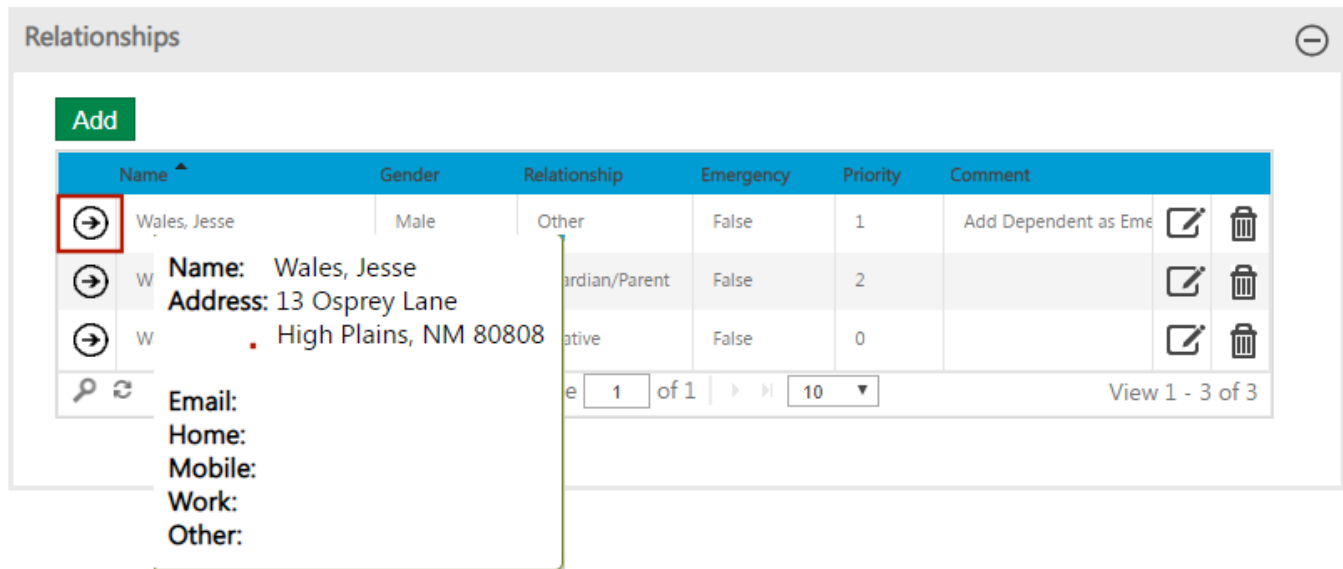
☒ Pre-approved



## Relationships

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

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



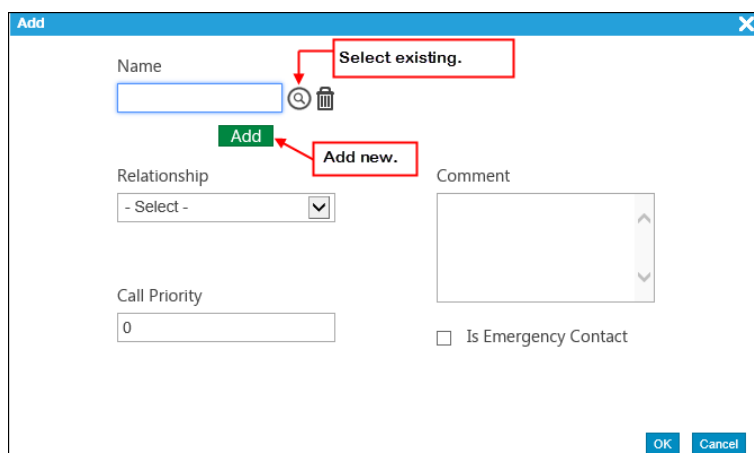
The screenshot shows the 'Relationships' window with a table of contacts. A details popup is open for the contact 'Wales, Jesse'.

Name	Gender	Relationship	Emergency	Priority	Comment
Wales, Jesse	Male	Other	False	1	Add Dependent as Em
Wales, Jesse		Guardian/Parent	False	2	
Wales, Jesse		Relative	False	0	

Details for 'Wales, Jesse':

- Name: Wales, Jesse
- Address: 13 Osprey Lane, High Plains, NM 80808
- Email:
- Home:
- Mobile:
- Work:
- Other:

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:



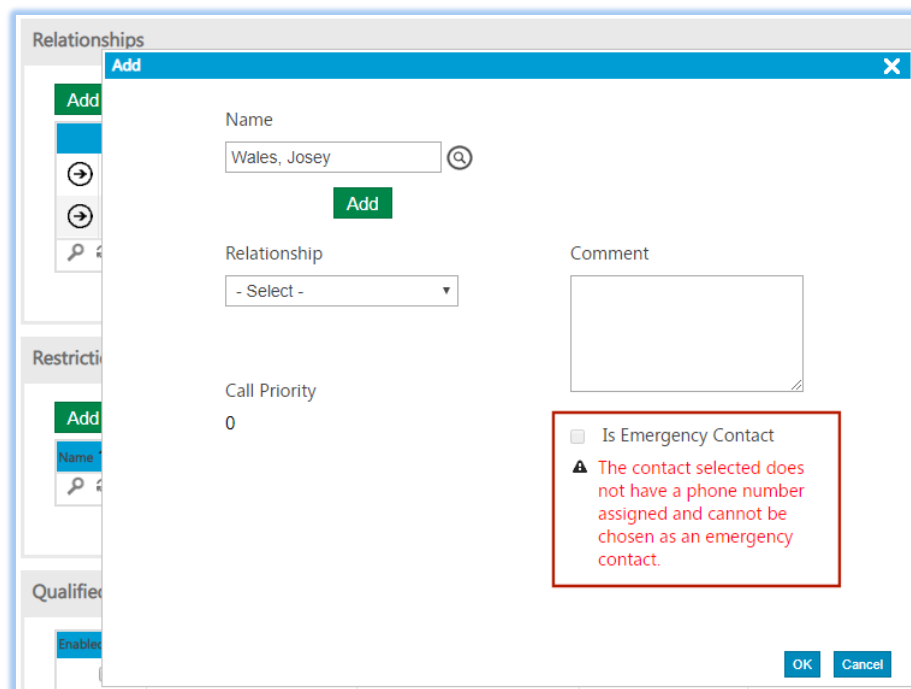
The 'Add' dialog box contains the following fields and controls:

- Name:** A text field with a search icon and a trash icon. A red box labeled 'Select existing.' points to the search icon.
- Add:** A green button. A red box labeled 'Add new.' points to it.
- Relationship:** A dropdown menu with '- Select -' selected.
- Comment:** A text area.
- Call Priority:** A text field with '0' entered.
- Is Emergency Contact:** A checkbox.
- OK** and **Cancel** buttons at the bottom right.

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 pages. Complete the fields, as required, to complete the record.

If the contact does not have a phone number on file, the *Is Emergency Contact* check box is disabled and a descriptive message is displayed:



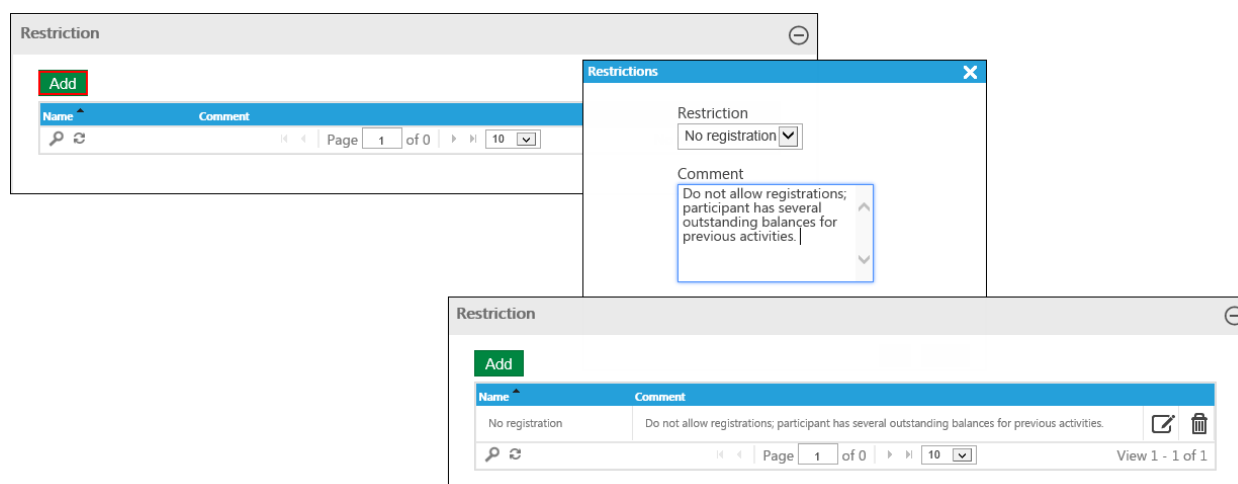
When you add a new relationship contact, the *Same as Parent/Guardian* check box is available on the Billing Address page. When you select this check box, the program completes the contact and preferences information for the new record with the parent/guardian record values.

Once you have completed the relationship contact add process, the program returns you to the Contact Detail page. The Relationships group displays the contacts and the relationship type.

## Restriction

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

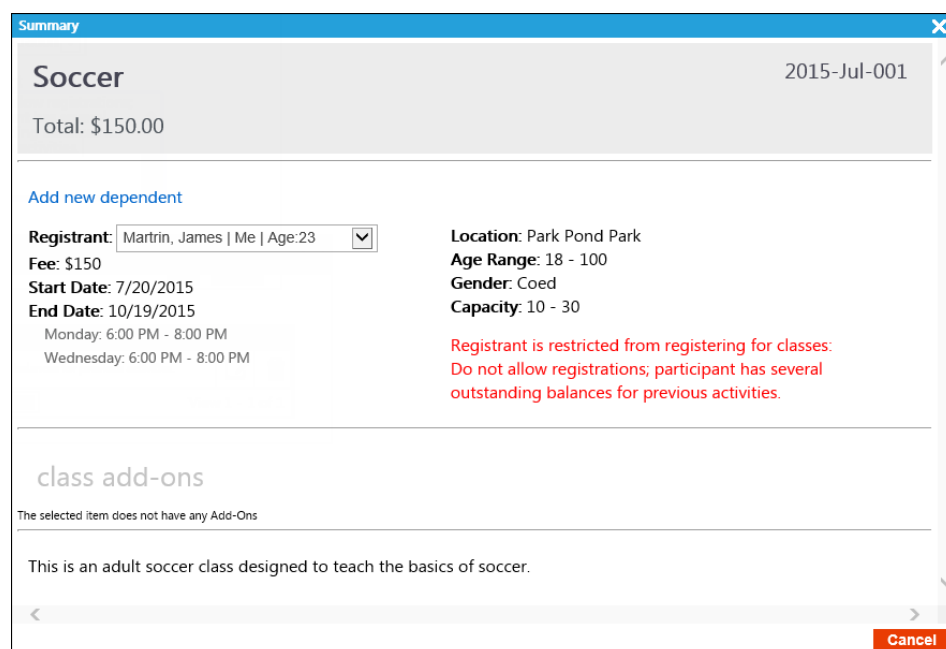
When you click **Add**, the Restrictions box displays. Select the applicable restriction and then add comments, if appropriate, specific to the restriction for this particular contact. When you save the restriction, the Restriction group displays the restriction description and comment:



The image shows two overlapping windows. The top window is titled 'Restriction' and contains an 'Add' button and a table with columns 'Name' and 'Comment'. The bottom window is titled 'Restrictions' and shows a table with one row. The 'Restriction' column has a dropdown menu set to 'No registration'. The 'Comment' column contains the text: 'Do not allow registrations; participant has several outstanding balances for previous activities.'

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

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:



The image shows a 'Summary' dialog box for a 'Soccer' class. It displays the total fee of \$150.00 and the class ID 2015-Jul-001. The registrant is 'Martrin, James | Me | Age: 23'. The fee is \$150. The start date is 7/20/2015 and the end date is 10/19/2015. The location is Park Pond Park, and the age range is 18 - 100. The gender is Coed and the capacity is 10 - 30. A red message states: 'Registrant is restricted from registering for classes: Do not allow registrations; participant has several outstanding balances for previous activities.' The class add-ons section is empty. A 'Cancel' button is at the bottom right.

**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:

Qualified Discounts <span>⊖</span>				
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 %
<span>🔍 ↺</span> <span>⏪ ⏩</span> Page <input type="text" value="1"/> of 1 <span>⏪ ⏩</span> <span>10 ▼</span> <span>View 1 - 3 of 9</span>				

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**

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

### Class Search

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

**Search Classes**

**Keyword**

**Location**  

- Select -

**Class Type**  

- Select -

**Category**  

- Select -

**Status**  

Active

**Gender**  

- Select -

**Age**  

0

**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> <div style="margin-bottom: 10px;"> <b>Fee*</b> </div>
--	---

Registration Custom Layout

### 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: 2px 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> </div>	<div style="margin-bottom: 10px;"> <b>Start Date*</b> <span style="border: 2px 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> </div>
---	---

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

Field	Description
<i>Registration Custom Layout</i>	Determines the layout template to use during registration. Only those templates for which the <i>Show for Registration</i> check box is selected are available. Use the <b>Custom Fields</b> and <b>Custom Fields Layout</b> options on the <b>Administration</b> tab to maintain customized fields.
<i>Registration Disclaimer</i>	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
<i>Include Disclaimer on Receipt</i>	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.
<i>Is Special Event</i>	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.
<i>Show on Portal</i>	If selected, makes this class available on your citizen portal.
<i>Restrict to Residents Only</i>	If selected, excludes nonresidents from class registration.
<i>Restrict to Members Only</i>	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.
<i>Allow Multiple Registrations</i>	If selected, allows a registrant to register multiple times for this class, whether registering through administration or the portal.
<i>Restrict to View Only on Portal</i>	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.
<i>Check Specific Boundaries (Add Service to System Settings)</i>	If selected, enforces registration restrictions according to the specific boundaries defined in the <i>Class Residence Verification Services</i> field in System Settings. This setting works with the residency settings to determine a registrant's eligibility for the class.
<i>Auto Add Waitlist Contacts</i>	Overrides the global <i>Auto Add Waitlist Contacts as Registrants</i> 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.
<i>Fee Template</i>	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 <i>Fee Template</i> and a <i>Fee Name</i> .
<i>Fee Name</i>	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 <i>Fee Name</i> and a <i>Fee Template</i> .



Field	Description
<i>Age Calculation Date</i>	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 <i>Class Start Date</i> field is changed, the <i>Age Calculation Date</i> field is automatically changed to the updated class start date.
<i>Minimum/Maximum # of Registrants</i>	Define the class size. Once the maximum number of participants is reached, registrants are moved to a waitlist for the activity.
<i>Minimum/Maximum School Grade</i>	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.
<i>Allow Waitlist to Remain Open</i>	If selected, causes the waitlist to remain open past the end of the registration period.
<i>Allow Admin to Overenroll Class</i>	If selected, makes the <b>Overenroll</b> button available along with the <b>Waitlist</b> button on the Class Details page. Using Overenroll allows you to add participants over the maximum number specified without using the waitlist feature.
<i>Description</i>	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.
<i>Registration Receipt Note</i>	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.

### 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	

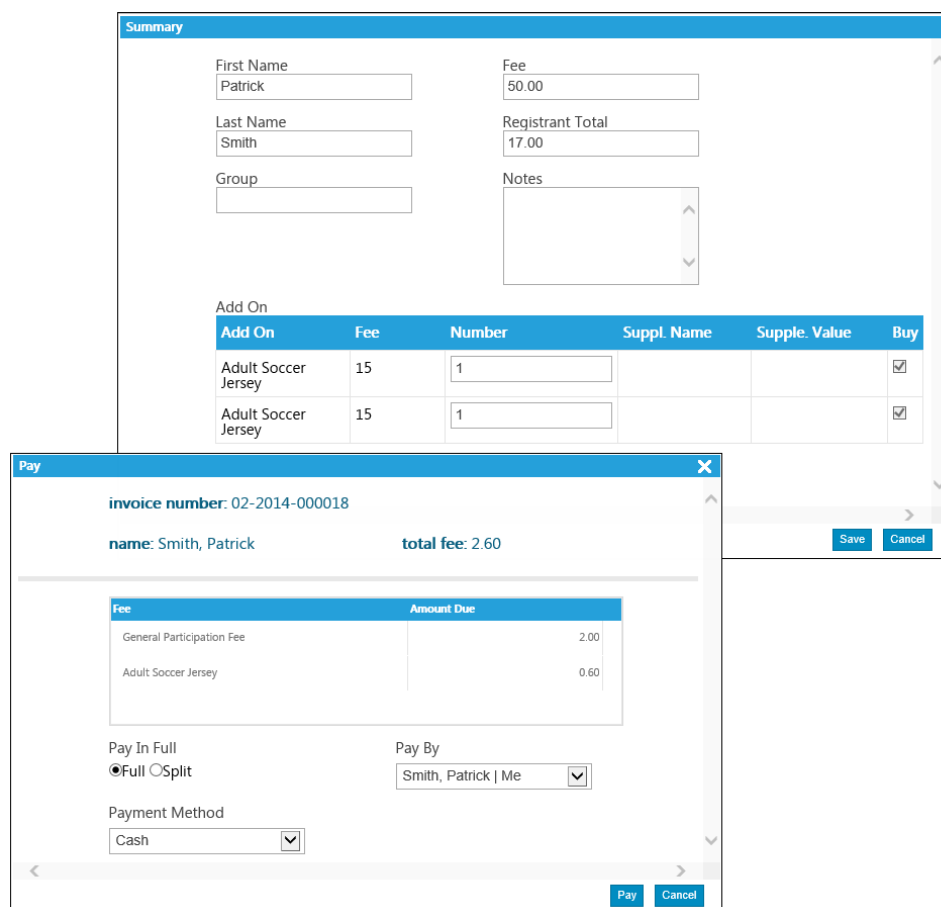
If a registrant has made a partial payment, the entry for the registrant contains two rows: one for the partial payment and one for the total invoice.

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:



The image shows two overlapping windows. The background window is titled 'Summary' and contains the following fields:

- First Name: Patrick
- Last Name: Smith
- Group: (empty)
- Fee: 50.00
- Registrant Total: 17.00
- Notes: (empty text area)

Below these fields is an 'Add On' table:

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"/>

The foreground window is titled 'Pay' and contains the following information:

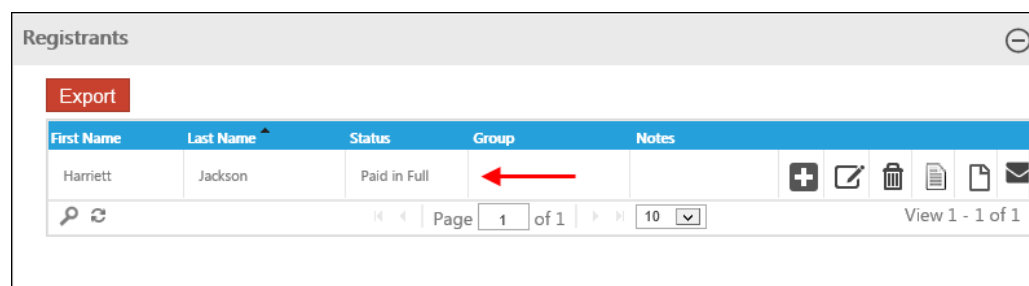
- invoice number: 02-2014-000018
- name: Smith, Patrick
- total fee: 2.60

Below this is a table showing fees:

Fee	Amount Due
General Participation Fee	2.00
Adult Soccer Jersey	0.60

At the bottom of the 'Pay' window, there are options for 'Pay In Full' (radio buttons for Full and Split), 'Pay By' (dropdown menu showing 'Smith, Patrick | Me'), and 'Payment Method' (dropdown menu showing 'Cash').

If you complete the payment process, the *Status* field indicates the change:



The image shows a 'Registrants' window with an 'Export' button and a table of registrants. The table has columns for First Name, Last Name, Status, Group, and Notes. The first row shows 'Harriett Jackson' with a status of 'Paid in Full'. A red arrow points to the 'Status' field in the first row.

First Name	Last Name	Status	Group	Notes
Harriett	Jackson	Paid in Full		

Below the table is a pagination bar showing 'Page 1 of 1' and 'View 1 - 1 of 1'.

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

Class Refund Fees

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

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

Comments

☒ Cancel Recreational Soccer - Int Registration?

Void

Transfer

Refund Check

Account Credit

Cancel

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

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

Registrants

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

+

Receipt Number: RECEIPT-01-2014-000008

Transaction Date: 01/06/2014

Registrant: Marcy Madison

Paid By: Marcy Madison

Payment Method: Cash

Amount: \$3.00

Page 1 of 1

10

View 1 - 6 of 6

Customers using Incode Version 9 in Collection Export Integration Settings will not include unexported voided collections.

If a collection has been exported, attempting a void notifies the user of the need to adjust the external financial system manually:

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 credit, or retain the existing data. The registration will be voided.

Fee Name  
Summer Camp Fee

Comments

☒ Cancel Discount Class Registration?

Void Transfer Refund Check Account Credit Cancel

Transaction Exported to External System

The original transaction has already been imported into the external financial system. Void will have to be manually entered in external system.

Continue?

Cancel Proceed

## 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

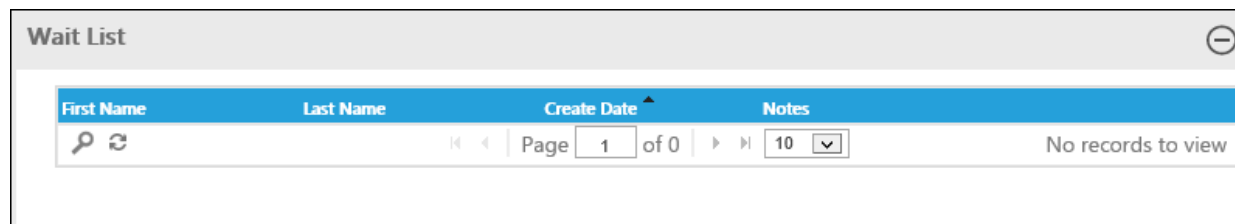
Team Name	Cpt. First Name	Cpt. Last Name	Status	Create Date	Notes
<div> <div> <div></div> <div></div> </div> <div> <div>Page</div> <div>1</div> <div>of 0</div> </div> <div> <div>10</div> <div></div> </div> </div>					

No records to view

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:

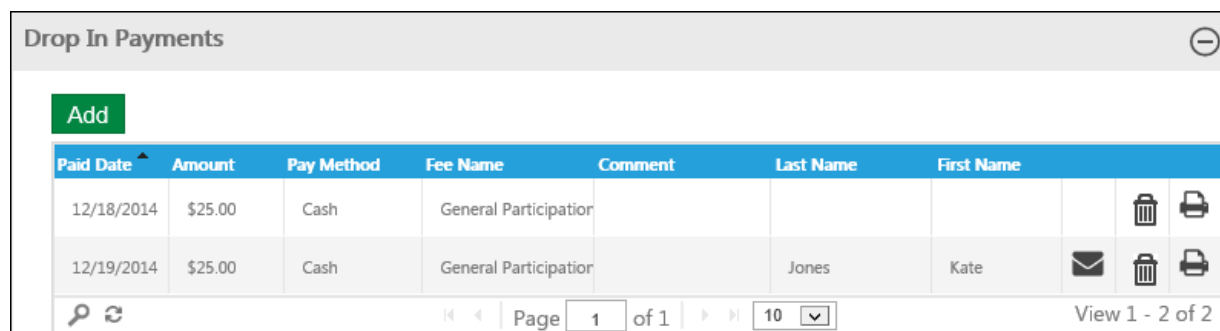


The screenshot shows a 'Wait List' window with a table header containing 'First Name', 'Last Name', 'Create Date', and 'Notes'. Below the header, there is a search icon, a refresh icon, and a pagination bar showing 'Page 1 of 0' and a dropdown menu set to '10'. The text 'No records to view' is displayed on the right side of the table area.

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:



The screenshot shows a 'Drop In Payments' window. At the top left is a green 'Add' button. Below it is a table with columns: 'Paid Date', 'Amount', 'Pay Method', 'Fee Name', 'Comment', 'Last Name', and 'First Name'. The table contains two rows of data. The first row has '12/18/2014', '\$25.00', 'Cash', 'General Participation', and empty fields for 'Comment', 'Last Name', and 'First Name'. The second row has '12/19/2014', '\$25.00', 'Cash', 'General Participation', empty 'Comment', 'Jones' for 'Last Name', and 'Kate' for 'First Name'. To the right of the second row are icons for email, delete, and print. At the bottom, there is a search icon, a refresh icon, a pagination bar showing 'Page 1 of 1', a dropdown menu set to '10', and the text '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

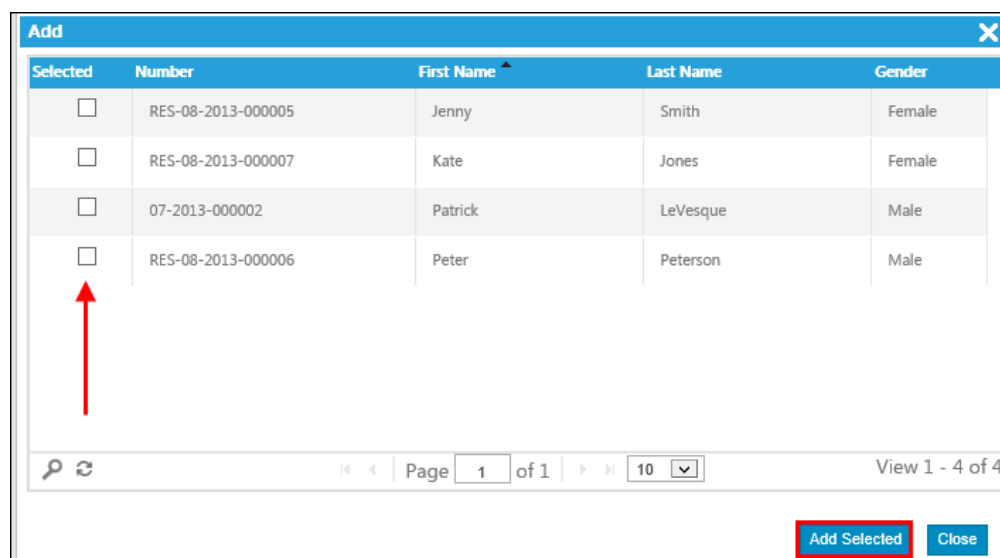
Cancel

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**:

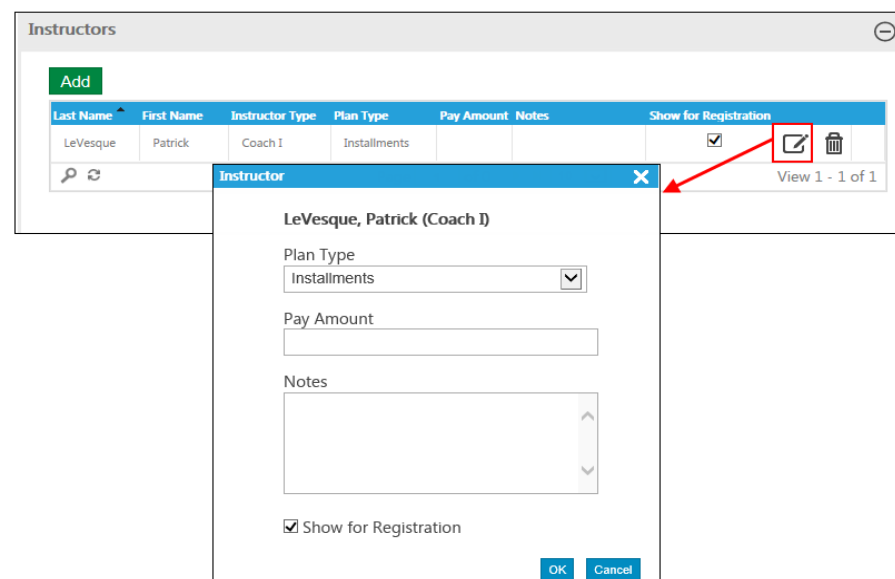


Selected	Number	First Name	Last Name	Gender
<input type="checkbox"/>	RES-08-2013-000005	Jenny	Smith	Female
<input type="checkbox"/>	RES-08-2013-000007	Kate	Jones	Female
<input type="checkbox"/>	07-2013-000002	Patrick	LeVesque	Male
<input type="checkbox"/>	RES-08-2013-000006	Peter	Peterson	Male

Page 1 of 1 | 10 | View 1 - 4 of 4

**Add Selected** Close

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



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:

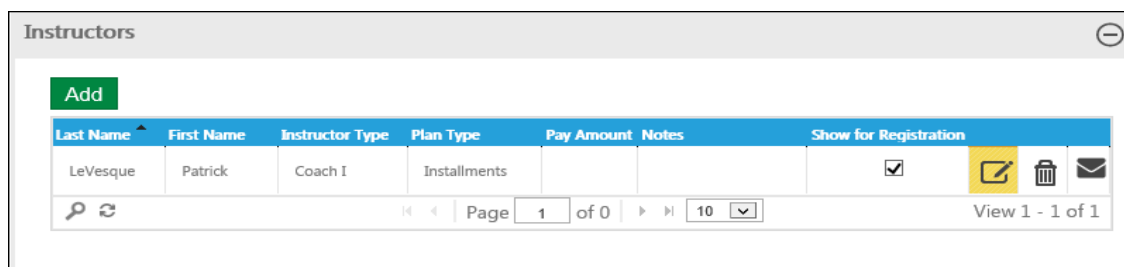
Notes:

☒ 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:

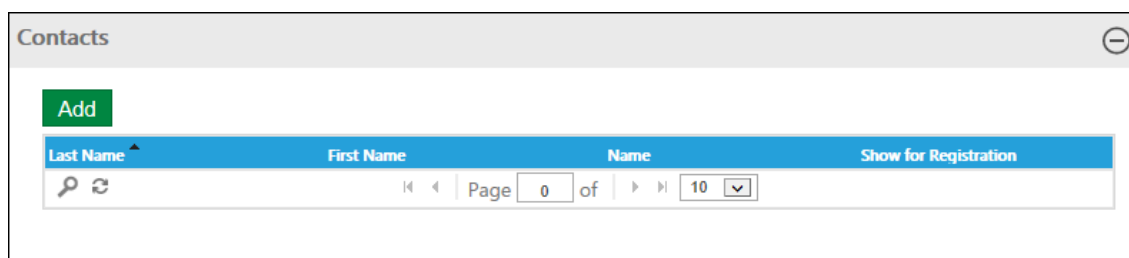


Last Name	First Name	Instructor Type	Plan Type	Pay Amount	Notes	Show for Registration
LeVesque	Patrick	Coach I	Installments			<input checked="" type="checkbox"/>

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

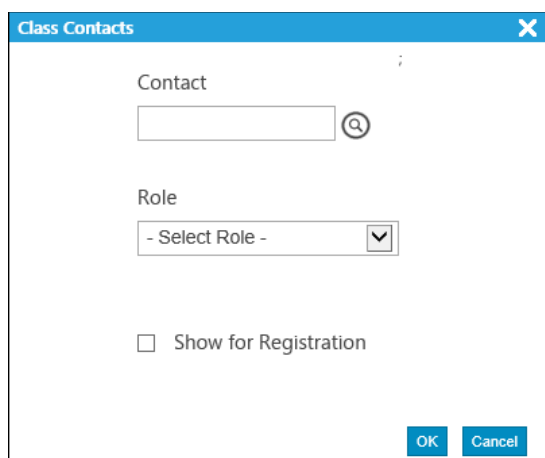
## Contacts

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



Last Name	First Name	Name	Show for Registration
-----------	------------	------	-----------------------

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:



Class Contacts

Contact

Role

- Select Role -

☐ Show for Registration

OK

Cancel

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

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

Contacts

Add

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

Page

1

of 1

10

View 1 - 1 of 1

## Add-Ons

The Add-Ons 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"/>	

Page

1

of 1

10

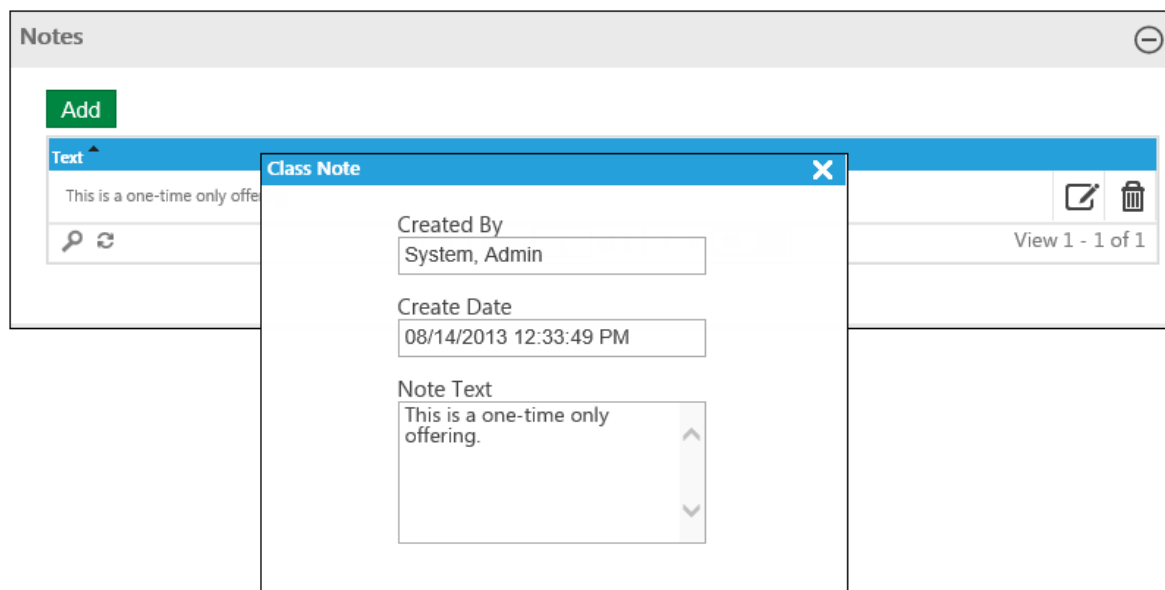
View 1 - 1 of 1

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.

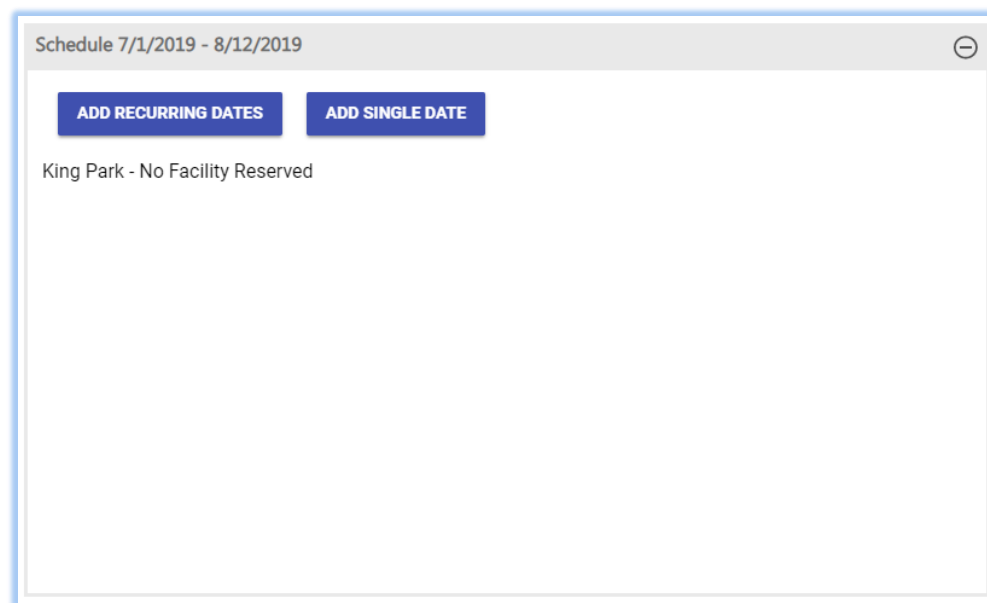
## Notes

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:



## Schedule

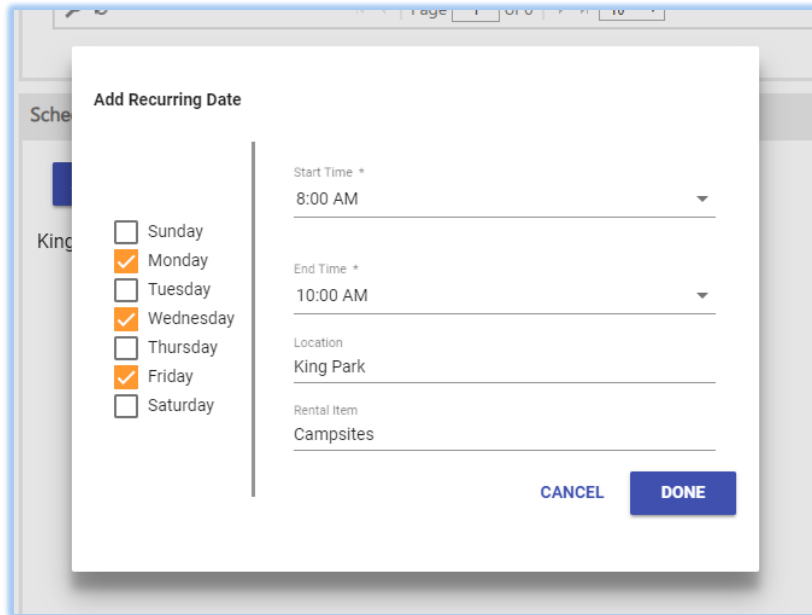
The **Schedule** pane allows for the variable scheduling and selection of locations and rental items:



The start and end dates of a selected class display in the section header. Below the section header are buttons to add recurring and single dates. The section also shows the location that has been selected for the class and, if applicable, the facility reserved.

### *Recurring Dates*

To schedule recurring dates for a class, click the **ADD RECURRING DATES** button. In the dialog that opens, select, at minimum, the days and the start and end times:



**Add Recurring Date**

☐ Sunday  
☒ Monday  
☐ Tuesday  
☒ Wednesday  
☐ Thursday  
☒ Friday  
☐ Saturday

Start Time \*  
8:00 AM

End Time \*  
10:00 AM

Location  
King Park

Rental Item  
Campsites

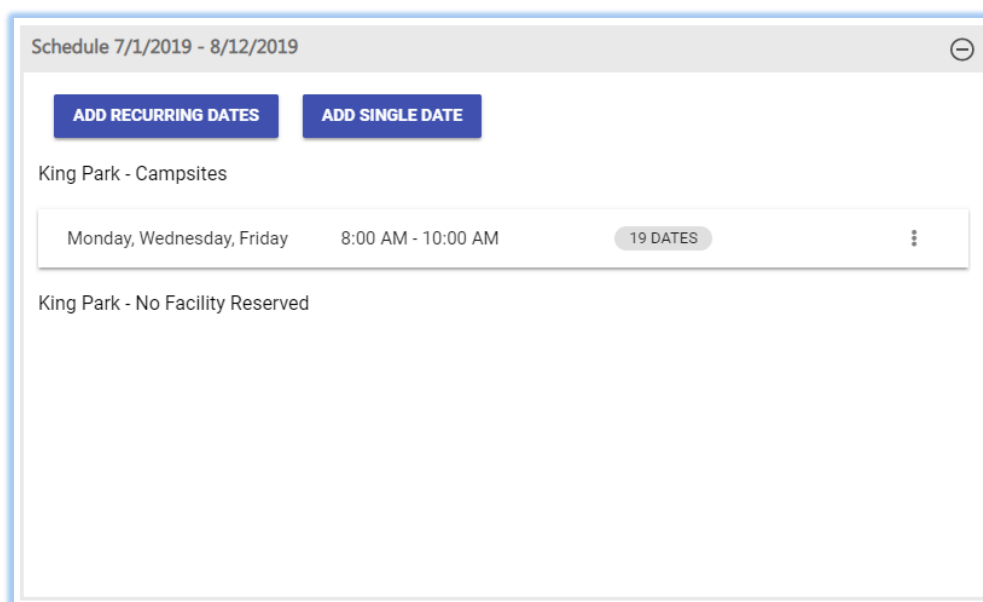
CANCEL DONE

The dialog also contains fields for selecting the class location and, if applicable, rental item, such as a specific facility within the location.

To select a *Rental Item*, first select the *Location*, then the *Rental Item*. Selecting a *Location* filters the selections on the *Rental Item* drop-down to those that are valid for the location only.

**Note:** Selecting a facility marks it on the facility calendar as unavailable for renting during the scheduled time of the class.

When finished, click **DONE**. The **Schedule** section refreshes, displaying the new entry, including the total number of dates, on an expandable card:



Schedule 7/1/2019 - 8/12/2019

ADD RECURRING DATES ADD SINGLE DATE

King Park - Campsites

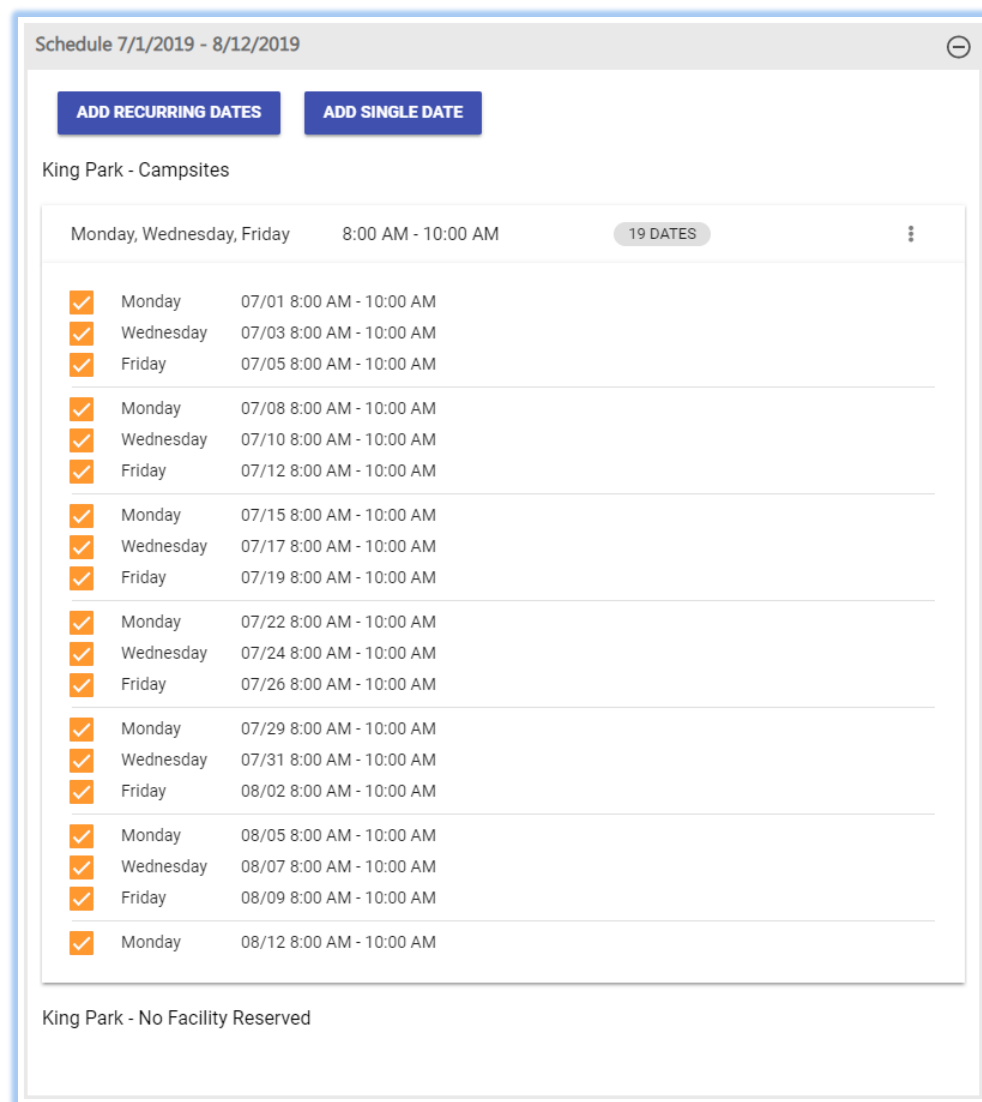
Monday, Wednesday, Friday	8:00 AM - 10:00 AM	19 DATES	⋮
---------------------------	--------------------	----------	---

King Park - No Facility Reserved

As shown in the image above, cards are grouped under headings containing their corresponding locations and rental items.

For cards that do not have specific locations selected, the heading defaults the location selected in the **Setup** section of the Class Details page. For cards that do not have specific rental items selected, the heading displays “No Facility Reserved” next to the location.

To view the complete list of class dates or remove individual dates from the list, click the card to expand it:



Schedule 7/1/2019 - 8/12/2019

ADD RECURRING DATES ADD SINGLE DATE

King Park - Campsites

	Monday, Wednesday, Friday	8:00 AM - 10:00 AM	19 DATES
<input checked="" type="checkbox"/>	Monday	07/01 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	07/03 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	07/05 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	07/08 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	07/10 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	07/12 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	07/15 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	07/17 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	07/19 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	07/22 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	07/24 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	07/26 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	07/29 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	07/31 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	08/02 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	08/05 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Wednesday	08/07 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Friday	08/09 8:00 AM - 10:00 AM	
<input checked="" type="checkbox"/>	Monday	08/12 8:00 AM - 10:00 AM	

King Park - No Facility Reserved

The expanded card shows all scheduled class dates and times that fall within the date range of the class.

If you need to make a custom change and remove specific days from the list, deselect the corresponding check boxes.

To edit the days, start and end times, location or rental item of the recurring schedule itself, click the action menu represented by the vertical ellipses on the right side of the card:



Schedule 7/1/2019 - 8/12/2019

**ADD RECURRING DATES** **ADD SINGLE DATE**

King Park - Campsites

Monday, Wednesday, Friday 8:00 AM - 10:00 AM 19 DATES

**Edit Recurring Date**

☐ Sunday  
☒ Monday  
☐ Tuesday  
☒ Wednesday  
☐ Thursday  
☒ Friday  
☐ Saturday

Start Time \* 8:00 AM

End Time \* 10:00 AM

Location King Park

Rental Item Campsites

**CANCEL** **UPDATE**

<input checked="" type="checkbox"/>	Monday	08/05 8:00 AM - 10:00 AM
<input checked="" type="checkbox"/>	Wednesday	08/07 8:00 AM - 10:00 AM
<input checked="" type="checkbox"/>	Friday	08/09 8:00 AM - 10:00 AM
<input checked="" type="checkbox"/>	Monday	08/12 8:00 AM - 10:00 AM

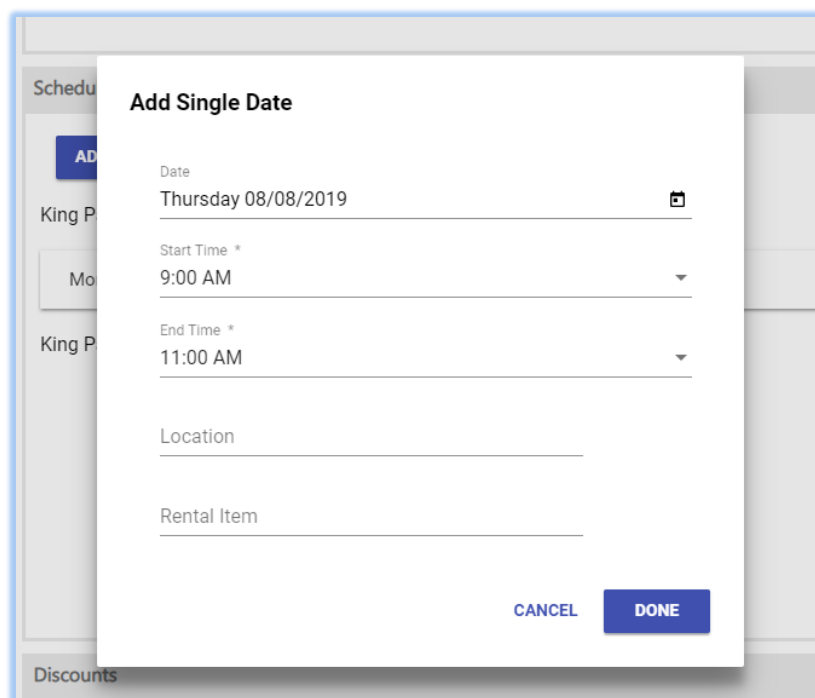
King Park - No Facility Reserved

**Note:** Editing a recurring schedule resets any custom changes to their default states.

To add another series of recurring days for the same class, click the **ADD RECURRING DATES** button again to repeat the process.

### Single Dates

To schedule single dates for a class, click the **ADD SINGLE DATE** button. In the dialog that opens, select, at minimum, the day and the start and end times:



**Add Single Date**

Date  
Thursday 08/08/2019

Start Time \*  
9:00 AM

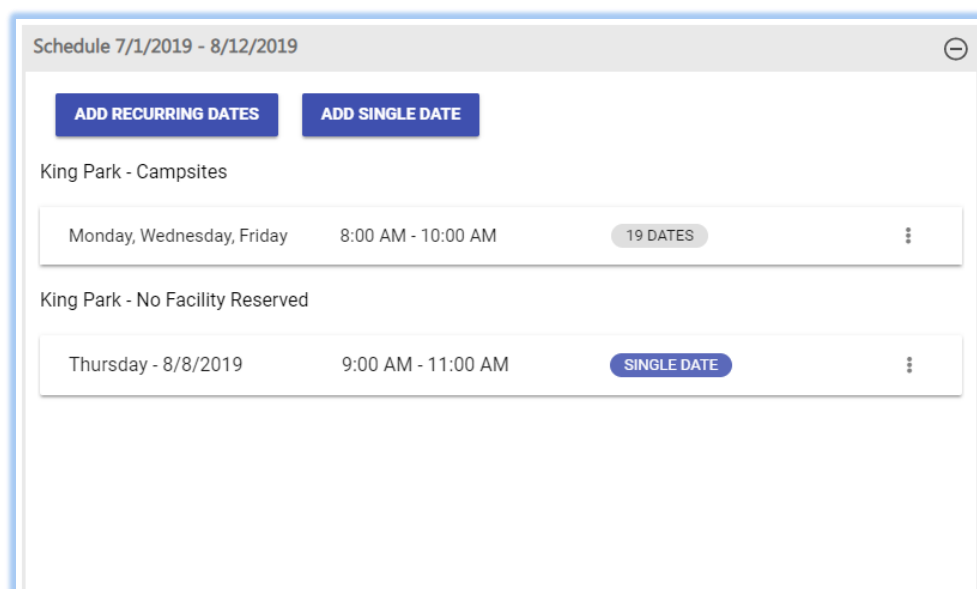
End Time \*  
11:00 AM

Location

Rental Item

CANCEL DONE

When finished, click **DONE**. The Schedule section refreshes, displaying the new single-date entry on a card:



Schedule 7/1/2019 - 8/12/2019

ADD RECURRING DATES ADD SINGLE DATE

King Park - Campsites

Monday, Wednesday, Friday 8:00 AM - 10:00 AM 19 DATES

King Park - No Facility Reserved

Thursday - 8/8/2019 9:00 AM - 11:00 AM SINGLE DATE

### **View Schedule**

If a recurring schedule has been edited or a single date has been added to a schedule, a *View Schedule* link appears at various points in the class registration process:

## Class Registration Create

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

SELECT PAYER
REGISTER CLASS
CONFIRM ORDER
PAY INVOICE

Keyword

Class Number

Class Type

Location

Gender

Age


Start Date

End Date

Instructor

Category

Day of the Week



Class	Description	Date	Fee	Age	Total Result: 25
<b>Adolescent Flag Football</b> Location: Foreside Field 07-2018-000410	Flag Football for Adolescents. • For 11-17 year olds Rules 1. Each person will wear 2 flags 2. You're out if both flags are pulled off 3. No Tackling. You're out if you tackle	Start Date: 5/11/2018 12:00:00 AM End Date: 5/11/2019 12:00:00 AM <a href="#" style="border: 1px solid red; padding: 2px;">View Schedule</a>	<b>\$20.00</b> Non-Resident: \$25.00 <span style="color: red;">Discounts Available</span>	Ages: 1 - 99 Gender: Coed	<a href="#" style="background-color: #007bff; color: white; padding: 5px;">Details</a>
<b>Baseball Fundamentals</b> Location: Affton Community Center (ACC) 08-2018-000458		Start Date: 8/27/2018 12:00:00 AM End Date: 8/31/2019 12:00:00 AM <a href="#" style="border: 1px solid red; padding: 2px;">View Schedule</a>	<b>\$75.00</b> Non-Resident: \$75.00	Ages: 5 - 75 Gender: Male	<a href="#" style="background-color: #007bff; color: white; padding: 5px;">Details</a>
<b>ClassTypeTest</b> Location: Bowling Bowl ACG-11-2018-000467		Start Date: 11/2/2018 12:00:00 AM End Date: 12/31/2018 12:00:00 AM <a href="#" style="border: 1px solid red; padding: 2px;">View Schedule</a>	<b>\$0.00</b> Non-Resident: \$0.00	Ages: 0 - 99 Gender: Coed	<a href="#" style="background-color: #007bff; color: white; padding: 5px;">Details</a>

Clicking the link opens a Schedule pop-up containing a chronologically ordered list of all dates and times scheduled for the class:



## Class Registration Create

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

SELECT PAYER

Keyword

Gender

- Select -

Instructor

- Select -

**Class** ▲

Adolescent Flag Football  
Location: Foreside Field  
07-2018-000410

Baseball Fundamentals  
Location: Affton Community Center (ACC)  
08-2018-000458

**Schedule**

Friday, May 11 2018	03:30 PM - 06:00 PM
Monday, May 14 2018	03:30 PM - 06:30 PM
Tuesday, May 15 2018	03:30 PM - 06:30 PM
Wednesday, May 16 2018	03:30 PM - 06:30 PM
Thursday, May 17 2018	03:30 PM - 06:30 PM
Friday, May 18 2018	03:30 PM - 06:00 PM
Monday, May 21 2018	03:30 PM - 06:30 PM
Tuesday, May 22 2018	03:30 PM - 06:30 PM
Wednesday, May 23 2018	03:30 PM - 06:30 PM
Thursday, May 24 2018	03:30 PM - 06:30 PM
Friday, May 25 2018	03:30 PM - 06:00 PM
Monday, May 28 2018	03:30 PM - 06:30 PM
Tuesday, May 29 2018	03:30 PM - 06:30 PM


























Total Times: 62

[CLOSE](#)

The *View Schedule* link also appears during the registration process from the citizen portal.

## Discounts

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

Discounts																													
<div>Add</div> <table> <tr> <th>Name ▲</th><th>Description</th><th>Type</th><th>Discount</th><th></th></tr> <tr> <td>Boy Scouts</td><td>Boy Scouts</td><td>Custom</td><td>5.00%</td><td> </td></tr> <tr> <td>City of Tyler Employee</td><td>City of Tyler Employee</td><td>Employee</td><td>10.00%</td><td> </td></tr> <tr> <td>Employee</td><td>Employee</td><td>Employee</td><td>\$7.00</td><td> </td></tr> <tr> <td>Middle Age</td><td>Middle Age</td><td>Age</td><td>\$3.00</td><td> </td></tr> </table> <div>  <span>Page 1 of 1</span> <span>10</span> <span>View 1 - 4 of 4</span> </div>					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	 
Name ▲	Description	Type	Discount																										
Boy Scouts	Boy Scouts	Custom	5.00%	 																									
City of Tyler Employee	City of Tyler Employee	Employee	10.00%	 																									
Employee	Employee	Employee	\$7.00	 																									
Middle Age	Middle Age	Age	\$3.00	 																									

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

Discounts

Add

Name

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%

Page 1 of 1
10
View 1 - 6 of 6

Add Selected
Close

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

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

Discount Details

[Parks & Rec](#) >> [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
<i>Age</i>	This discount applies to a contact's age. Selecting <i>Age</i> displays <i>From Age</i> and <i>To Age</i> 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 <i>From Age</i> needs to be entered.
<i>Employee</i>	This discount applies to any employee who has the <i>Employee</i> check box checked on the Contact Details page. Selecting <i>Employee</i> displays an <i>Available to Family Members</i> check box. Selecting this check box makes family members also eligible for the employee discount.
<i>Custom</i>	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 <i>Available to Family Members</i> check box.
<i>Multi-Family</i>	<p>This discount applies when a contact registers other family members for the same class or membership. Selecting <i>Multi-Family</i> displays a Multi-Family Discount Setup section at the bottom of the page (see image below). Beginning with <i>Family Member #2</i>, this section contains fields for setting up dollar amount or percentage discounts that apply when additional family members are registered.</p> <p>For <i>Family Member #2</i>, select the discount dollar amount or percentage and click Add. Discount dollar amount and percentage fields for <i>Family Member #3</i> display the <i>Family Member #2</i> 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

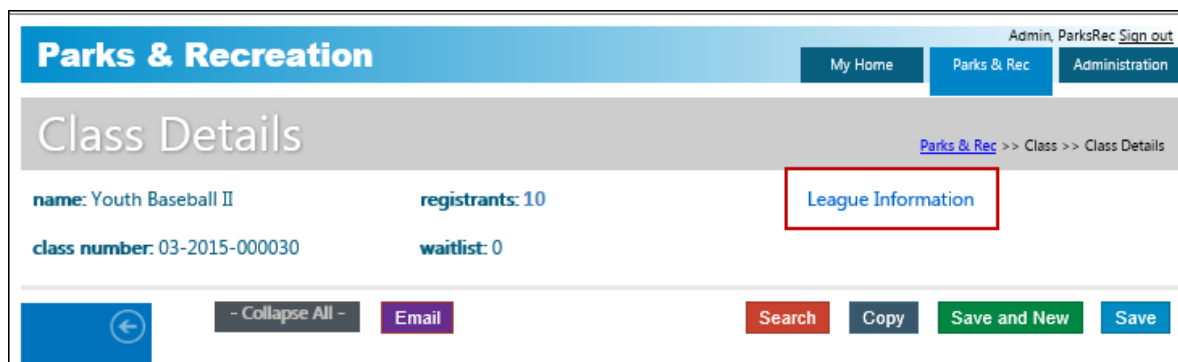
To return to the Class Details page from the Discount Details page, click the **Back to Class** button.

### 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

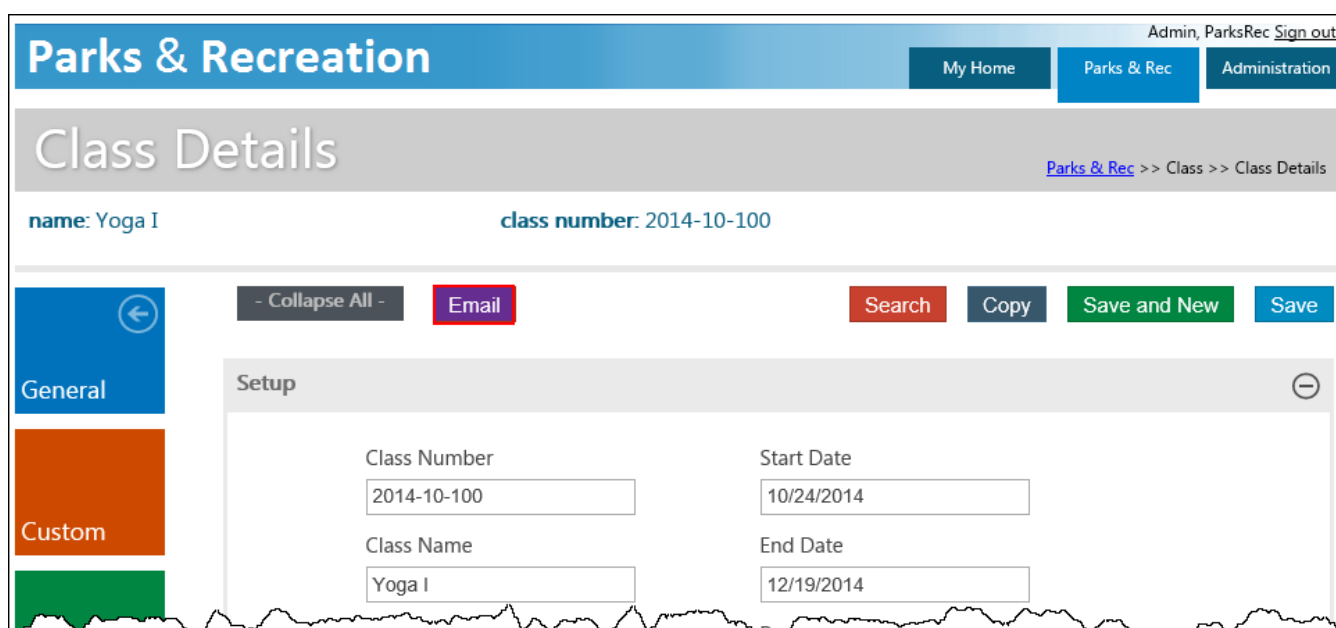
**name:** Youth Baseball II **registrants:** 10 **League Information**

**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](#)

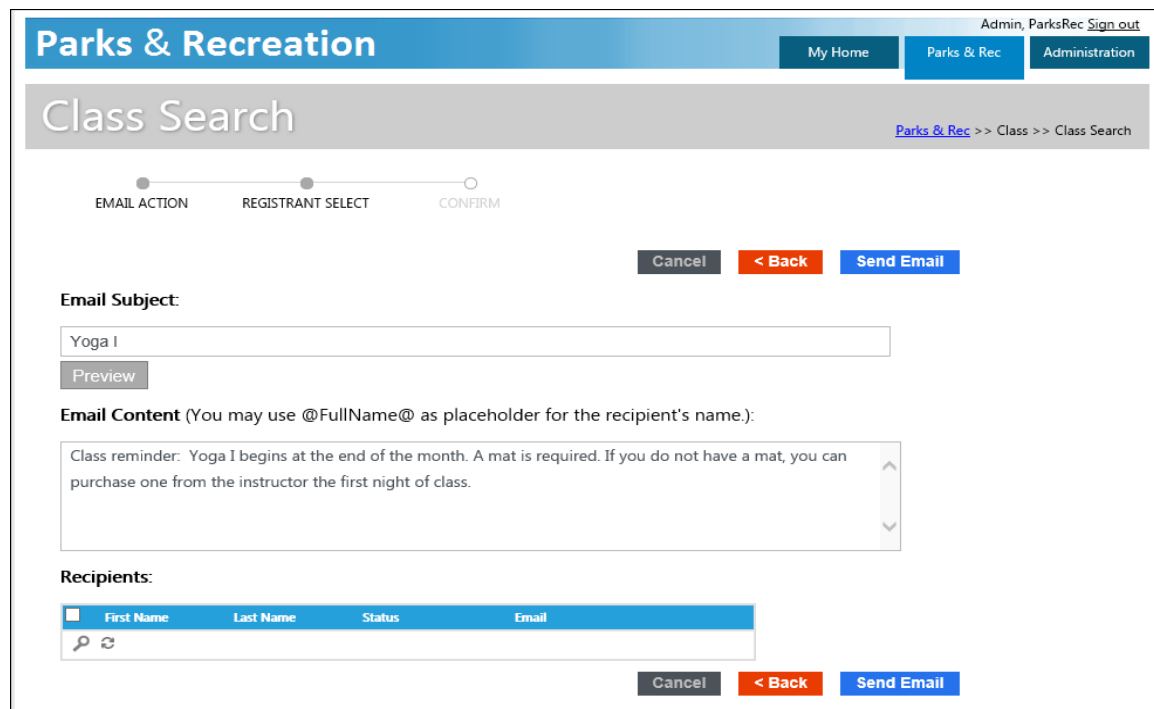
**General**

**Custom**

**Setup**

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

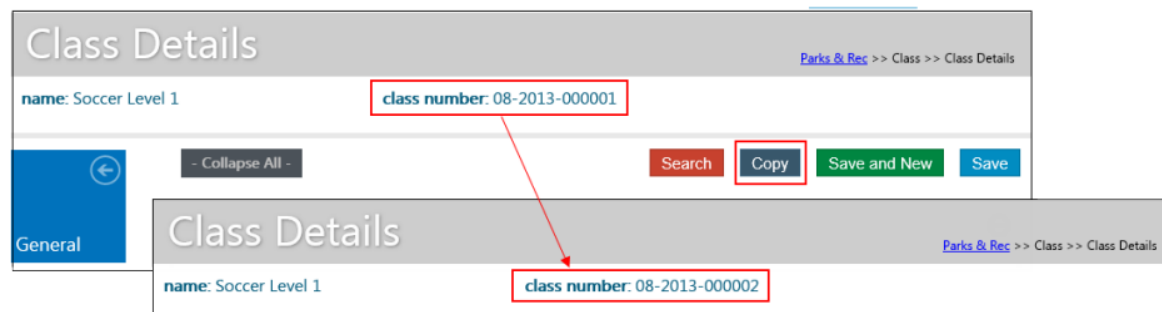
When you select Email, the Email Update provides the option for distributing an email to class registrants who have a valid email address. The Email Update page provides the *Email Subject* and *Email Content* fields. The default value for the Email Subject line is the class name, but you can change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



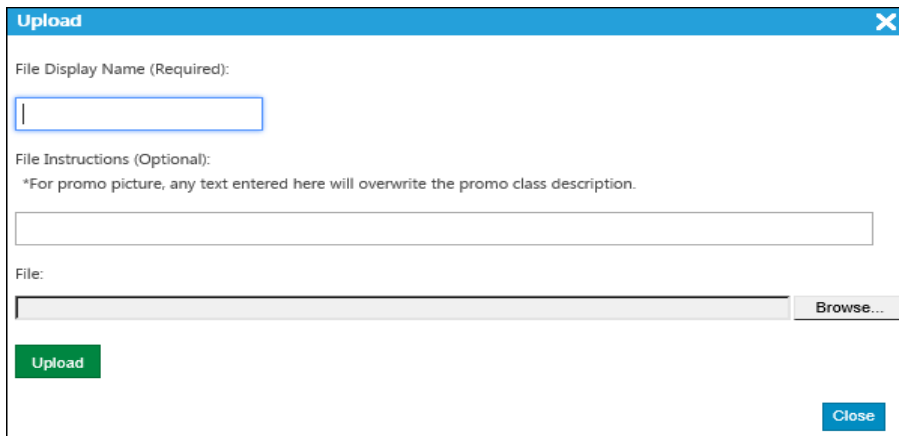
You can update the new record to customize the individual details.

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.

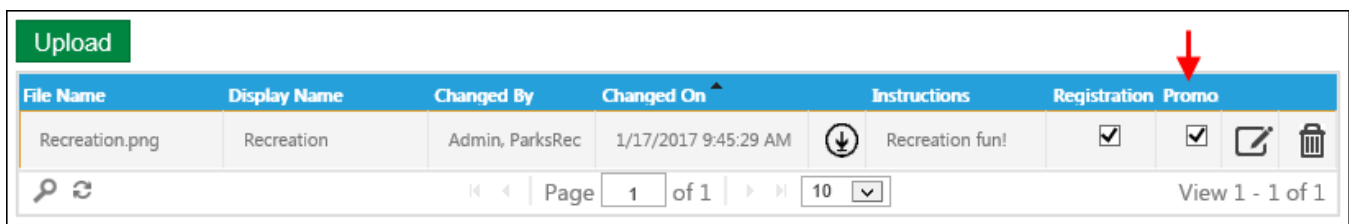
File:

Browse...

Upload

Close

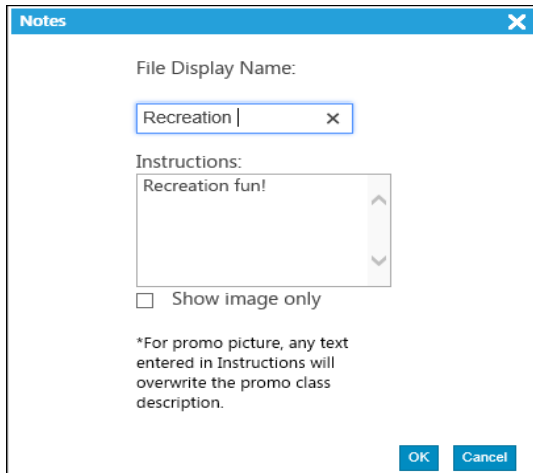
After the image uploads, select the *Promo* check box to identify the image as a scrolling item. When the *Is Special Event* check box is selected on the Class Details page, and the *Promo* check box is selected, the image displays on the citizen portal. When a user hovers his or her pointer over the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

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

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.

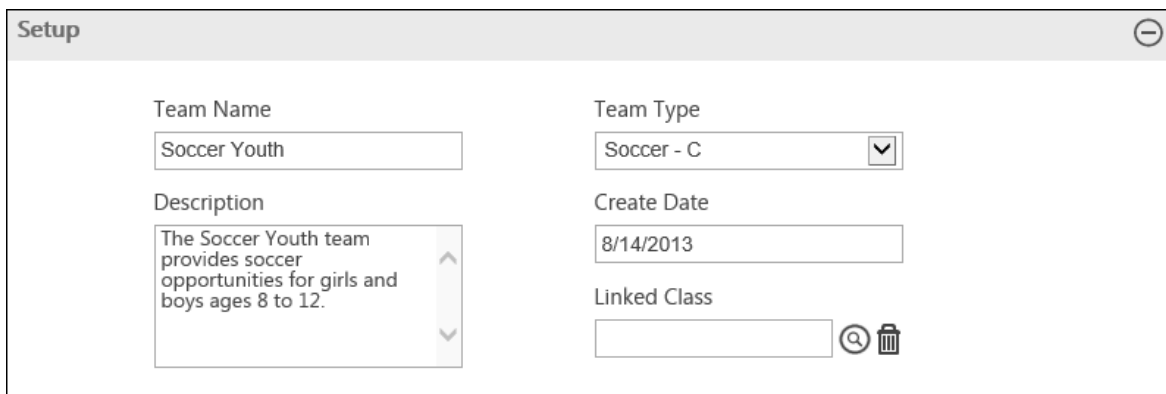
OK Cancel

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

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.



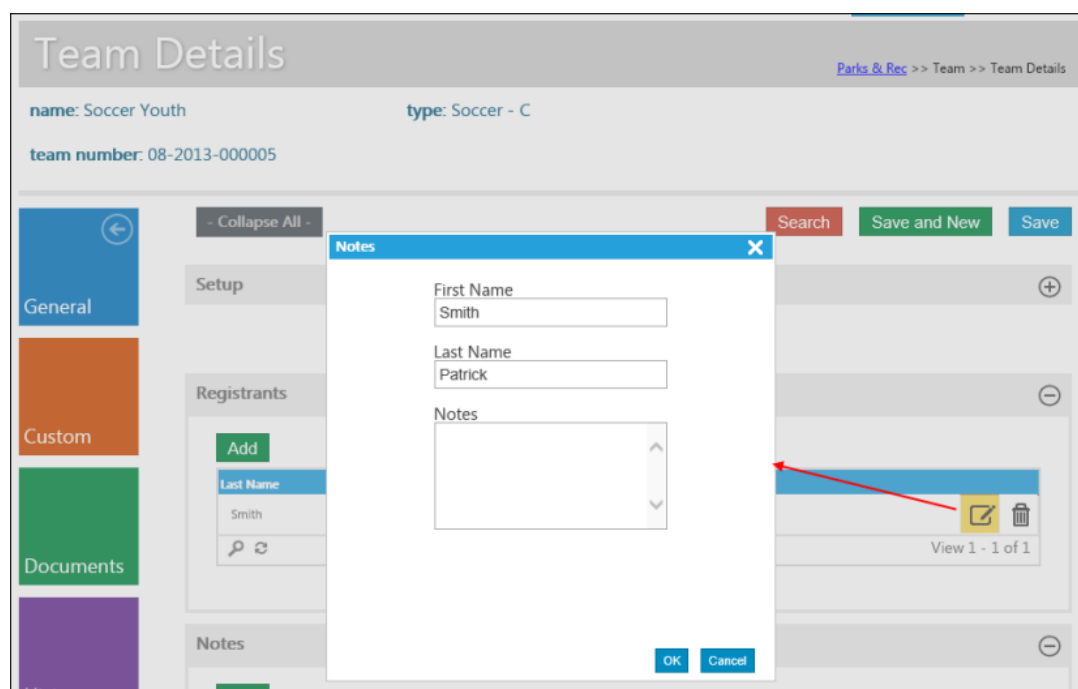
## Registrants

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>Page 1 of 1</span> <span>10</span> <span>View 1 - 1 of 1</span> </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:











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>Page 1 of 1</span> <span>10</span> <span>View 1 - 1 of 1</span> </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:

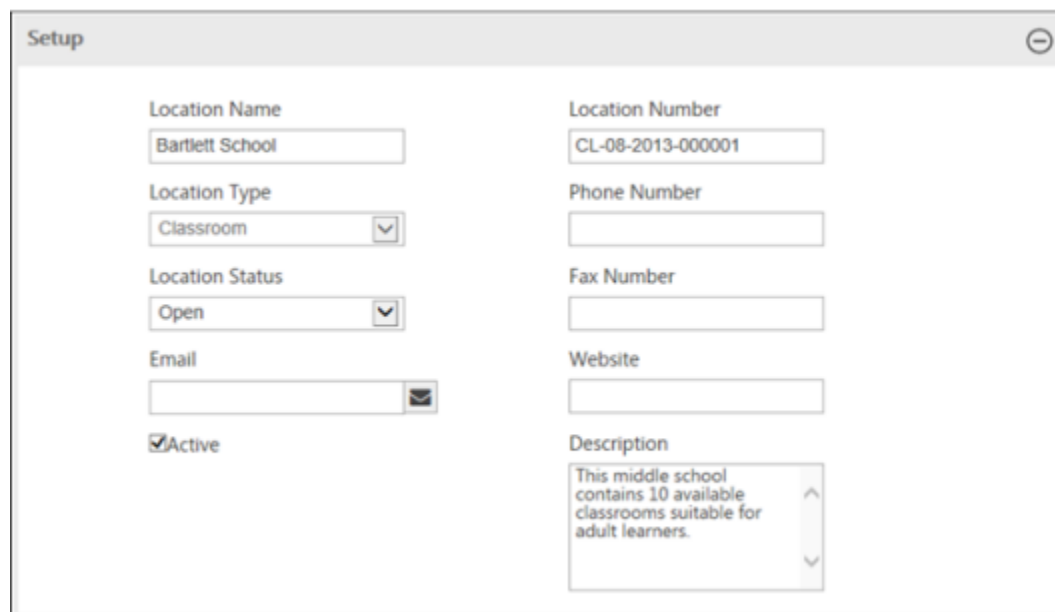
Notes				
<a href="#">Add</a>				
Text	Created By	Create Date		
Teams are subdivided after registration is complete.	System, Admin	08/14/2013 01:08:09 PM		
  Page 1 of 0 10 View 1 - 1 of 1				

## Location

Location maintains location records by type and status.

### Setup

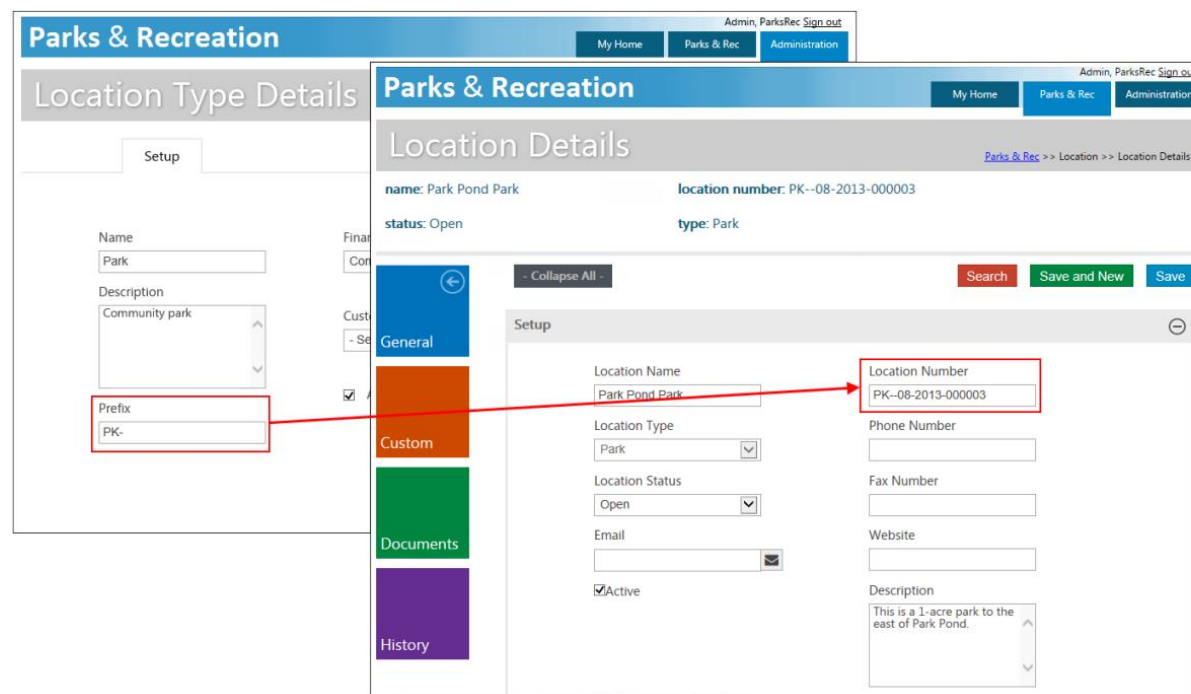
Setup fields provide the location profile: name, type, status, and description. Contact information can also be provided for the site:



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

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

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



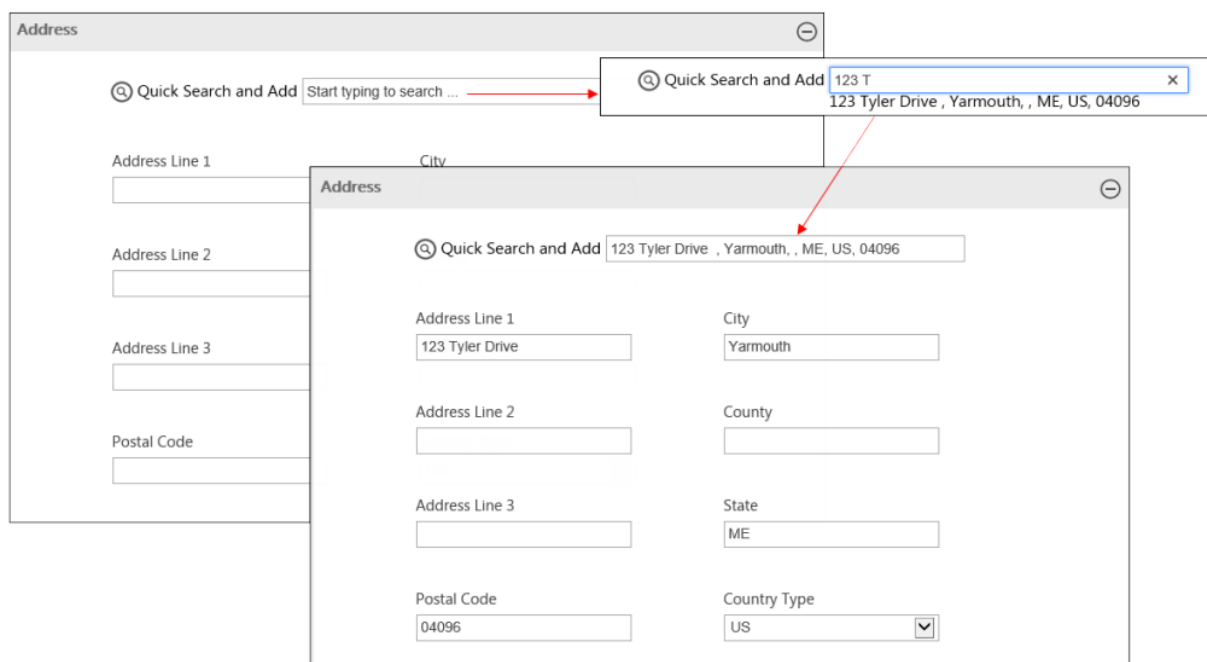
The screenshot shows the 'Location Details' page for 'Park Pond Park'. A red box highlights the 'Prefix' field in the 'Location Type Details' sidebar, which contains 'PK-'. A red arrow points from this prefix to the 'Location Number' field in the main 'Setup' form, which displays 'PK-08-2013-000003'. The main form also shows the location name 'Park Pond Park', status 'Open', type 'Park', and a description 'This is a 1-acre park to the east of Park Pond.'.

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

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

## Address

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



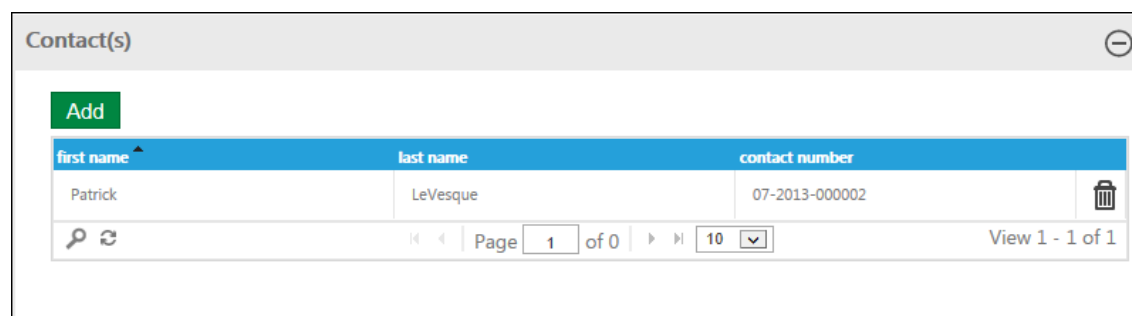
The screenshot shows the 'Address' form with a 'Quick Search and Add' feature. The search box contains '123 T' and a dropdown menu shows the suggestion '123 Tyler Drive, Yarmouth, ME, US, 04096'. The form fields are as follows:

Field	Value
Address Line 1	123 Tyler Drive
Address Line 2	
Address Line 3	
Postal Code	04096
City	Yarmouth
County	
State	ME
Country Type	US

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

## Contacts

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



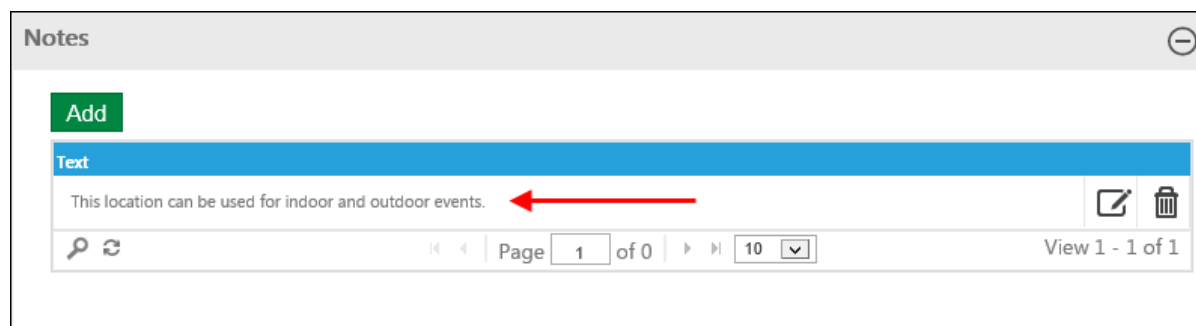
The screenshot shows the 'Contact(s)' form with a table of contacts. The table has columns for first name, last name, and contact number. The first row shows Patrick LeVesque with contact number 07-2013-000002.

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

Page 1 of 0, 10, View 1 - 1 of 1

## Notes

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



## Hours

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

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

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

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

# 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:

Parks & Recreation

My Home
Parks & Rec
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

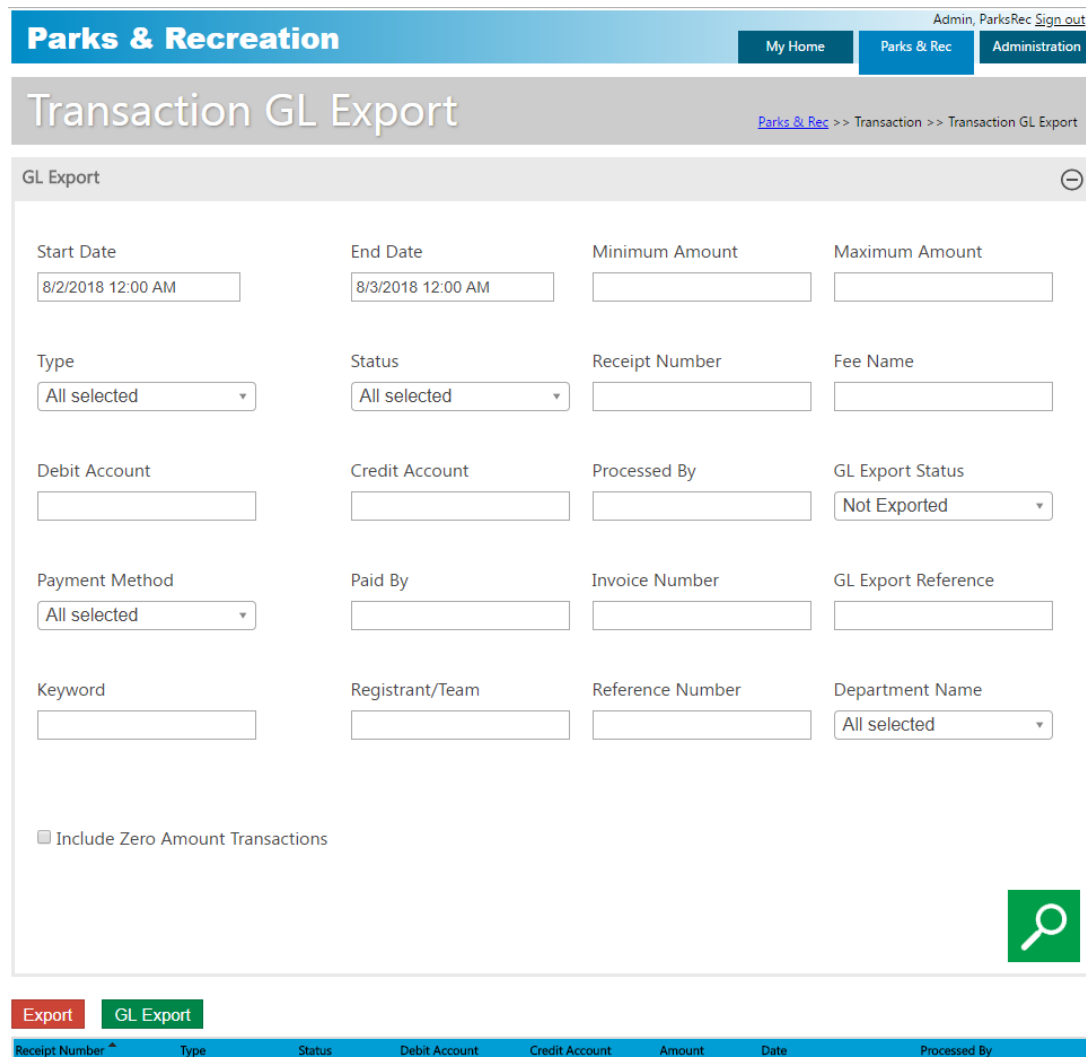
Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
<div> <div>Page 1 of 0</div> <div>10</div> </div>							

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:



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

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

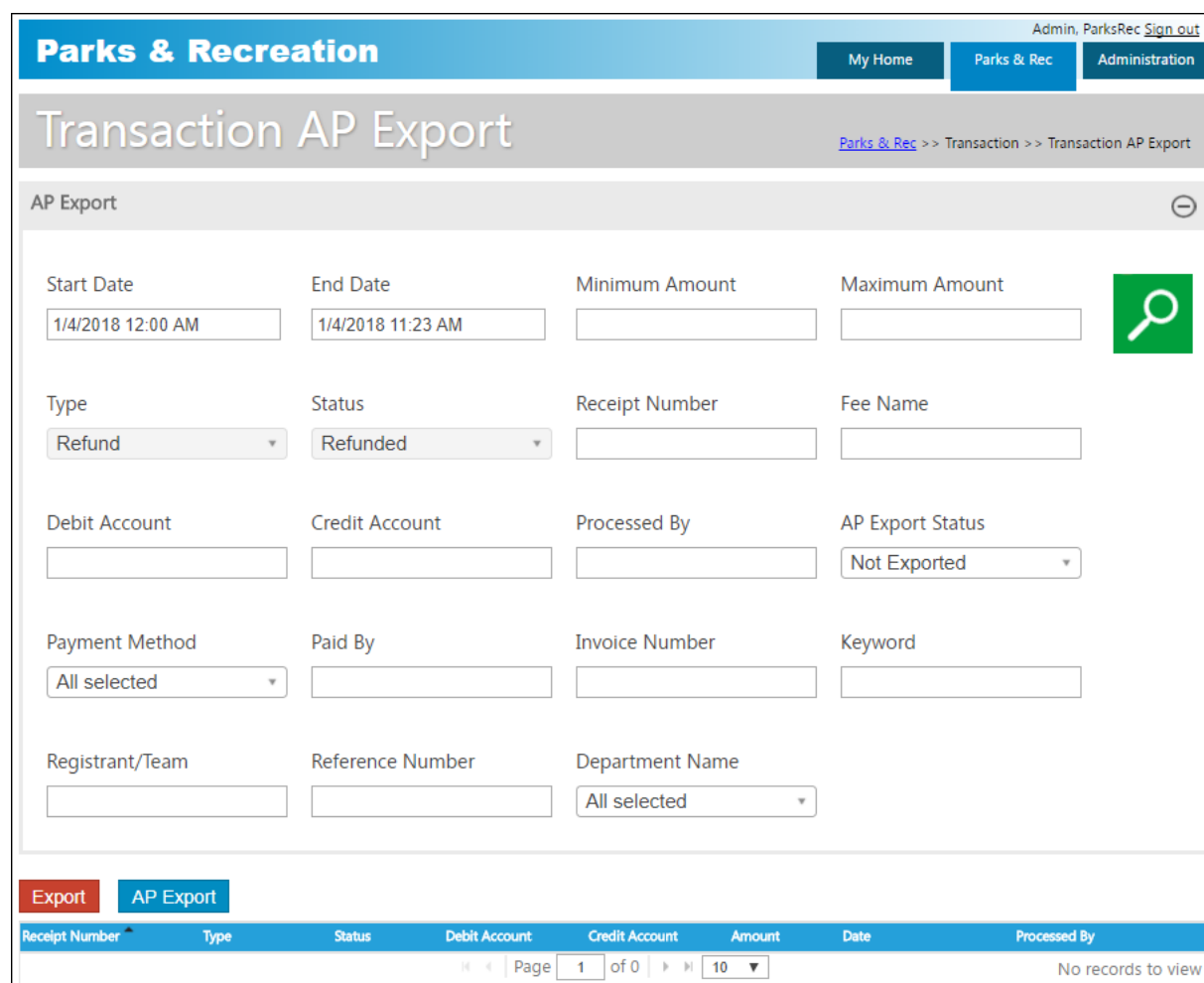
To include \$0.00 receipts in the GL export, select the *Include Zero Amount Transactions* check box.

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:




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

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

## 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
No records to view							

Page 1 of 0 10

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

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

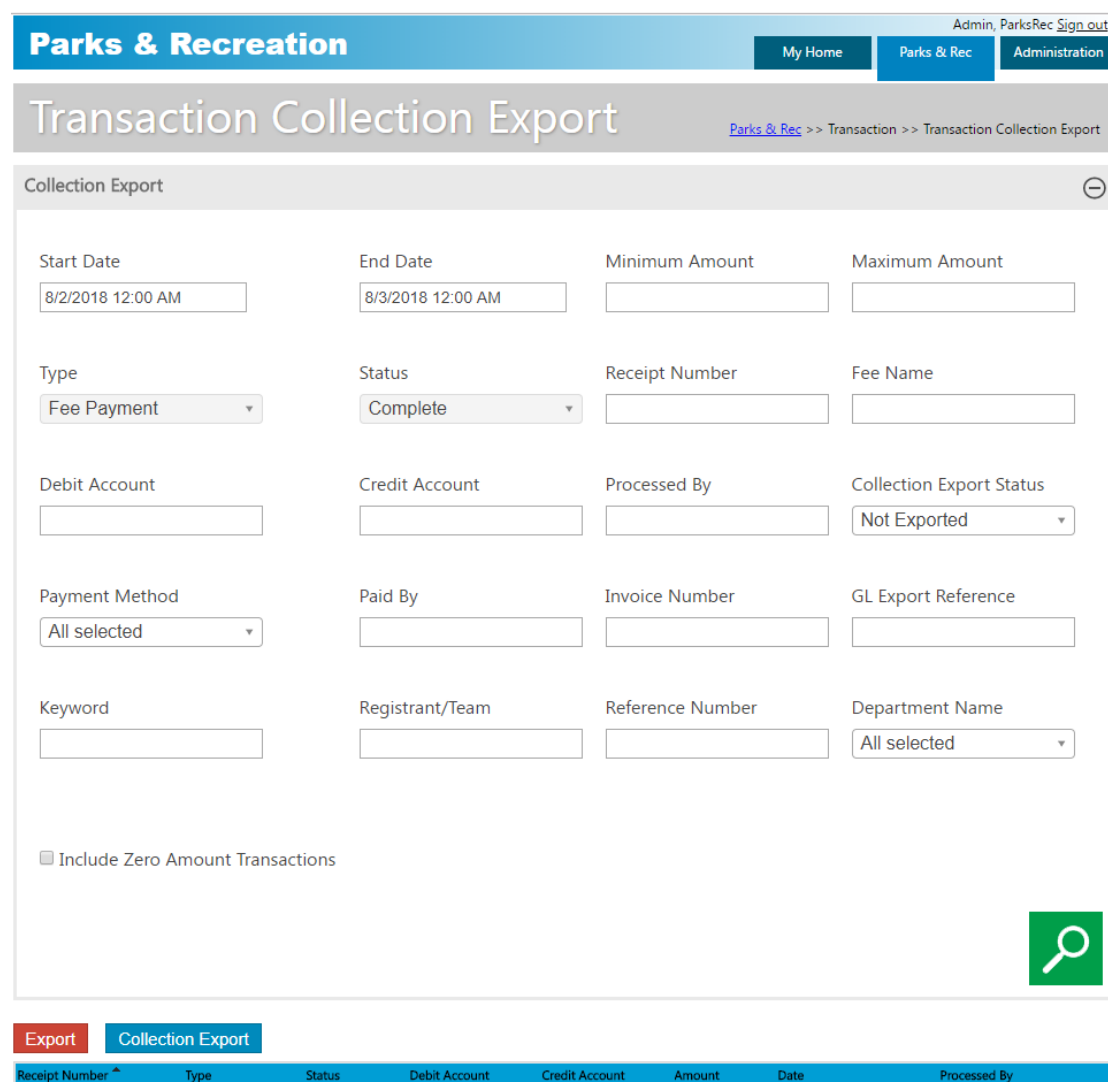


## Collection Export

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

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

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



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

My Home Parks & Rec Administration

### Transaction Collection Export

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

Collection Export

Start Date: 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**

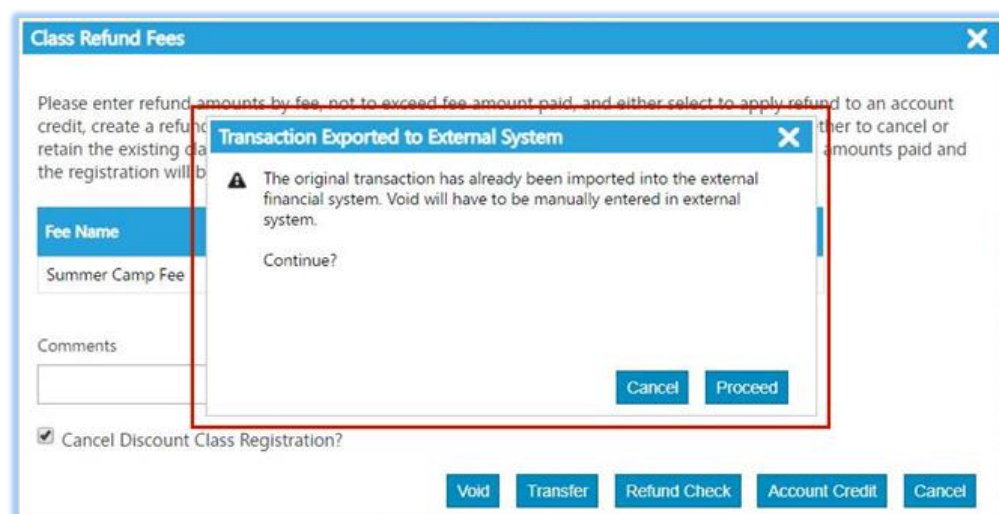
Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
----------------	------	--------	---------------	----------------	--------	------	--------------

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.

Customers using Incode Version 9 in Collection Export Integration Settings will not include unexported voided collections.

If a collection has been exported, attempting a void notifies the user of the need to adjust the external financial system manually:



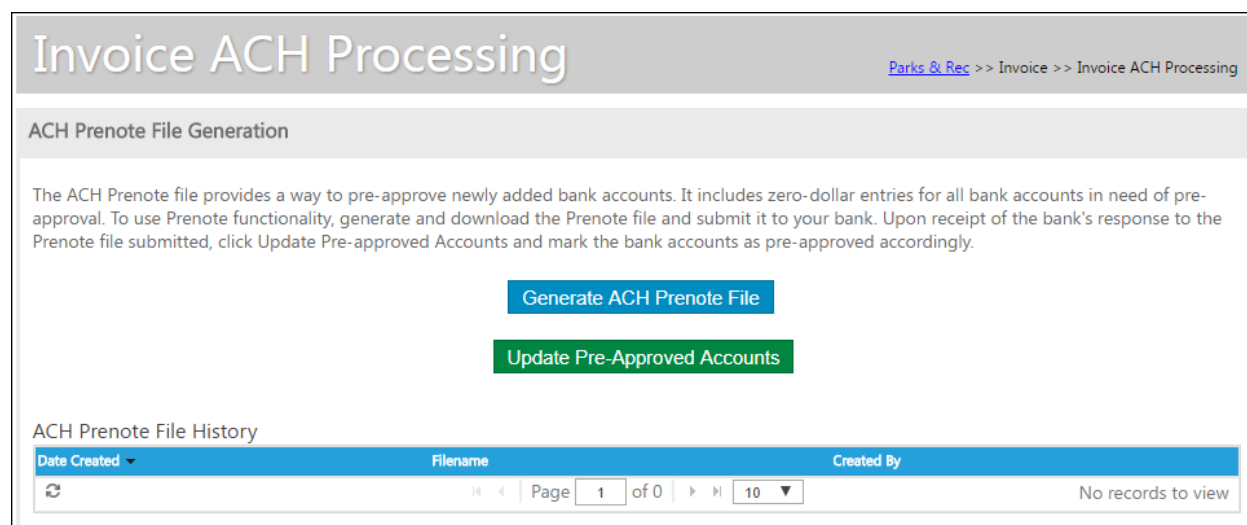
The screenshot shows a web application window titled "Class Refund Fees". It contains a form with fields for "Fee Name" (filled with "Summer Camp Fee"), "Comments", and a checkbox for "Cancel Discount Class Registration?". A modal dialog box titled "Transaction Exported to External System" is overlaid on the form. The dialog contains a warning icon and the text: "The original transaction has already been imported into the external financial system. Void will have to be manually entered in external system." Below this text is a "Continue?" label. At the bottom of the dialog are "Cancel" and "Proceed" buttons. The background form also has buttons for "Void", "Transfer", "Refund Check", "Account Credit", and "Cancel" at the bottom.

## Invoice

### ACH Processing

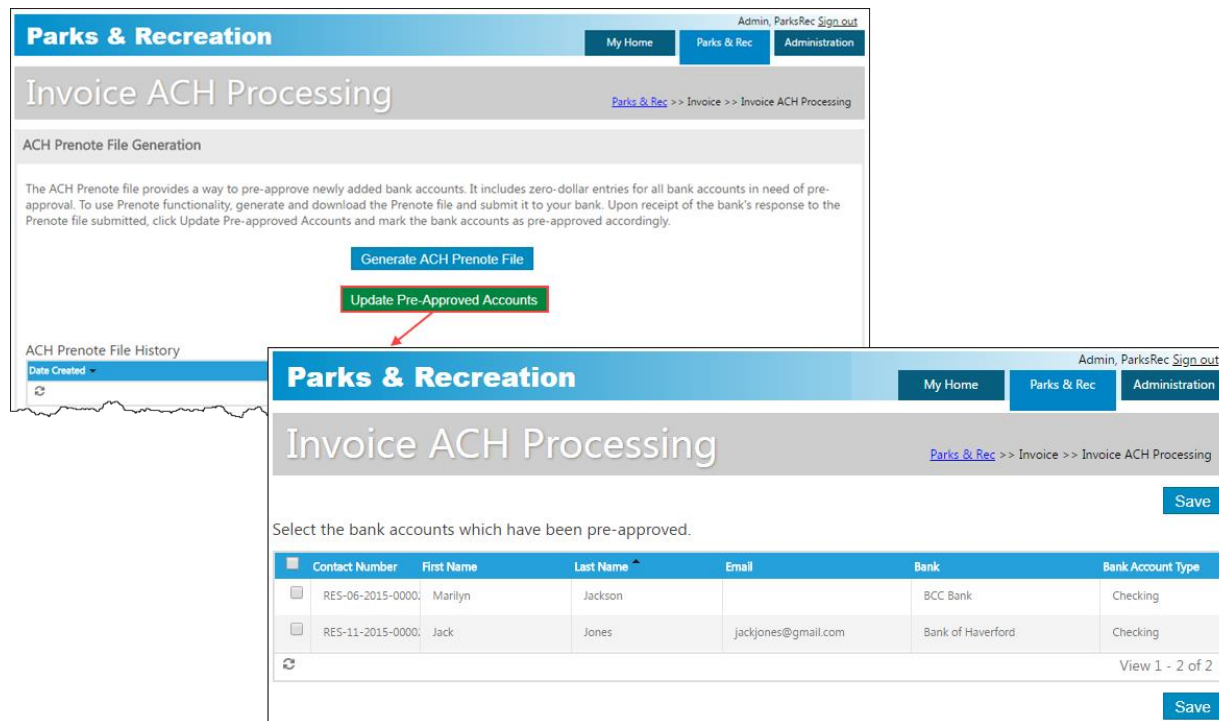
ACH Processing includes options for processing payments by automated clearinghouse (ACH).

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



The screenshot shows a web application page titled "Invoice ACH Processing". The breadcrumb trail is "Parks & Rec >> Invoice >> Invoice ACH Processing". The main section is "ACH Prenote File Generation". It contains a paragraph explaining the ACH Prenote file and its purpose. Below the text are two buttons: "Generate ACH Prenote File" (blue) and "Update Pre-Approved Accounts" (green). At the bottom, there is a section titled "ACH Prenote File History" which includes a table with columns "Date Created", "Filename", and "Created By". The table shows "Page 1 of 0" and "No records to view".

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



**Parks & Recreation** Admin, ParksRec Sign out  
My Home Parks & Rec 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](#)

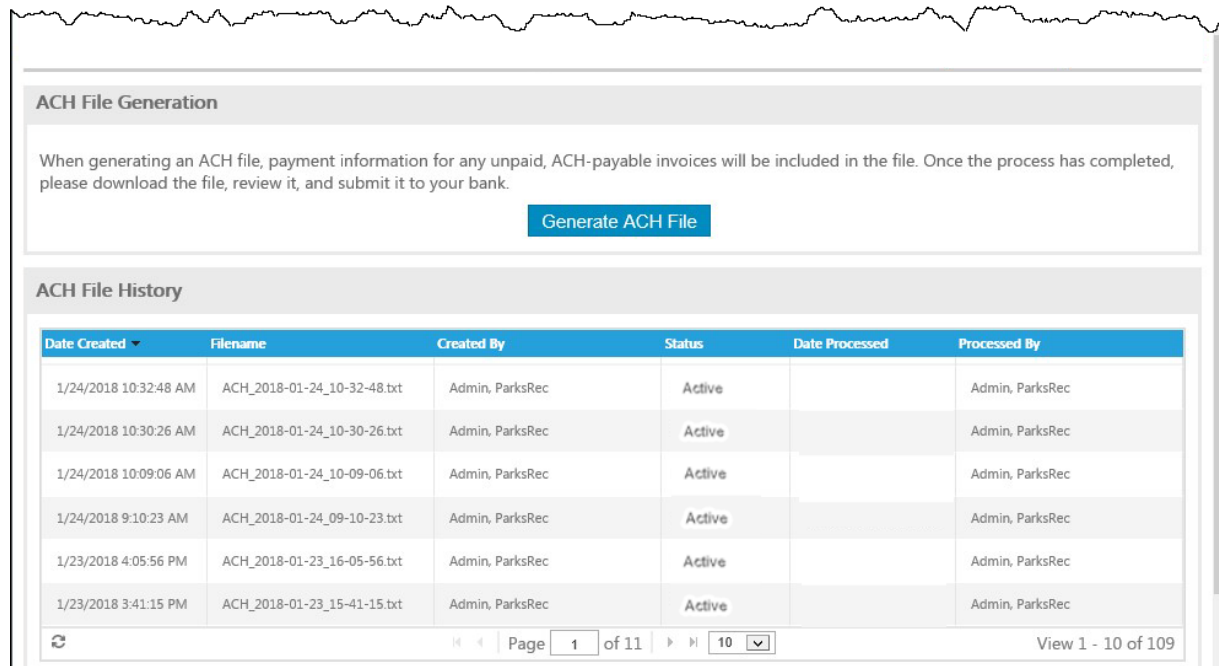
Select the bank accounts which have been pre-approved.

<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.

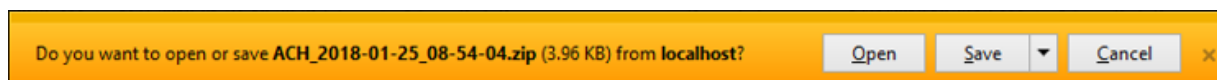
[Generate ACH File](#)

### 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

Page 1 of 11 10 View 1 - 10 of 109

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



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

My Home
Parks & Rec
Administration

Admin, ParksRec
Sign out

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

Export

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

Page 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:

Parks & Recreation

Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Invoice Details

Parks & Rec >> Invoice >> Invoice Details

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

Invoiced To: Matthews, Mary

Search

Invoice

Ice Arena
Fri, June 30, 2017 12:00pm - 3:00pm
Location: Hayward Arena
15 attending

Fee Name	Invoiced	Unpaid/Due	Payment
General Rental Fee	\$900.00	\$0.00	\$ 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 page, 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
15 attending

Purchase Additional Add-Ons

The add-on items you select will be added to your
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	\$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

Pay

☒ Full
☐ Split

< Back





☒ Email Receipt?

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

Parks & Recreation

Admin, ParksRec Sign out

My Home
Parks & Rec
Administration

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

View Invoice
Print Receipt

### Receipt

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

Intermediate Yoga - 05-2017-000042

\$80.00

Location: Bartlett School  
Dates: 6/23/2017 - 8/11/2017  
Times: F: 07:00 PM - 08:00 PM  
Registrant: Simone Jackson  
Yoga Mat - Intermediate Yoga

\$15.00

Total: \$95.00

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

#### What Next?

Main Menu
Create Class Registration
Create Rental Registration
Purchase Add on Item


## My Reports

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


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

My Reports
Parks & Rec >> My Reports >> My Reports


Search Reports
1 2


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


Run Report


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


Run Report


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

Run Report


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

Run Report


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

Run Report


1 2

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


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

My Reports
Parks & Rec >> My Reports >> My Reports


Search Reports
1


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

Run Report


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

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 Type: Any Class Status: 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	Tu	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	Active	Classroom	11/18/2013	12/20/2013	Tu	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	Tu	0	0

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



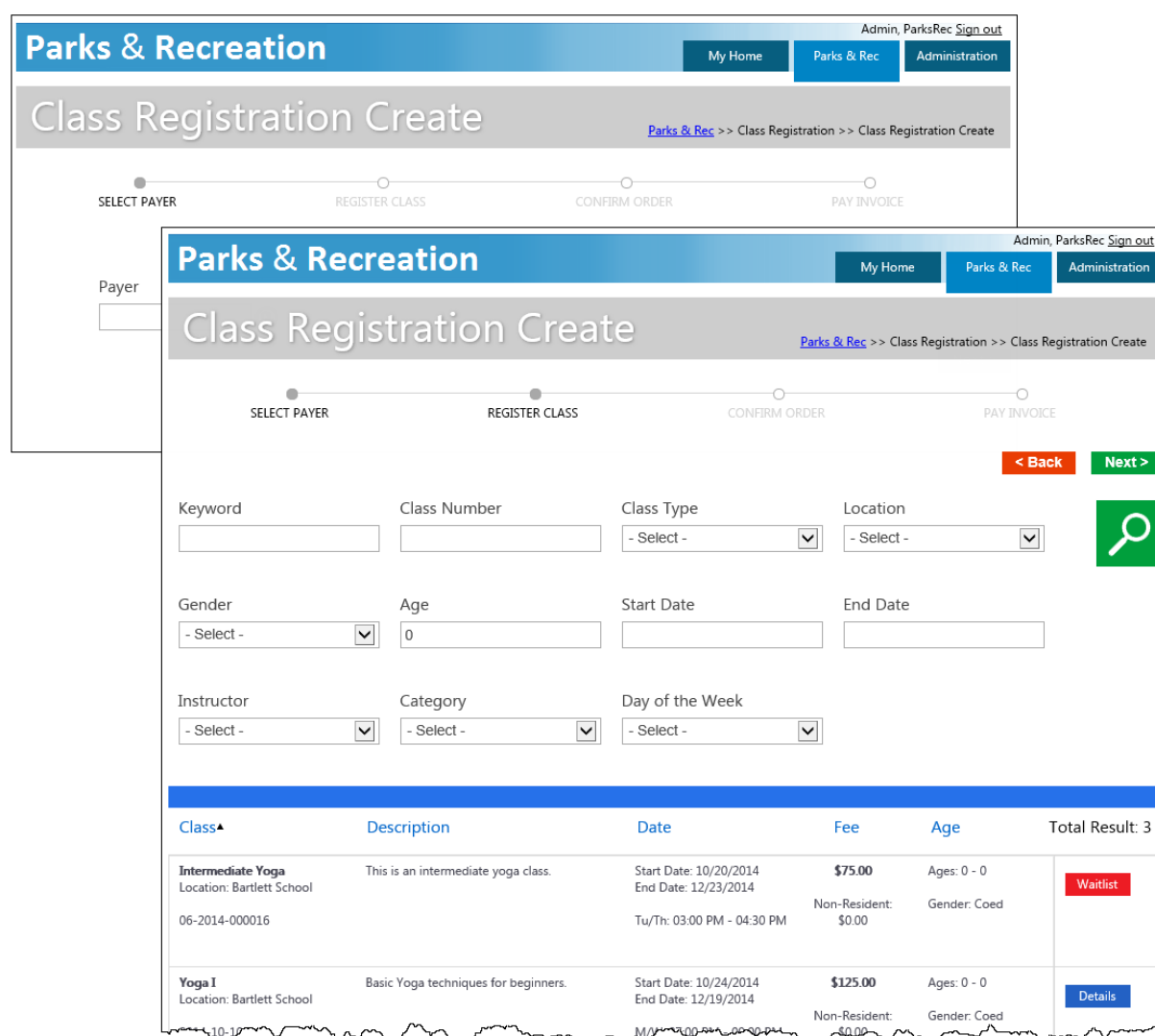
## Class Registration

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 page includes a search form with the following fields:

- Keyword
- Class Number
- Class Type (dropdown menu)
- Location (dropdown menu)
- Gender (dropdown menu)
- Age (text input, value: 0)
- Start Date
- End Date
- Instructor (dropdown menu)
- Category (dropdown menu)
- Day of the Week (dropdown menu)

Below the search form is a table of results. The table has columns: Class, Description, Date, Fee, Age, and Total Result: 3. The results are as follows:

Class	Description	Date	Fee	Age	Total Result: 3
Intermediate Yoga Location: Bartlett School 06-2014-000016	This is an intermediate yoga class.	Start Date: 10/20/2014 End Date: 12/23/2014 Tu/Th: 03:00 PM - 04:30 PM	\$75.00 Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	Waitlist
Yoga I Location: Bartlett School	Basic Yoga techniques for beginners.	Start Date: 10/24/2014 End Date: 12/19/2014	\$125.00 Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	Details

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

Class ▾	Description	Date	Fee	Age	Total Result: 18
Summer Camp Week 1 Location: Johnson Park 07-2018-000449	Testing the formatting. This is a large heading. • 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

End Date: 10/3

Available Disco

Middle Age, Mi

Location: Johnson Park

Age Range: 5 - 99

Gender: Coed

Capacity: 1 - 100

Group:

Attachments

Add

Add-Ons

Name	Fee	Quantity	Buy
------	-----	----------	-----

Register

Cancel

CONTACT DETAIL

Confirm

Wallace Beaur

Troy, MI 48091

Contact Prefe

Unspecified

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

Location: Johnson Park

Age Range: 5 - 99

Gender: Coed

Capacity: 1 - 100

Group:

Attachments

Add

Add-Ons

Name	Fee	Quantity	Buy
------	-----	----------	-----

Register

Cancel

Upload

File (Required):

Choose File No file chosen

Description:

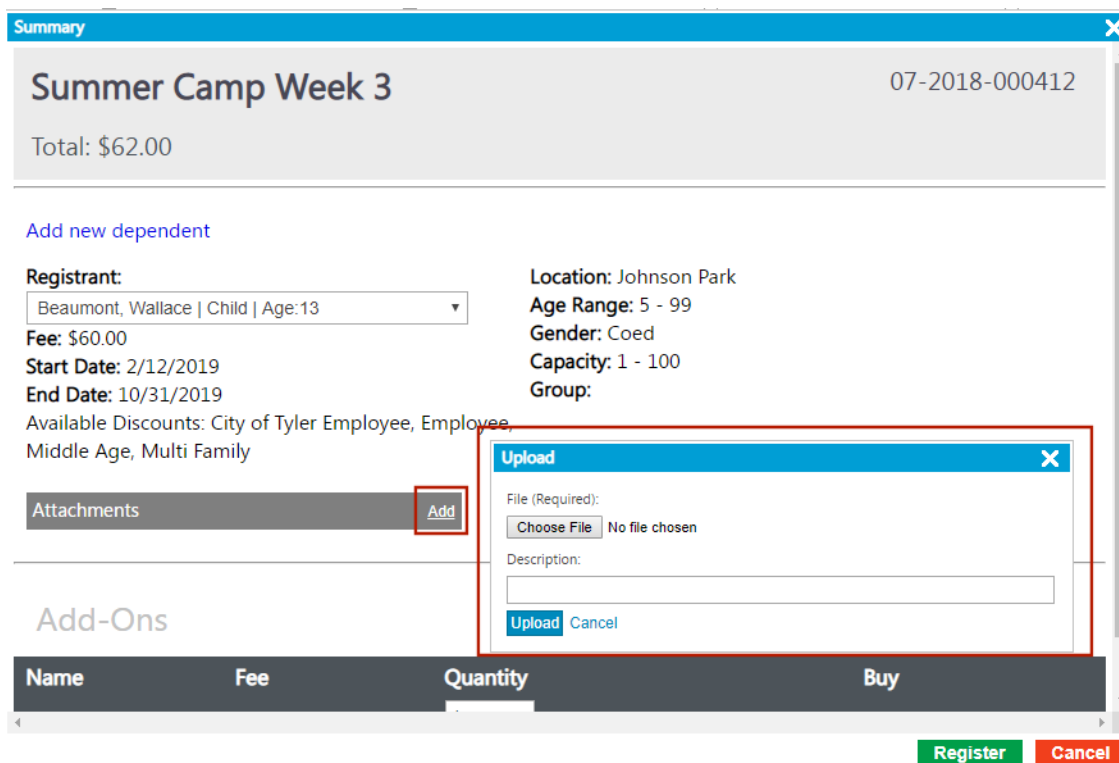
Upload Cancel

The Summary page also lists available discounts.

Tyler Parks and Recreation 2018.5

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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

**Location:** Johnson Park  
**Age Range:** 5 - 99  
**Gender:** Coed  
**Capacity:** 1 - 100  
**Group:**

**Attachments** **Add**

**Add-Ons**

Name	Fee	Quantity	Buy

**Upload**

File (Required):  
 Choose File No file chosen

Description:

**Upload** **Cancel**

**Register** **Cancel**

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

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

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

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

My Home
Parks & Rec
Administration

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

SELECT PAYER
REGISTER CLASS
CONFIRM ORDER
PAY INVOICE

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

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**, **Pay Later** 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:

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

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

SELECT PAYER
REGISTER CLASS
CONFIRM ORDER
PAY INVOICE

Order Summary
Invoice To: Beaumont, Charlie

Beaumont, 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 Pay Later Cashiering

☒ Email Receipt?
Back

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

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

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

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

SELECT PAYER
REGISTER CLASS
CONFIRM ORDER
PAY INVOICE

Order Summary
Invoice To: Beaumont, Charlie

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

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

Payment

Register Now

☒ Email Receipt?

< Back

### Split/Partial Payments

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

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

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

## Parks & Recreation

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

[My Home](#)
[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

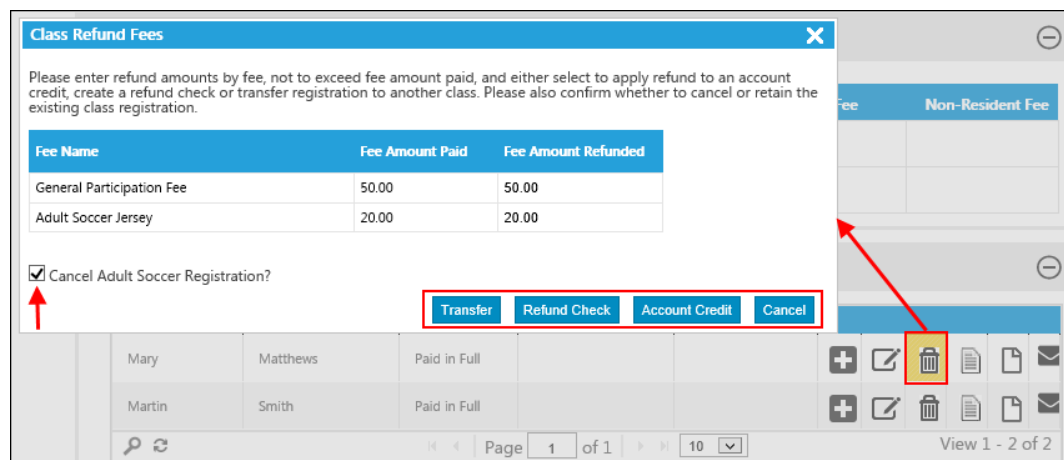
For classes set up to allow waitlists, you can move waitlist registrants to the class registration list as space becomes available. Use the Class Details page to move a contact from a waitlist to a class registration list. When you do so, the program provides the payment options.

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:





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

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.

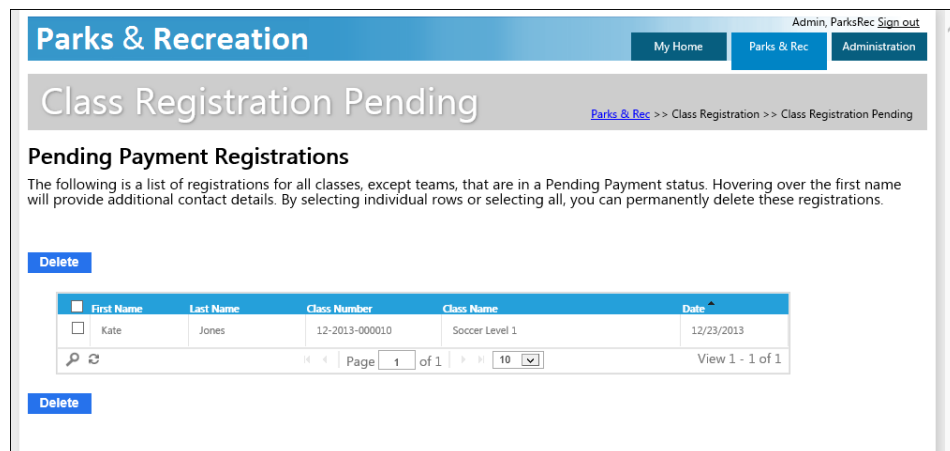
The *Cancel <Class Name> Registration?* check box directs the program to cancel the registration in addition to issuing the refund. If you clear this check box, the Class Refund Fees dialog box refreshes to remove the Transfer option. In this case, the refund is processed, but the class registration 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 process is designed to make it easy for you to view and select available locations and their associated rental facilities and prices before scheduling and booking the rentals.



On the first page of the rental registration create process, all locations as of today's date appear on individual cards arranged alphabetically:

## Rental Registration Create

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

**Rental - Reservations**







Date  
Tuesday 11/27/2018  Duration Type \* 

Reservation Type \*  Location 

---


Select a Location NEXT

18 Available

<input type="checkbox"/>	Afton Community Center (ACC)	9 Facilities	VIEW	
<input type="checkbox"/>	Bowling Bowl	6 Facilities	VIEW	
<input type="checkbox"/>	Ebsworth Park	7 Facilities	VIEW	
<input type="checkbox"/>	Faust Park	12 Facilities	VIEW	
<input type="checkbox"/>	Field House	3 Facilities	VIEW	
<input type="checkbox"/>	Forside Recreational Facility	1 Facilities	VIEW	

To focus the list, use the *Duration Type*, *Reservation Type* and *Location* filters at the top of the page.

**Note:** The duration types are hourly, half day and daily, and the available selections on the drop-down are set up at Administration > Parts & Rec. Setup > Available Type.



Each card shows the number of associated facilities. To display an alphabetical list of the facilities, click the chevron  on the far-right side of a card:



## Rental Registration Create

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

---

**Rental - Reservations**


Date  
 Tuesday 11/27/2018  Duration Type \* 

Reservation Type \*  Location 

---

Select a Location **NEXT**

18 Available

☐ **Aftton Community Center (ACC)**
9 Facilities
VIEW 

<a href="#">Buffer Rental</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$20.00</b> Non-Resident: \$25.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Delete</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$20.00</b> Non-Resident: \$25.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Fitness Room</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Room</span>	<b>Price: \$0.00</b> Non-Resident: \$0.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Gathering Great Room</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$50.00</b> Non-Resident: \$55.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Gathering Room A</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$50.00</b> Non-Resident: \$55.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Gathering Room B</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$50.00</b> Non-Resident: \$55.00	<a href="#">GO TO CALENDAR</a>
<a href="#">Meeting Room</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Room</span>	<b>Price: \$30.00</b> Non-Resident: \$30.00	<a href="#">GO TO CALENDAR</a>
<a href="#">multidaytest</a>	<span style="background-color: #eee; border-radius: 10px; padding: 2px 5px;">Aquatic Center</span>	<b>Price: \$0.00</b> Non-Resident: \$0.00	<a href="#">GO TO CALENDAR</a>

Each facility shows the reservation type and price and contains a link to the Rental Reservations calendar.

To continue the rental registration process, select check boxes next to any locations that contain rental items you may want to reserve, and click the **NEXT** button:

## Rental Registration Create

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

**Rental - Reservations**

Date  
Tuesday 11/27/2018

Duration Type \*

Reservation Type \*

Location  
Faust Park

Select a Location

18 Available

<input type="checkbox"/>	Aftton Community Center (ACC)	9 Facilities	VIEW	▼
<input type="checkbox"/>	Bowling Bowl	6 Facilities	VIEW	▼
<input type="checkbox"/>	Ebsworth Park	7 Facilities	VIEW	▼
<input checked="" type="checkbox"/>	Faust Park	12 Facilities	VIEW	▼
<input checked="" type="checkbox"/>	Field House	3 Facilities	VIEW	▼
<input type="checkbox"/>	Forside Recreational Facility	1 Facilities	VIEW	▼

NEXT

The Rental Reservations calendar opens:

## Rental Registration Create

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

Rental - Reservations

NEW RESERVATION

CHECKOUT

Location: Faust Park

Rental Item: +

< > today Nov 25 – Dec 1, 2018 month week day list

	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Sat 12/1
12am							
1am							
2am							
3am							
4am							
5am							
6am							
7am							
8am							

Click in the *Rental Item* field to select from a drop-down of the facilities that are available for the selected location:

Location: Faust Park

Rental Item: +

< > today Nov 25 – week day list

	Sun 11/25	Mon 11/26	Tue 11/27		Sat 12/1
12am					
1am					
2am					
3am					

Faust Hourly  
 Faust Multi-Day  
 Faust One Session  
 Faust Park Area 1  
 Faust Park Area 2

Once you have selected a facility, the calendar reloads to show the available rental times in the unshaded areas:

## Rental Registration Create

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

Rental - Reservations

NEW RESERVATION


CHECKOUT

Location: Faust Park Rental Item: Faust Hourly

Nov 25 – Dec 1, 2018

month week day list

	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Sat 12/1
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							

To reserve a time, click directly on the day and start time in the unshaded area, or click the orange plus button  above the calendar. In either instance, a date-time dialog opens for you to select and save the appropriate entries:


Location: Faust Park Rental Item: Faust Hourly

Nov 25 – Dec 1, 2018

month week day list

	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Sat 12/1
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							

**Faust Park**

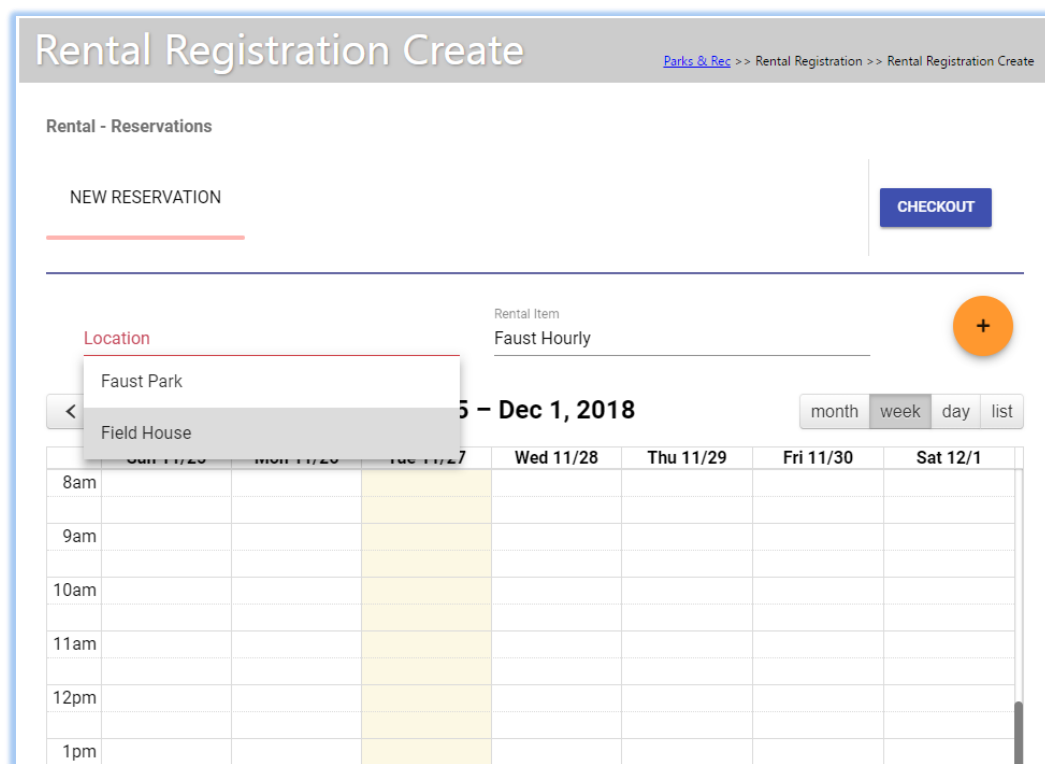
**Faust Hourly**  Court

Date \* 11/29/2018 Start Time \* 10:00 AM End Time \* 11:00 AM

CANCEL SAVE

**Note:** The types of fields on this dialog vary according to the facility reservation type, i.e., whether it is hourly, half day or daily, and only the times that have not been reserved already display on the time drop-downs.

If you want to try another location, clear the *Location* field, and select from a drop-down of your previously selected locations:



The screenshot shows the 'Rental Registration Create' dialog. At the top, there's a breadcrumb trail: [Parks & Rec](#) >> [Rental Registration](#) >> [Rental Registration Create](#). Below this, the section is titled 'Rental - Reservations'. There's a 'NEW RESERVATION' link and a 'CHECKOUT' button. The 'Location' field is set to 'Faust Park', and the 'Rental Item' is 'Faust Hourly'. A calendar is displayed for the week of December 1, 2018, with the date '5 - Dec 1, 2018' highlighted. The calendar shows time slots from 8am to 1pm. The slot for Wednesday, December 1st, at 12pm is shaded blue-gray, indicating a reservation. A dropdown menu is open for the 'Location' field, showing 'Faust Park' and 'Field House' as options.

Once you have saved a reservation, a card showing the reservation date, time and rental item displays above the calendar, and the day and time slot is shaded in blue-gray on the calendar:



## Rental Registration Create

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

Rental - Reservations

11/29/2018  
10:00 AM - 11:00 AM  
Faust Hourly

CHECKOUT

---

Location  
Faust Park

Rental Item  
Faust Hourly

+

< > today

Nov 25 – Dec 1, 2018

month week day list

	Sun 11/25	Mon 11/26	Tue 11/27	Wed 11/28	Thu 11/29	Fri 11/30	Sat 12/1
6am							
7am							
8am							
9am							
10am					10:00 - 11:00 Reserved - Faust Hourly		
11am							
12pm							
1pm							

To change the day or time of a saved reservation, click the card or the shaded area in the calendar, and the date-time dialog opens, enabled for editing. To discard a reservation, click the trash can icon on the card.

You may make as many reservations as you need, and a card displays for each one.

### Checkout

Clicking the **CHECKOUT** button takes you to the Rental Details & Acknowledgements page containing add-ons, required disclaimers and custom fields, if applicable:

# Rental Registration Create

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

Rental Details & Acknowledgements

[BACK](#)
[NEXT](#)

Affton Community Center (ACC) - Fitness Room

Fitness Room

The fitness room has seven dual fitness stations, two recumbent bikes, three treadmills, an elliptical, a low impact tread master and free weights. An adult must accompany children ages 14-16. Children age 17 must have a parental release form. Call for fee information.

☐ By checking this box, I certify that I have read, understand and agree to the terms shown here  
*\* You have to agree to the terms to proceed*

12/26/2018

09:00 AM - 10:00 AM

Fitness Room

Available Add - Ons

Account Credit Add On - \$15.00

Quantity

1

Supplemental Data

Add Adult Registration - \$5.00

Quantity

1

If multiple facilities have been selected, the additional items are grouped under the appropriate facility cards:

## Rental Registration Create

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

---

**Rental Details & Acknowledgements**

[BACK](#)   [NEXT](#)

---

**Afton Community Center (ACC) - Fitness Room**

Fitness Room

The fitness room has seven dual fitness stations, two recumbent bikes, three treadmills, an elliptical, a low impact tread master and free weights. An adult must accompany children ages 14-16. Children age 17 must have a parental release form. Call for fee information.

☒ By checking this box, I certify that I have read, understand and agree to the terms shown here

12/26/2018  
 09:00 AM - 10:00 AM  
 Fitness Room

**Available Add - Ons**

Account Credit Add On - \$15.00

Quantity  
1

Supplemental Data

Add Adult Registration - \$5.00

Quantity  
1

12/26/2018  
 10:00 AM - 11:00 AM  
 Fitness Room

**Available Add - Ons**

Account Credit Add On - \$15.00

Quantity  
1

Supplemental Data

Add Adult Registration - \$5.00

Quantity  
1

If you are scheduling the same facility in multiple time slots, after making item selections for one facility, you may click a button to have the same selections applied automatically to the other facilities:

<b>T-Shirt - \$9.00</b> Quantity 2 <hr/> Color <hr/>	<b>T-Shirt - \$9.00</b> Quantity 1 <hr/> Color <hr/>
<b>Lunch - \$10.00</b> Quantity 2 <hr/> Lunch Test <hr/>	<b>Lunch - \$10.00</b> Quantity 1 <hr/> Lunch Test <hr/>
Number Of Attendees 0 <hr/>	Number Of Attendees 0 <hr/>
Tee Shirt <hr/>	Tee Shirt <hr/>
Height" <hr/>	Height" <hr/>
Medical Release Req... <hr/>	Medical Release Req... <hr/>
<div>Apply these selection(s) to all Fitness Room</div>	

### Add Payer

The *Add Payer* field is the last step of the rental registration create process. This step also displays the registration date:

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

Registration Date:

12/23/2018

BACK

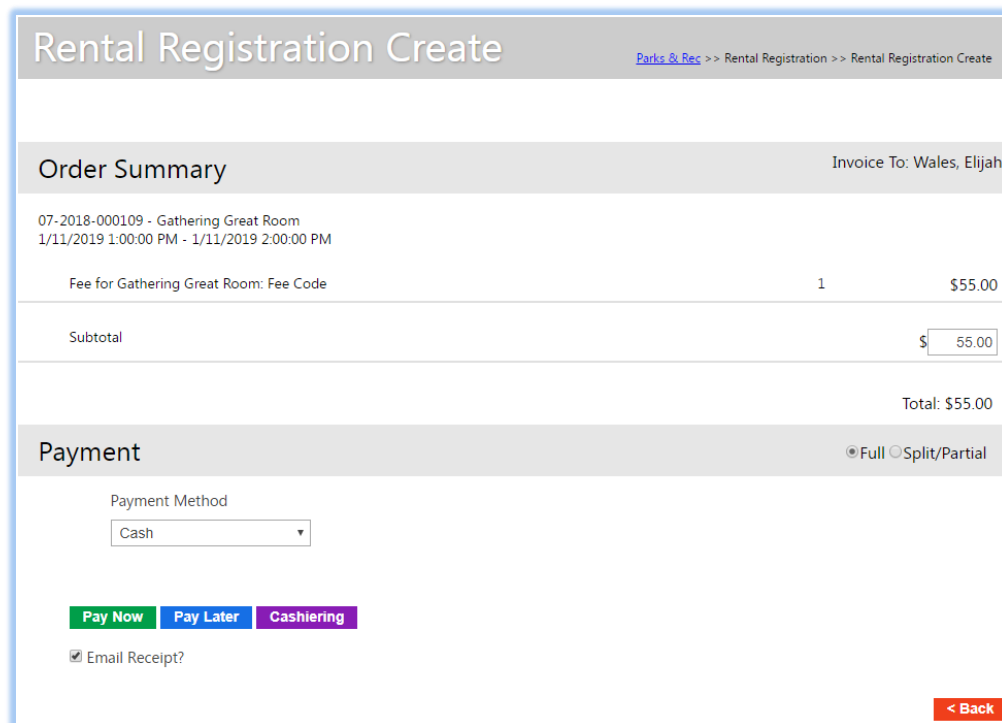
NEXT

Add Payer\*

---

After selecting the payer, click **NEXT**. Confirm the current order, and click **Next** again.

The program displays a summary page for review and payment:



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

---

**Order Summary** Invoice To: Wales, Elijah

07-2018-000109 - Gathering Great Room  
1/11/2019 1:00:00 PM - 1/11/2019 2:00:00 PM

Fee for Gathering Great Room: Fee Code	1	\$55.00
Subtotal		\$ 55.00
		Total: \$55.00

**Payment** ☒ Full ☐ Split/Partial

Payment Method  
Cash

**Pay Now** **Pay Later** **Cashiering**

☒ Email Receipt?

[< Back](#)

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

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**, **Pay Later** or **Cashiering** to complete the registration. If you select **Pay Now**, the program displays a printable receipt page. If you select **Pay Later**, 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 you select **Cashiering**, the transaction is submitted to Tyler Cashiering for processing.

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

☐ Full
 ☒ Split/Partial

pay. method	pay. amount	supple. data	value
BridgePay	\$ <input type="text"/>		
Cash	\$ <input type="text"/>		
OpenEdge	\$ <input type="text"/>		
Persolvent	\$ <input type="text"/>		

Bal: \$55.00
Total: \$0.00

Pay Now
Pay Later
Cashiering

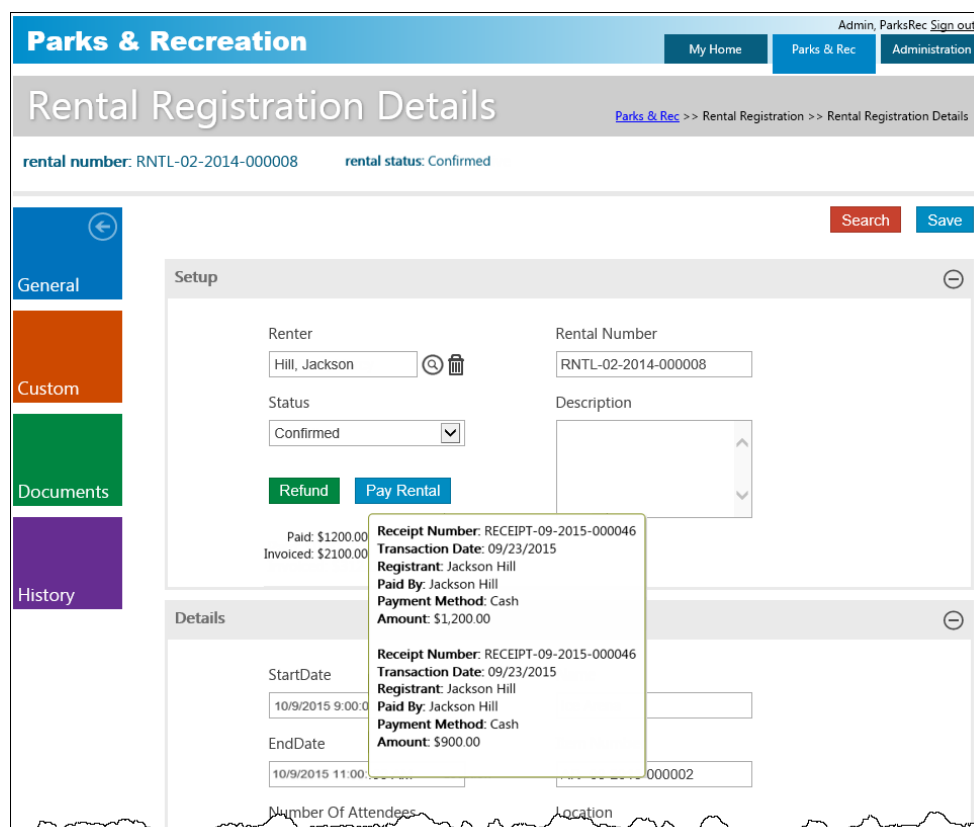
☒ Email Receipt?

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

### Rental Registration Details

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

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



**Parks & Recreation** Admin ParksRec Sign out  
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

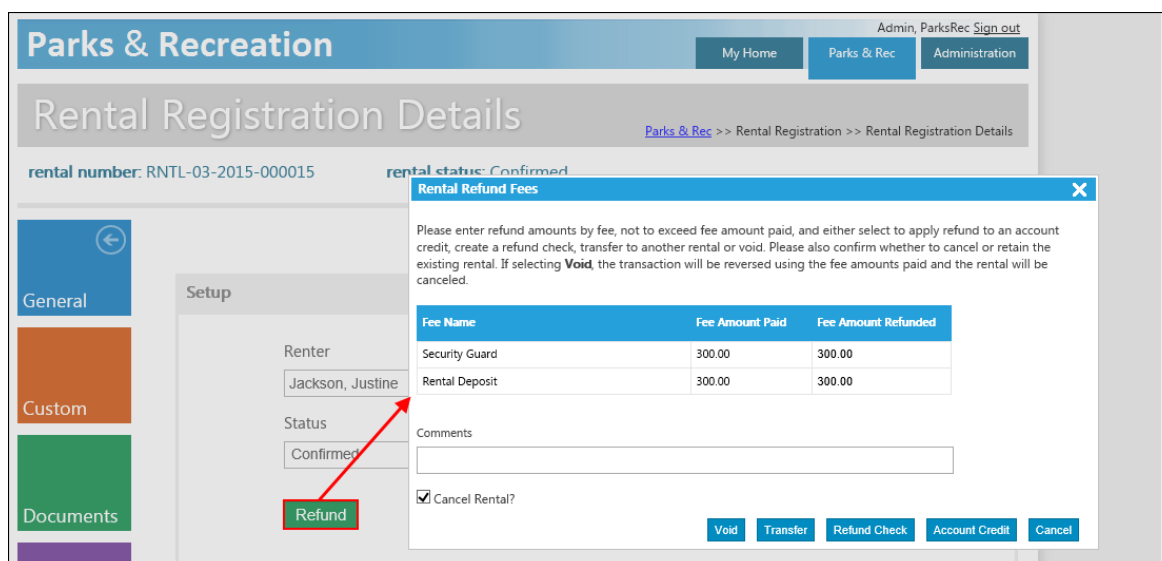
Number Of Attendees: 000002 Location:

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**

Admin, ParksRec [Sign out](#)

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

## 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:

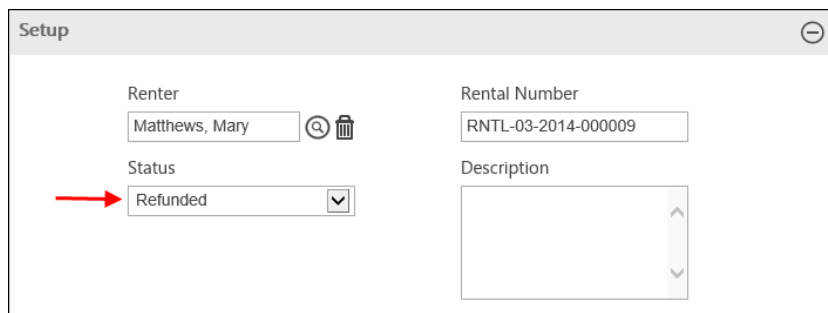
- **Void**—Reverses the transaction and cancels the registration. If you select this option, the program displays a confirmation message confirming the void of the entire transaction. If you continue, the action voids the entire transaction and removes all rental registrations associated with that transaction.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

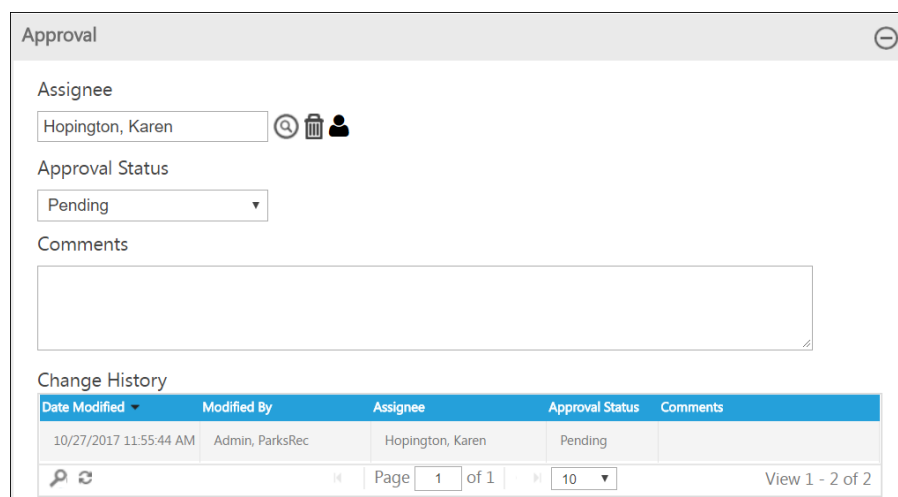
Renter: Matthews, Mary

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	

Page 1 of 1

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

## Rental Registration Details

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

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

General

Custom

Documents

History

Setup
⊖

Renter

Status

Paid: \$0.00  
 Invoiced: \$312.00

Rental Number

Description

Refund
Pay Rental

Search
Save

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

Summary

✕

First Name

Last Name

Fee

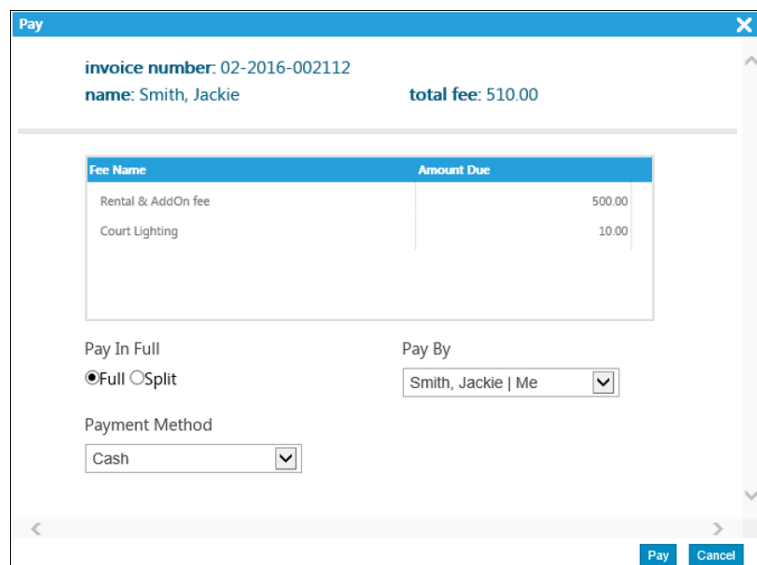
Registrant Total

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

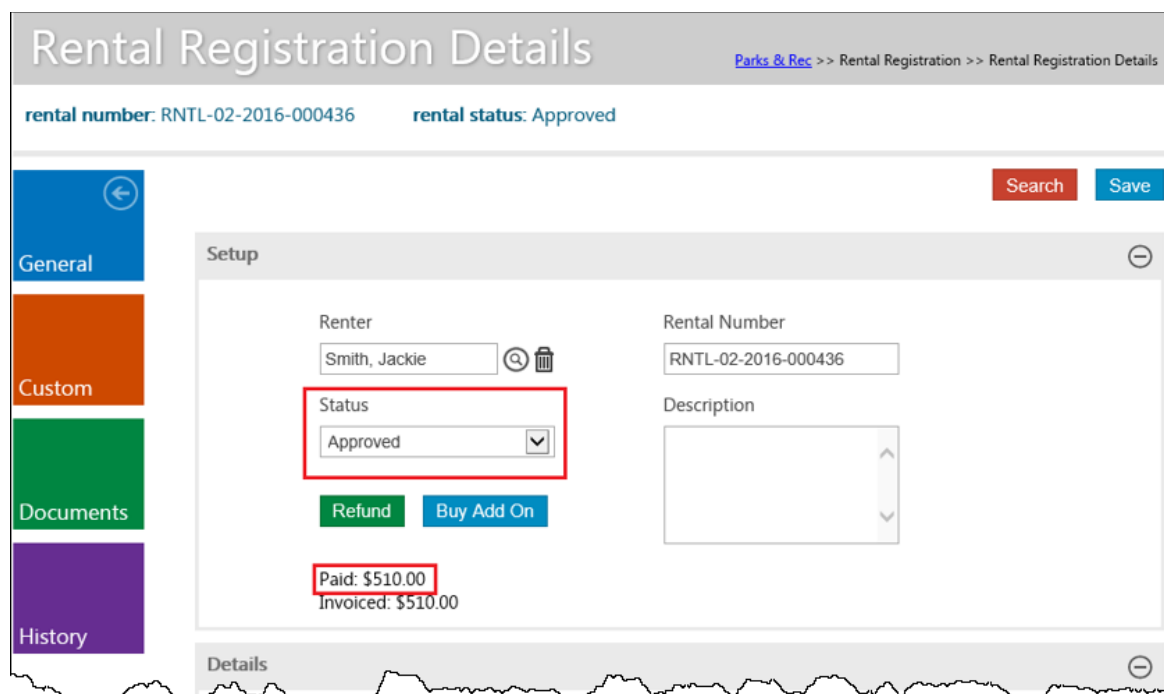
Payment Method:

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

General tab selected

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
Admin, ParksRec Sign out
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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Parks & Rec
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

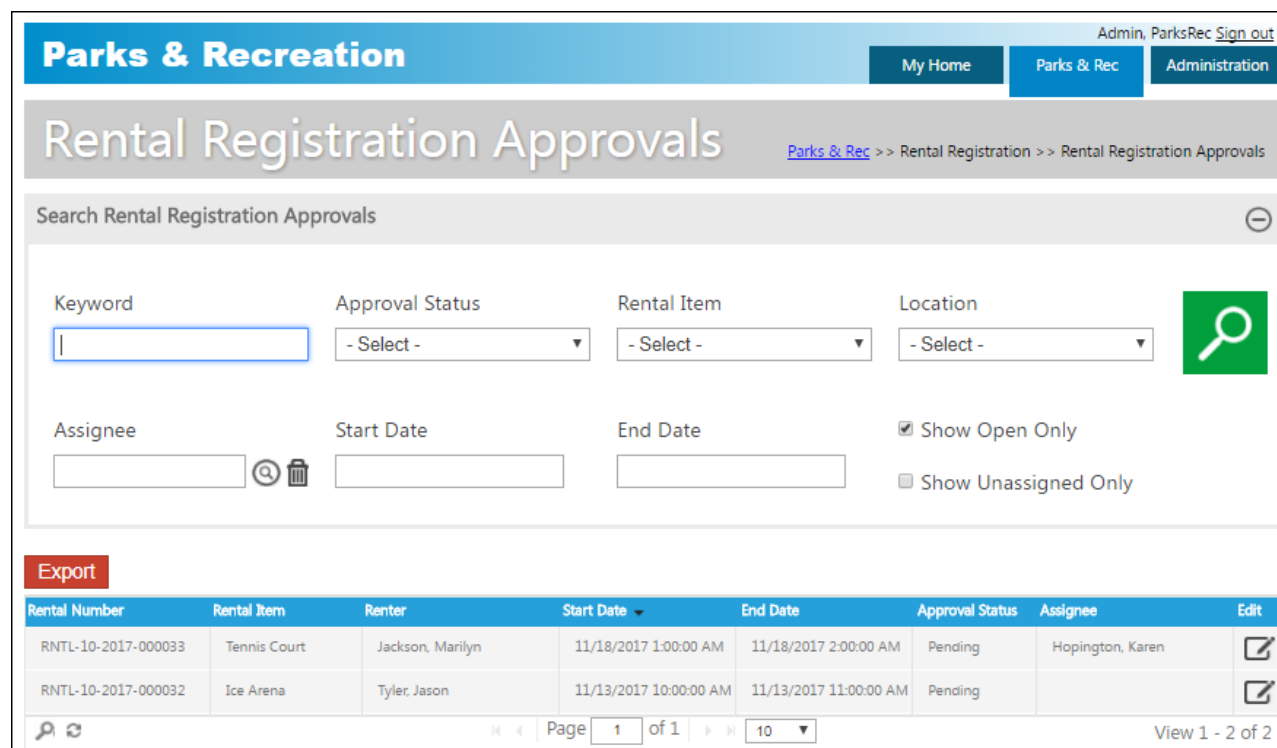
Total Amount: \$0.00

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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My Home Parks & Rec Administration

# 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**

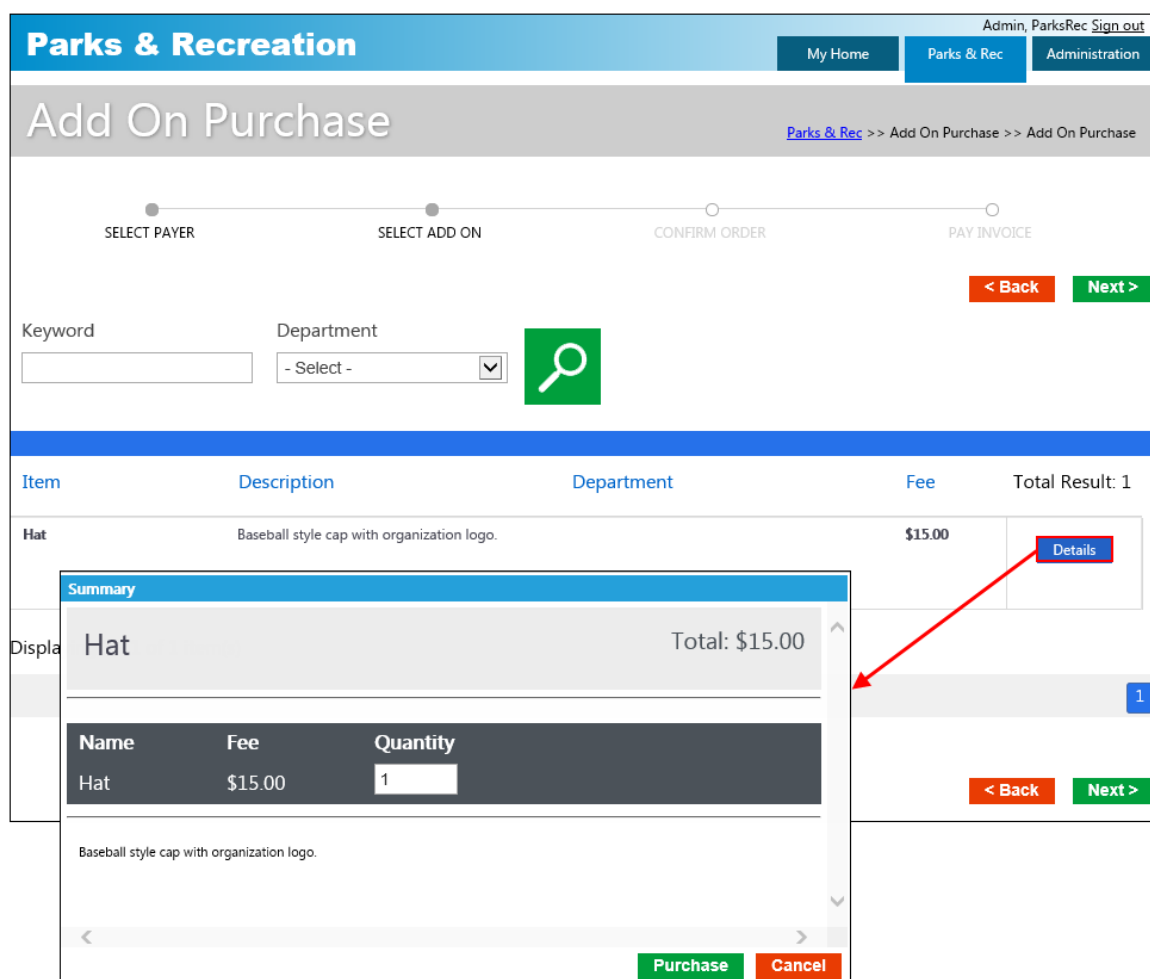
Rental Number	Rental Item	Renter	Start Date	End Date	Approval Status	Assignee	Edit
RNTL-10-2017-000033	Tennis Court	Jackson, Marilyn	11/18/2017 1:00:00 AM	11/18/2017 2:00:00 AM	Pending	Hopington, Karen	
RNTL-10-2017-000032	Ice Arena	Tyler, Jason	11/13/2017 10:00:00 AM	11/13/2017 11:00:00 AM	Pending		

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:



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


My Home Parks & Rec Administration

### Add On Purchase

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

SELECT PAYER SELECT ADD ON CONFIRM ORDER PAY INVOICE

< Back Next >

Keyword Department - 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:

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

**Rental - Reservations**

[BACK TO SEARCH](#)

[NEW RESERVATION](#) CHECKOUT

---

Location

Rental Item

+

today < >

**July 15 – 21 2018**

month week day list

	Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							

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.



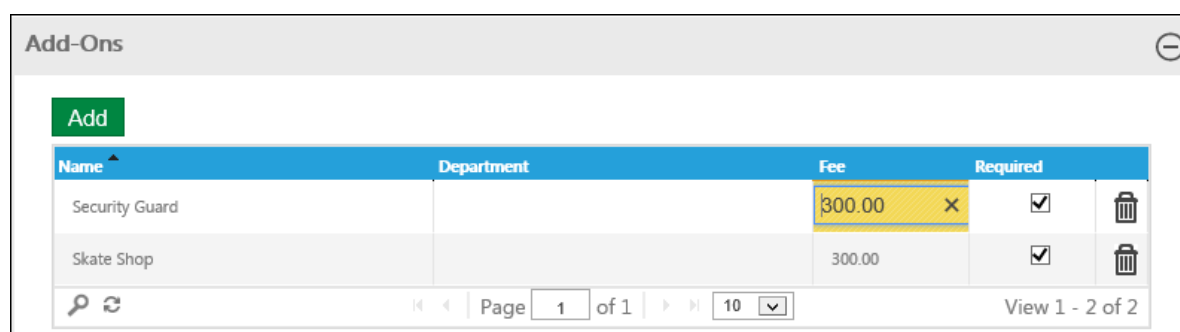
In addition to general rental information, the Rental Details page provides options for determining rental requirements and assigning miscellaneous administrative settings:

Field	Description
<i>Require Approval</i>	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.
<i>Include Disclaimer on Receipt</i>	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.
<i>Active</i>	If selected, indicates the item is currently available for rental.
<i>Allow Alcohol</i>	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
<i>Show on Portal</i>	If selected, the Browse Facility setting is enabled for the citizen portal, the portal includes this rental item on the Browse Facilities list.
<i>Allow Portal Registration</i>	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.
<i>Financial Group</i>	Identifies the financial source for the rental. For example, customer pay indicates payment is required by the renter.
<i>Expense Disbursement</i>	Identifies an expense disbursement method, if applicable.
<i>Registration Custom Layout</i>	Determines the layout template to use during registration. Only those templates for which the <i>Show for Registration</i> check box is selected are available. Use the Custom Fields and Custom Fields Layout options on the <b>Administration</b> tab to maintain customized fields.
<i>Registration Disclaimer</i>	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.
<i>Maximum Occupancy</i>	Defines the maximum number of attendees that can be included at activities hosted at the rental facility.

Field	Description
<i>Maximum/Minimum Days Booked in Advance</i>	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 advance minimum and maximum days. Using the Administration page, you can still rent the facility, but receive a warning message.
<i>Description</i>	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.
<i>Registration Receipt Note</i>	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"/>	

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

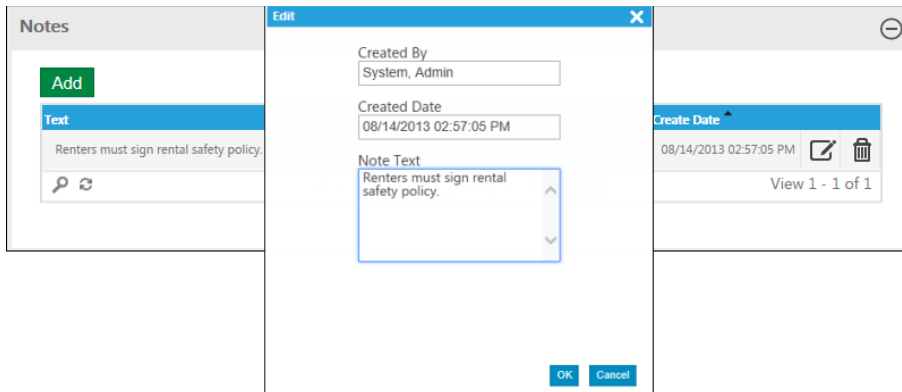
To make an add-on required, select the *Required* check box for the add-on item. In this case, the Required box on the Details page of the portal displays a default value of one (1) and the user cannot change this. If an add-on item or service is not required, the value of this box is zero (0).

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

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

### Notes

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



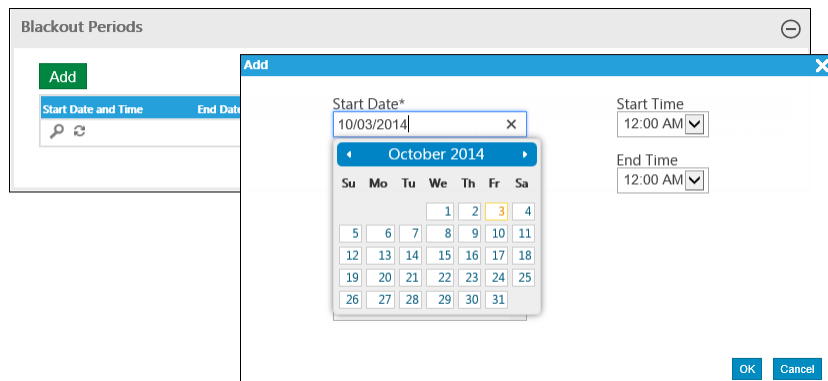
The screenshot shows the 'Notes' interface with an 'Add' button and a list of notes. A modal window titled 'Edit' is open, showing the following fields:

- Created By:** System, Admin
- Created Date:** 08/14/2013 02:57:05 PM
- Note Text:** Renters must sign rental safety policy.

At the bottom of the modal are 'OK' and 'Cancel' buttons. To the right of the modal, a sidebar shows the 'Create Date' as 08/14/2013 02:57:05 PM and a 'View 1 - 1 of 1' indicator.

### Blackout Periods

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



The screenshot shows the 'Blackout Periods' interface with an 'Add' button and a list of blackout periods. A modal window titled 'Add' is open, showing the following fields:

- Start Date\*:** 10/03/2014 (with a calendar dropdown showing October 2014)
- Start Time:** 12:00 AM
- End Time:** 12:00 AM

At the bottom of the modal are 'OK' and 'Cancel' buttons.

### Hours

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

Hours ⊖

Day of the week	IsActive	Start time	End time
Sunday	<input type="checkbox"/>	12:00 AM <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 ⊖

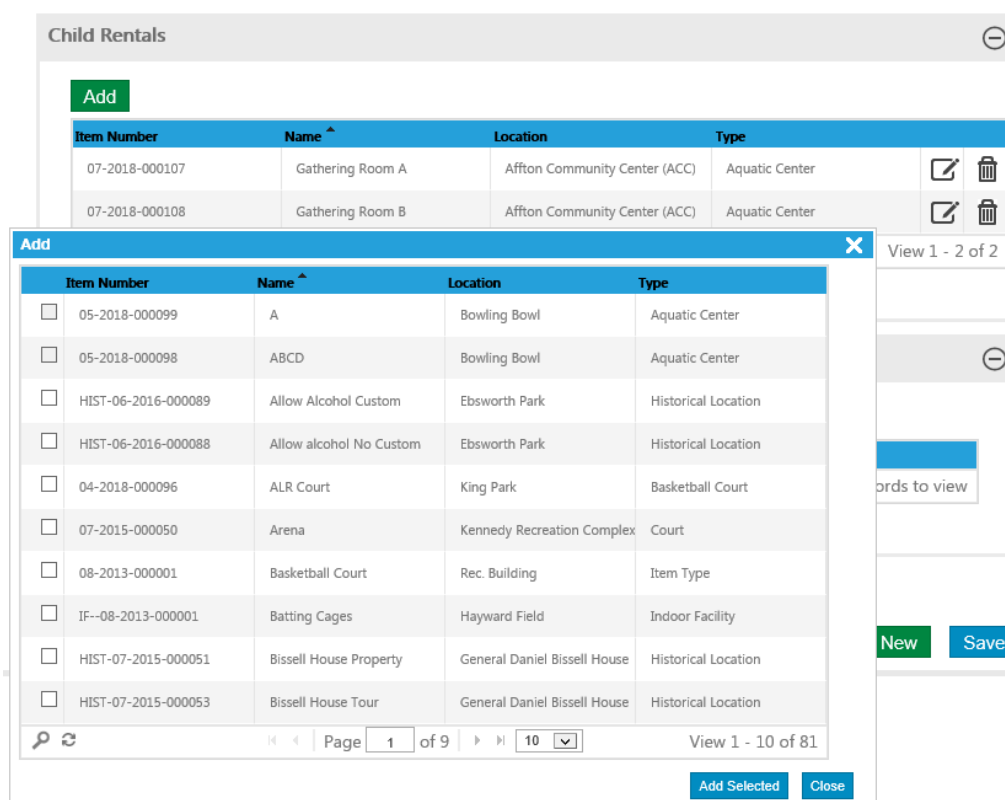
Add

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 dialog titled "Child Rentals" contains an "Add" button and a table of rental items. The table has columns: Item Number, Name, Location, and Type. Below the table are pagination controls showing "Page 1 of 9" and "View 1 - 10 of 81". At the bottom are "Add Selected" and "Close" buttons.

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 dialog titled "Child Rentals" shows the "Add" button disabled (grayed out). The table below it shows "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

🔍 ↺

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, Day, and List 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 filters, you can narrow the rental item to a specific item at a specific location. Select the *Location*, and then select the *Rental Item*. The available options for the *Rental Item* are dependent on the *Location* selected:



Parks & Recreation

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

Admin, ParksRec [Sign out](#)

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

Rental - Reservations

[BACK TO SEARCH](#)

NEW RESERVATION

CHECKOUT

Location

Afton Community Center (ACC)

x

Rental Item

Gathering Great Room

x

+

< >

today

Jan 6 - 12, 2019

month

week

day

list

	Sun 1/6	Mon 1/7	Tue 1/8	Wed 1/9	Thu 1/10	Fri 1/11	Sat 1/12
10am							
11am							
12pm							
1pm						1:00 - 2:00 Gathering Great Room	
2pm							
3pm						3:00 - 4:00 Gathering Great Room	
4pm							

## Reimbursement

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

Parks & Recreation

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

System, Admin [Sign out](#)

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

Search Reimbursement

Keyword

Reimbursement Status

Method

Reimbursed

- Select -

🔍

Export

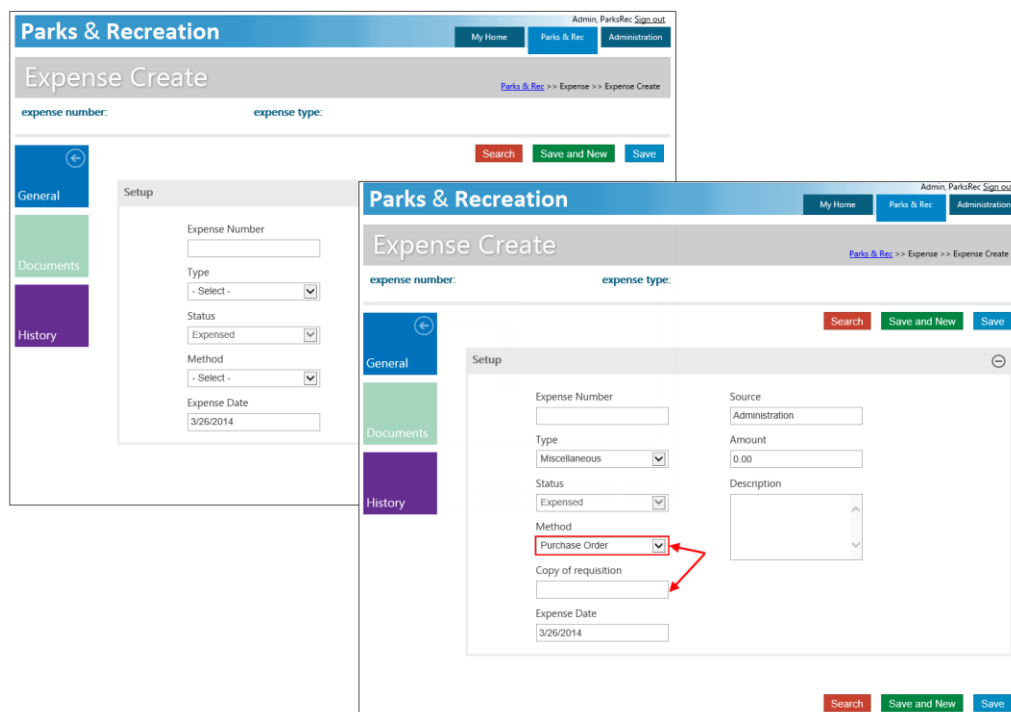
Reimbursement Number	Reimburse Status	Reimbursement Method	Expense Number
<div> <div>🔍</div> <div>Page 1 of 0</div> <div>10</div> </div>			

No records to view

## Expense

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

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



The image displays two screenshots of the 'Expense Create' form in the 'Parks & Recreation' system. The left screenshot shows the initial form with fields for Expense Number, Type, Status, Method, and Expense Date. The right screenshot shows the form after selecting 'Purchase Order' from the Method dropdown, which has triggered the appearance of a 'Copy of requisition' field. Red arrows indicate the selection of 'Purchase Order' and the resulting new field.

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

[Parks & Rec >> Expense >> 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 10

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

My Home

Parks & Rec

Administration

Admin, ParksRec Sign out

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

General
- Collapse All -
Search
Save and New
Save

\* indicates required field.

Name\*

Membership Fee\*

Number Of Days

Non-resident Fee\*

Start Date

Fee Name

End Date

Fee Template

- Select -

Registration Start

Minimum Age

Registration Deadline

Maximum Age

☐ Allow Auto-Renewal

Registration Custom Layout

- Select -

☐ Is a Group Membership

Registration Disclaimer

- Select -

☐ Show on Portal

☐ Resident Only

☐ Include Disclaimer on Receipt

Membership Description

Font Family
Font Sizes
B
I
U
A
A

The *Allow Auto-Renewal* check box makes the current membership available for automatic renewal. When this option is selected, the *Allow ACH Payment* check box is also available.

### Search

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

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

Memberships Search
Parks & Rec >> Memberships >> Memberships Search

Memberships Search

Keyword
Access Type
Access To
Age

- Select -
- Select -

☐ Is a Group Membership
☐ Residents Only

Create

Name	Discounts	Membership Fee	Membership Period	Is a Group Membership		
age test memb		\$0.00 / \$0.00	111 days	false		
Delete		\$20.00 / \$25.00	09/04/2018	false		
Mem 1	Discounts Available	\$10.00 / \$10.00	09/01/2018 - 09/30/2019	false		
Mem demo		\$10.00 / \$10.00	09/13/2018	false		
Membership Test		\$0.00 / \$0.00	50 days	false		
Park and Music	Discounts Available	\$15.00 / \$15.00	30 days	false		
Pauls 30 day	Discounts Available	60 & Older, Boy Scouts, Employee, Stefan Age	30 days	false		
PO Review		\$10.00 / \$12.00	10/03/2018 - 10/31/2018	false		
Sailor Boiz		\$10.00 / \$10.00	09/01/2018 - 09/01/2019	false		
Stefan Membership		\$100.00 / \$120.00	30 days	false		

Page 1 of 2
10
View 1 - 10 of 17

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\*

**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		
Martin, Marian	Not Yet Implemented	05/03/2018	05/02/2019		
Smith, Martin	Not Yet Implemented	05/03/2018	05/02/2019		
Sullivan, Nancy	Not Yet Implemented	05/03/2018	05/02/2019		
Tyler, Jason	Not Yet Implemented	05/03/2018	05/02/2019		
Young, Charles	Not Yet Implemented	05/03/2018	05/02/2019		

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

Page 1 of 0 View 1 - 6 of 6











Clicking this button opens the Edit Membership Member page 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 page.

## Discounts

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

Discounts					
Add					
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%		
  Page 1 of 1 10 View 1 - 4 of 4					

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

Discounts					
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"/> 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%		
  Page 1 of 1 10 View 1 - 6 of 6					
				Add Selected	Close

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

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

## Discount Details

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

[Back to Membership](#)

[Save](#)

Name*	Dollar Amount
<input type="text" value="Employee"/>	<input type="text" value="7.00"/>
Description	Percentage
<input type="text" value="test"/>	<input type="text"/>
Discount Type*	Start Date*
<input type="text" value="Employee"/>	<input type="text" value="5/17/2018"/>
	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 date or location access restrictions for a type of membership, they are defined using the Privileges option:

Edit Membership Privilege

\* indicates required field.

Name\*

Number of Accesses

Start Date

End Date

Access Type

Access To

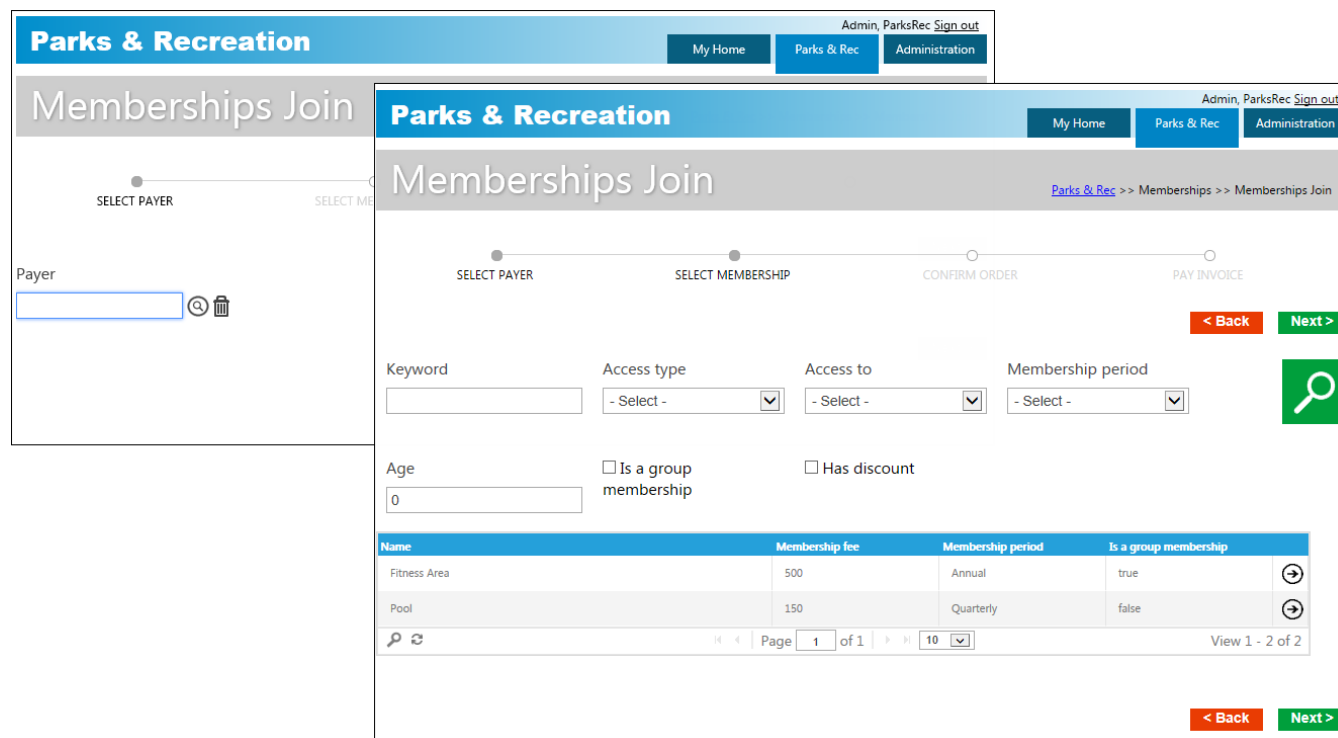
Number Of Days

OK

Cancel

## 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 -]

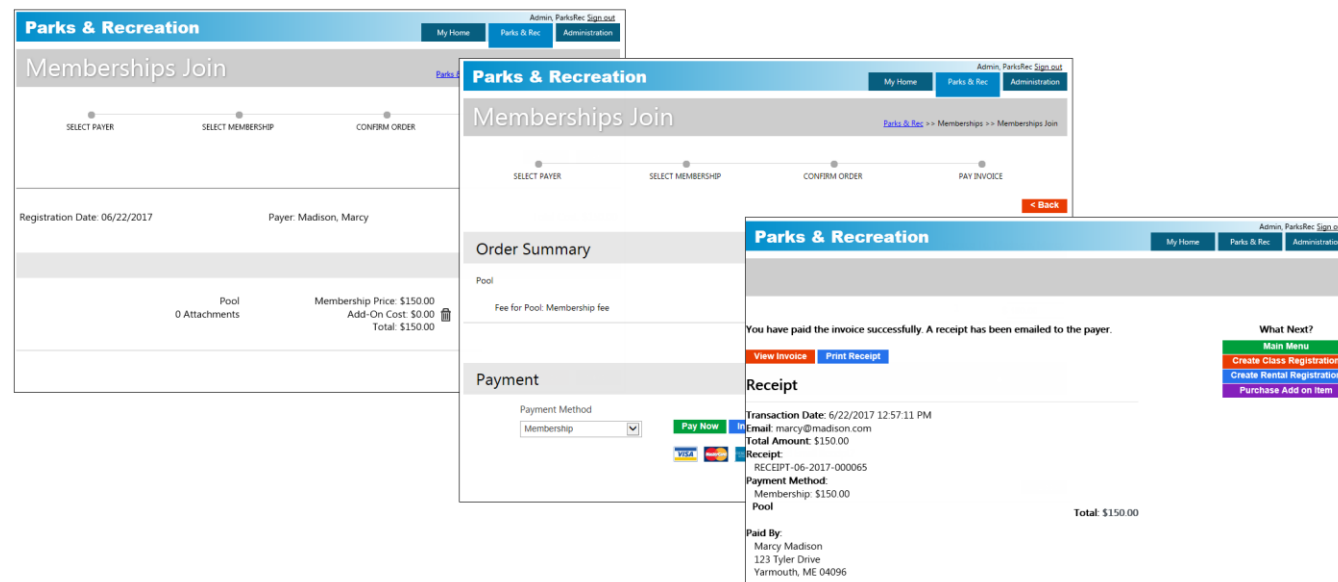
Age: [Input Field] ☐ Is a group membership ☐ Has discount

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 page identifies the membership type and amount, along with the options to pay now, pay later (receive an invoice) or submit the transaction to Cashiering:



**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 Method: Membership

Pay Now

### Receipt

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

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 \$150.00  
Pool

Total: \$150.00

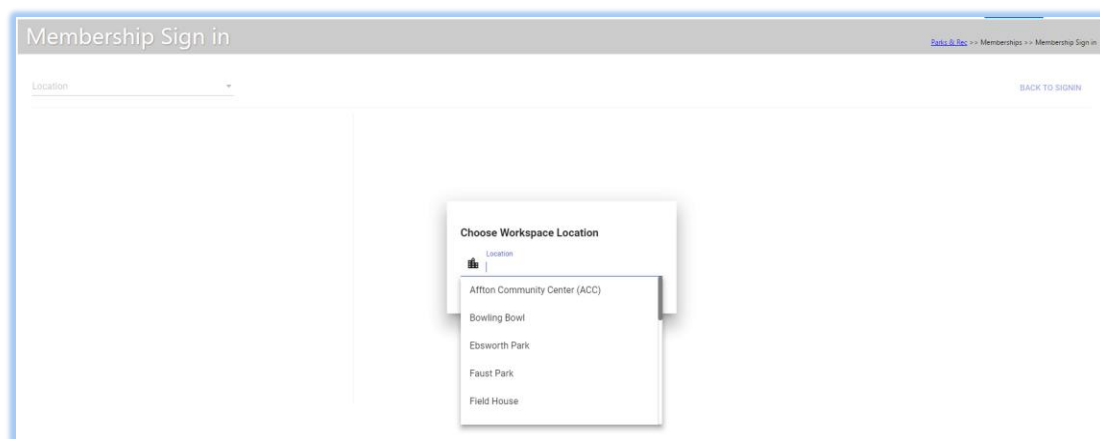
Paid By: Marcy Madison  
123 Tyler Drive  
Yarmouth, ME 04096

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

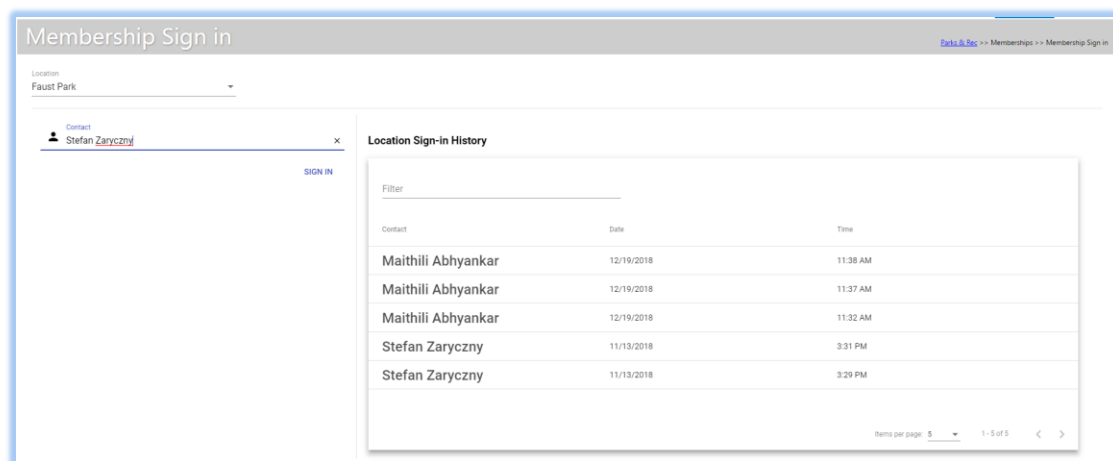
## Sign In

The Membership Sign In process is designed to let you select the location you are working from, track location sign-in history, view usage-based memberships and deduct usages, view membership privileges and locations and print and link membership cards manually or with a scanner.

Clicking the *Sign In* link opens a page that asks you to select the workspace location you will be signing members into:



Once you have selected a location, the main Membership Sign In page displays:



A **Location Sign-in History** displays in the right panel of the page, showing a list of the contacts who have signed in, along with the dates and times of sign-in.

Use the *Filter* field to focus the list. To sort the list by *Contact*, *Date* or *Time*, click the corresponding column header.

The left panel contains *Location* and *Contact* fields. The workspace location selected in the first step defaults in the *Location* field. If necessary, you may change the location by clicking in the field and selecting from a drop-down of available locations.

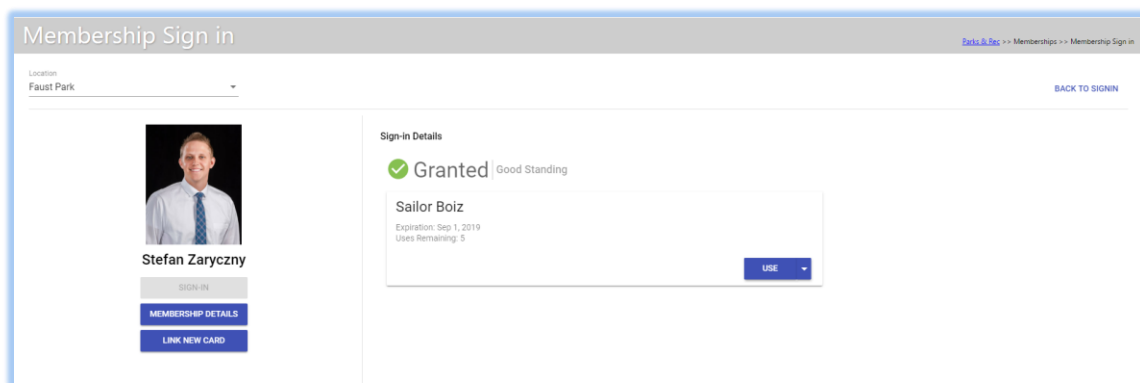
If a contact has a membership card, scan the card to navigate automatically to the **Sign-in Details**.

If a contact does not have a membership card to be scanned, click in the *Contact* field. The drop-down contains all contacts, sorted alphabetically by last name, who hold or have held at least one membership to any location in the system. Email addresses also are shown next to the contact names.

You may scroll and select the contact from the list or type the contact's name in the field. As you type, the list of names filters accordingly.

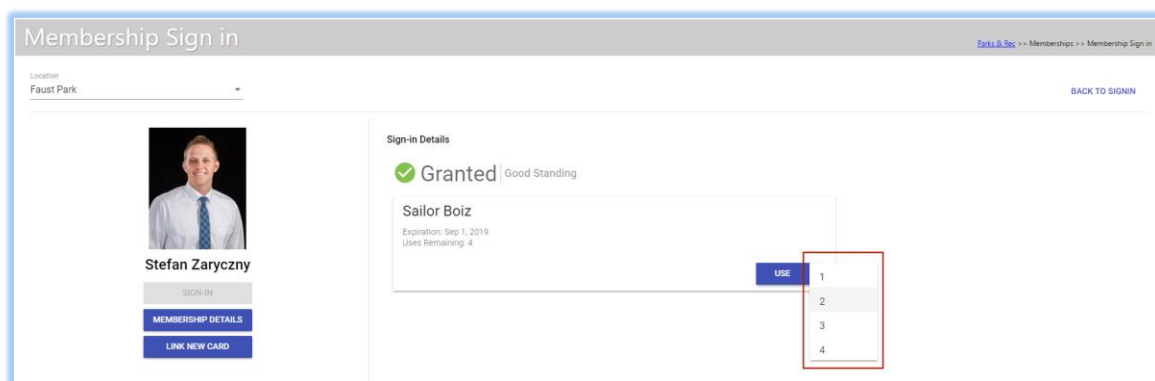
Once you select the contact's name, click the **SIGN IN** button.

On the following page, the right panel contains the **Sign-in Details**, and the left panel contains the location and the contact:



The **Sign-in Details** show the membership providing access to the location, the membership expiration date and the number of uses remaining. If the contact has multiple memberships, the one that expires first is shown, and usage is deducted from that one.

To deduct one use, click the **USE** button. To deduct multiple uses, click the prompt on the right side of the button, and select the number from the drop-down:



The number you select appears in parentheses on the **USE** button:

Sign-in Details

✓

Granted

Good Standing

Sailor Boiz

Expiration: Sep 1, 2019

Uses Remaining: 4

USE (2)

To deduct the uses, click the button. The name of the button changes to **LOGGED** and is disabled, and the number of *Uses Remaining* is adjusted accordingly:

Sign-in Details

✓

Granted

Good Standing

Sailor Boiz

Expiration: Sep 1, 2019

Uses Remaining: 2

LOGGED

If a membership provides unlimited access, the **USE** button and the number of *Uses Remaining* do not appear in the panel.

To view a contact's complete list of memberships and membership cards, click the **MEMBERSHIP DETAILS** button in the left panel:

Membership Sign in

Location  
Faust Park

Stefan Zaryczny

SIGN IN

MEMBERSHIP DETAILS

LINK NEW CARD

Membership Details

MEMBERSHIPS

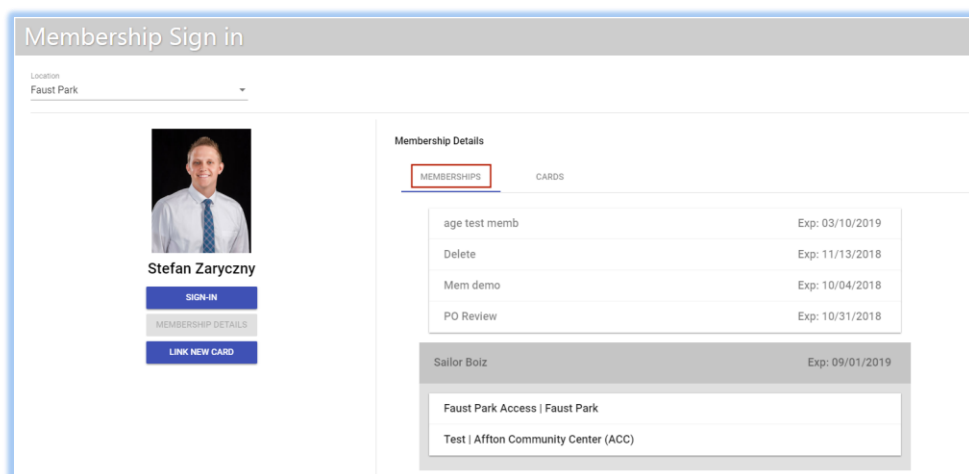
CARDS

age test memb	Exp: 03/10/2019
Delete	Exp: 11/13/2018
Mem demo	Exp: 10/04/2018
PO Review	Exp: 10/31/2018
Sailor Boiz	Exp: 09/01/2019
Stefan Membership	Exp: 01/03/2019
Super Free	Exp: 09/20/2018
TC Paul	Exp: 01/25/2019

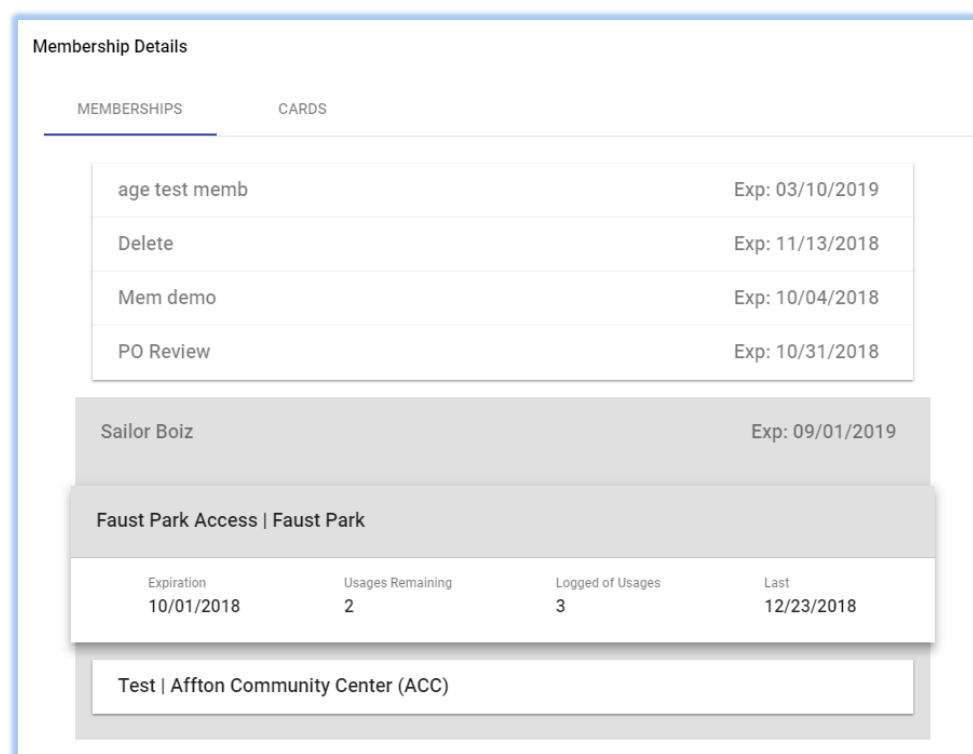
Memberships display on individual cards on the **Memberships** tab. To view the privilege and location associated with a membership, click the corresponding card to expand it:

Tyler Parks and Recreation 2018.5

130




Privileges and locations also appear on individual cards. To view the expiration date, uses remaining, logged uses and the last logged use of a privilege, click the corresponding card to expand it:



Membership card numbers and their issued dates display on the **Cards** tab:

## Membership Sign in

Location  
Faust Park



**Stefan Zaryczny**

[SIGN-IN](#)

[MEMBERSHIP DETAILS](#)

[LINK NEW CARD](#)

### Membership Details

[MEMBERSHIPS](#)
[CARDS](#)

CARD NUMBER	DATE ISSUED	
123456789	12/10/18	⋮
44566	12/10/18	⋮
555555	11/27/18	⋮
444444	11/27/18	⋮

[PRINT A CARD](#) [LINK NEW CARD](#)

To remove a card, click the vertical ellipses to the right of the expiration date, and select **Remove**.

Buttons to print a card and to link a new card are available at the bottom of the tab.

The **PRINT A CARD** button opens a dialog containing the name of the city or county, the name of the member and a bar code derived from the contact number on the Contact Details page:

### Membership Details

[MEMBERSHIPS](#)
[CARDS](#)

1 of 1

Find | Next

Louis County Parks and Rec

Member: Stefan Zaryczny

\*042018004289\*

[PRINT A CARD](#) [LINK NEW CARD](#)

The **LINK NEW CARD** button opens a dialog for scanning or entering a card number for a card printed outside of Parks and Recreation:



Membership Details

MEMBERSHIPS


CARDS

CARD NUMBER	DATE ISSUED
123456789	
44566	
555555	
444444	

PRINT A CARD

LINK NEW CARD

Link Card



Card Number

778899

Scan for easy enter!

CANCEL

LINK CARD

# Administration

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

Parks & Recreation
Admin, 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
Restrictions

Report Setup
Search
Create

Cashier Setup
ACH Settings
Banks
Payment Method
GL Account
Adjust Reason
Delete Reason
Disbursement Type
Fee Schedule
Fee
Cart Fees
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.
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.

Category	Description
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.
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.
Cart Fees	Sets up cart fees on the administrative and citizen portal sides.
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.

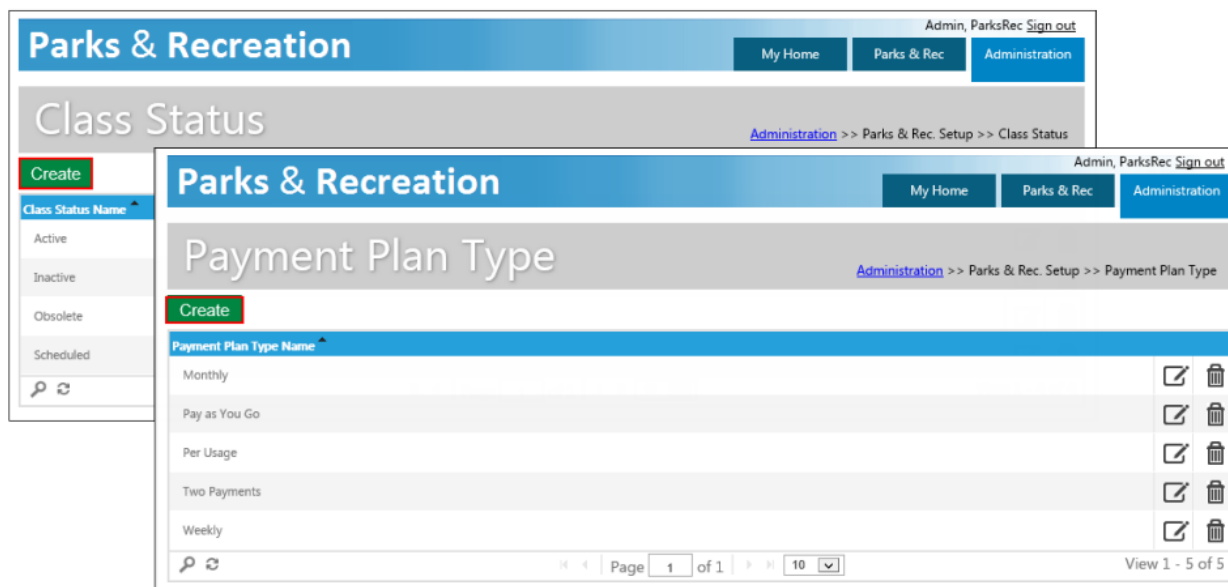
## Report Setup

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 <b>Rights</b> 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 <b>Parks &amp; Rec</b> 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. 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		

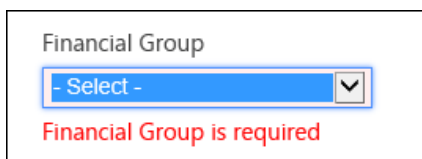
The bottom screenshot also shows a pagination bar indicating 'Page 1 of 1' and 'View 1 - 5 of 5'.

## 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.

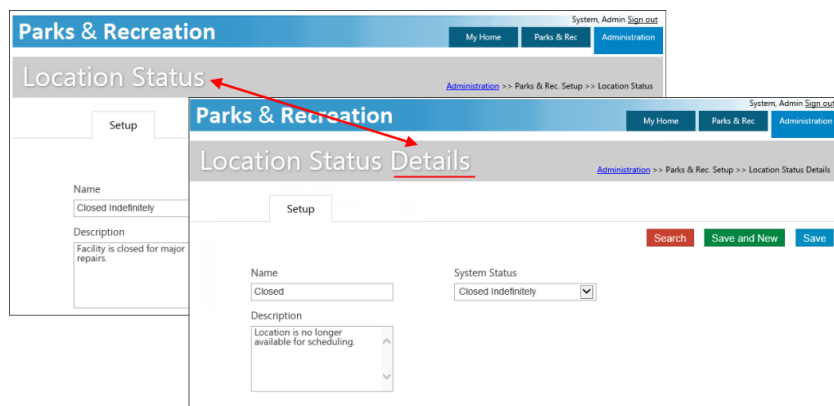
Throughout the setup pages, the Name boxes typically allow up to 20 characters of text.

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 red error message below it: 'Financial Group is required'.

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:

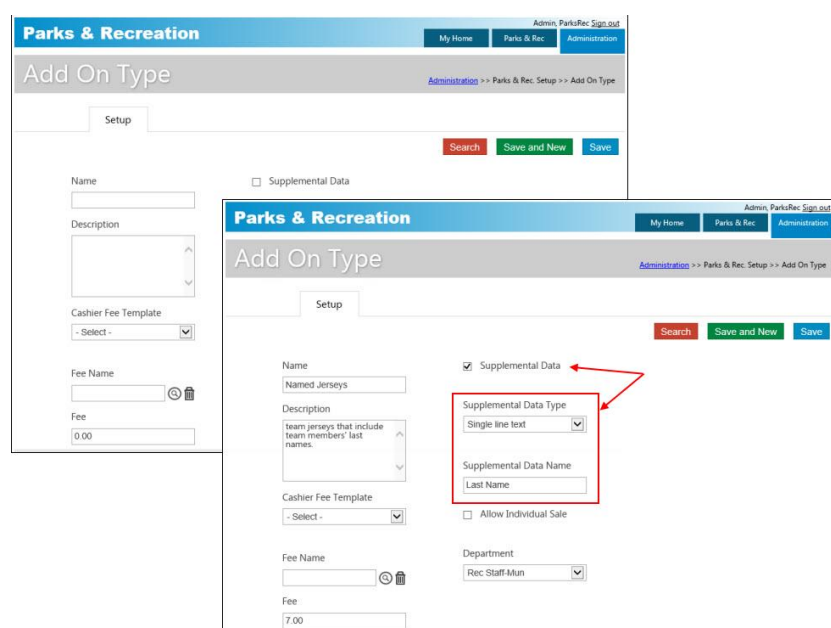


Several detail pages include the System Status list. This status is recognized by the Parks and Recreation application for processing. However, you can create user-defined variations for a status that provides additional details. For example, if the system status for an instructor is Inactive, you can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

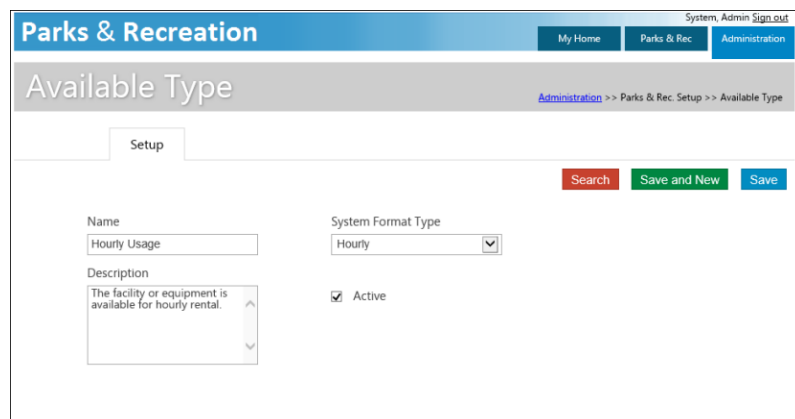
If you select the *Supplemental Data* check box, you must complete the Supplemental Data Type list and the *Supplemental Data Name* box:



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

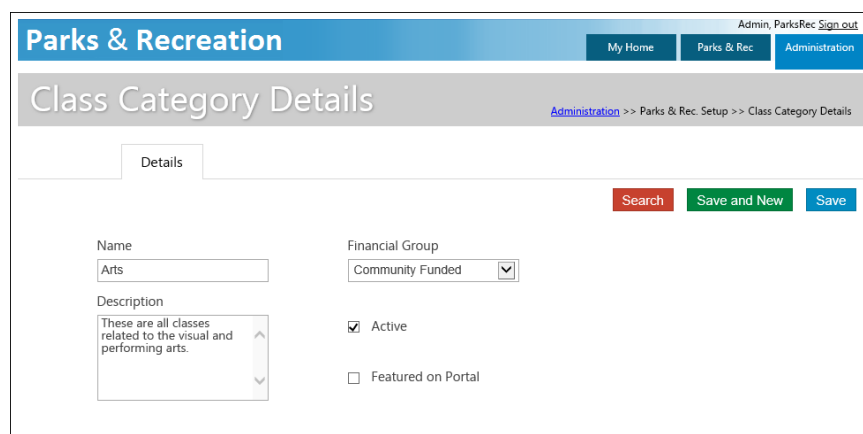
Description: The facility or equipment is available for hourly rental.

☒ 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

System Status

Open

Description

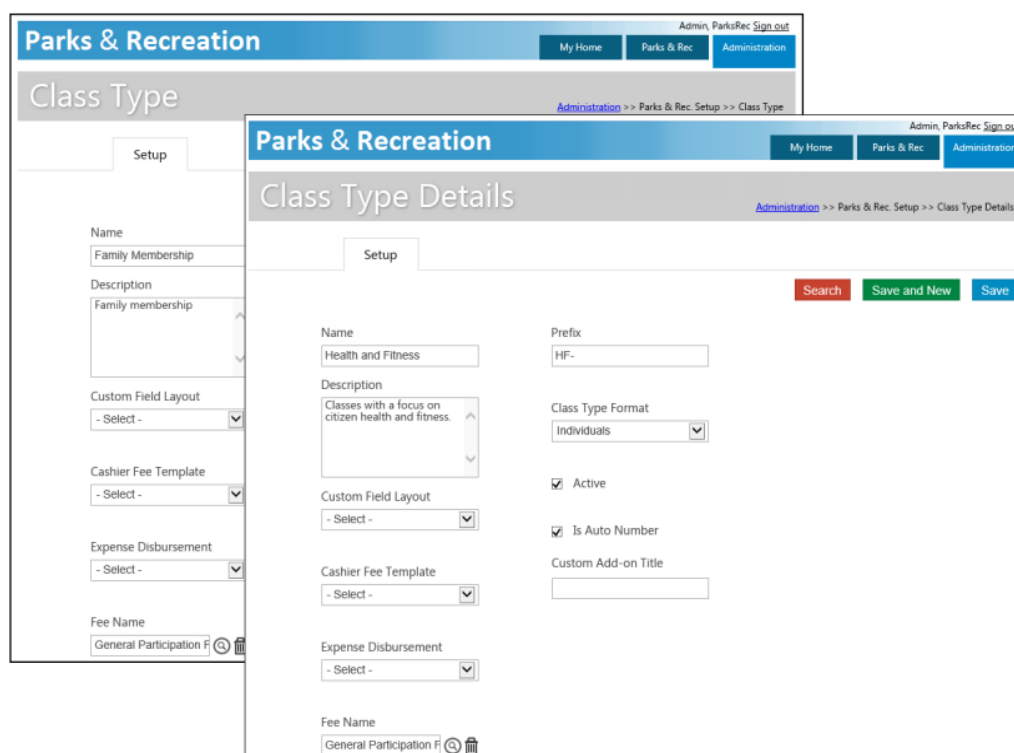
The class is scheduled pending the number of participants who sign up.

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.

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 be 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:



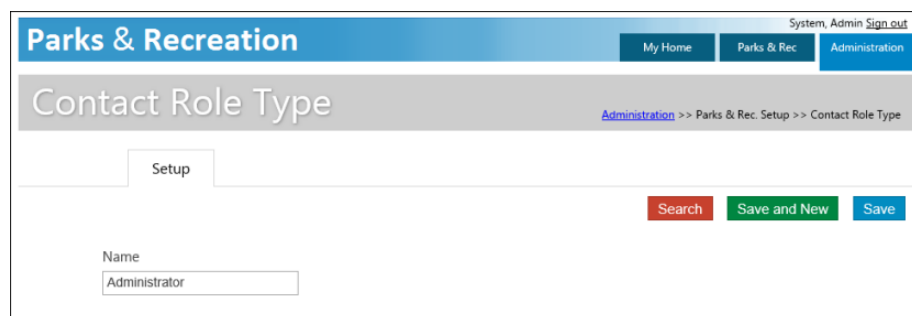
If you select a value for the Custom Field Layout list, the program assigns the custom layout to all classes to which this class type is assigned.

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.

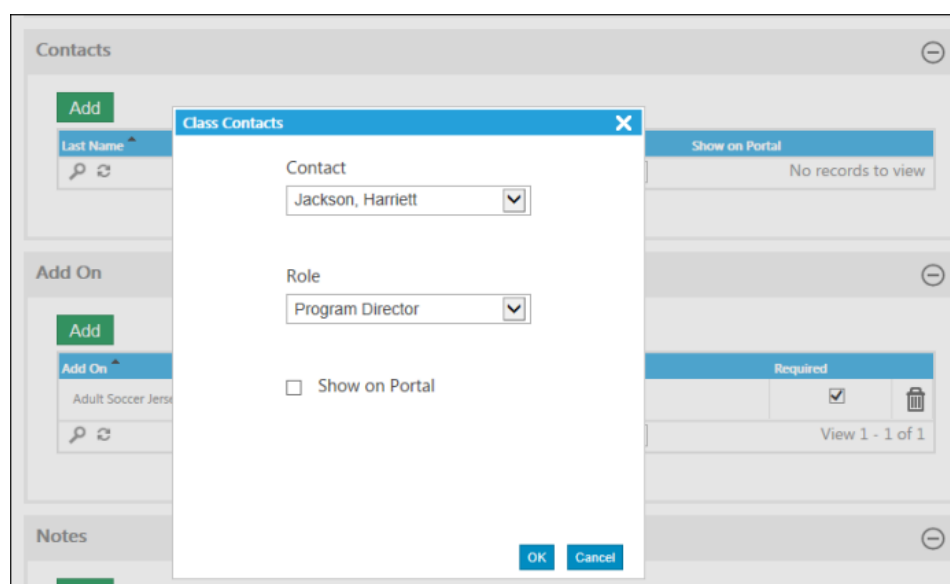
## Contact Role Type

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



The screenshot shows the 'Parks & Recreation' application interface. At the top, there's a navigation bar with 'My Home', 'Parks & Rec', and 'Administration'. Below this, the 'Contact Role Type' page is displayed. It includes a 'Setup' tab, a 'Search' button, a 'Save and New' button, and a 'Save' button. A text input field labeled 'Name' contains the value 'Administrator'.

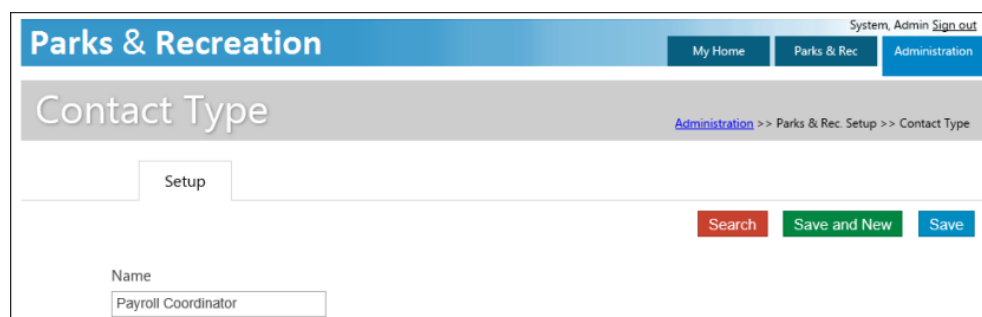
When you assign contacts to a class or activity and you click **Add**, the Class Contacts dialog box includes the Role list, where you can select the applicable role for the contact:



The screenshot shows a 'Class Contacts' dialog box. It has a 'Contact' dropdown menu with 'Jackson, Harriett' selected. Below it, there's a 'Role' dropdown menu with 'Program Director' selected. There is also a checkbox labeled 'Show on Portal' which is currently unchecked. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. The background shows a blurred view of the 'Contacts' page with an 'Add' button and a table of contacts.

## 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:

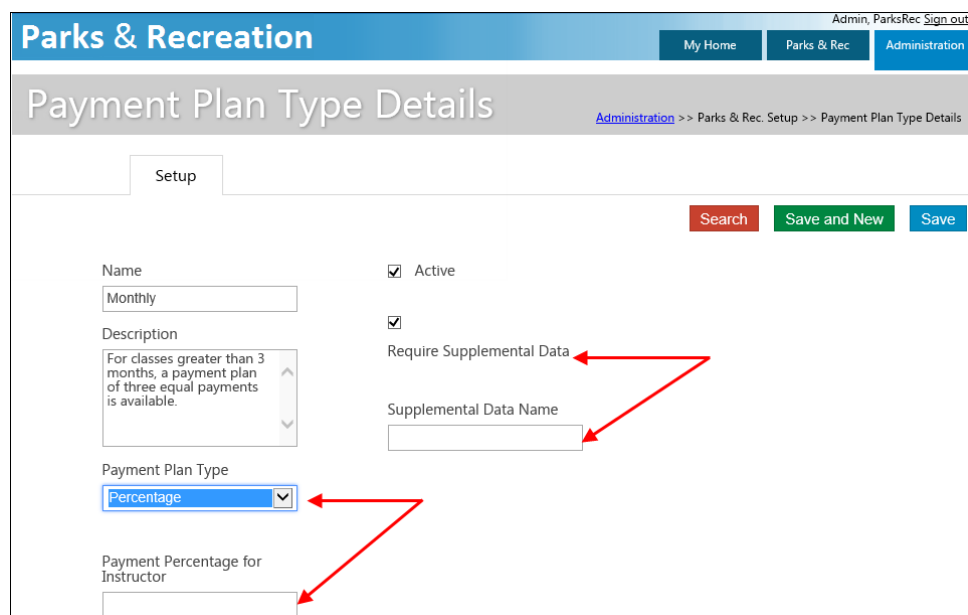


The screenshot shows the 'Parks & Recreation' application interface. At the top, there's a navigation bar with 'My Home', 'Parks & Rec', and 'Administration'. Below this, the 'Contact Type' page is displayed. It includes a 'Setup' tab, a 'Search' button, a 'Save and New' button, and a 'Save' button. A text input field labeled 'Name' contains the value 'Payroll Coordinator'.

## 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.

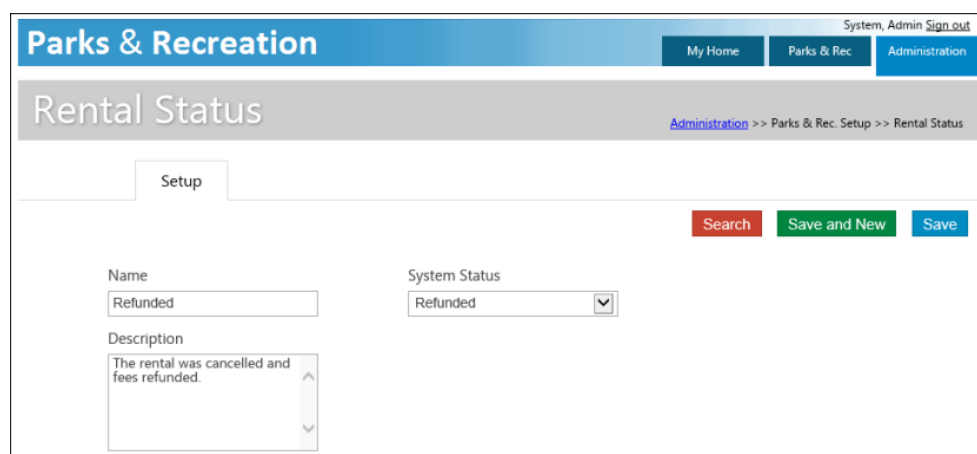
If you select the *Require Supplemental Data* check box, you must complete the Supplemental Data Name box:



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

## Rental Status

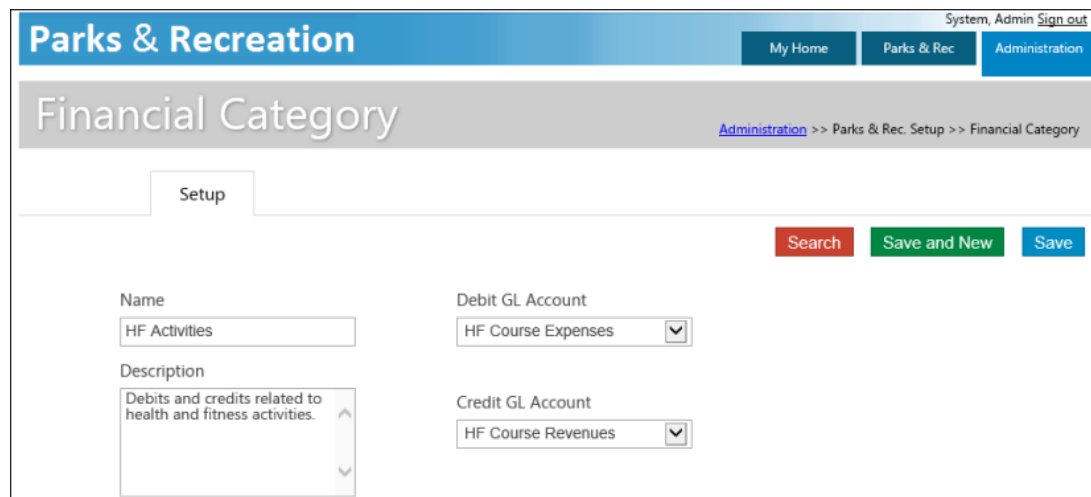
Rental Status defines status levels for rental equipment or property:



The 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:

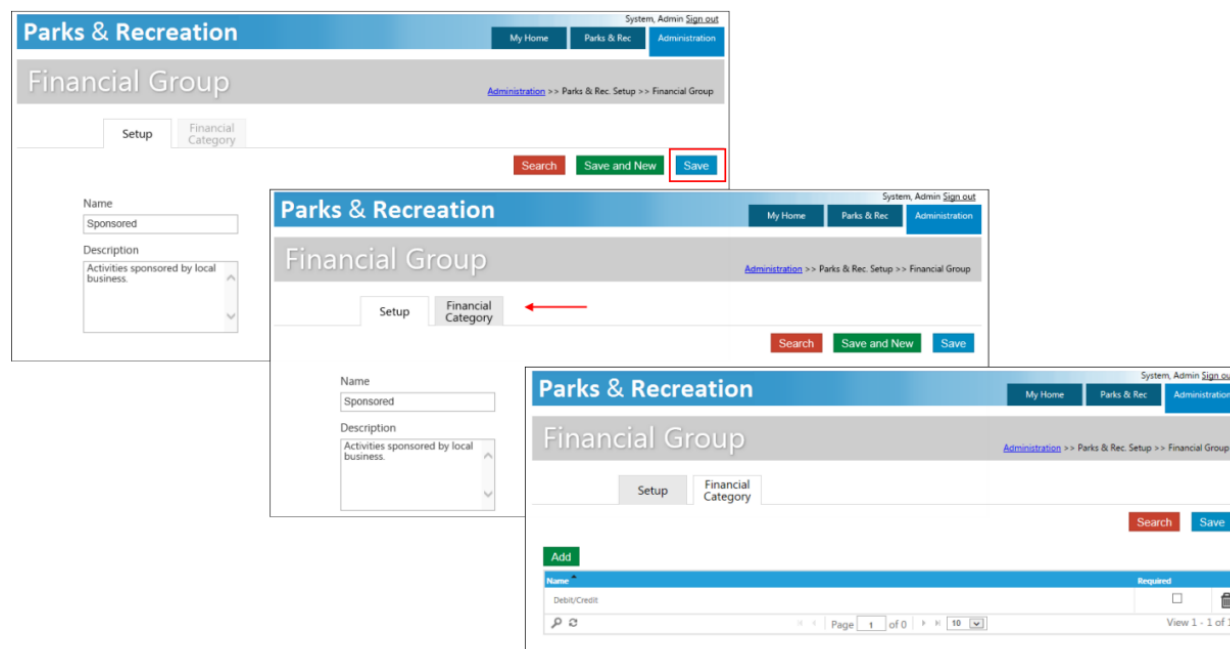


The screenshot shows the "Financial Category" setup form. At the top, there's a navigation bar with "Parks & Recreation" and links for "My Home", "Parks & Rec", and "Administration". Below this is a breadcrumb trail: "Administration >> Parks & Rec. Setup >> Financial Category". The form has a "Setup"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

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

## Financial Group

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

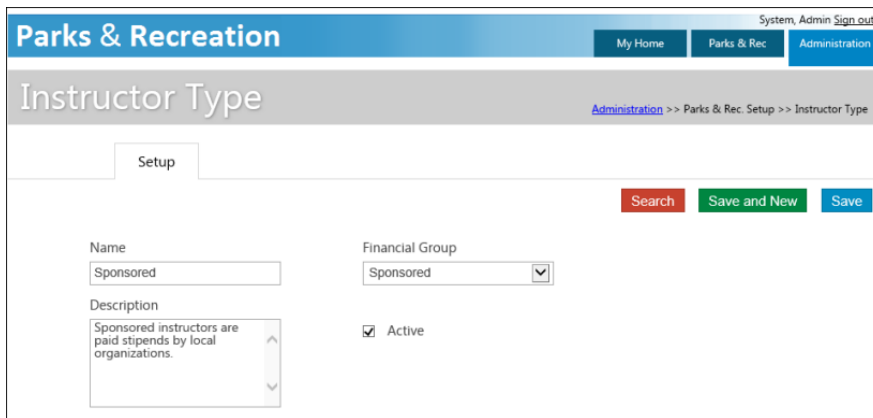


The image shows three overlapping screenshots of the "Financial Group" setup process:

- Top Screenshot:** Shows the "Financial Group" setup form with the "Setup" tab selected. The "Name" field is "Sponsored" and the "Description" is "Activities sponsored by local business." The "Save" button is highlighted with a red box.
- Middle Screenshot:** Shows the same form, but with the "Financial Category" tab selected. A red arrow points from the "Save" button in the top screenshot to this tab.
- Bottom Screenshot:** Shows the "Financial Group" form with the "Financial Category" tab selected. It includes an "Add" button and a table with columns "Name" and "Required". The table currently has one row: "Debit/Credit". The bottom right corner shows "Page 1 of 1" and "View 1 of 1".

## Instructor Type

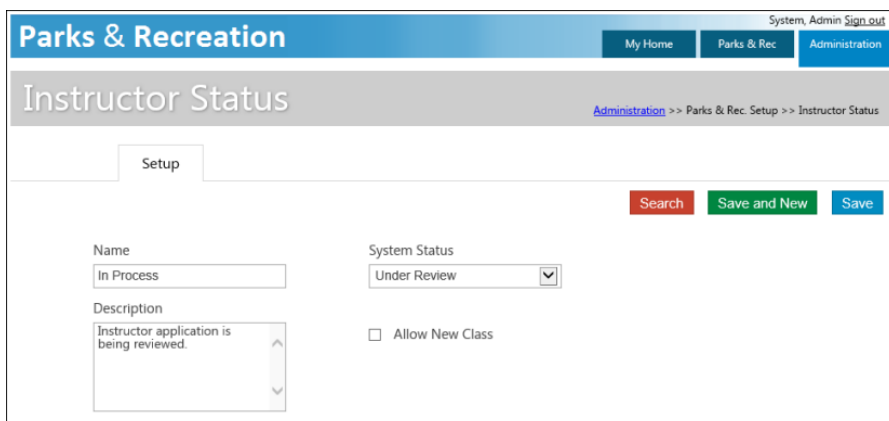
Instructor Type specifies types for your program instructors, including associated financial group details for each type:



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:

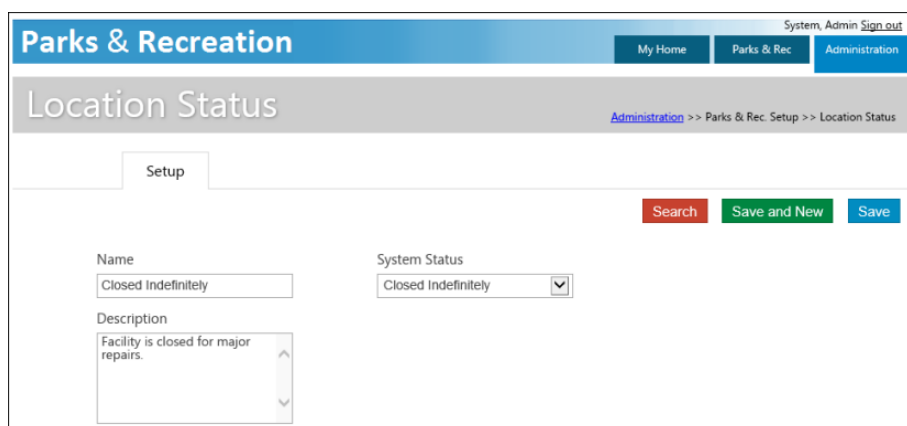


The screenshot shows the 'Instructor Status' setup page in the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. A breadcrumb trail indicates the path: 'Administration >> Parks & Rec. Setup >> Instructor 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

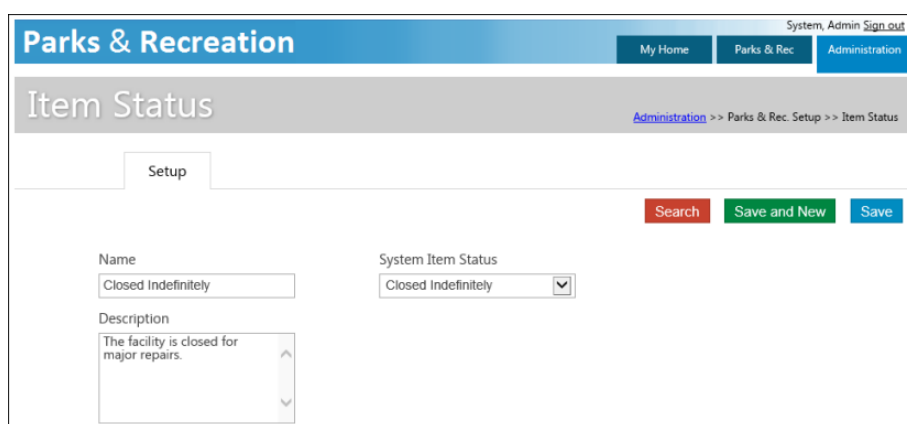
Location Status identifies the status of locations where programs are offered:



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

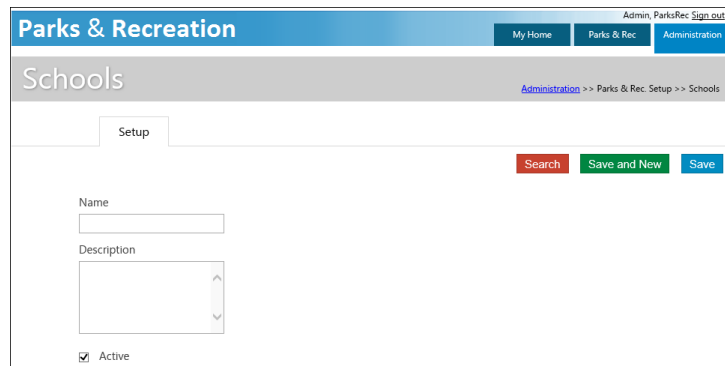
[Preview](#)

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

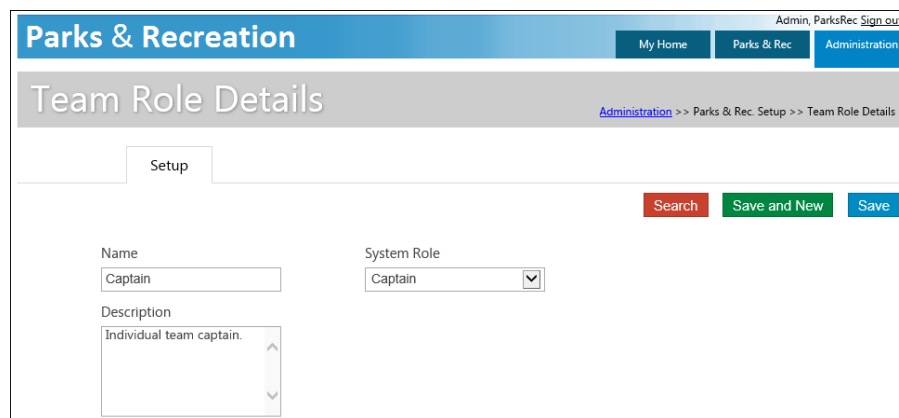
Schools maintains records for schools that can be associated with your organization's programs:



The screenshot shows the 'Schools' setup page in the '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, the 'Schools' title is displayed with a breadcrumb trail: 'Administration >> Parks & Rec. Setup >> Schools'. A 'Setup' tab is active. On the right, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form fields include a 'Name' text box, 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:

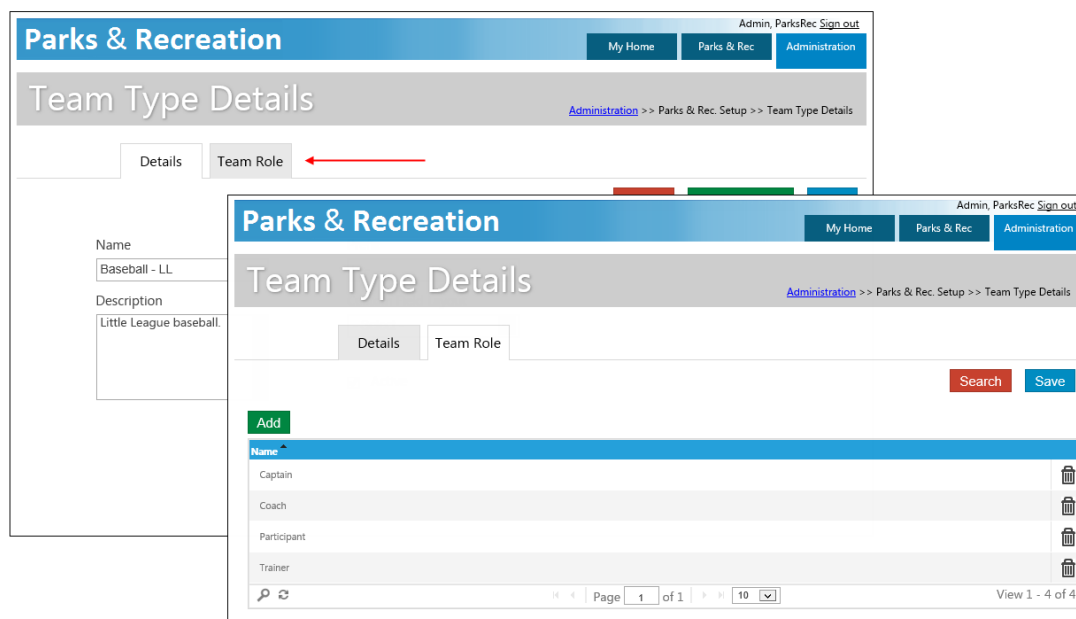


The screenshot shows the 'Team Role Details' setup page in the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. Below the header, the 'Team Role Details' title is displayed with a breadcrumb trail: 'Administration >> Parks & Rec. Setup >> Team Role Details'. A 'Setup' tab is active. On the right, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form fields include a 'Name' text box with 'Captain' entered, a 'System Role' dropdown menu with 'Captain' selected, and a 'Description' text area with 'Individual team captain.' entered.

## Team Type

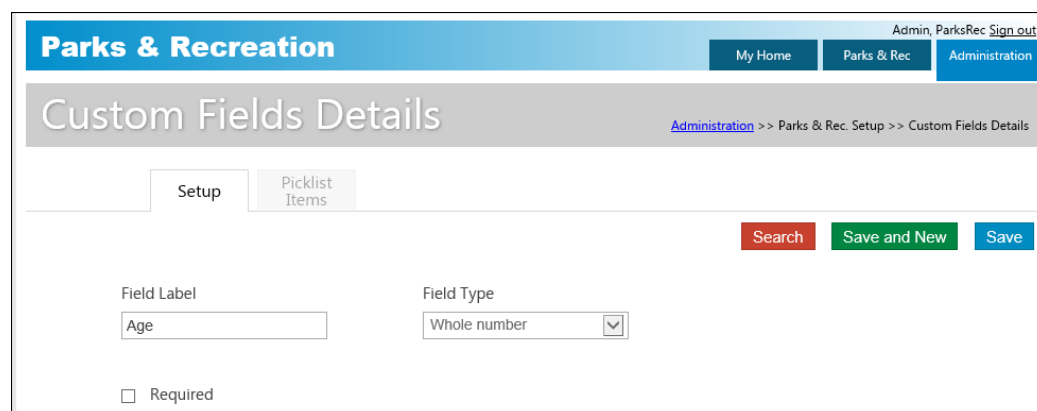
Team Type provides type categories to assign to teams. When you save a team type record, the **Team Role** tab becomes active. Use this tab to assign roles to the team type.

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:



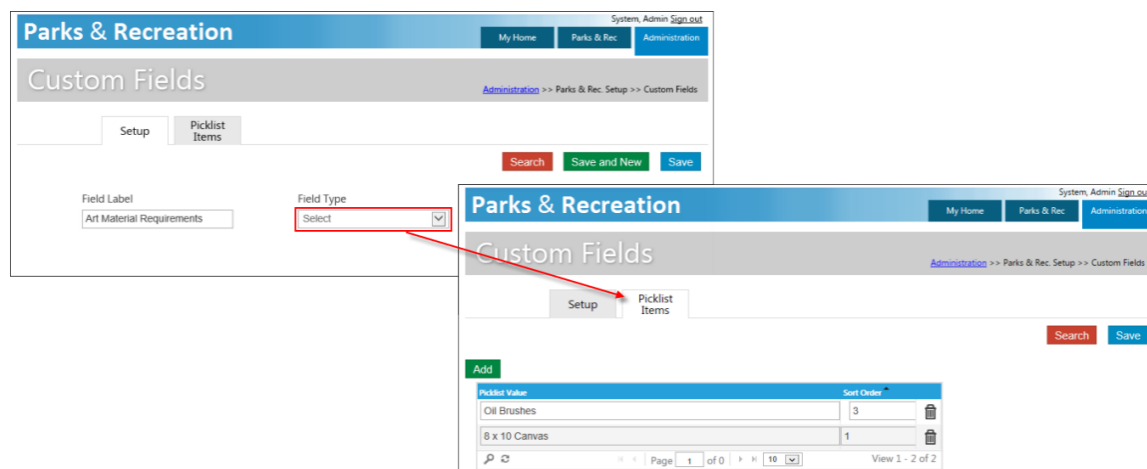
## Custom Fields

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** System: Admin Sign out  
My Home Parks & Rec Administration

**Custom Fields** Administration >> Parks & Rec. Setup >> Custom Fields

Setup Picklist Items

Search Save and New Save

Field Label: Art Material Requirements

Field Type: Select

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

**Custom Fields** Administration >> Parks & Rec. Setup >> Custom Fields

Setup Picklist Items

Search Save

Add

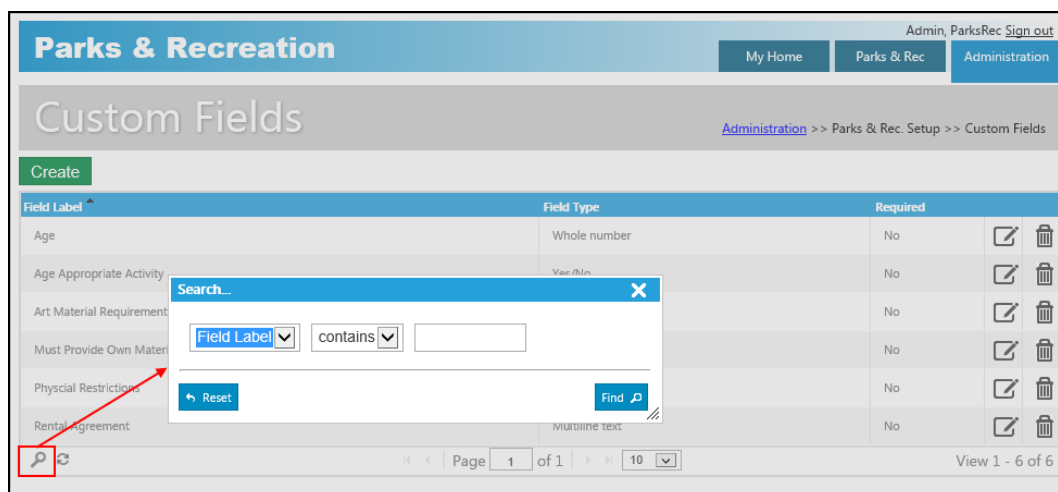
Picklist Value	Sort Order
Oil Brushes	3
8 x 10 Canvas	1

Page 1 of 0 10 View 1 - 2 of 2

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

**Custom Fields** Administration >> Parks & Rec. Setup >> 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... X

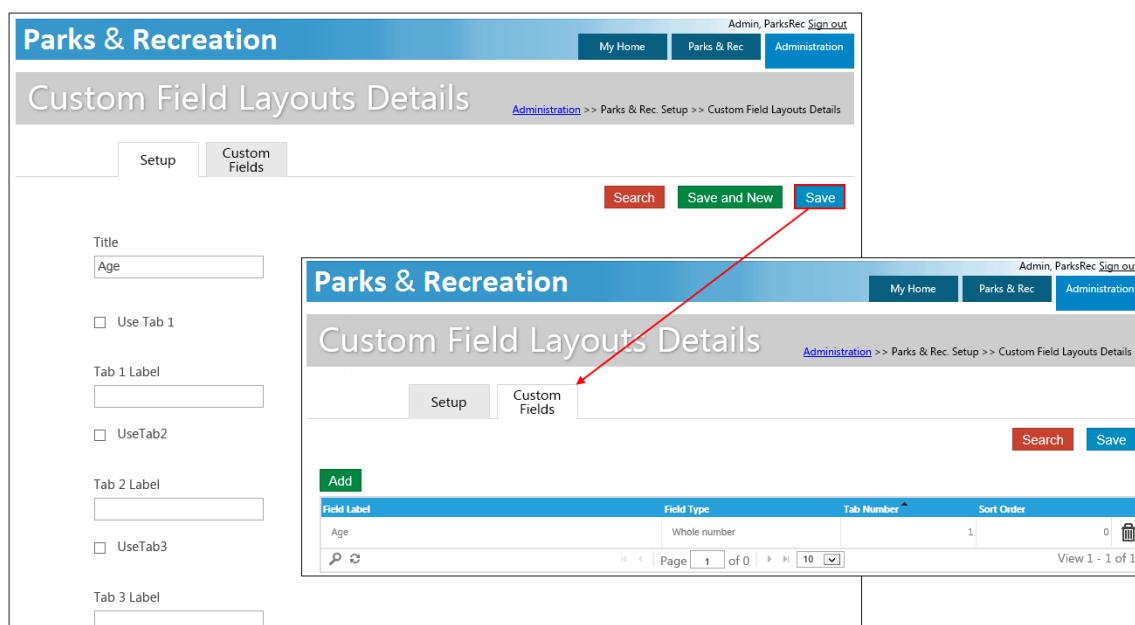
Field Label contains

Reset Find

Page 1 of 1 10 View 1 - 6 of 6

## 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

**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

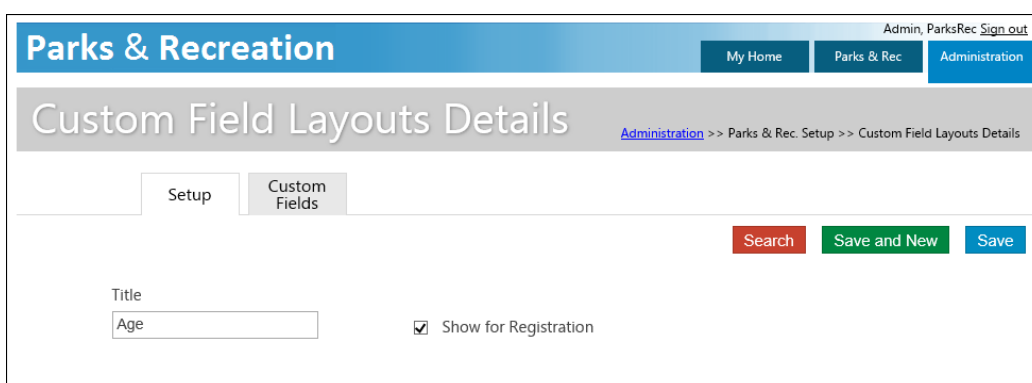
Search Save

Add

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

Page 1 of 0 10 View 1 - 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

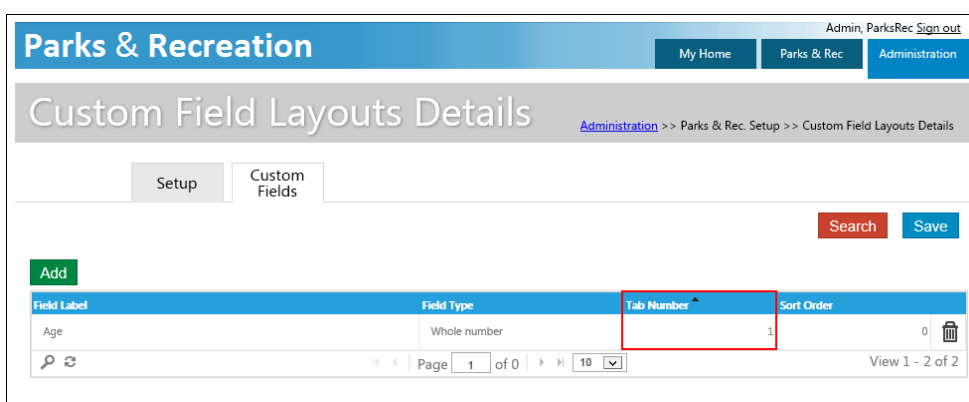
Setup Custom Fields

Search Save and New Save

Title  
Age

☒ Show for Registration

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

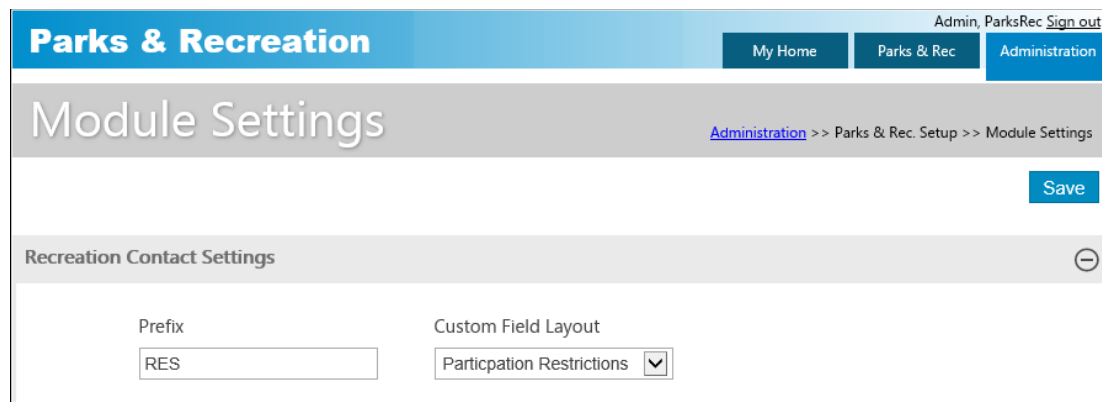
Add

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:



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

# Module Settings

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

Save

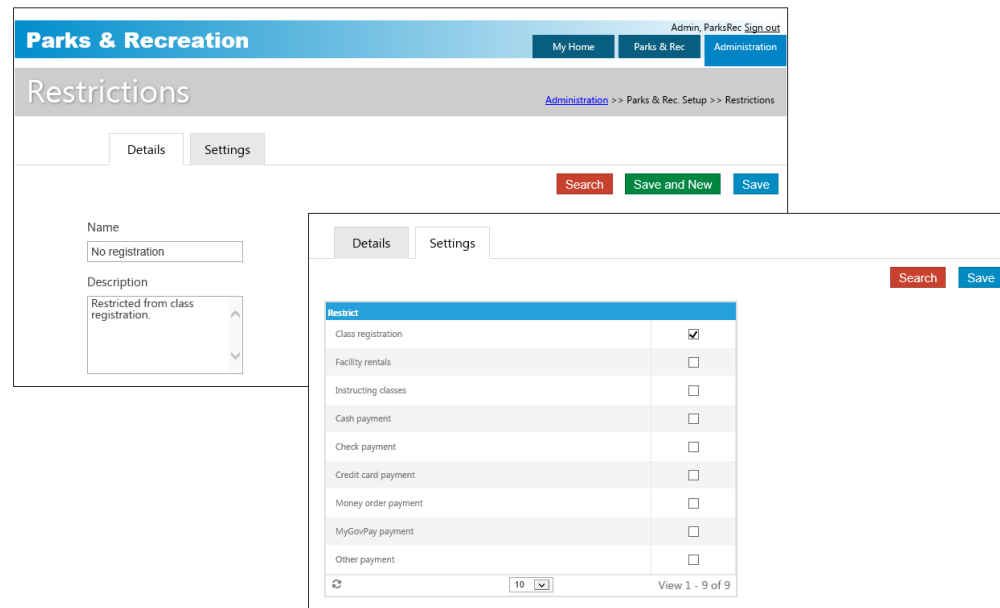
## Recreation Contact Settings

Prefix: RES Custom Field Layout: Participation Restrictions

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.

## 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

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

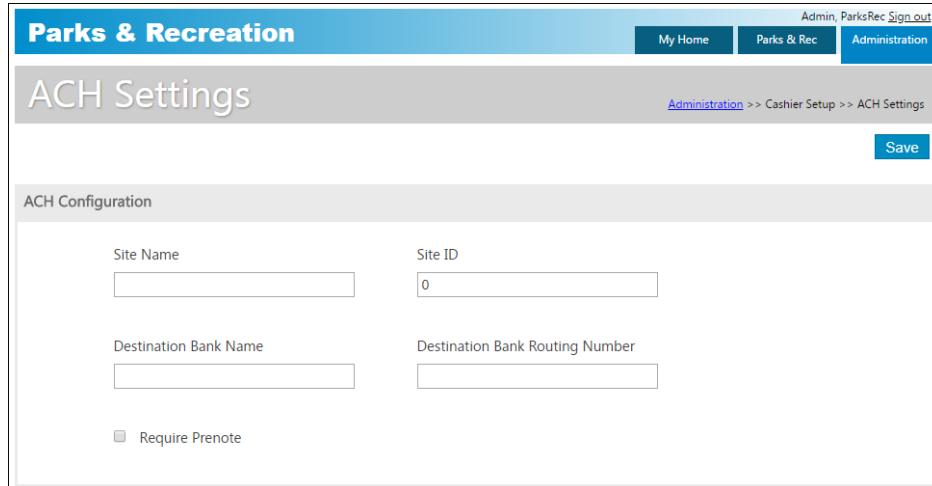
Once you have created restrictions, use the Restrictions group on the Contact Details page to assign a restriction to a contact.

## 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:

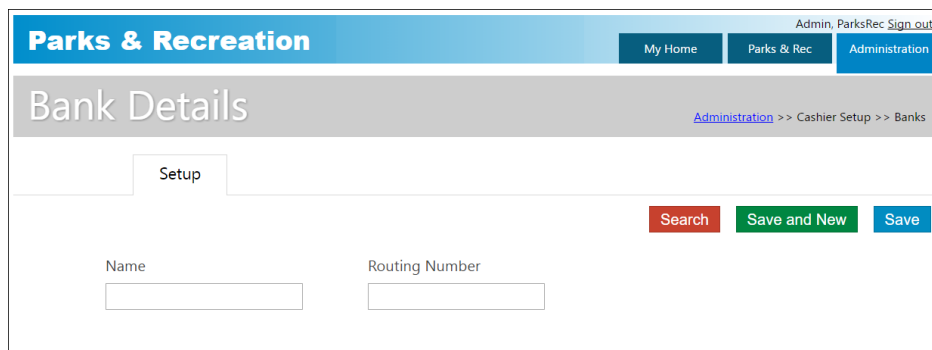


The screenshot shows the 'Parks & Recreation' application interface. At the top, there's a navigation bar with 'My Home', 'Parks & Rec', and 'Administration' tabs. The 'Administration' tab is active. Below the navigation bar, the page title is 'ACH Settings'. A breadcrumb trail reads 'Administration >> 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 left, 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

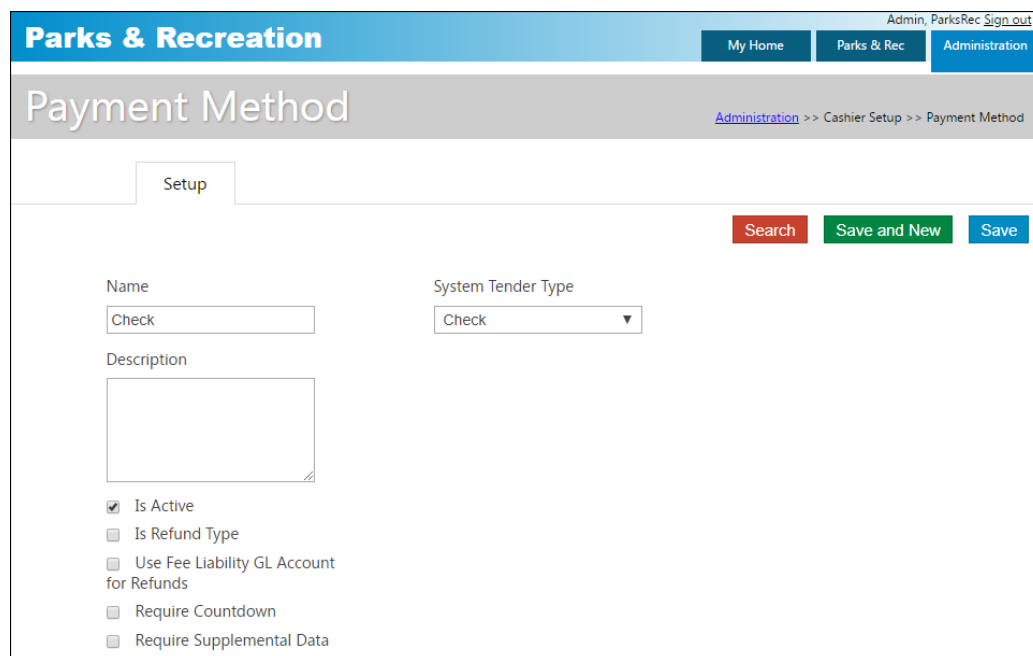
Banks establishes the names and routing numbers of the banks that are available in the Parks and Recreation application:



The screenshot shows the 'Parks & Recreation' application interface. At the top, there's a navigation bar with 'My Home', 'Parks & Rec', and 'Administration' tabs. The 'Administration' tab is active. Below the navigation bar, the page title is 'Bank Details'. A breadcrumb trail reads 'Administration >> Cashier Setup >> Banks'. A 'Setup' tab is selected. In the top right corner, 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

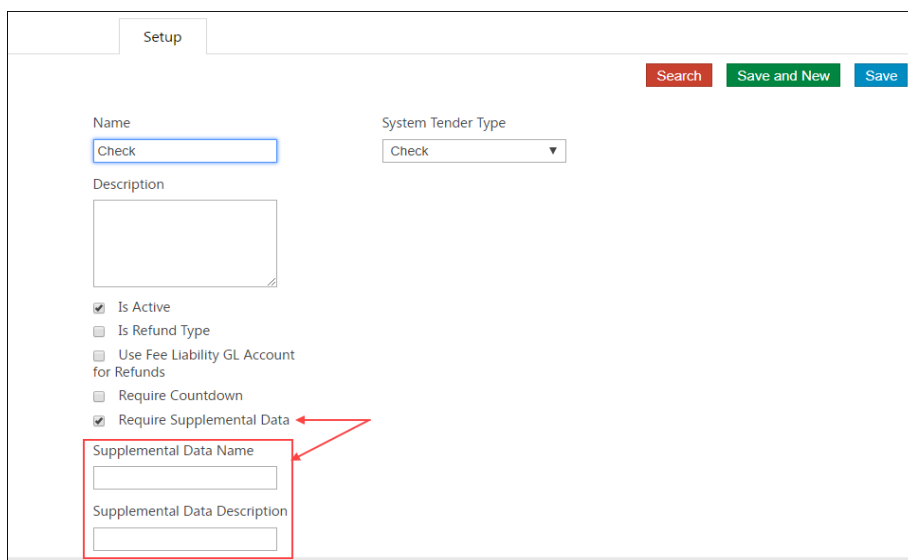
Payment Method establishes the types of payments accepted for activities and events provided by your organization:



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 side, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form contains the following fields and options:

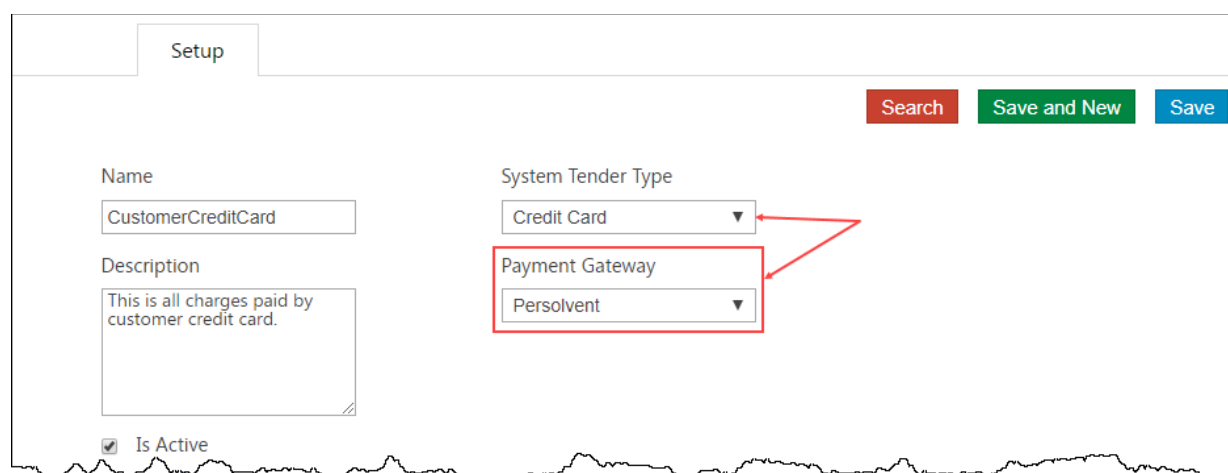
- Name:** A text input field containing the word 'Check'.
- System Tender Type:** A dropdown menu with 'Check' selected.
- Description:** A large text area for additional details.
- Is Active:** A checked checkbox.
- Is Refund Type:** An unchecked checkbox.
- Use Fee Liability GL Account for Refunds:**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





## Rental Registration Create

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



### 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 10px;">\$ 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.

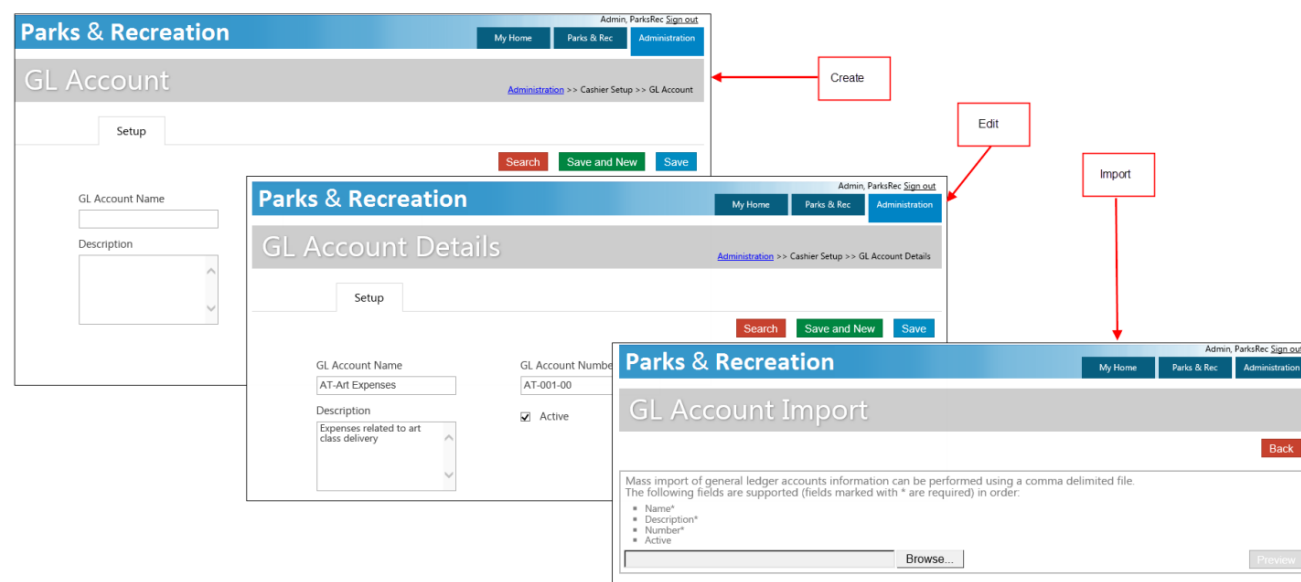
The options for the System Tender Type list are not available for update.

### 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	 		
Page 1 of 2			View 1 - 10 of 11	

Click **Create** or click the **Edit** button to display the Setup page, or click **Import** to display the Account Import page:



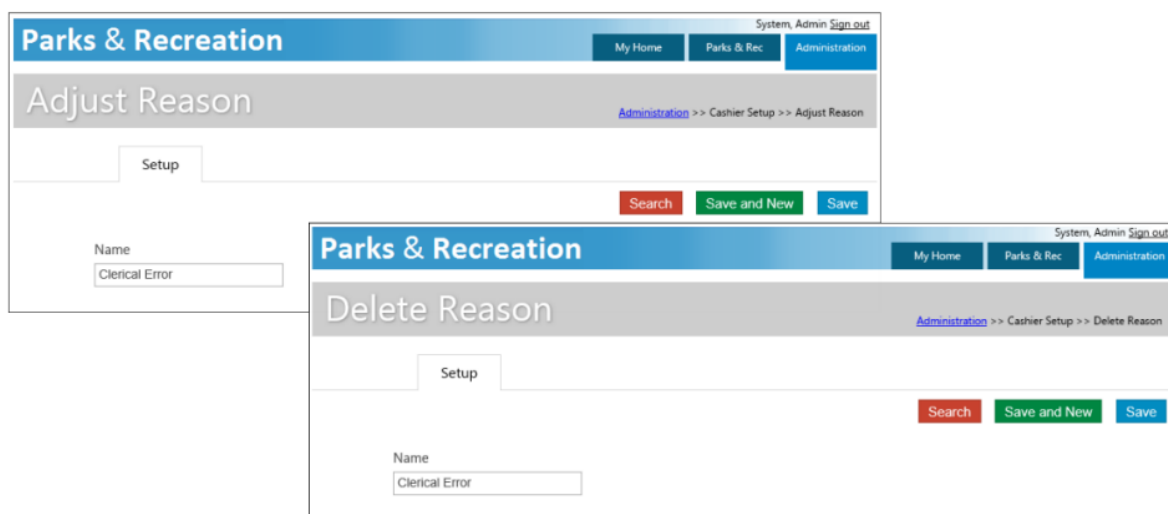
The diagram illustrates the navigation paths from the 'GL Account' list page to three different sub-pages:

- Create:** A red box labeled 'Create' has an arrow pointing to the 'Setup' tab on the 'GL Account' page.
- Edit:** A red box labeled 'Edit' has an arrow pointing to the 'GL Account Details' page.
- Import:** A red box labeled 'Import' has an arrow pointing to the 'GL Account Import' page.

The 'GL Account' page shows a table of accounts with 'Create' and 'Import' buttons. The 'GL Account Details' page shows a 'Setup' tab and a 'GL Account Name' field. The 'GL Account Import' page shows a 'Mass import' section with a 'Browse...' button.

## Adjust Reason/Delete Reason

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

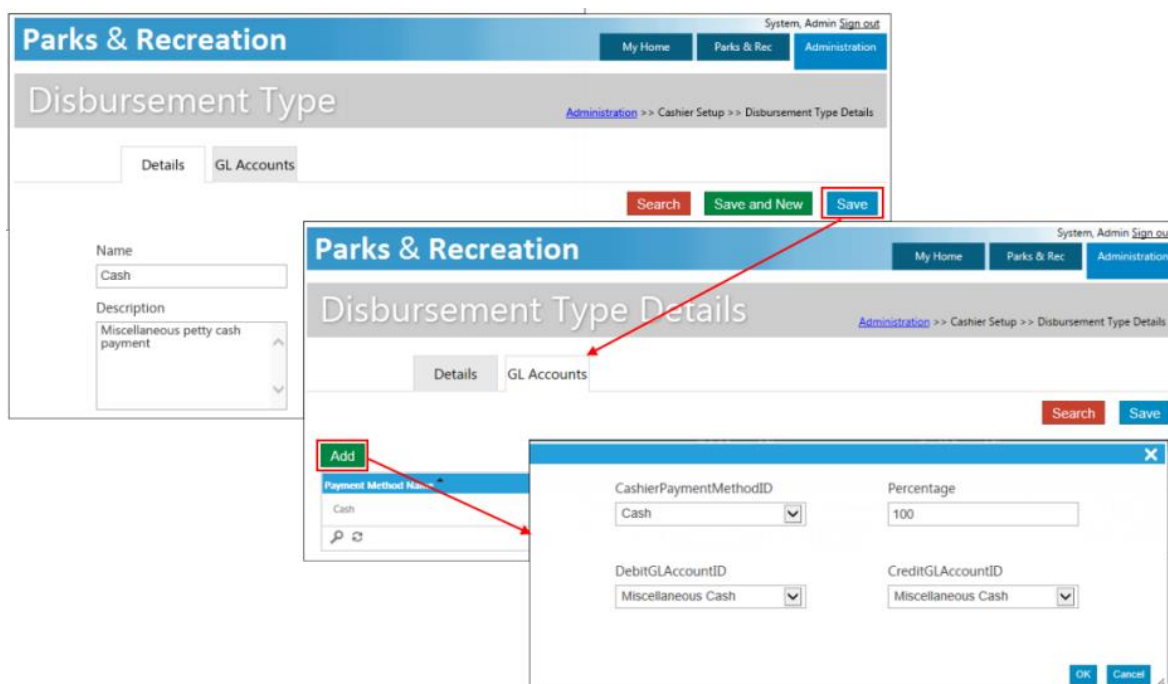


The image shows two screenshots of the Tyler Parks & Recreation software interface. The top screenshot is the 'Adjust Reason' form, and the bottom screenshot is the 'Delete Reason' form. Both forms have a blue header bar with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and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

Adjust and delete reasons cannot contain more than 20 characters of text.

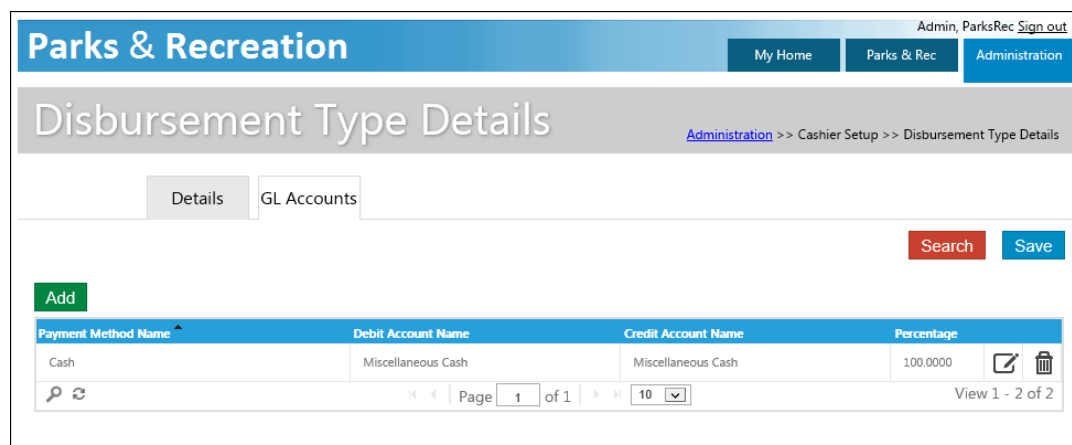
## Disbursement Type

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. The 'Disbursement Type' form has a blue header bar with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The breadcrumb trail is 'Administration >> Cashier Setup >> Disbursement Type Details'. It has 'Details' and 'GL Accounts' tabs, a 'Name' field with the value 'Cash', a 'Description' field with the value 'Miscellaneous petty cash payment', and buttons for 'Search', 'Save and New', and 'Save'. The 'Disbursement Type Details' form has a blue header bar with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The breadcrumb trail is 'Administration >> Cashier Setup >> Disbursement Type Details'. It has 'Details' and 'GL Accounts' tabs, and buttons for 'Search' and 'Save'. A red arrow points from the 'Add' button in the 'Disbursement Type' form to the 'Add' button in the 'Disbursement Type Details' form. The 'Add' button in the 'Disbursement Type Details' form is highlighted with a red box. The 'Disbursement Type Details' form has a 'Payment Method Name' dropdown menu with 'Cash' selected, and a 'Percentage' field with the value '100'. It also has 'DebitGLAccountID' and 'CreditGLAccountID' dropdown menus, both with 'Miscellaneous Cash' selected. The 'Add' button is highlighted with a red box.

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

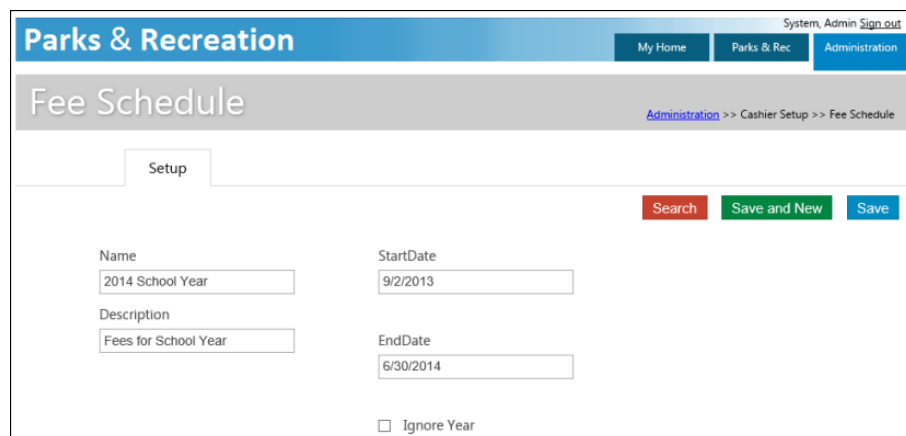
Payment Method Name	Debit Account Name	Credit Account Name	Percentage
Cash	Miscellaneous Cash	Miscellaneous Cash	100.0000

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:



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

My Home Parks & Rec Administration

## Fee Schedule

Administration >> Cashier Setup >> Fee Schedule

Setup

Search Save and New Save

Name: 2014 School Year StartDate: 9/2/2013

Description: Fees for School Year EndDate: 6/30/2014

☐ Ignore Year

## Fee

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:

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

Search

Save and New

Save

**Name**

**Fee Type**

Calculated ▼

**Description**

Deposit for rental facilities. ▼

**Liability GL Account**

Fee Liability ▼

**Comment**

Deposits are typically 1/4 of the total amount due. ▼

☒ Active

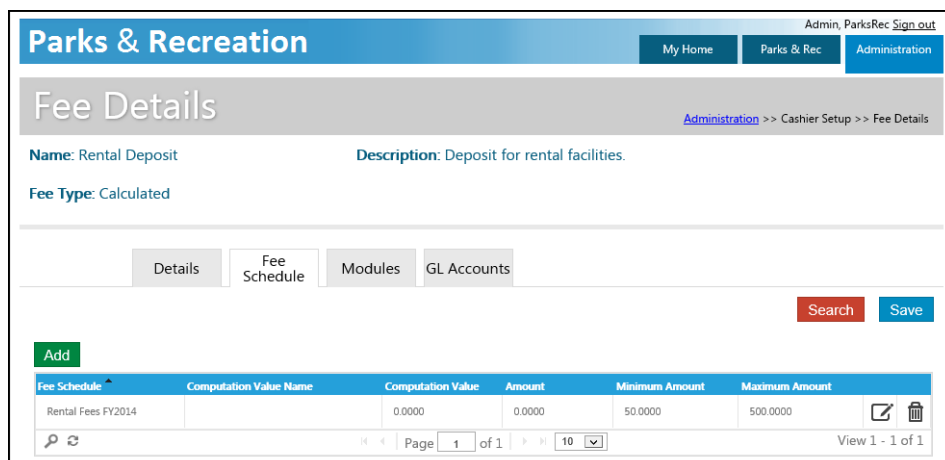
The *Liability GL Account* field allows you to associate a liability account with a fee. In order for the specified account to be used for refunds of this fee, the check box for *Use Fee Liability GL Account for Refunds* must be selected in the Payment Method Details for the payment method used with 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

Search Save

Add

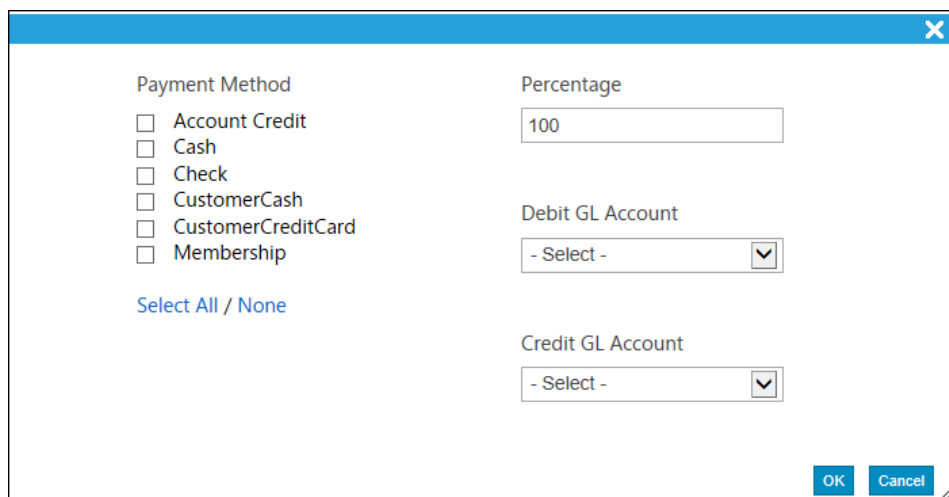
Fee Schedule	Computation Value Name	Computation Value	Amount	Minimum Amount	Maximum Amount
Rental Fees FY2014		0.0000	0.0000	50.0000	500.0000

Page 1 of 1 View 1 - 1 of 1

You may set up a fee as a percentage or an amount (flat fee).

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

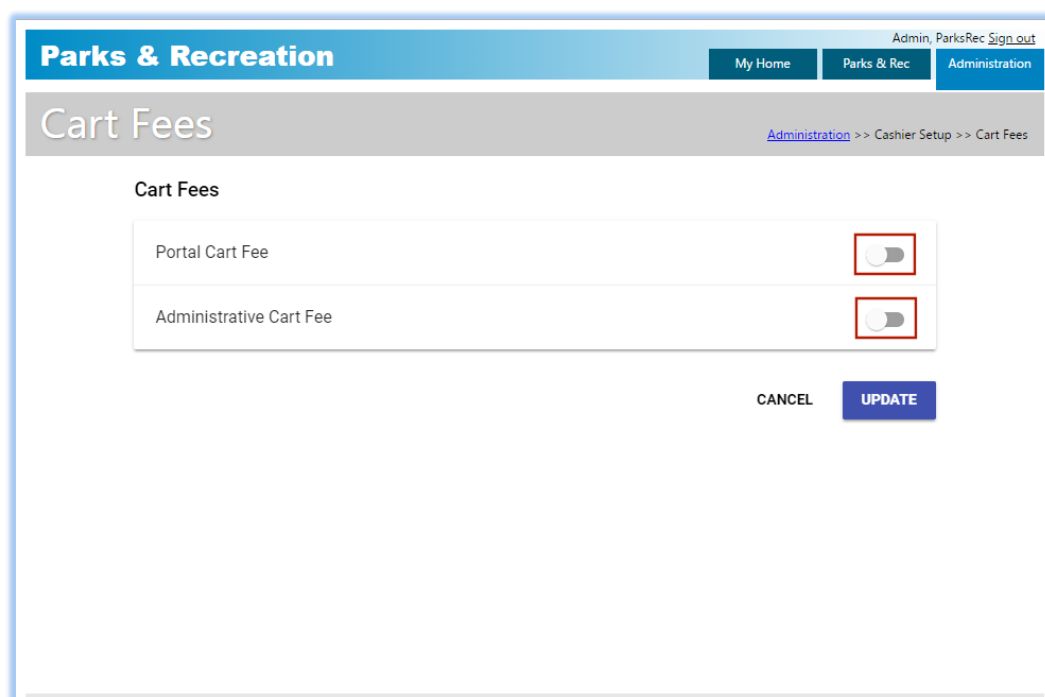
- Select -

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.

## Cart Fees

The Cart Fees option lets you set up cart fees on the administrative and citizen portal sides:



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

## Cart Fees

[Administration](#) >> Cashier Setup >> Cart Fees

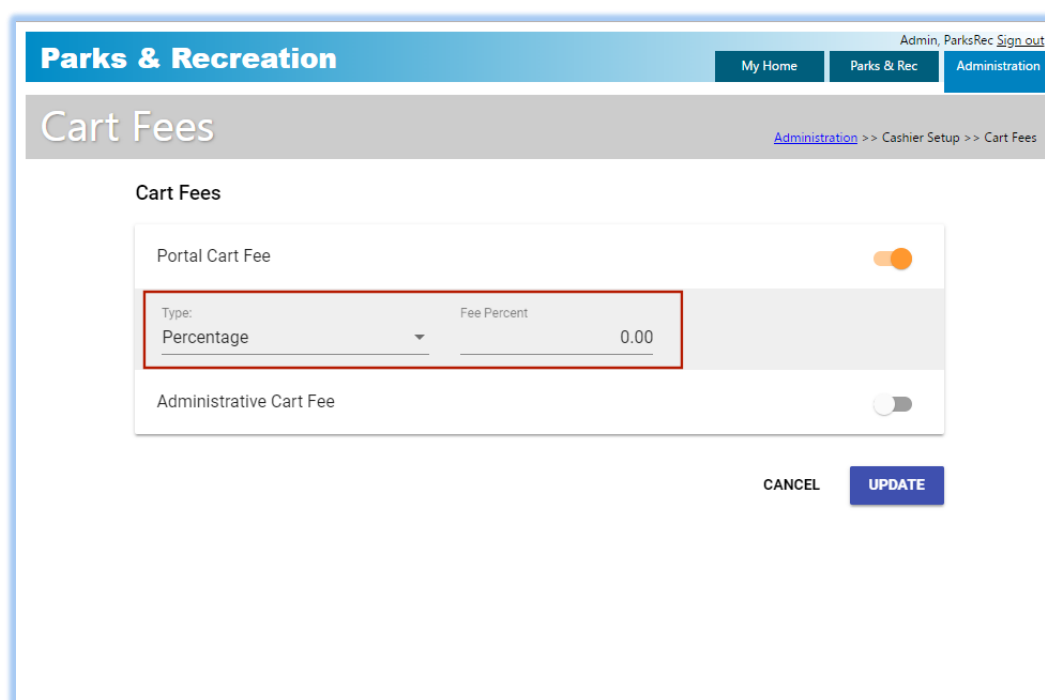
**Cart Fees**

Portal Cart Fee	<input type="checkbox"/>
Administrative Cart Fee	<input type="checkbox"/>

CANCEL UPDATE

The **Portal Cart Fee** and **Administrative Cart Fee** appear on individual cards. To set up either cart fee, click its corresponding button on the right side of the card.

The card expands to display two fields side by side:



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

## Cart Fees

[Administration](#) >> Cashier Setup >> Cart Fees

**Cart Fees**

Portal Cart Fee <input checked="" type="checkbox"/>	
Type: Percentage	Fee Percent 0.00
Administrative Cart Fee <input type="checkbox"/>	

CANCEL UPDATE

Click in the left field to select from a drop-down whether the cart fee will be a **Percentage** or an **Amount**.



Parks & Recreation

Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Cart Fees
Administration >> Cashier Setup >> Cart Fees

Cart Fees

Portal Cart Fee

Type:

Percentage
Amount

Fee Percent

0.00

CANCEL

UPDATE

In the right field, type the percentage or dollar amount:

Parks & Recreation

Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Cart Fees
Administration >> Cashier Setup >> Cart Fees

Cart Fees

Portal Cart Fee

Type:

Percentage

Fee Percent

3.00

CANCEL

UPDATE

Click the **UPDATE** button to save your entries.

## Cart Fee Payment Method Setup

To ensure that cart fees hit the correct general ledger accounts, add any payment methods used in Parks and Recreation to the **GL Accounts** tab on the administrative and portal cart fee pages:

### Administrative Cart Fee

## Fee Details

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

**Name:** Administrative Cart Fee      **Description:** Administrative Cart Fee      **Fee Type:** Calculated

Details    Fee Schedule    Modules    **GL Accounts**

[Add](#)      [Search](#)

Payment Method Name ^	Debit Account Name	Credit Account Name	Percentage		
BridgePay	Cash Account	Accounts Receivable	100.0000		
Cash	Cash Account	Accounts Receivable	100.0000		
Credit Card	Cash Account	Accounts Receivable	100.0000		
OpenEdge	Cash Account	Accounts Receivable	100.0000		

Page 1 of 1    10    View 1 - 4 of 4

[Save](#)

### Portal Cart Fee

## Fee Details

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

**Name:** Portal Cart Fee      **Description:** Portal Cart Fee      **Fee Type:** Calculated

Details    Fee Schedule    Modules    **GL Accounts**

[Add](#)      [Search](#)

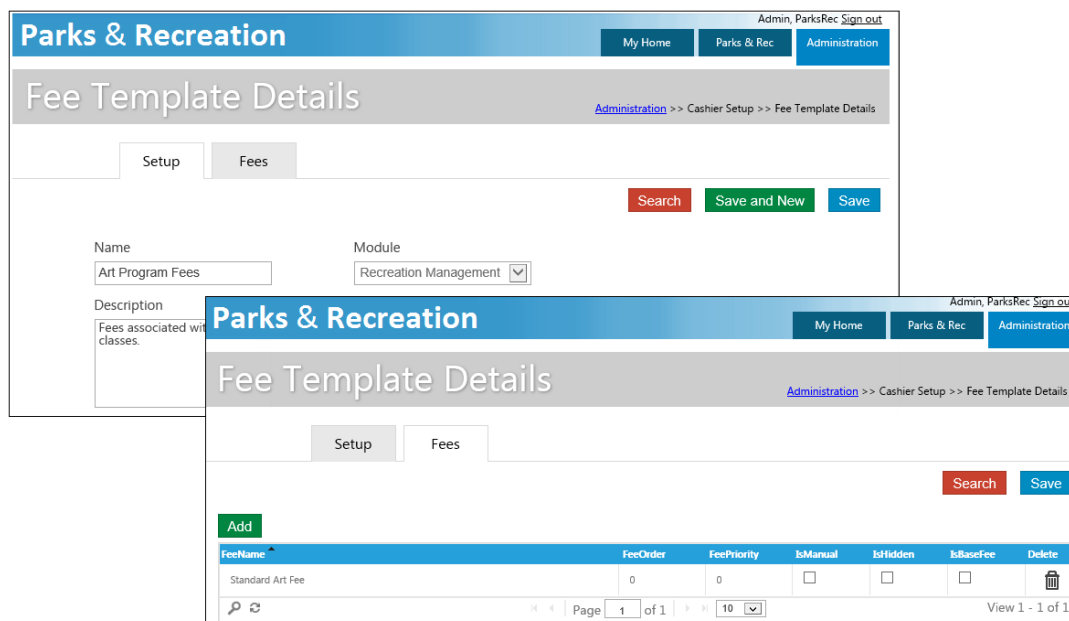
Payment Method Name ^	Debit Account Name	Credit Account Name	Percentage		
BridgePay	Cash Account	Accounts Receivable	100.0000		
Cash	Cash Account	Accounts Receivable	100.0000		
OpenEdge	Cash Account	Accounts Receivable	100.0000		

Page 1 of 1    10    View 1 - 3 of 3

[Save](#)

## Fee Template

Fee Template assigns associated fees to a template, which you can then apply to an activity:



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

My Home Parks & Rec Administration

## 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

My Home Parks & Rec Administration

## Fee Template Details

Administration >> Cashier Setup >> Fee Template Details

Setup Fees

Add Search Save

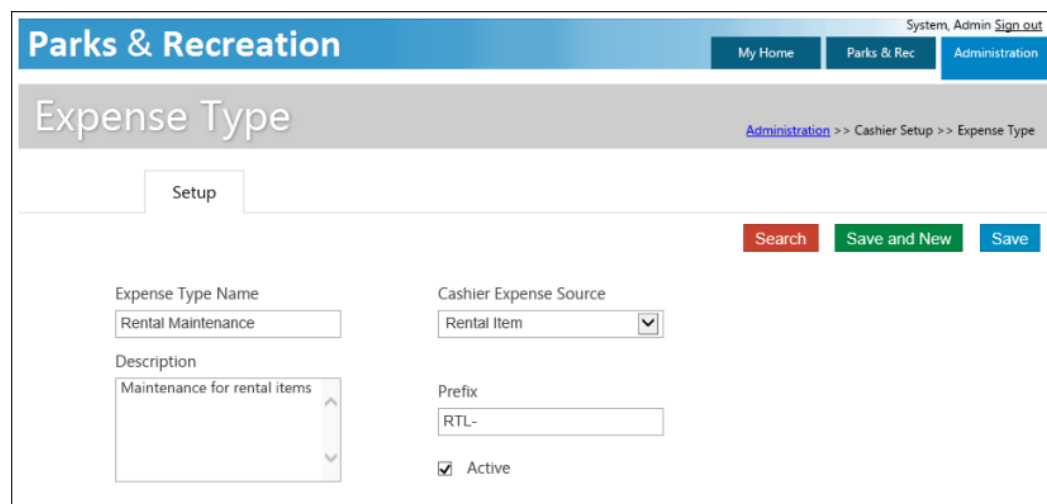
FeeName	FeeOrder	FeePriority	IsManual	IsHidden	IsBaseFee	Delete
Standard Art Fee	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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:



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

My Home Parks & Rec Administration

## Expense Type

Administration >> Cashier Setup >> Expense Type

Setup

Search Save and New Save

Expense Type Name: Rental Maintenance

Description: Maintenance for rental items

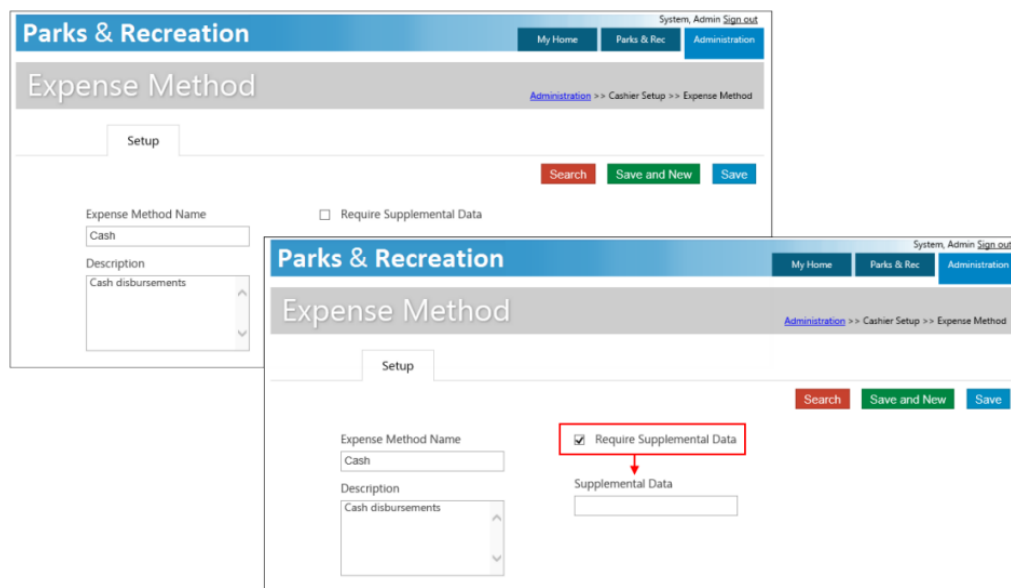
Cashier Expense Source: Rental Item

Prefix: RTL-

☒ Active

### Expense Method

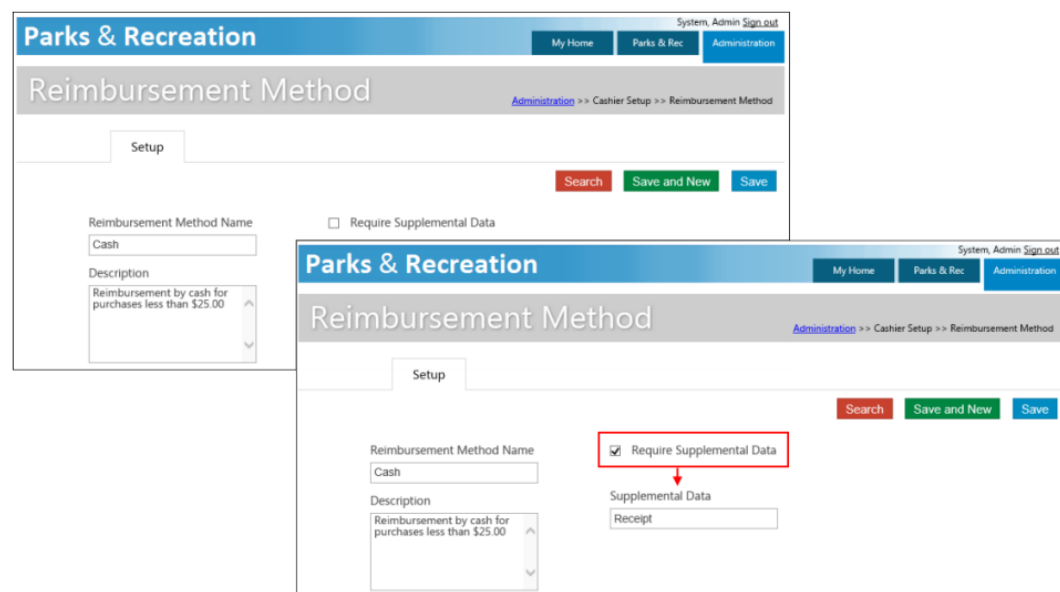
Expense Method defines options for meeting expense obligations. If you select the *Require Supplemental Data* check box, the page refreshes to include the *Supplemental Data* box. Use this box to define the data required:



The screenshot shows the 'Expense Method' 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'. Below the header, the breadcrumb trail is 'Administration >> Cashier Setup >> Expense Method'. The main content area is titled 'Expense Method' and includes a 'Setup' tab. There are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form contains two fields: 'Expense Method Name' with the value 'Cash' and 'Description' with the value 'Cash disbursements'. A checkbox labeled 'Require Supplemental Data' is present and is unchecked in the top view. In the bottom view, this checkbox is checked, and a red box highlights it with an arrow pointing to a new 'Supplemental Data' field containing the text 'Receipt'.

## 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:



The screenshot shows the 'Reimbursement Method' 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'. Below the header, the breadcrumb trail is 'Administration >> Cashier Setup >> Reimbursement Method'. The main content area is titled 'Reimbursement Method' and includes a 'Setup' tab. There are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form contains two fields: 'Reimbursement Method Name' with the value 'Cash' and 'Description' with the value 'Reimbursement by cash for purchases less than \$25.00'. A checkbox labeled 'Require Supplemental Data' is present and is unchecked in the top view. In the bottom view, this checkbox is checked, and a red box highlights it with an arrow pointing to a new 'Supplemental Data' field containing the text 'Receipt'.

## 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

Search

Save and New

Save

Name

Partial Payment

System Cashier Status

Partial Payment

Description

Partial payment is received but outstanding balance due

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%		

Page 1 of 2

10

View 1 - 10 of 12

The Discount page contains a table of existing discounts, with each row corresponding to a discount. To add a discount to the grid, click **Create**; to edit a discount, click the edit icon in the corresponding row. In either instance, the Discount Details page opens:

## Discount Details

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

Setup

Search

Name*	Dollar Amount
<input type="text" value="60 &amp; Older"/>	<input type="text" value="1.00"/>
Description	Percentage
<input type="text"/>	<input type="text"/>
Discount Type*	Start Date*
<input type="text" value="Age"/>	<input type="text" value="05/25/2018"/>
From Age	End Date
<input type="text" value="60"/>	<input type="text" value="06/07/2019"/>
To Age	
<input type="text"/>	
<input checked="" type="checkbox"/> Available to Classes <input checked="" type="checkbox"/> Available to Rentals <input checked="" type="checkbox"/> Available to Memberships <input checked="" type="checkbox"/> Available to Non-Resident	

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
<i>Age</i>	This discount applies to a contact's age. Selecting <i>Age</i> displays <i>From Age</i> and <i>To Age</i> 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 <i>From Age</i> needs to be entered.
<i>Employee</i>	This discount applies to any employee who has the <i>Employee</i> check box checked on the Contact Details page. Selecting <i>Employee</i> displays an <i>Available to Family Members</i> check box. Selecting this check box makes family members also eligible for the employee discount.
<i>Custom</i>	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 <i>Available to Family Members</i> check box.
<i>Multi-Family</i>	<p>This discount applies when a contact registers other family members for the same class or membership. Selecting <i>Multi-Family</i> displays a Multi-Family Discount Setup section at the bottom of the page (see image below). Beginning with <i>Family Member #2</i>, this section contains fields for setting up dollar amount or percentage discounts that apply when additional family members are registered.</p> <p>For <i>Family Member #2</i>, select the discount dollar amount or percentage and click Add. Discount dollar amount and percentage fields for <i>Family Member #3</i> display the <i>Family Member #2</i> 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

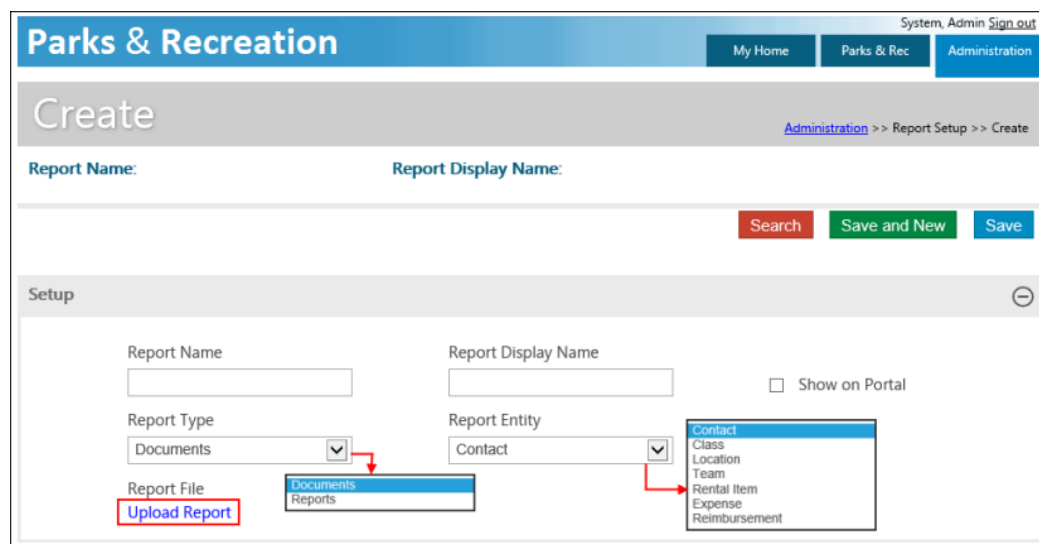
Save and New

Save



## Report Setup

The Report Setup pages define the reports that are available to Parks & Recreation users. If the *Show on Portal* check box is selected, the report is available on the citizen portal:



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

My Home Parks & Rec Administration

Create Administration >> Report Setup >> Create

Report Name: Report Display Name:

Search Save and New Save

Setup

Report Name: Report Display Name: ☐ Show on Portal

Report Type: Documents Report Entity: Contact

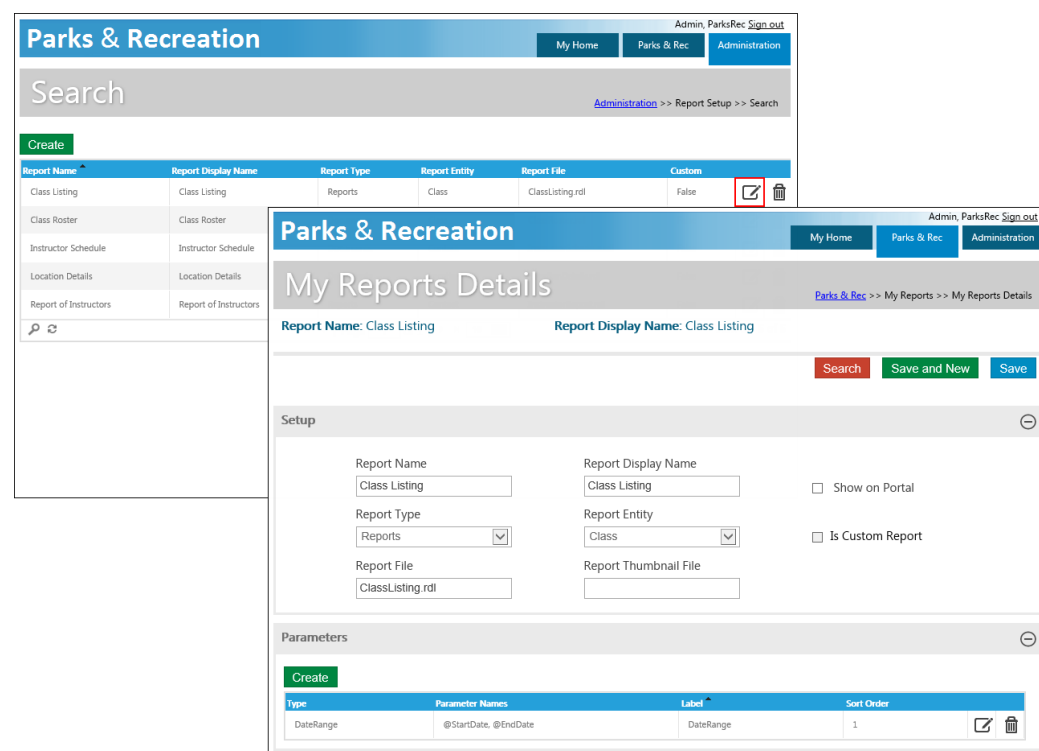
Report File: Upload Report

Documents Reports

Contact Class Location Team Rental Item Expense Reimbursement

Reports are created and maintained using Microsoft SQL Server Report services (SSRS) and made available in Tyler Parks and Recreation using the Create Report option.

Once reports are defined and uploaded, click **Search** to find available reports. Use the **Edit** button to maintain the report details:



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

My Home Parks & Rec Administration

Search Administration >> Report Setup >> Search

Create

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

My Reports Details Parks & Rec >> My Reports >> My Reports Details

Report Name: Class Listing Report Display Name: Class Listing

Search Save and New Save

Setup

Report Name: Class Listing Report Display Name: Class Listing ☐ Show on Portal

Report Type: Reports Report Entity: Class ☐ Is Custom Report

Report File: ClassListing.rdl Report Thumbnail File:

Parameters

Create

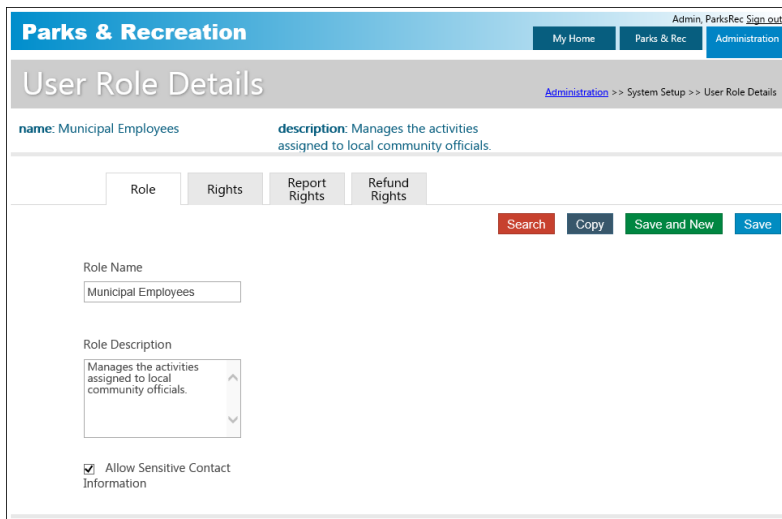
Type	Parameter Names	Label	Sort Order
DateRange	@StartDate, @EndDate	DateRange	1

## 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

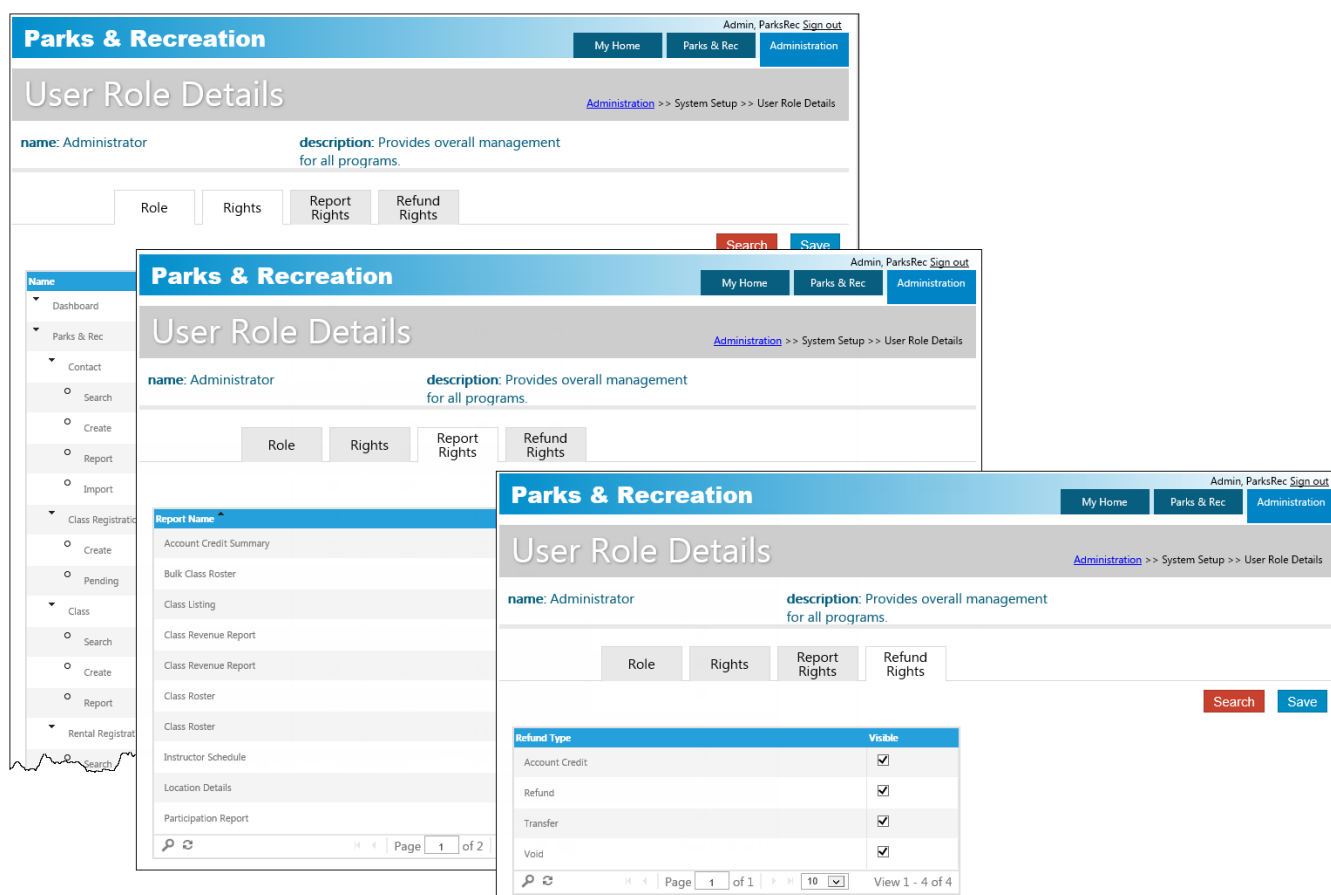
Search Copy Save and New Save

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

Page 1 of 2

**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"/>

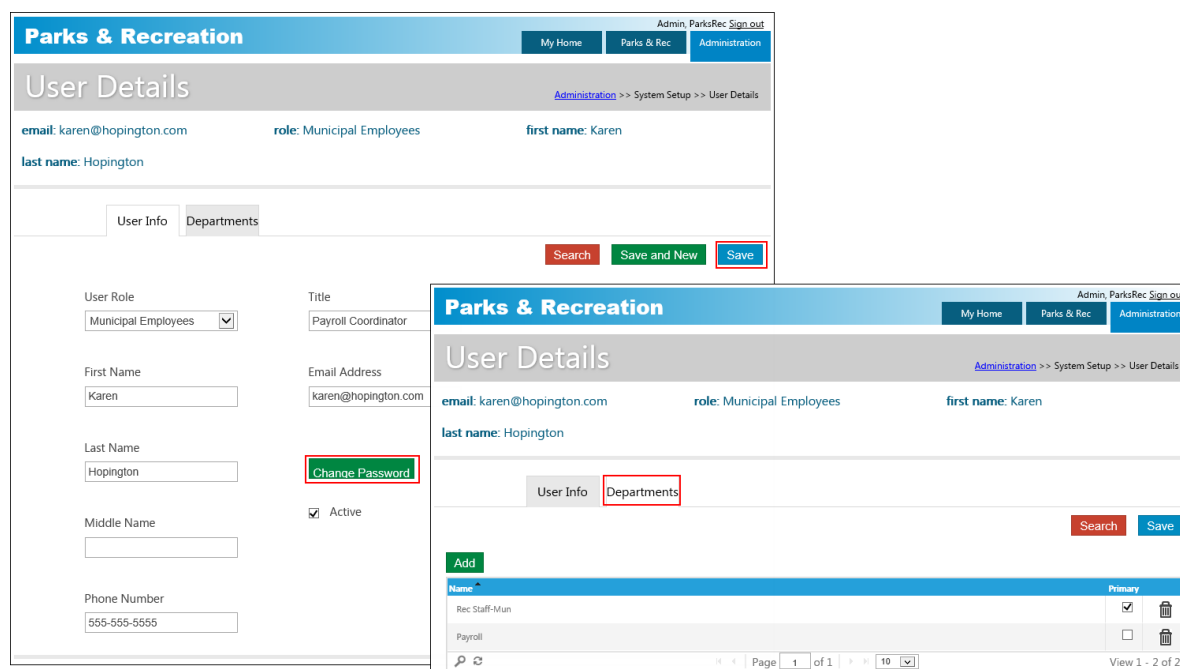
Page 1 of 1 View 1 - 4 of 4

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  
My Home Parks & Rec Administration

### 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  
Middle Name:   
Phone Number: 555-555-5555  
Active: ☒ **Change Password**

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

### 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

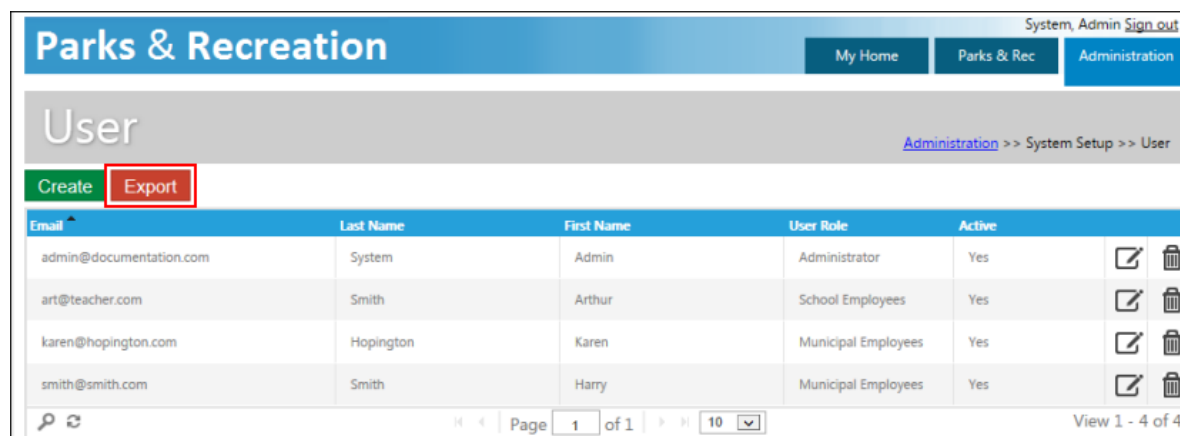
Name	Primary
Rec Staff-Mun	<input checked="" type="checkbox"/>
Payroll	<input type="checkbox"/>

Page 1 of 1 10 View 1 - 2 of 2

The same email address may be used for an administrative user who also is a contact; the passwords, however, may not be the same.

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

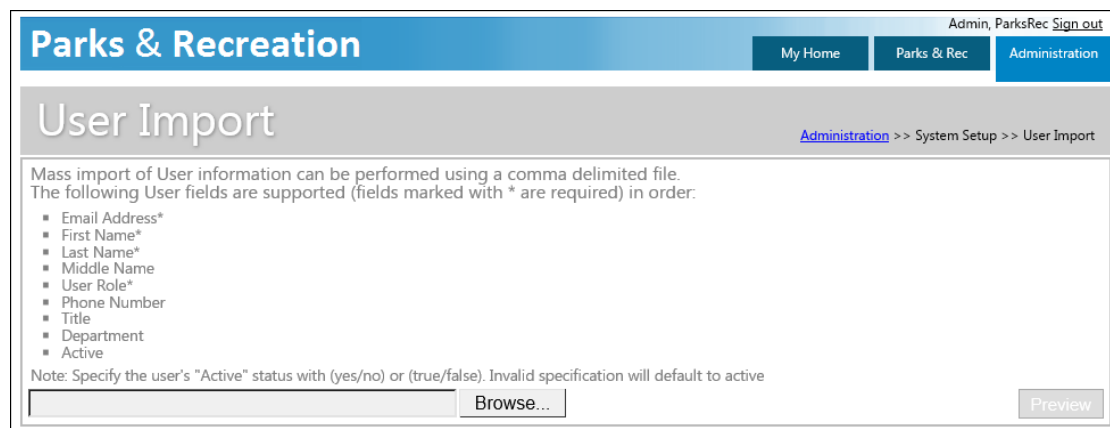
Create **Export**

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

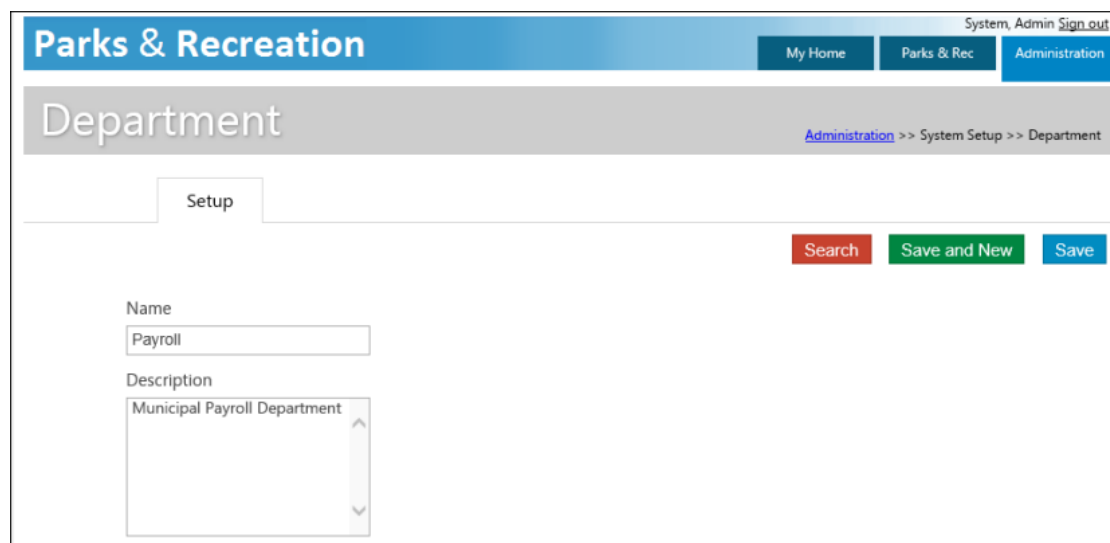
User Import allows you to import user details from a comma-separated values (.csv) file:



The screenshot shows the 'User Import' page within the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The main content area is titled 'User Import' and includes a breadcrumb trail: 'Administration >> System Setup >> User Import'. A text box explains that mass import of user information can be performed using a comma-delimited file, listing supported fields: Email Address\*, First Name\*, Last Name\*, Middle Name, User Role\*, Phone Number, Title, Department, and Active. A note specifies that the 'Active' status should be specified with (yes/no) or (true/false). Below the text is a 'Browse...' button and a 'Preview' button.

## Department

Department manages department records. Use department records to identify personnel associated with your community's Parks and Rec administration or programs:



The screenshot shows the 'Department' page within the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The main content area is titled 'Department' and includes a breadcrumb trail: 'Administration >> System Setup >> Department'. Below the title is a 'Setup' tab. On the right side, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form fields include 'Name' with the value 'Payroll' and 'Description' with the value 'Municipal Payroll Department'.

## 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:

# 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.tylertech.com/TPAR/QA/Development/TPAR.Admin.12CI/Services

Portal URL

☐ Allow more than 100% GL Allocation

☐ Payment Demo Enabled

☐ Contact Phone Required

☐ Remove Heat Map

Setting	Description
<i>Time Picker Interval</i>	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.
<i>Time Zone</i>	Indicates the time zone for your organization.
<i>Page Size in Admin Site</i>	Assigns the page size for all Administration groups.
<i>File Storage Service Endpoint</i>	Specifies the endpoint URL for your file storage service. If your organization uses Tyler Cashiering for payments, use the <i>File Storage Service Endpoint</i> field to specify the URL for your Tyler Cashiering application.
<i>Portal URL</i>	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
<i>Password Minimum Length</i>	Defines the minimum number of characters a password must contain.
<i>Max Failed Login Attempts</i>	Specifies the maximum number of failed login attempts allowed before the user is locked out.

Setting	Description
<i>Password History</i>	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.
<i>Require Upper Case</i>	Select if password must contain at least one uppercase character.
<i>Require Numeric</i>	Select if password must contain at least one numeric digit.
<i>Require Symbol</i>	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:

Residence Verification Settings

Resident City/Cities

-- OR --

Resident County/Counties

-- OR --

Resident Verification Service

Class Residence Verification Service  
Indicate the classes that require this verification in the individual class setup.

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* field determines whether 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.

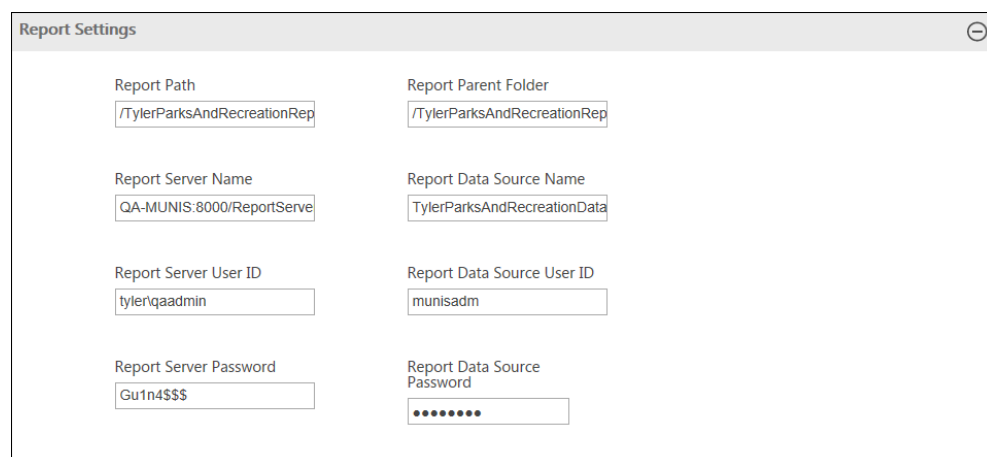
### Email Settings

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:



The screenshot shows a 'Report Settings' dialog box with a close button in the top right corner. It contains eight input fields arranged in a 4x2 grid:

Report Path /TylerParksAndRecreationRep	Report Parent Folder /TylerParksAndRecreationRep
Report Server Name QA-MUNIS:8000/ReportServe	Report Data Source Name TylerParksAndRecreationData
Report Server User ID tyler/qaadmin	Report Data Source User ID munisadm
Report Server Password Gu1n4\$\$\$	Report Data Source Password ••••••••

### Site Contact Settings

Site Contact Settings stores a contact name and telephone number for your organization. The contact information can be included on receipts printed from the citizen portal:

Site Contact Settings ⊖

Site Contact Name

Site Contact Phone

### Class Settings

Class Settings defines whether to have contacts moved automatically from the waitlist to the registration list when space becomes available. To turn on this setting, select the *Auto Add Waitlist Contacts as Registrants* check box:

Class Settings ⊖

☒ 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.

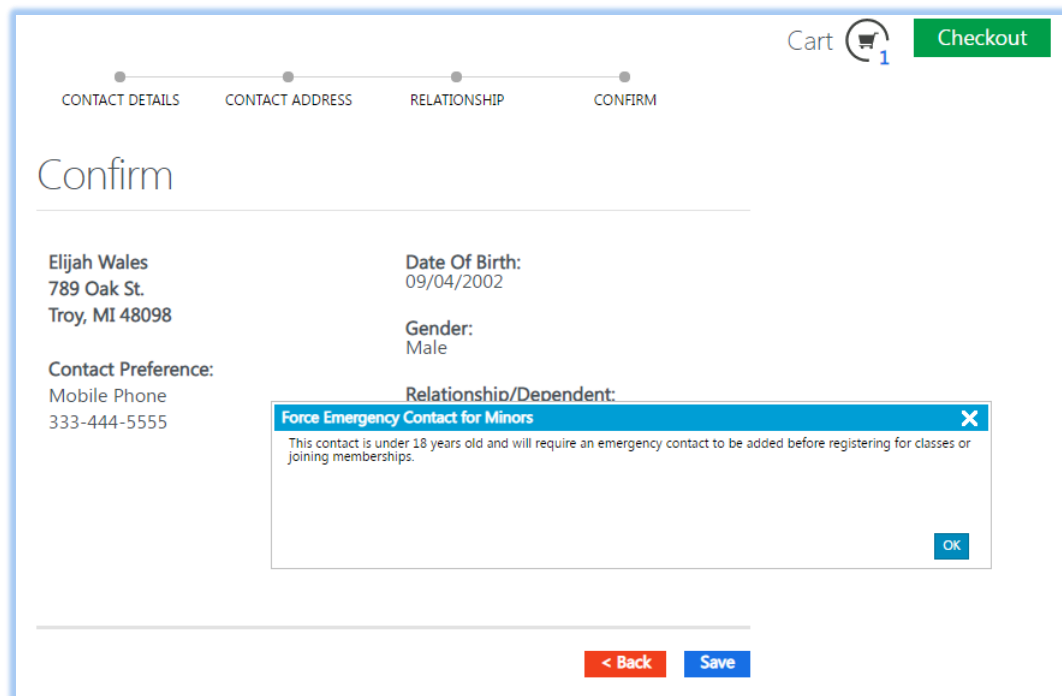
### Registration Settings

Registration Settings contains an *Enforce Emergency Contact for Minors* check box:

Registration Settings ⊖

☒ Enforce Emergency Contact for Minors

With this box selected, any citizen under 18 years of age is required to add an emergency contact when registering for classes or joining memberships. If the citizen does not have an emergency contact, the following message displays:



The screenshot shows a registration confirmation page. At the top, there is a progress bar with four steps: CONTACT DETAILS, CONTACT ADDRESS, RELATIONSHIP, and CONFIRM. The 'CONFIRM' step is currently active. In the top right corner, there is a 'Cart' icon with a '1' and a green 'Checkout' button. The main heading is 'Confirm'. Below this, the user's information is displayed: 'Elijah Wales', '789 Oak St.', 'Troy, MI 48098', 'Date Of Birth: 09/04/2002', 'Gender: Male', 'Contact Preference: Mobile Phone', and '333-444-5555'. A modal message box is overlaid on the page, titled 'Force Emergency Contact for Minors'. The message states: 'This contact is under 18 years old and will require an emergency contact to be added before registering for classes or joining memberships.' There is an 'OK' button at the bottom right of the modal. At the bottom of the page, there are '< Back' and 'Save' buttons.

This message also displays when a dependent is added on the fly during a registration and when a contact under 18 years of age is added through the administrative side of Parks and Recreation. Although the Contact Details page for an underage contact may be saved, the message serves as a reminder that, at some point, an emergency contact needs to be designated.

## 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.

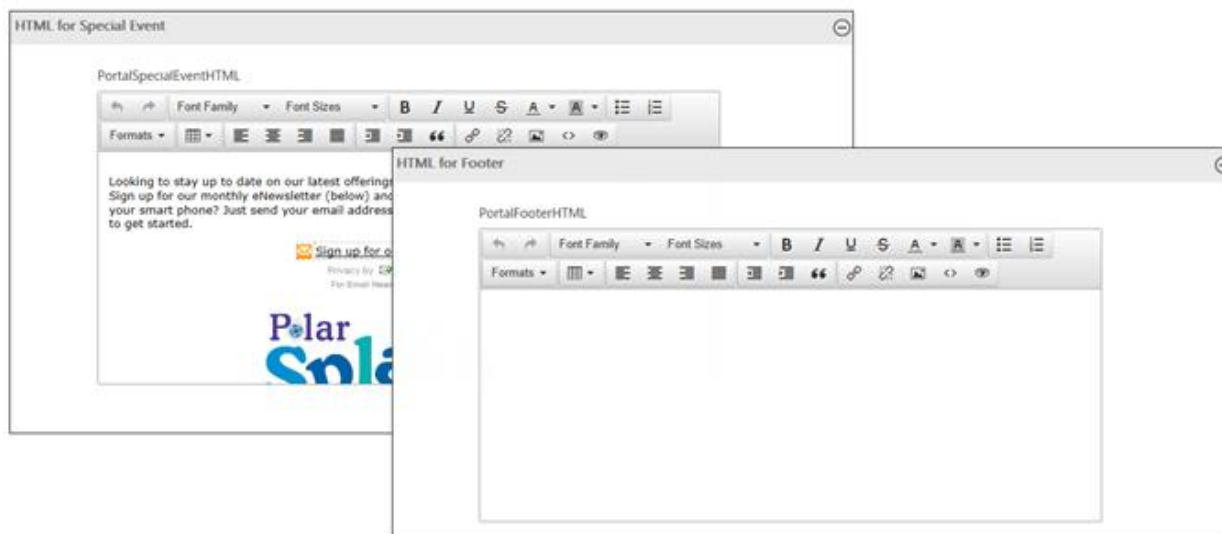
When the *Allow Invoicing in Portal* check box is selected, citizens completing registration using your organization's citizen portal can request to be invoiced for the registration in place of direct payment.

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"/>

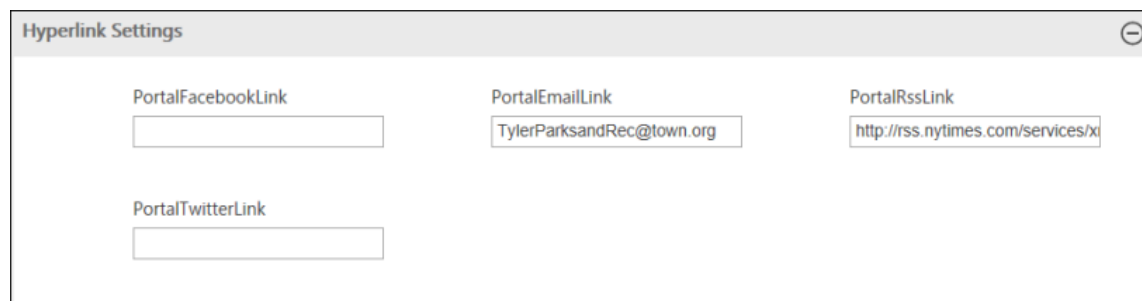
For Facility settings, if you select the *Display* check box, the citizen portal includes the option for browsing rental facilities. When you select this check box, use the **Portal Facility Browse** button box to define the name for the facility option that displays in the portal.

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

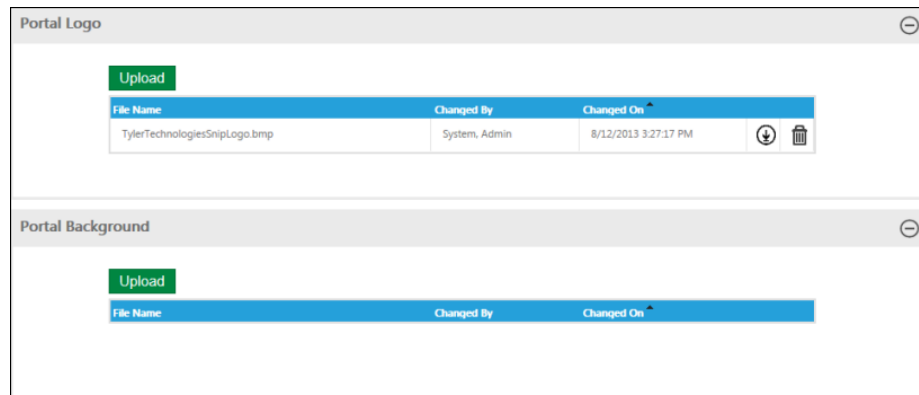
The Hyperlink Settings group assigns hyperlinks to the media bar on the main portal page. Currently, the media bar displays all options, even if you do not provide a hyperlink value. In this case, if a user clicks one of the media options, there would be no system response to the action:



## 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:



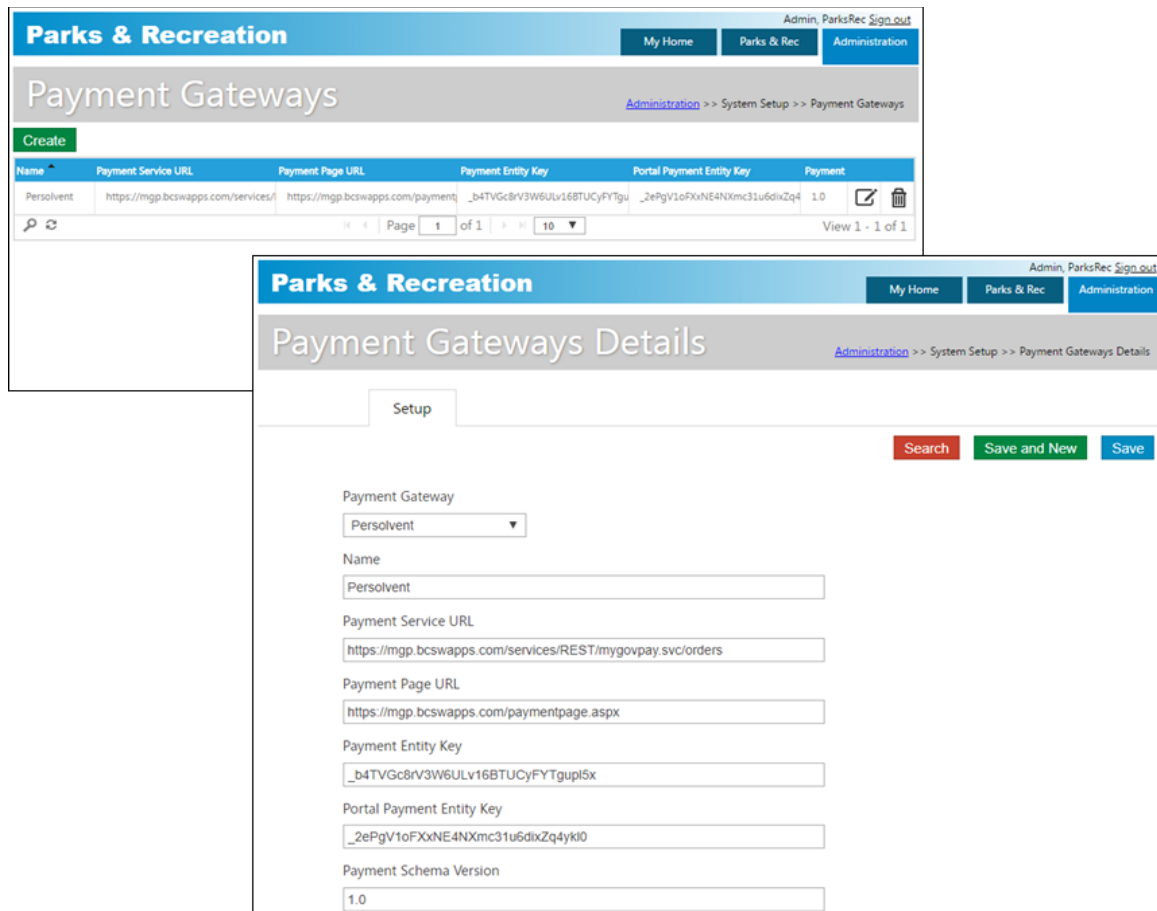
The logo has maximum width and height settings in order to maintain the aspect ratio of the image. If an uploaded image is larger than 230 px by 80 px, it is automatically cropped.

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



## Payment Gateways

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



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

### Payment Gateways

Administration >> System Setup >> Payment Gateways

Create

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

Page 1 of 10 View 1 - 1 of 1

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

### Payment Gateways Details

Administration >> System Setup >> Payment Gateways Details

Setup

Search Save and New Save

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

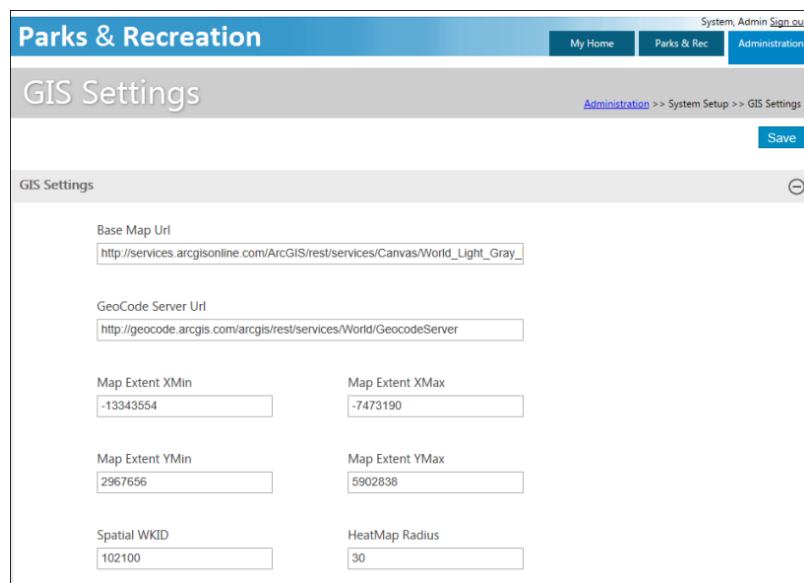
All portal redirects from payment gateways need to reference the Tenant ID after the domain name. By default, Tenant ID = **Home**



- *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:



The screenshot shows the 'GIS Settings' page within the 'Parks & Recreation' application. The page has a blue header with 'Parks & Recreation' and navigation tabs for 'My Home', 'Parks & Rec', and 'Administration'. Below the header, the 'GIS Settings' section is displayed with a 'Save' button. The settings include:

- Base Map Url:
- GeoCode Server Url:
- Map Extent XMin:
- Map Extent XMax:
- Map Extent YMin:
- Map Extent YMax:
- Spatial WKID:
- HeatMap Radius:

## Integration Settings

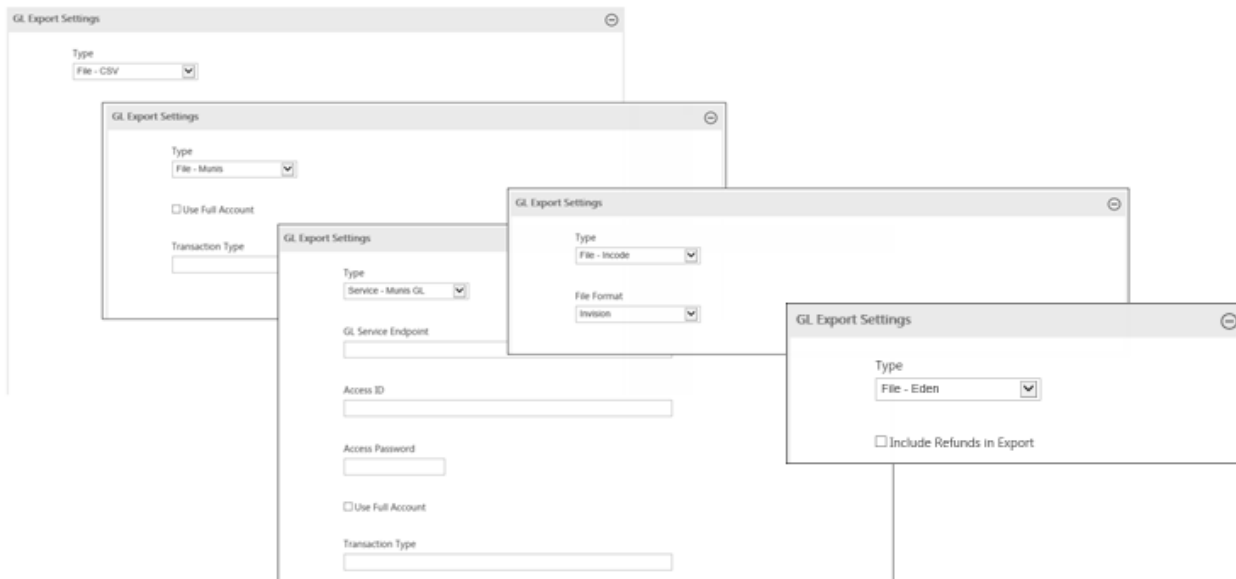
Integration Settings determines the file type for general ledger account export files, the invoice export settings files, and reimbursement export settings created from the Transaction Search page on the **Parks & Rec** tab.

### 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.

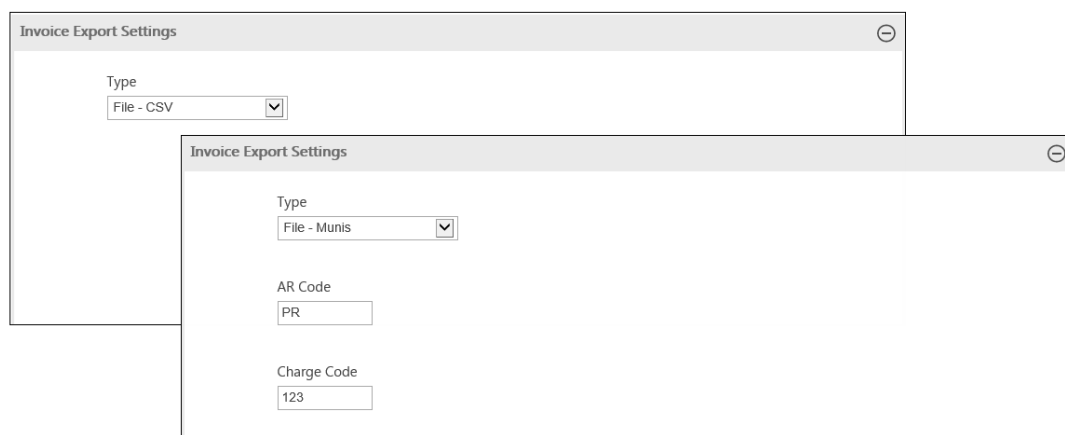
If you select Service–Munis GL, you must specify the service endpoint for the Munis general ledger in the GL Service Endpoint box, and you must provide the Munis web service user name and password.

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**

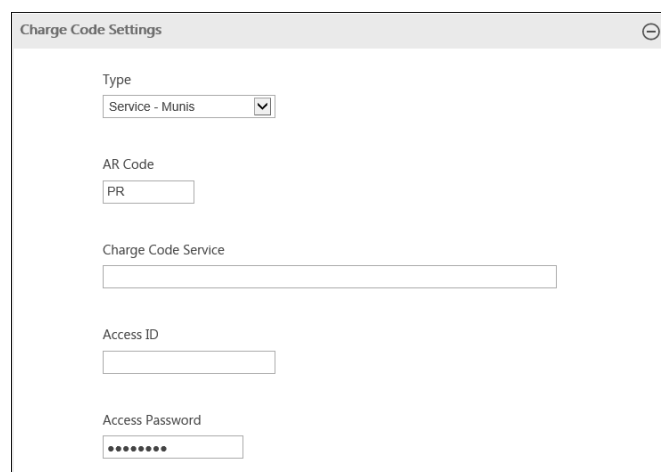
The Invoice Export Settings group supports the invoicing process for class registrations processed using the **Parks & Rec** tab. In this group, the Type list determines the type of invoice export to create: File–Munis or File–CSV:



The screenshot shows two overlapping 'Invoice Export Settings' dialog boxes. The top box has 'Type' set to 'File - CSV'. The bottom box has 'Type' set to 'File - Munis', 'AR Code' set to 'PR', and 'Charge Code' set to '123'.

### Charge Code Settings

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

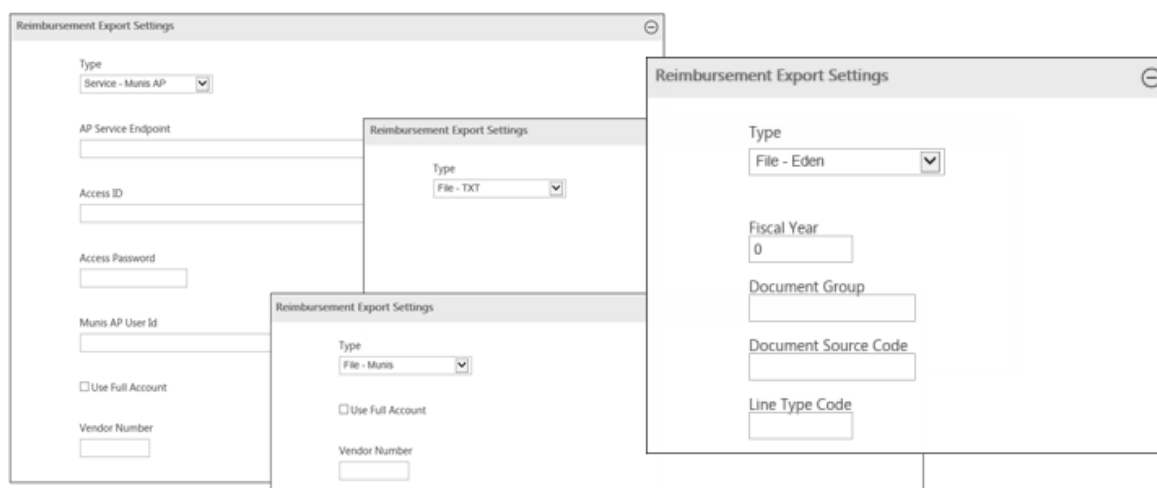


The screenshot shows the 'Charge Code Settings' dialog box. It has 'Type' set to 'Service - Munis', 'AR Code' set to 'PR', and 'Charge Code Service' is empty. 'Access ID' and 'Access Password' fields are also present but empty.

- **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.

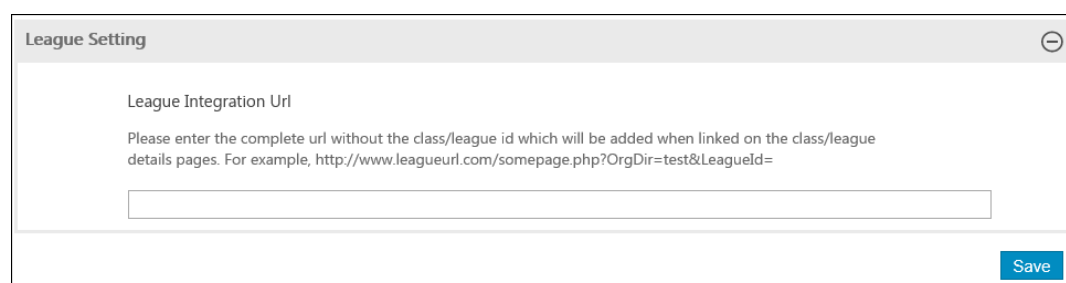
### Reimbursement Export Settings

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

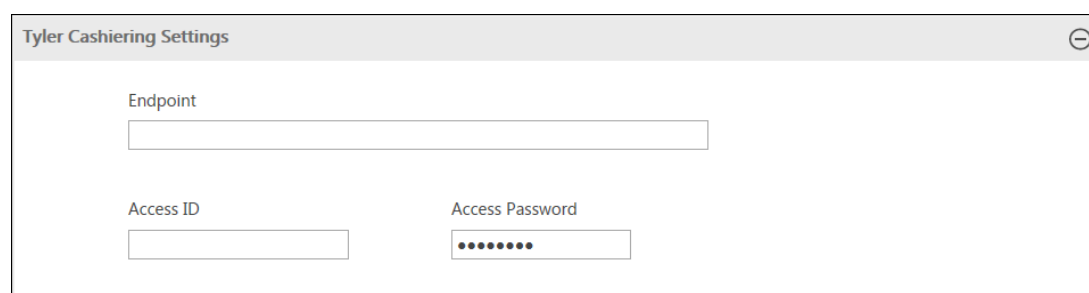
Tyler Parks and Recreation integrates with QuickScores to facilitate league management. On the Integration Settings page, the League setting allows you to input the entire league URL:



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=.](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>.

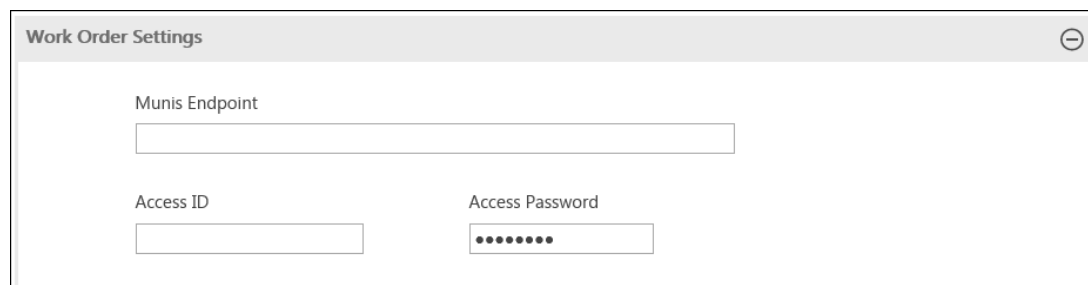
### Tyler Cashiering Settings

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:



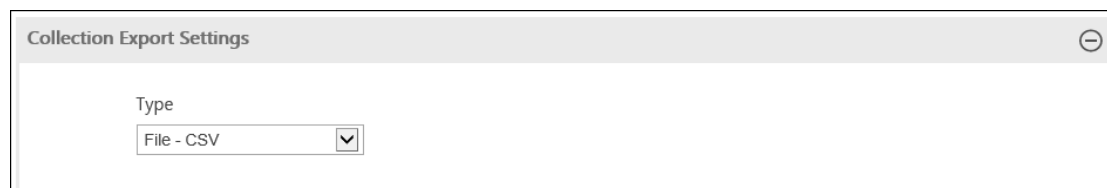
### Work Order Settings

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

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View 1 - 10 of 617


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:

[Sign In](#) | [New Account](#)  
 Cart  1 [Checkout](#)



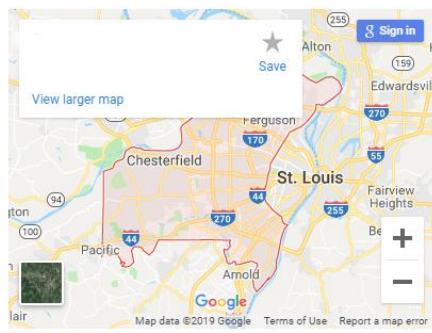
[Join Memberships](#)

[Browse Classes](#)

[Facilities](#)

### Activity Guide





Ice-Skating	Nature Outdoor
<a href="#">Aquatics</a> <a href="#">Camps</a> <a href="#">Concerts</a> <a href="#">Educational Enrichment</a> <a href="#">Fishing/Hunting</a>	<a href="#">History</a> <a href="#">Outdoor Adventures</a> <a href="#">Scout Series</a> <a href="#">Social Event</a> <a href="#">Sports/Fitness</a>



[View Larger Map](#)

[Fall/Winter 2014 Activity Guide](#)

stay connected:

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](mailto:harryj@yahoo.com)  
Yarmouth, Maine, United States

< Back

Save

System, Admin [Sign out](#)

My Home

Parks & Rec

Administration

## Parks & Recreation

### Contact Search

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

Search Contacts

Keyword

Gender

Registrant

Instructor

Resident

Contact Type



- Select -

- Select -

- Select -

- Select -

- 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	<a href="mailto:harryj@yahoo.com">harryj@yahoo.com</a>	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:

County Parks and Rec

Cart

1

Checkout

County Parks and Rec

Cart

1

Checkout

Keyword

Location

- Select -

Class

Adolescent Flag Football

Location: Foreside Field

07-2018-000410

Status: Open

Baseball Fundamentals

Location: Affton Community Center (ACC)

08-2018-000458

Status: Open

Coaching Clinic

Location: Field House

Type: Flag Football

Gender: Male

Age Range: 1 - 70

Class Number: 311604

Registration Dates: 6/8/2018 - 6/12/2018

Dates: 6/8/2018 - 6/12/2018

Times: Sun/Tues 00:05:00

Available Discounts: 60 & Older

Tyler Employee , Employee

Remove

Final Step - Make a Payment

Payment

Payment Method

- Select -

Pay Now

Pay Later

Order Summary

Invoice To: Wales, Josey

Wales, Jesse : 311604 - Coaching Clinic - Flag Football - Field House

Flag Football Fee

1

\$125.00

60 & Older

-\$1.00

Total: \$124.00

\*We automatically calculated and applied the best discount available to each item.

Back

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.