tyler
technologies

Tyler Parks and Recreation

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

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

- Provide class registrant restrictions related to minimum or maximum age, gender-specific, or community residency requirements.

- Set class schedule time and duration, including the registration period.

- Provide a list of requirements or suggested tools for the class (for example, swim goggles, books, sewing tools, and so on).

- Create custom data-entry fields specific to a class type.

- Create reports of registrant and activity details.

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

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

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

Tyler Parks and Recreation also provides customizable reporting using a Microsoft® SSRS (SQL Server Reporting Services) interface.
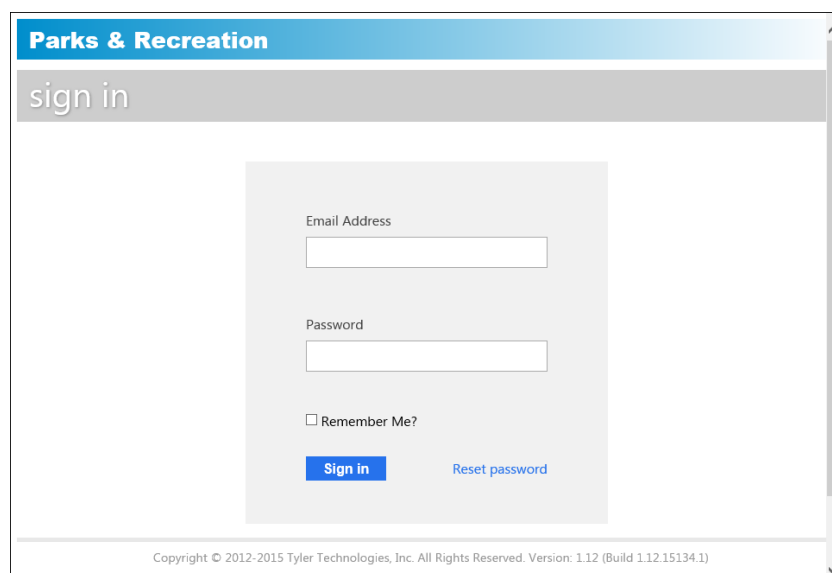
When you access the Administration pages for Tyler Parks and Recreation, the My Home, Parks & Rec, and Administration tabs are available. The Parks & Rec tab provides the contact, class, expense, rental, and report pages that your Parks and Recreation personnel use to manage programs and activities. The Administration tab manages the setup pages for the application, including system and portal settings.
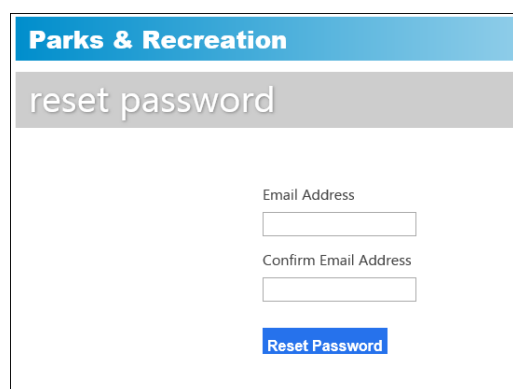
Overview

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

Sign In

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

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:

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:

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 **Display** 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 **Edit** 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 **Edit** button for a specific record, for example, in the Registrants group, the Group dialog box is available for edit.
✉ Email	Sends an email message to the specified address for the selected registrants, user, or instructor.
🖶 Print	Prints a receipt for an item. For example, in the Order History group for a Contact record, you can print a receipt for a paid item.
⟳ Refresh	Restores the full list of results or details.
🔍 Search	Searches the selected category or group using defined statements. Search... ✕ First Name ▾ contains ▾ Patrick ↩ Reset Find 🔍
⊙ Search	Provides a list of available options for a field.
⊕ Select	Selects the specified item and displays the details. For example, click the **Select** button to choose an item from a search results page. Contact Number First Name Last Name Select 08-2013-000004 Harriett Jackson ⊕ RES-08-2013-000009 Harry Jackson ⊕
➕ 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.
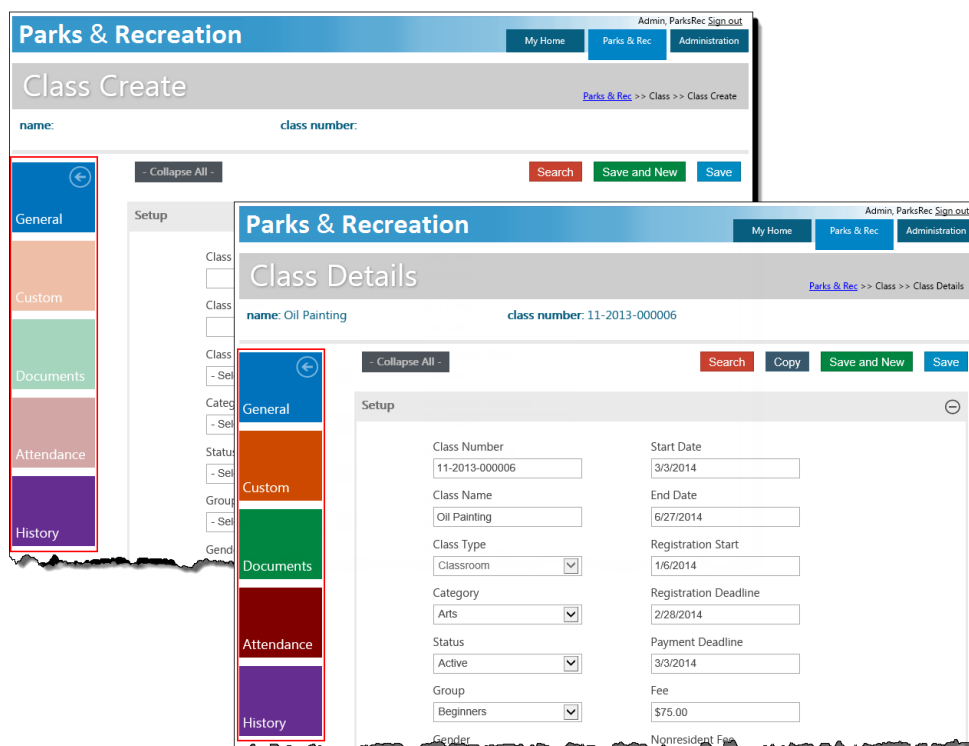
Program Options

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.
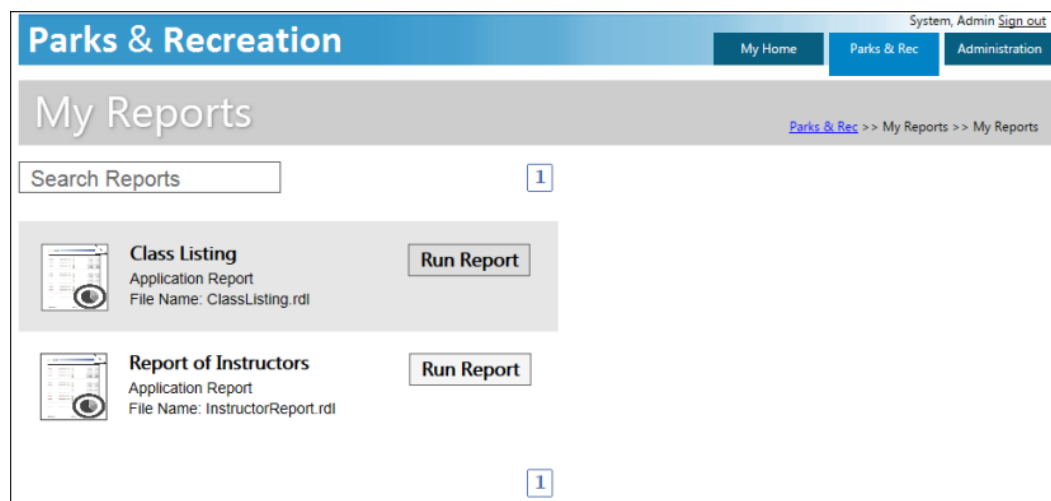
Program options include:

- 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:
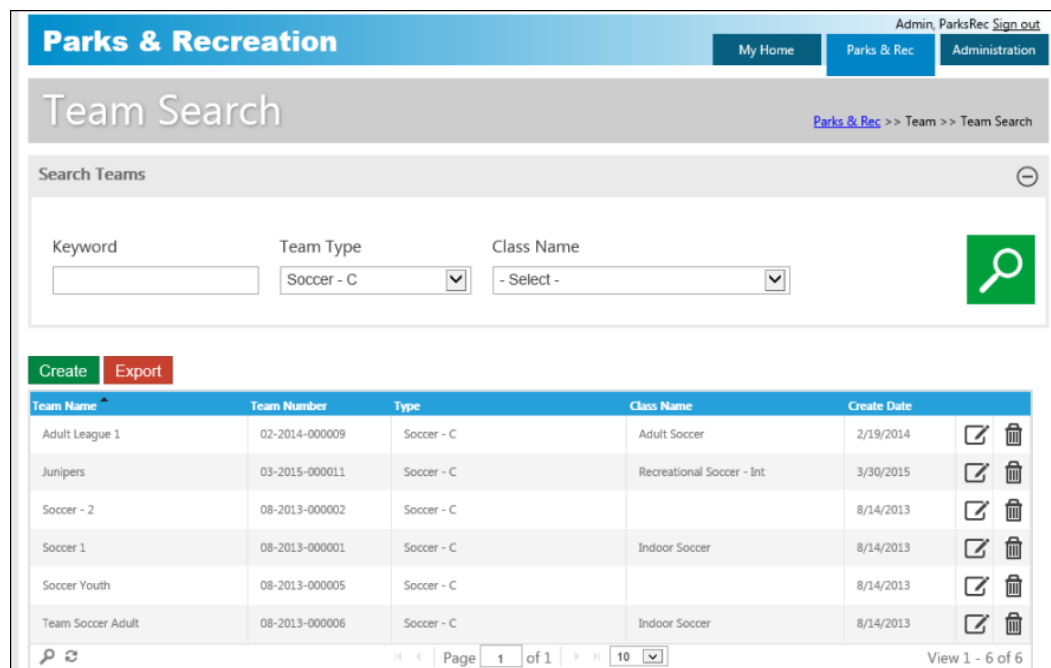

Reports are created and maintained using Microsoft® SQL Server Reporting Services (SSRS).

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:

Import

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

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:

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@cuvox.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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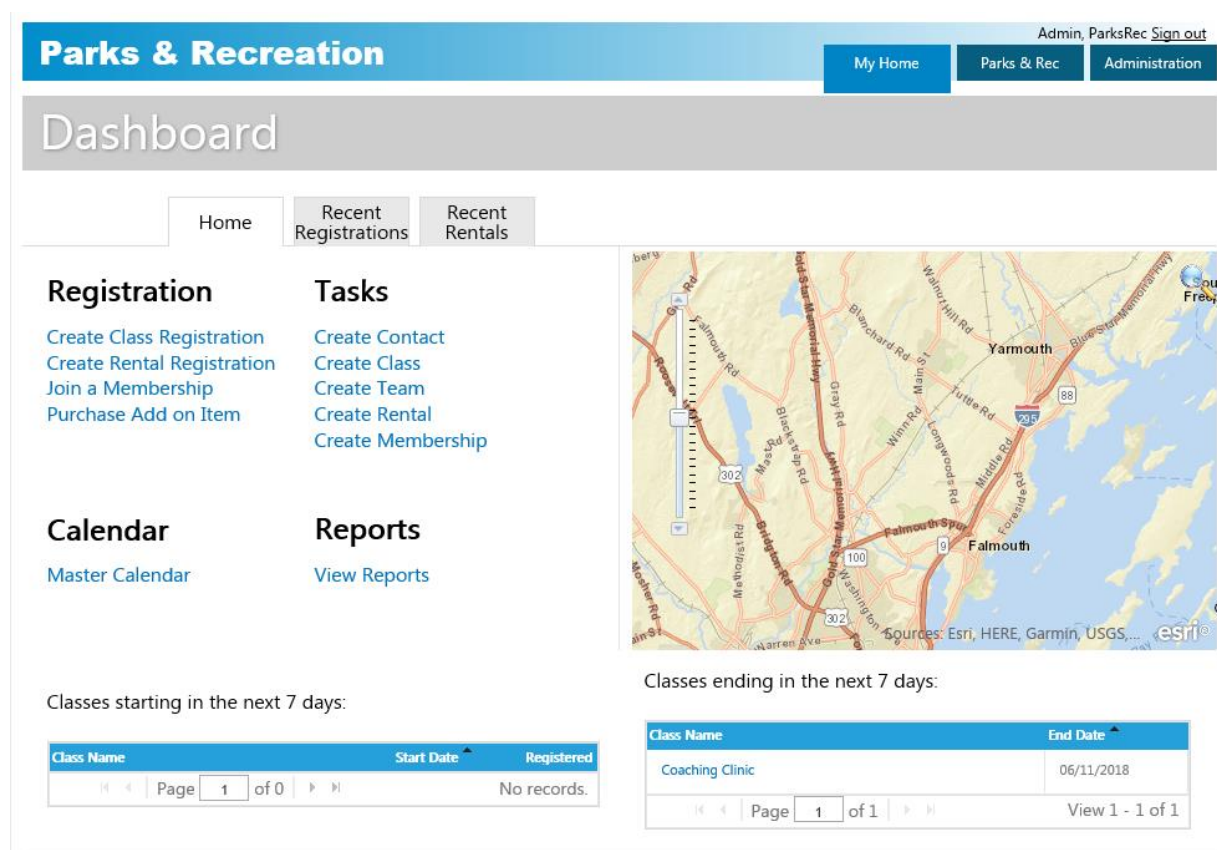
Import Summary
- 1 Records(s) successfully imported.
- 100 Record(s) were skipped as duplicates.

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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:

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.)
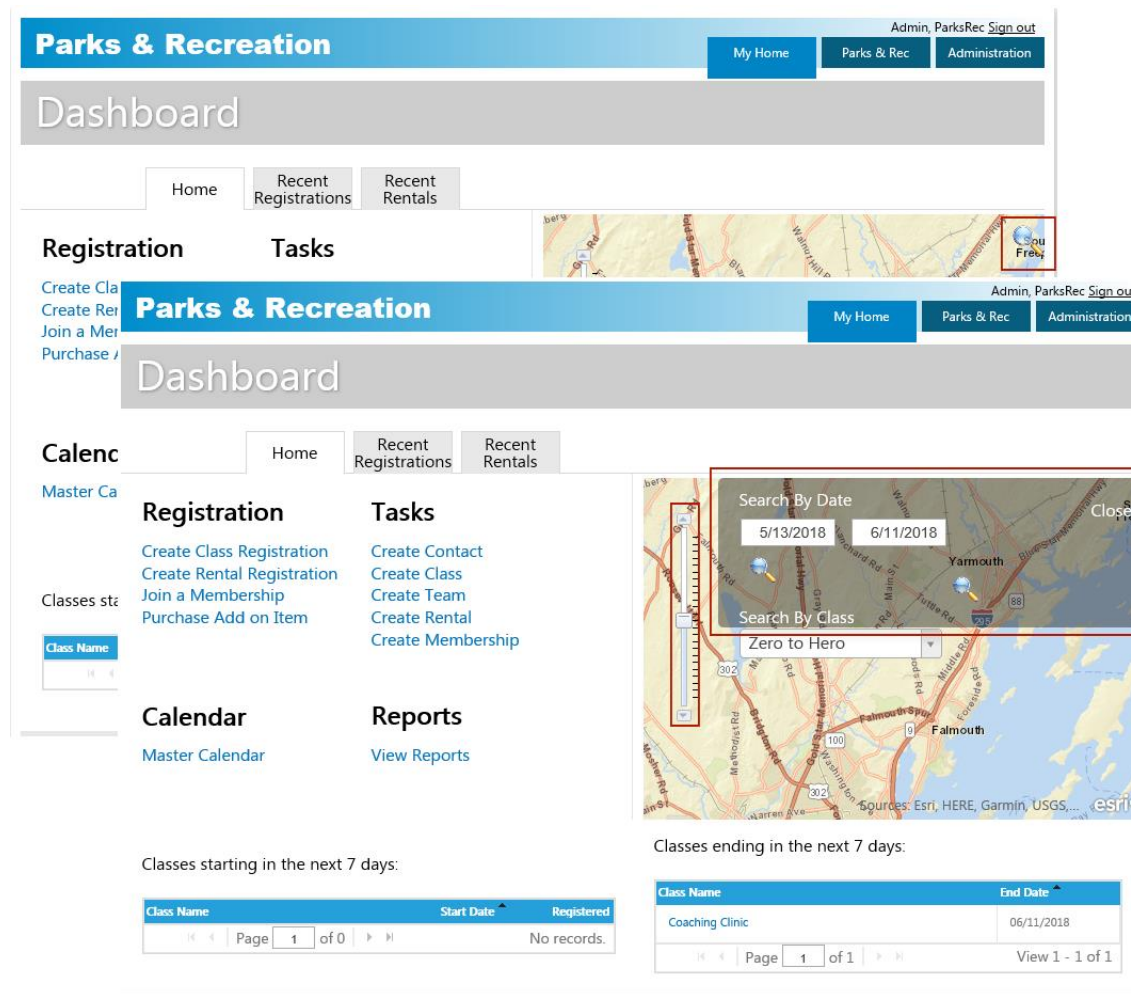
Home Tab

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:

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:

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:

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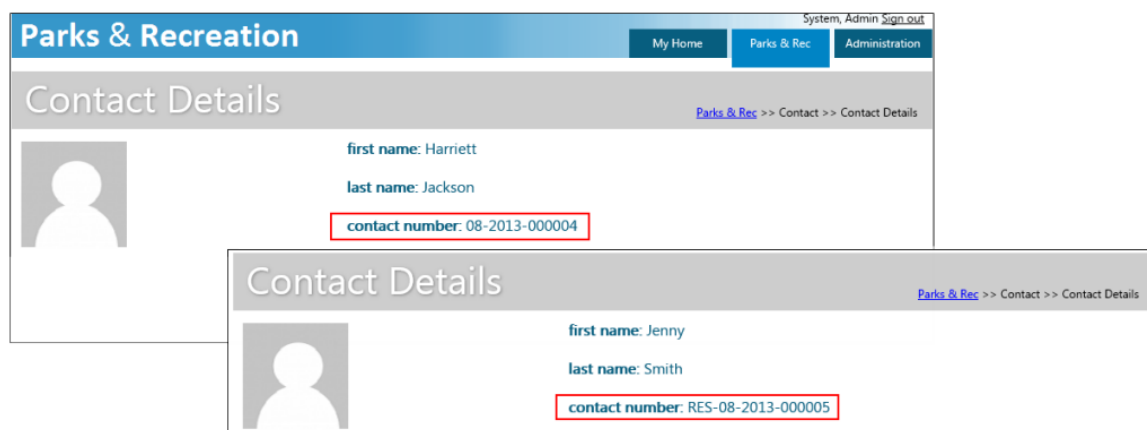
Category	Description
Contact	Defines contacts associated with the Parks and Recreation programs. Contacts can be participants, instructors, or staff.
Class	Manages the specific details for a class offering, including type, status, registration details, fees, available times, and so on.
Team	Defines teams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

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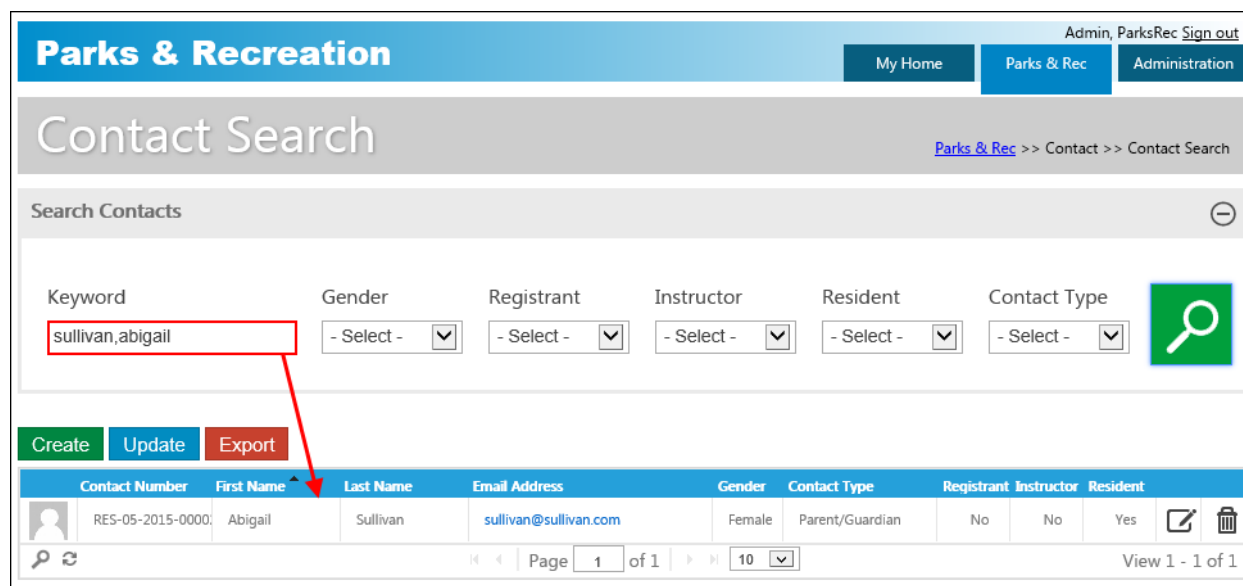
Contacts are the individuals associated with the Parks & Recreation activities, including participants, instructors, and item or facility renters. When citizens register for activities using the portal, contact records are created. Within your organization, personnel can create contact records for instructors,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

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

Contact Search

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

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

- Grant Login—Narrows your search results list to contacts for whom an email address is listed, but who have no login privileges. Select this option and click **Next**. Then, from the list displayed, select the contacts to give login privileges and click **Update**.

- Increment Grade—Narrows your search results list to contacts for whom a school grade of 12th grade or lower is listed. Select this option and click **Next**. Then, from the list displayed, select the contacts for which to update the school grade to the next grade and click **Update**.

Credit Refunds

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

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

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OK

Contact Information

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

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:

The same email address may be used for a contact who also is an administrative user; the passwords, however, may not be the same.
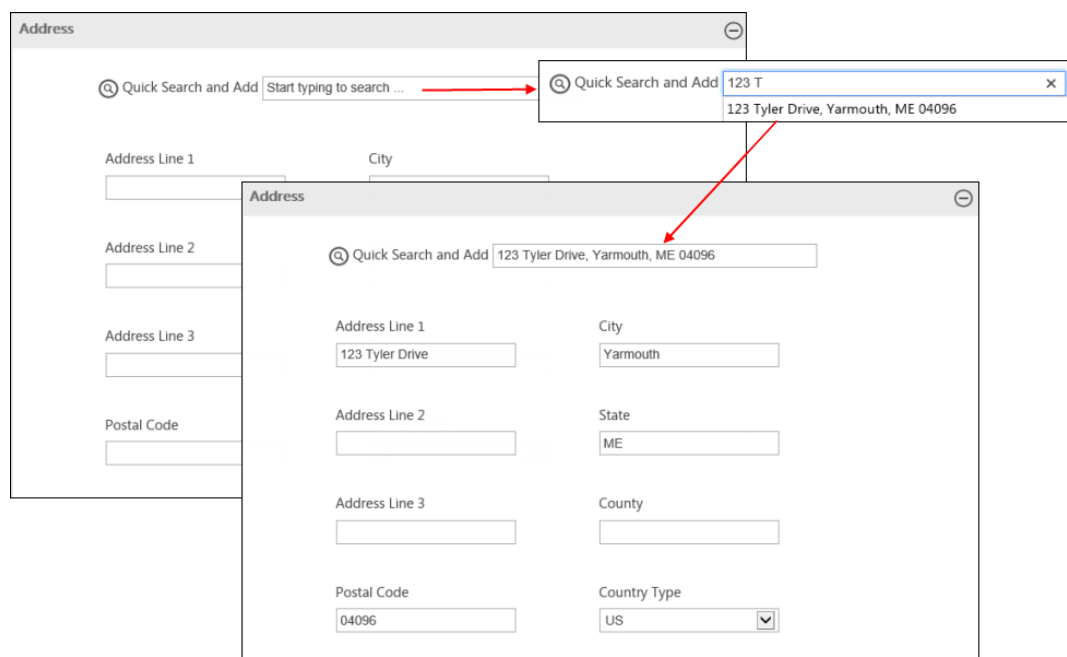
Resident requirements are verified according to the resident city or county entered in the System Settings program. When you create a contact record, the program verifies the value of the city or county; if the information entered matches the value of the *Resident City or Resident County* field in System 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:

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

Login Info

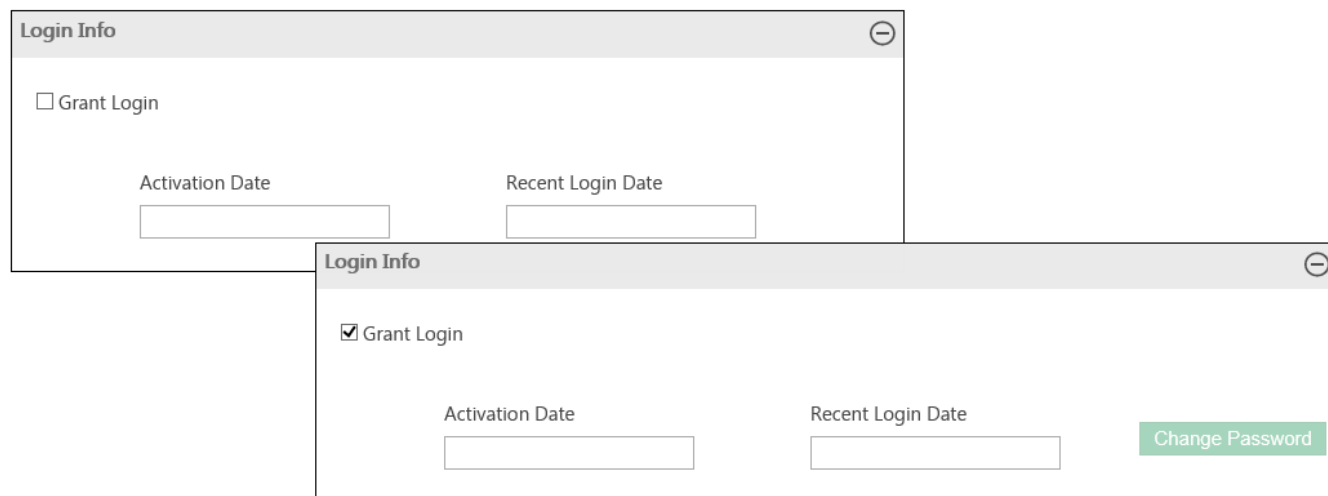Login Info grants login permission to users. When you select the *Grant Login* check box, the **Change Password** button is available. Click **Change Password** to send the user an email message containing a login password:

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

Registrant Info

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

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

Instructor Info

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

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:

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:
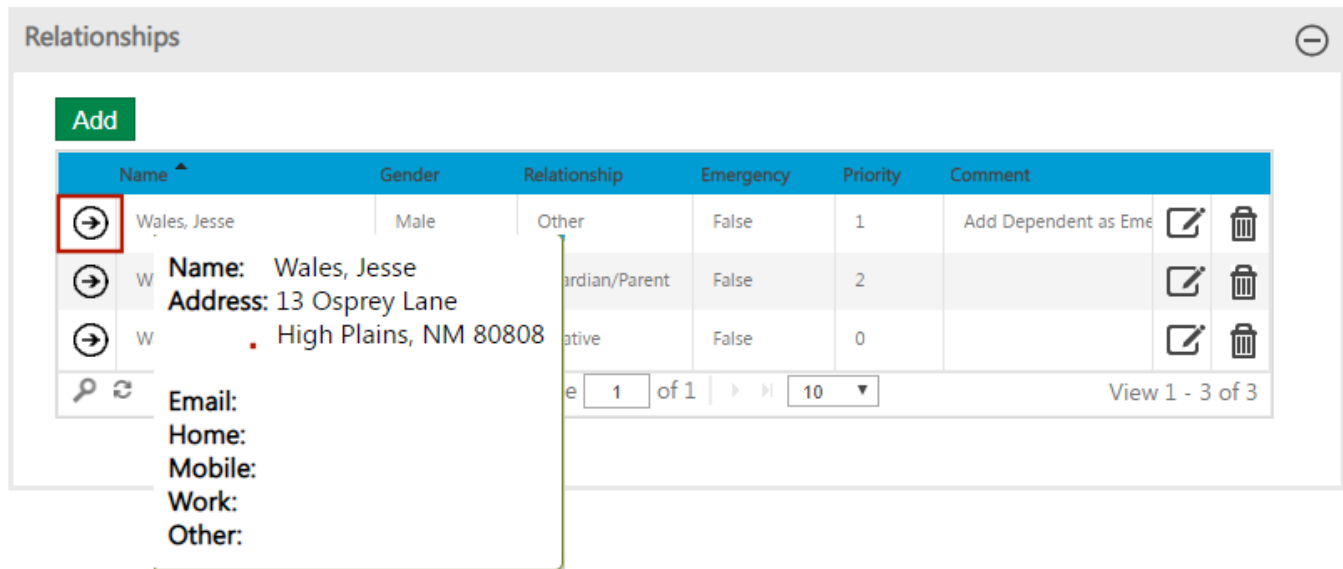
Relationships

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

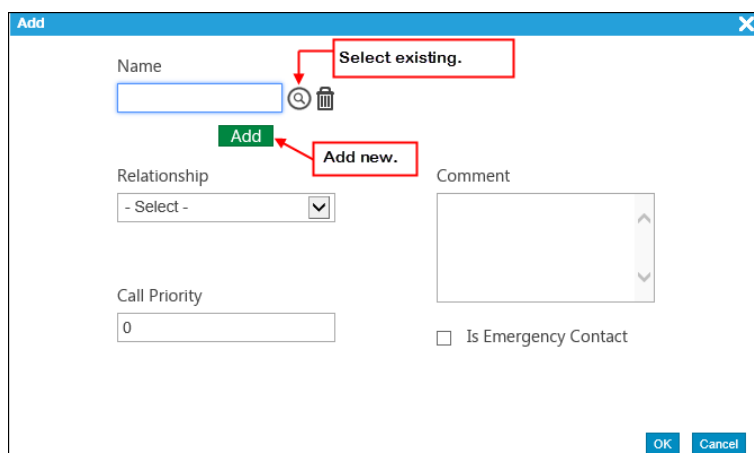For existing relationships, click the details button to display contact information:

To add a new relationship, click **Add** in the Relationships group to display the Add dialog box. Click the search button to select an existing contact for the relationship or click **Add** to add a new contact record:
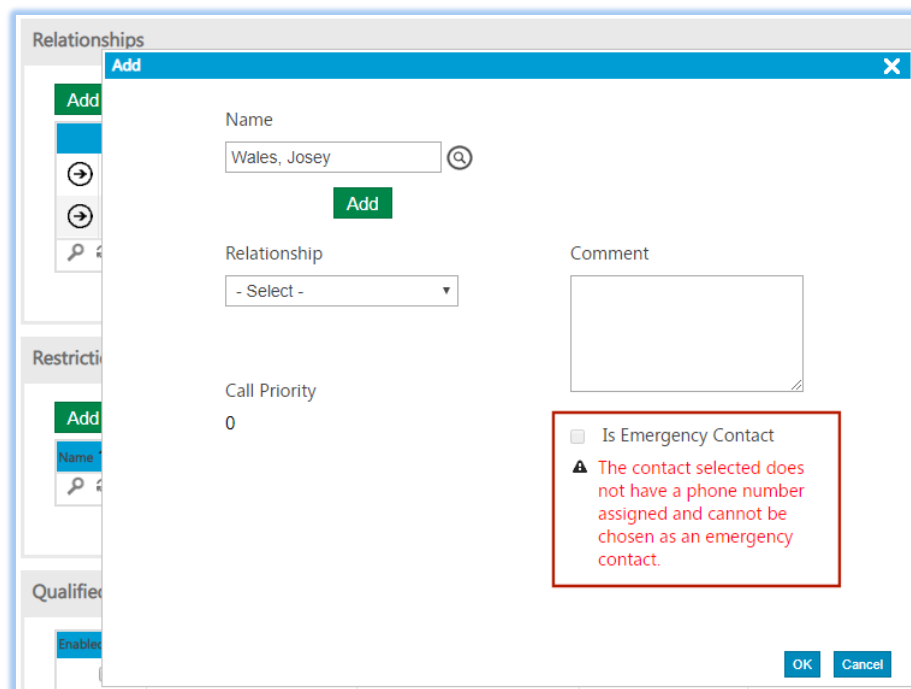
When you click **Add**, the *Name* field includes auto populate functionality. When you type the first few letters of a name, the program provides a list of existing options that match the text entered. The more text you enter, the narrower the list of possible selections. When the list of options provides a matching value, you can stop entering text and click the value to complete the field.

For relationship contacts, the program provides the Billing Address, Relationship, and Confirm 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:

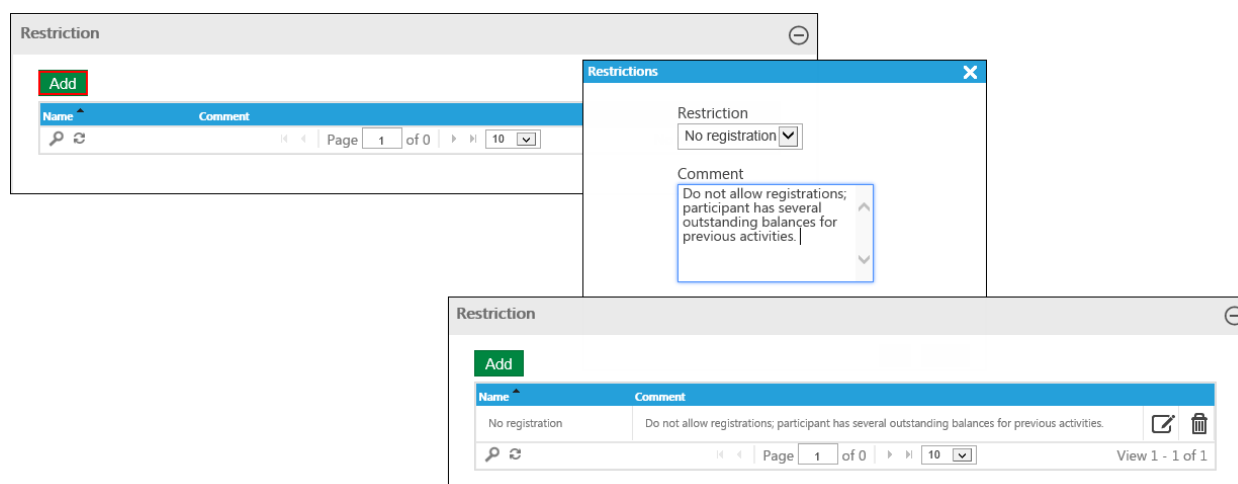When you add a new relationship contact, the *Same as Parent/Guardian* check box is available on the Billing Address page. When you select this check box, the program completes the contact and preferences information for the new record with the parent/guardian record values.

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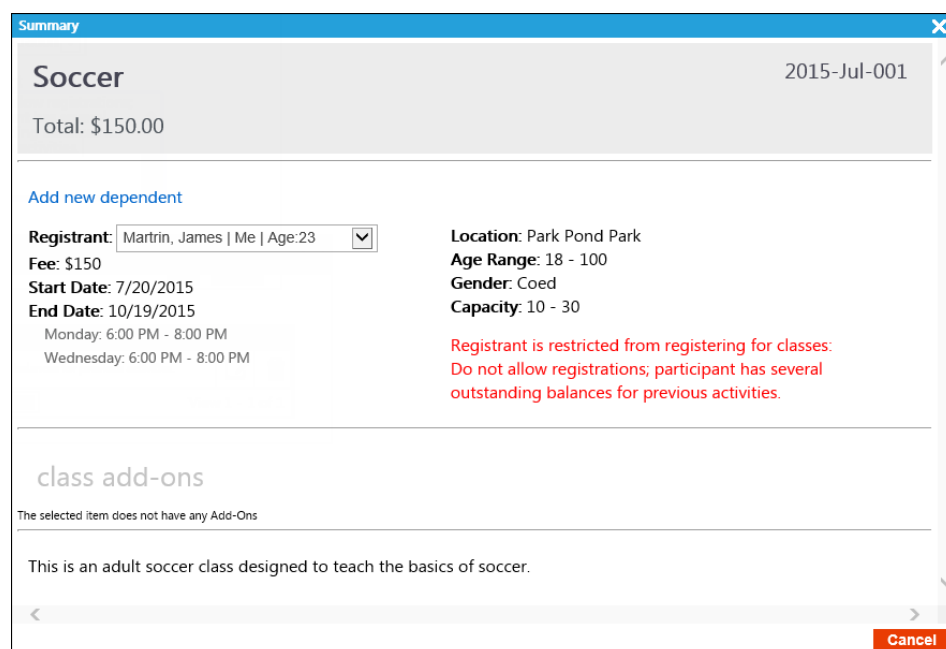
When you click **Add**, the Restrictions box displays. Select the applicable restriction and then add comments, if appropriate, specific to the restriction for this particular contact. When you save the restriction, the Restriction group displays the restriction description and comment:

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:

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

Qualified Discounts

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

Qualified Discounts

Enabled ▲	Name	Description	Type	Amount/Percent
	Middle Age	Middle Age	Age	$3.00
☐	Boy Scouts	Boy Scouts	Custom	5.00 %
☐	AAA	AAA Membership	Custom	5.00 %

🔍 ⟳   ⏮ ◀ | Page 1 of 1 | ▶ ⏭   10 ▼   View 1 - 3 of 9

Check boxes appear next to the custom discounts available to the employee. To make the employee eligible for a custom discount, select the corresponding check box. Any discount added to a class, rental or membership makes the employee eligible for the discount. Discounts are set up on the Discount page in Administration. (See the "Discount" section of this guide.)

Class

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

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

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:

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 (*):

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

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

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

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

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

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

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:

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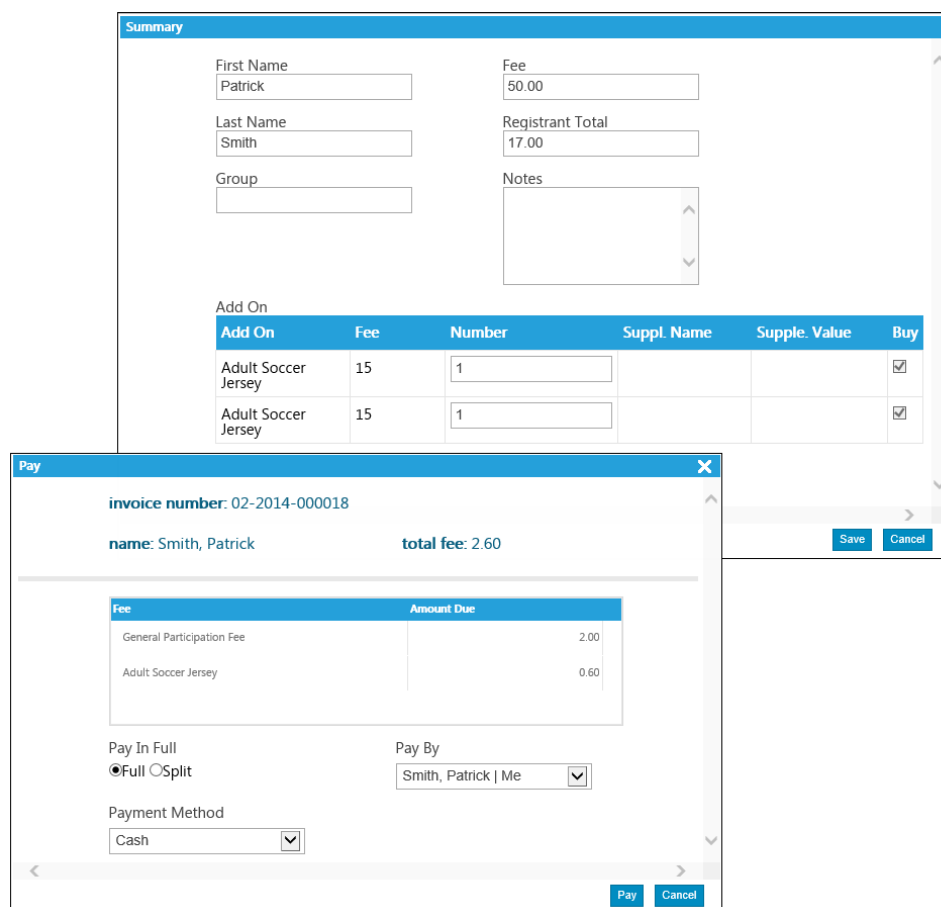
If a registrant has made a partial payment, the entry for the registrant contains two rows: one for the partial payment and one for the total invoice.

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.

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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:

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

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

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:

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:

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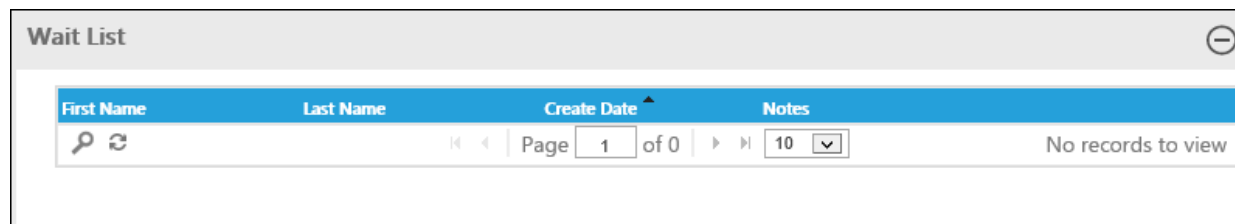
Use the Export option to create an Excel spreadsheet of the teams registered for the selected class or activity.

Wait List

Wait List provides a list of registrants who are not officially registered for the class due to space availability, but who wish to be registered should the availability change:
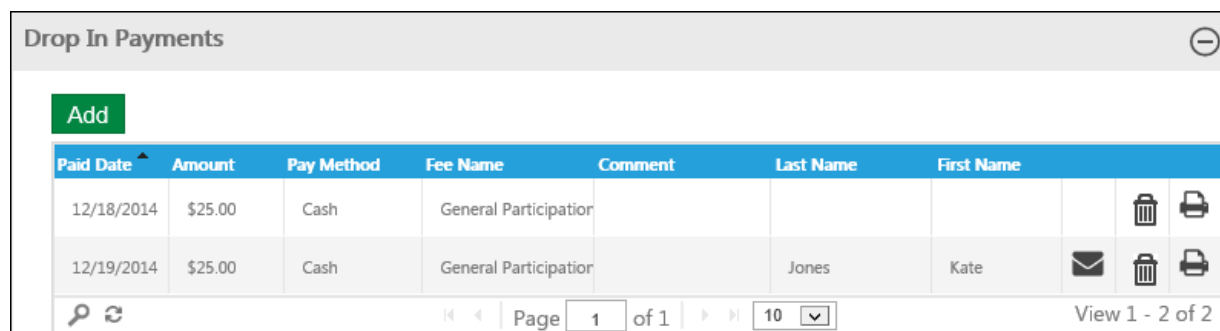
As space becomes available, use the Wait List group to move contacts to the class registration list. When you do so, the program provides the payment options.

Drop In Payments

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

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:

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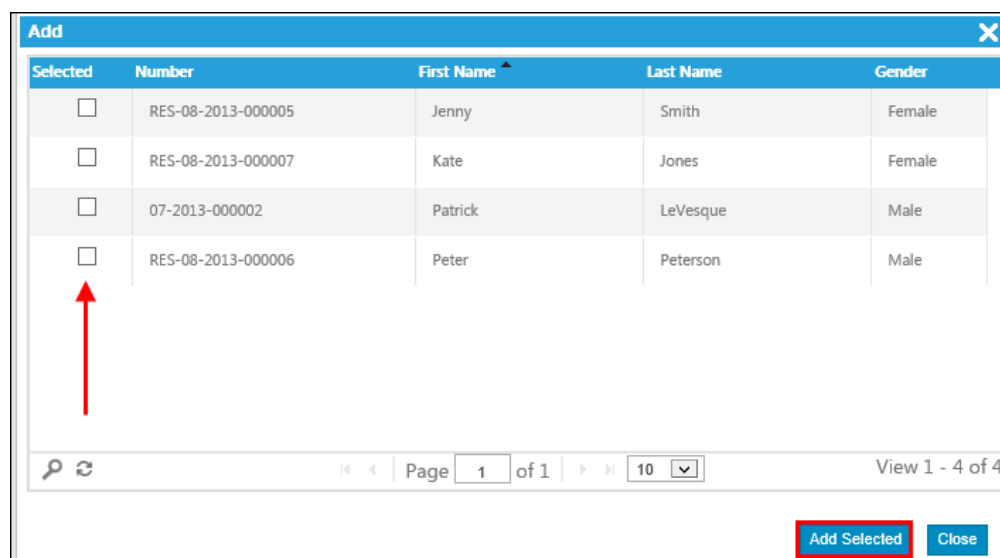
If you select Void, the program displays a confirmation message confirming the void of the entire transaction. If you continue, the action voids the entire transaction and removes all registrations associated with that transaction.

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**:
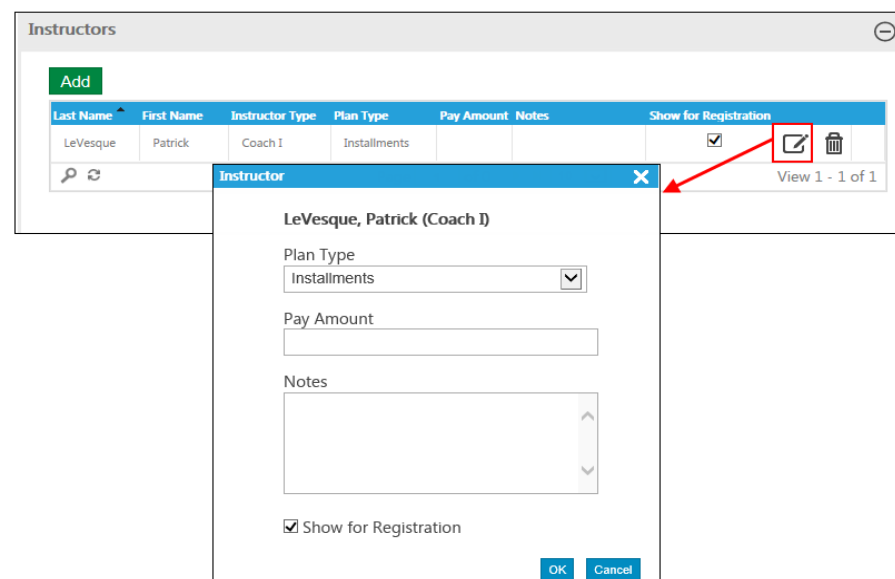
Once you have added the instructor, click the **Edit** button to assign a specific payment plan for the instructor using the Plan Type list:
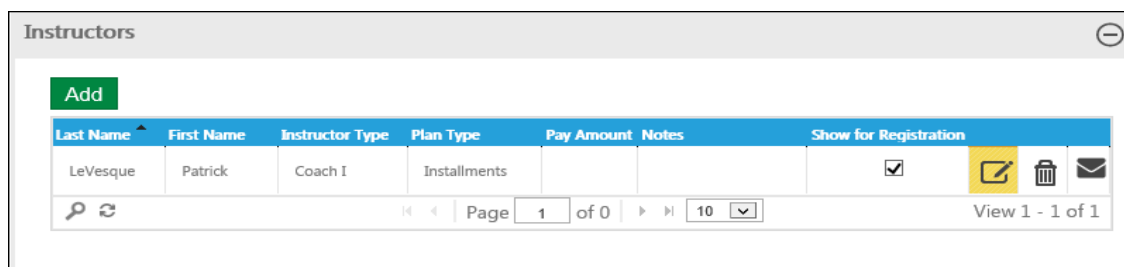
To include the instructor's name with the class details on the Class Registration page and on the citizen portal, select the *Show for Registration* check box. When you save the instructor record, the program updates the *Plan Type* and *Show for Registration* fields accordingly:
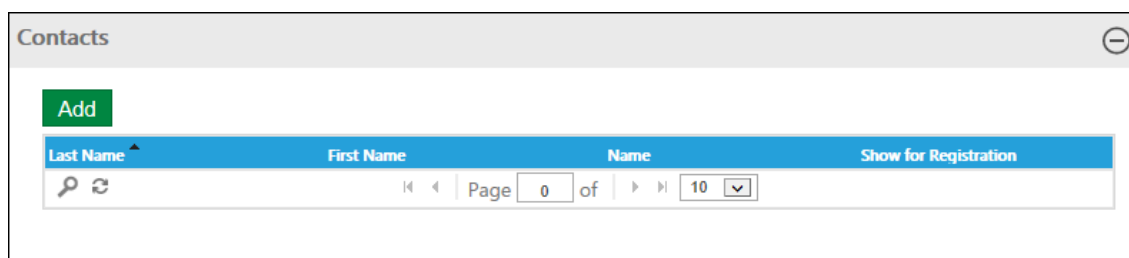
If the instructor record includes an email address, the email button is available. Click this button to create an email message with the To box completed with the instructor email address and the *Subject* field containing the class identifier.
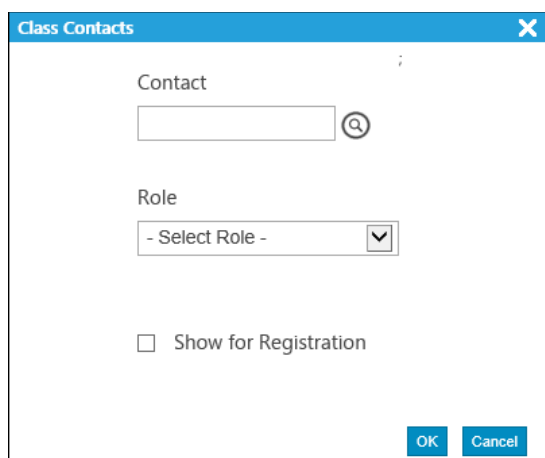
Contacts

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:

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:

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:

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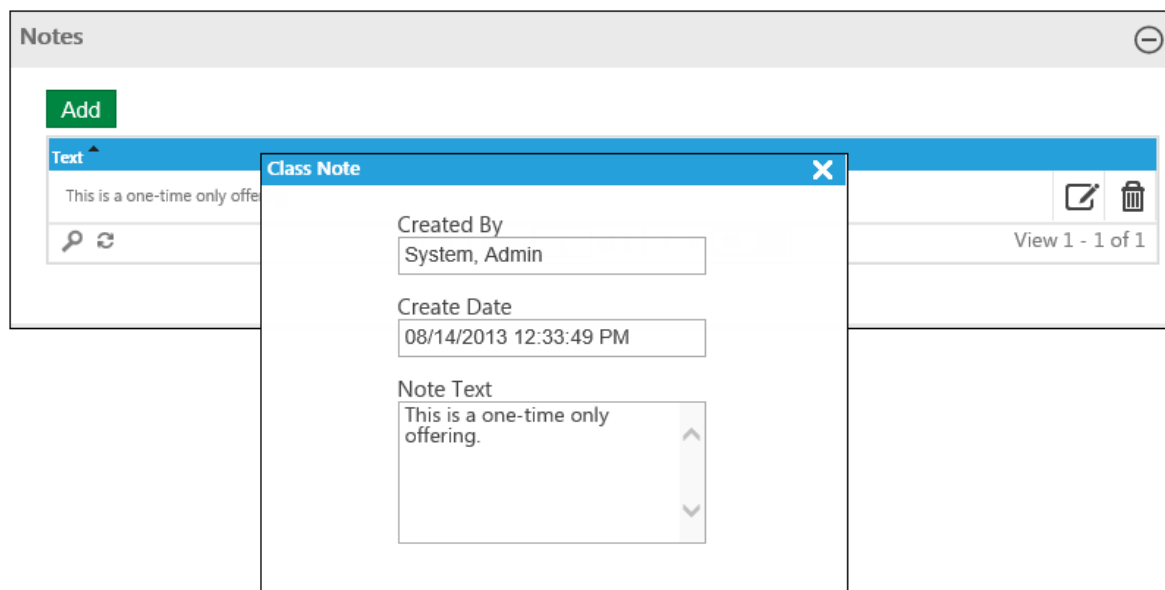
Add-On records are maintained using the Add-On types option in the Parks and Rec Setup group on the **Administration** tab and assigned to classes using the **Add** button in this group.

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.
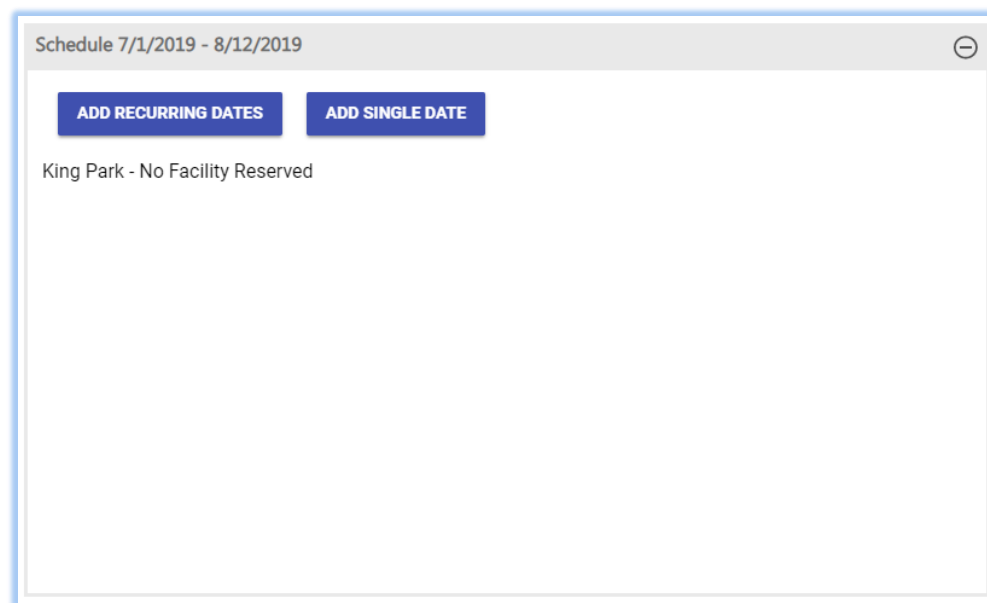
Notes

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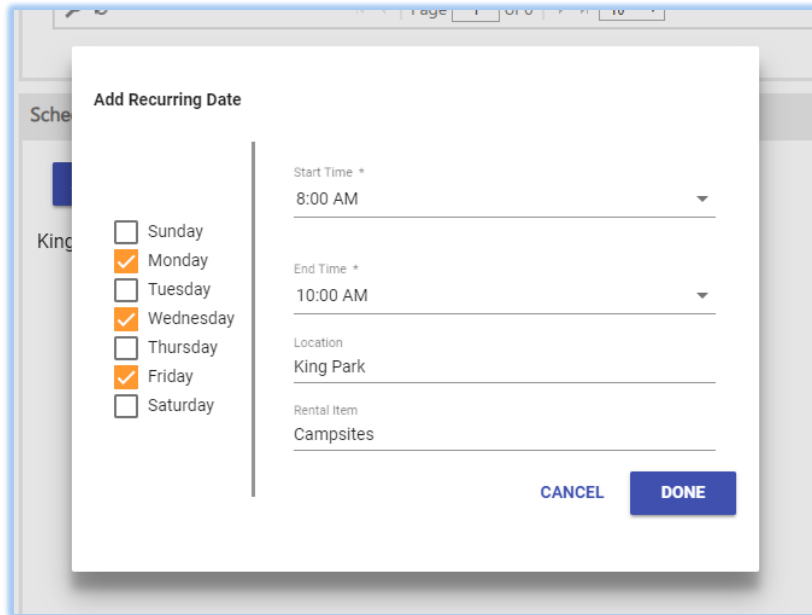
The **Schedule** pane allows for the variable scheduling and selection of locations and rental items:

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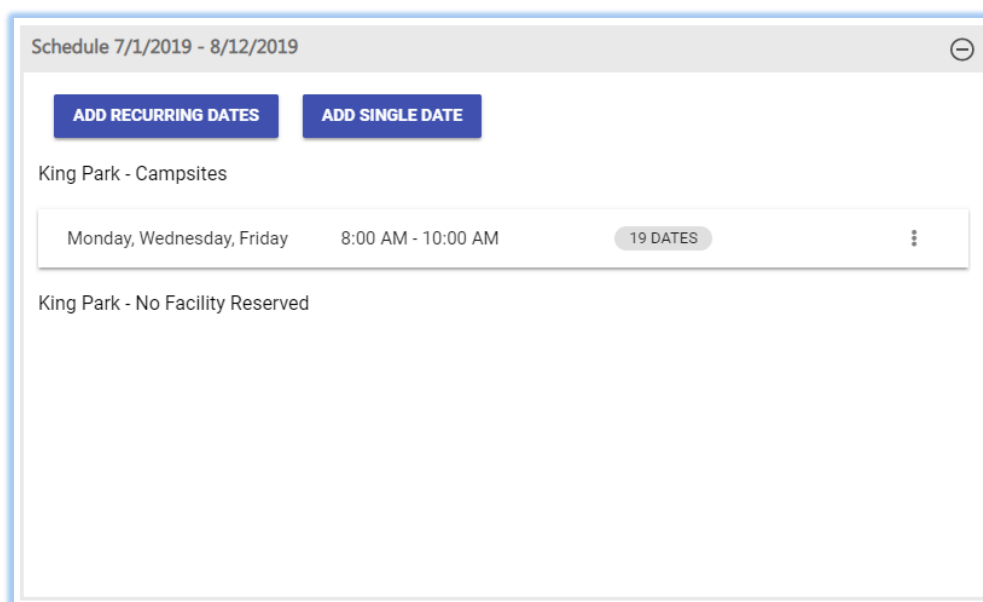
The dialog also contains fields for selecting the class location and, if applicable, rental item, such as a specific facility within the location.

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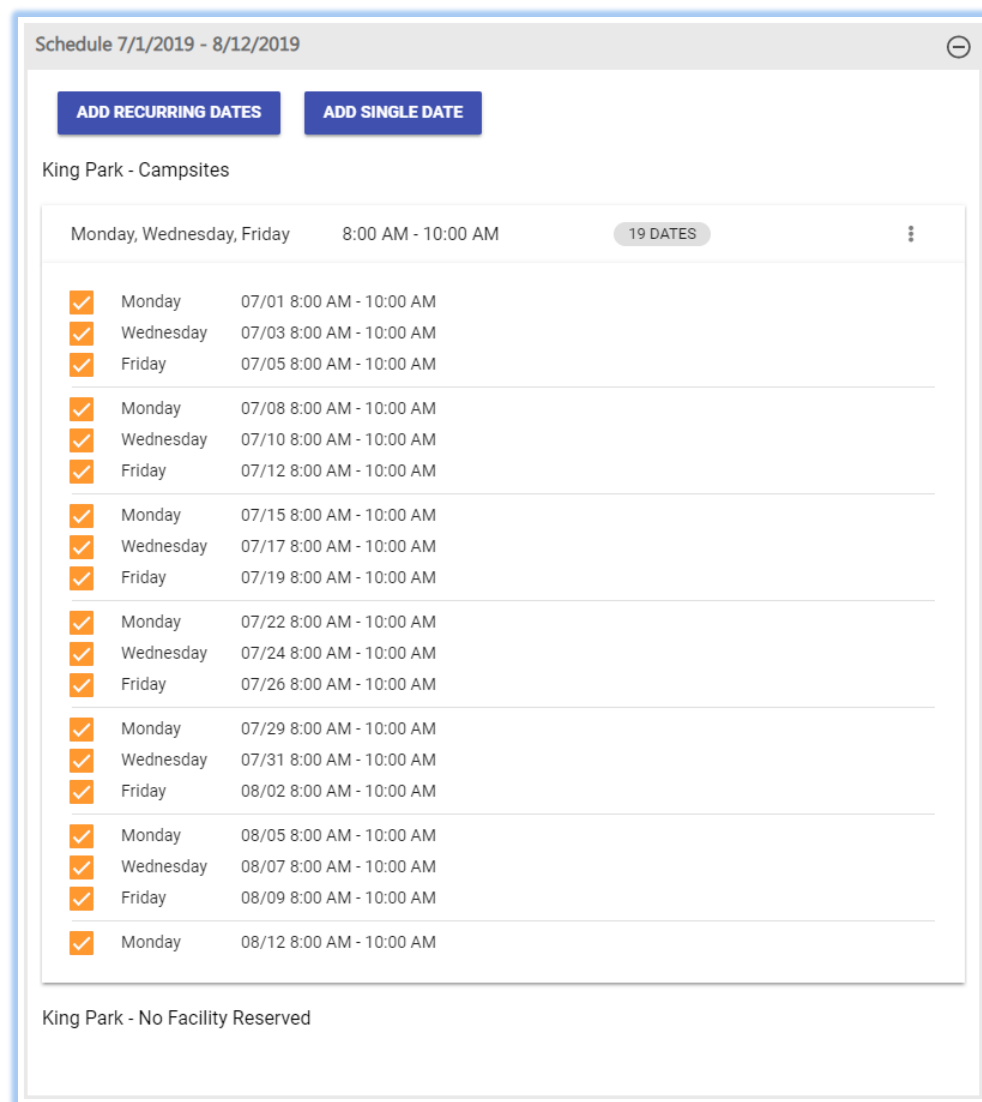
As shown in the image above, cards are grouped under headings containing their corresponding locations and rental items.

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:

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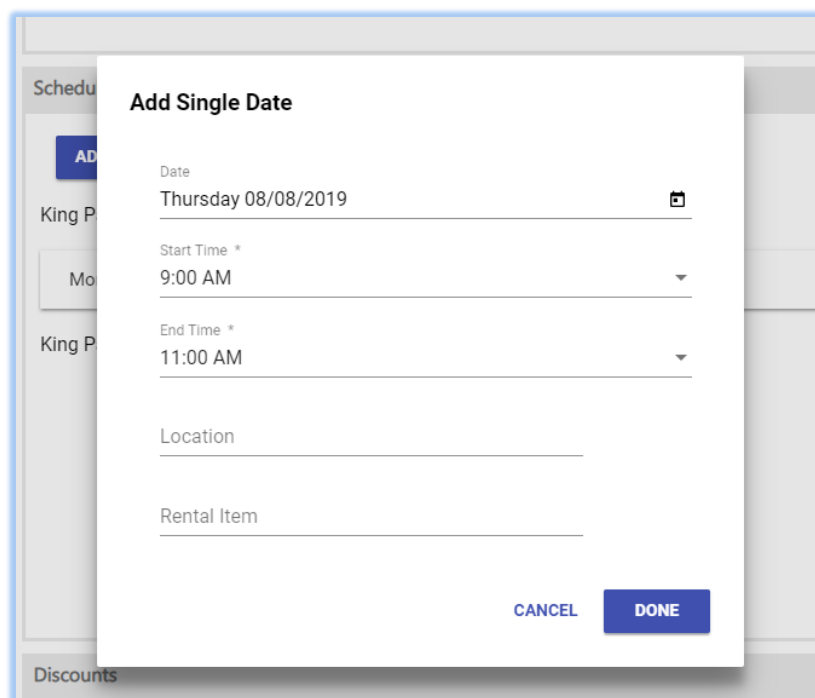
Note: Editing a recurring schedule resets any custom changes to their default states.

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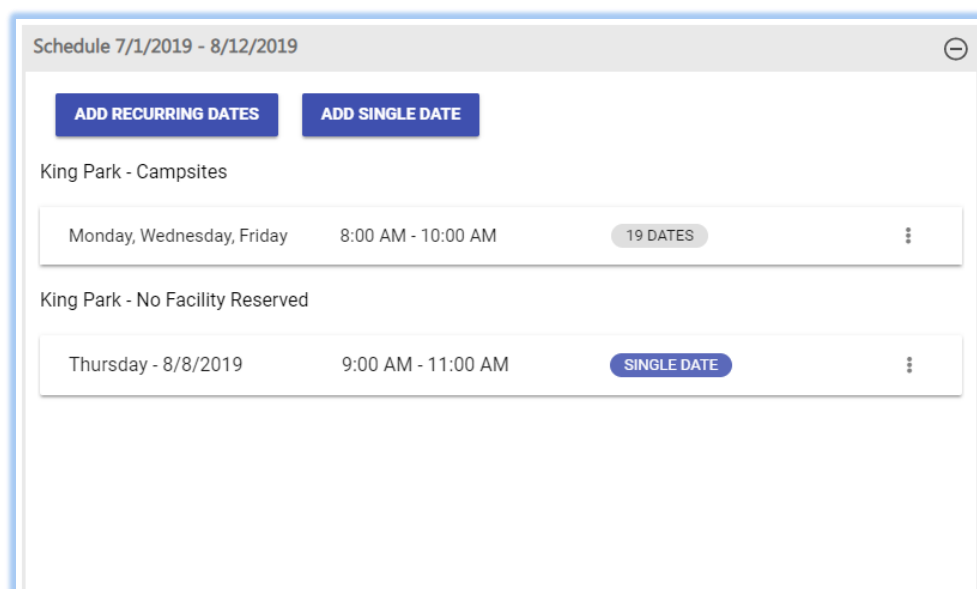
When finished, click **DONE**. The Schedule section refreshes, displaying the new single-date entry on a card:

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	
		- Select -	- Select -	🔍

Gender	Age	Start Date	End Date
- Select -	0		

Instructor	Category	Day of the Week
- Select -	- Select -	- Select -

Class ▲	Description	Date	Fee	Age		Total Result: 25
Adolescent Flag Football 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 View Schedule	$20.00 Non-Resident: $25.00 Discounts Available	Ages: 1 - 99 Gender: Coed	Details	
Baseball Fundamentals 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 View Schedule	$75.00 Non-Resident: $75.00	Ages: 5 - 75 Gender: Male	Details	
ClassTypeTest 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 View Schedule	$0.00 Non-Resident: $0.00	Ages: 0 - 99 Gender: Coed	Details	

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

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:

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

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:

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

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

Discount Types

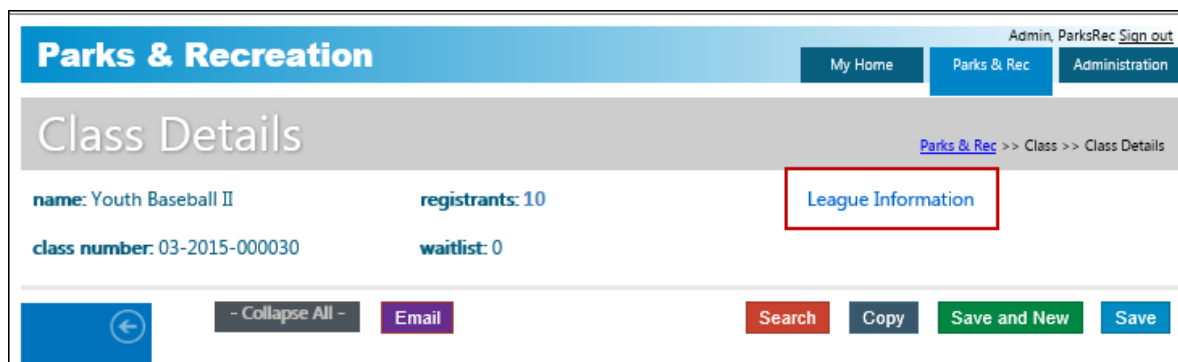| Discount Type	Description
Age	This discount applies to a contact's age. Selecting *Age* displays *From Age* and *To Age* fields. Any contact whose age falls within the range entered here is eligible for this discount. Both fields do not require entries; for example, if the discount is for seniors,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

Multi-Family Discount Setup Section

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:
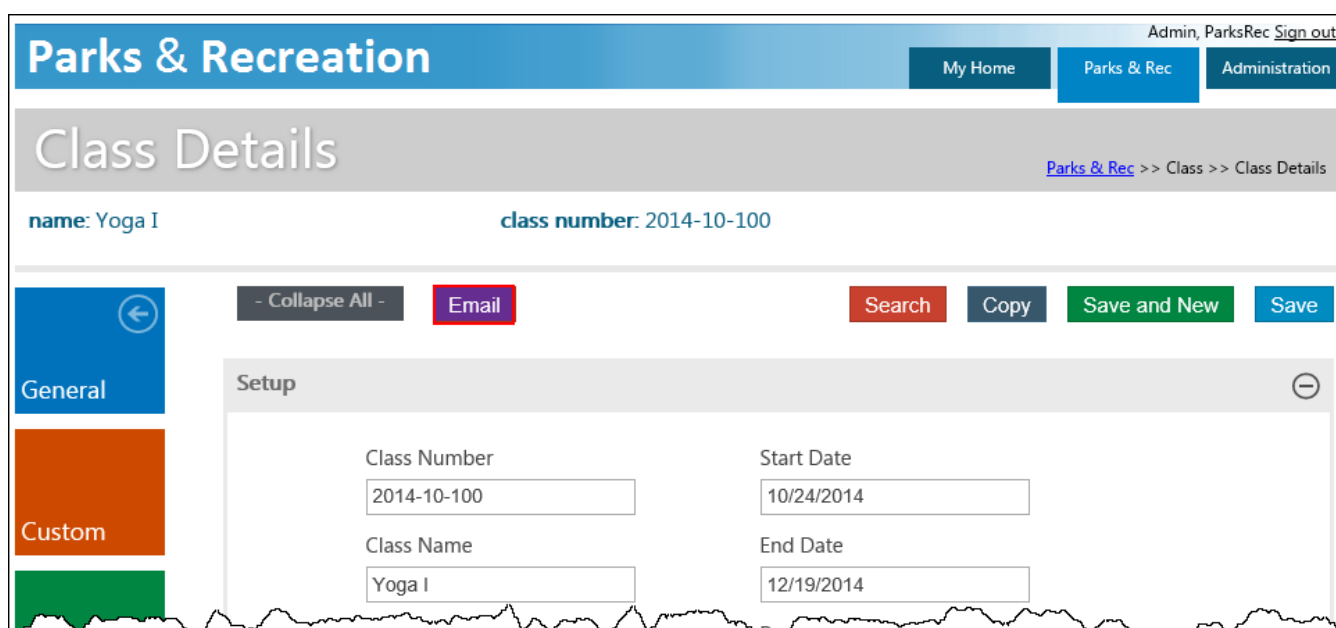
Email

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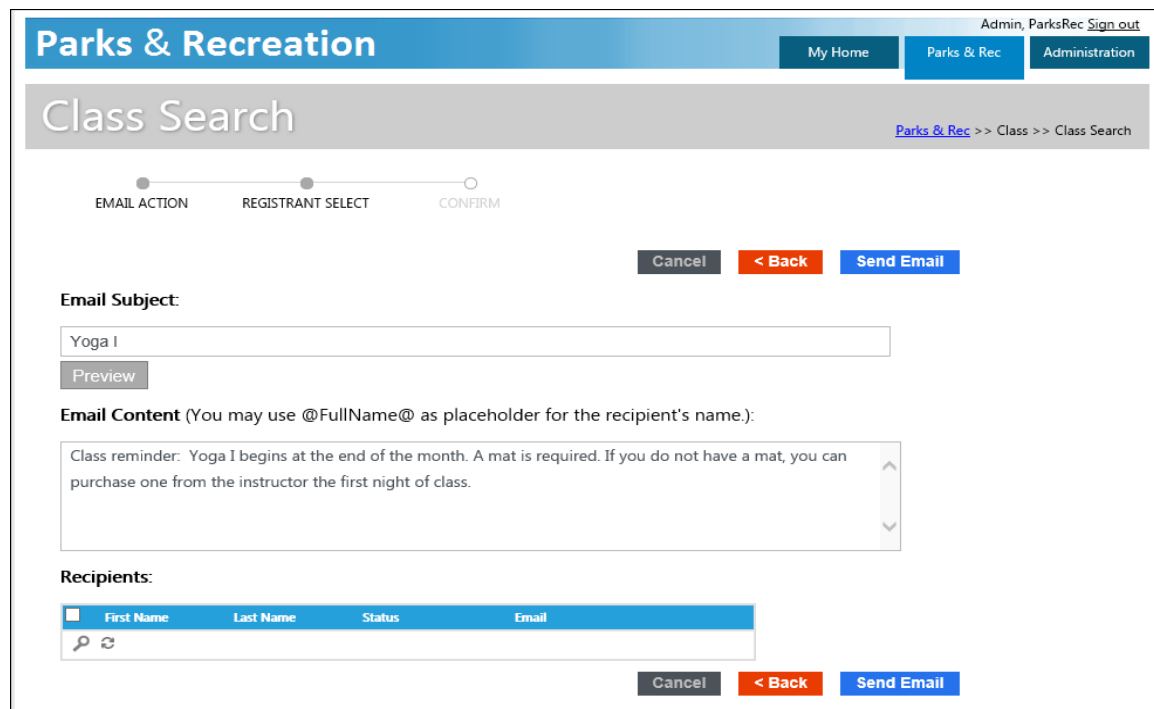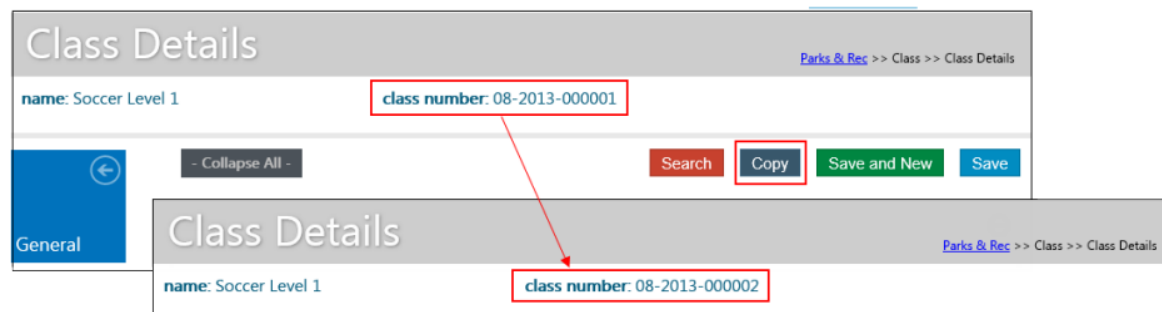
When you select Email, the Email Update provides the option for distributing an email to class registrants who have a valid email address. The Email Update page provides the *Email Subject* and *Email Content* fields. The default value for the Email Subject line is the class name, but you can change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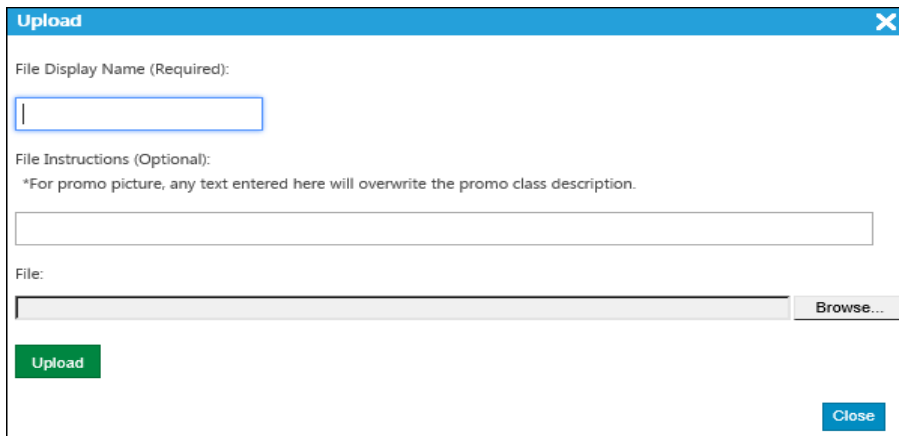
You can update the new record to customize the individual details.

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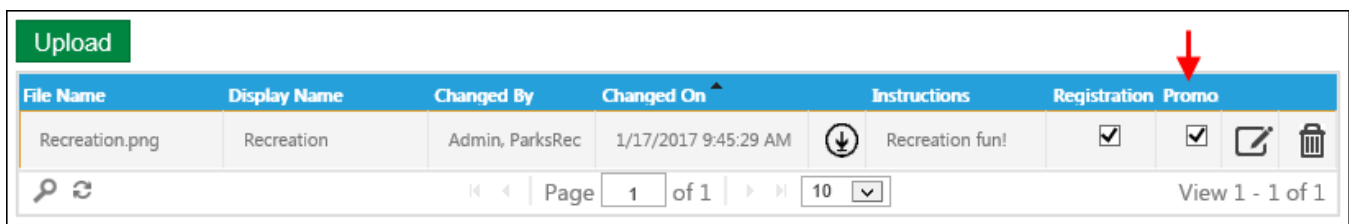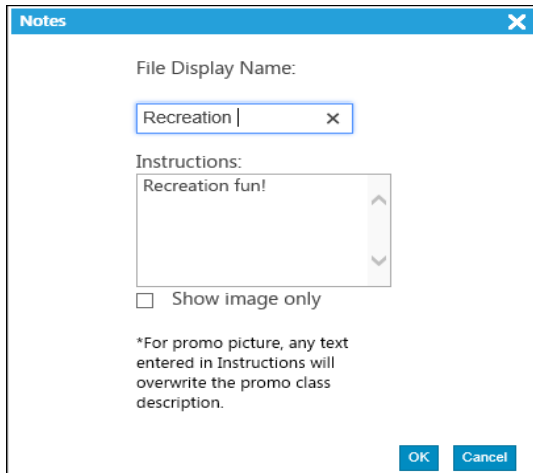
After the image uploads, select the *Promo* check box to identify the image as a scrolling item. When the Is *Special Event* check box is selected on the Class Details page, and the *Promo* check box is selected, the image displays on the citizen portal. When a user hovers his or her pointer over the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

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:
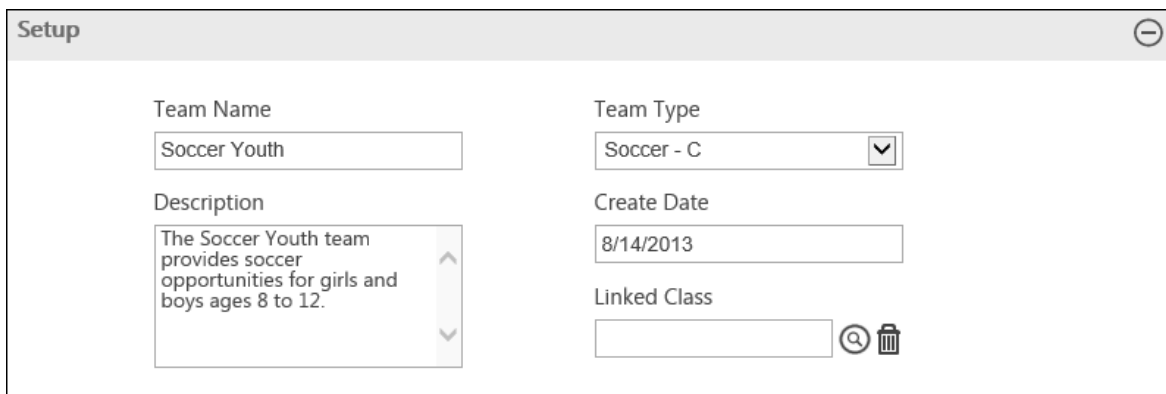
Team

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:

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.
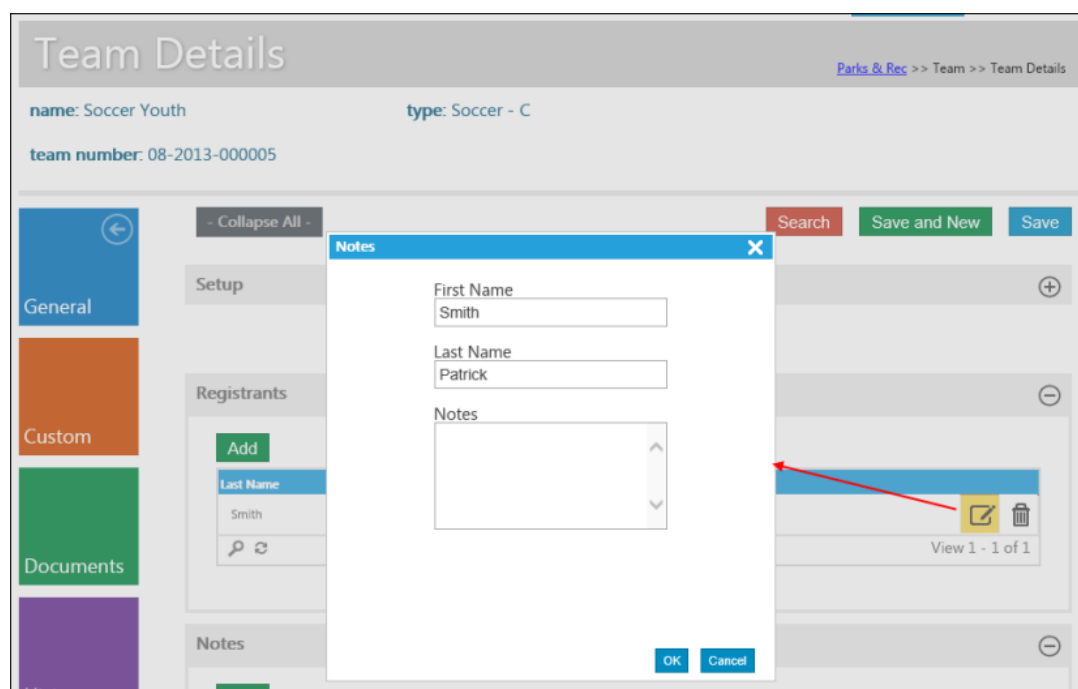
Registrants

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

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:

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.)

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:

Notes

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

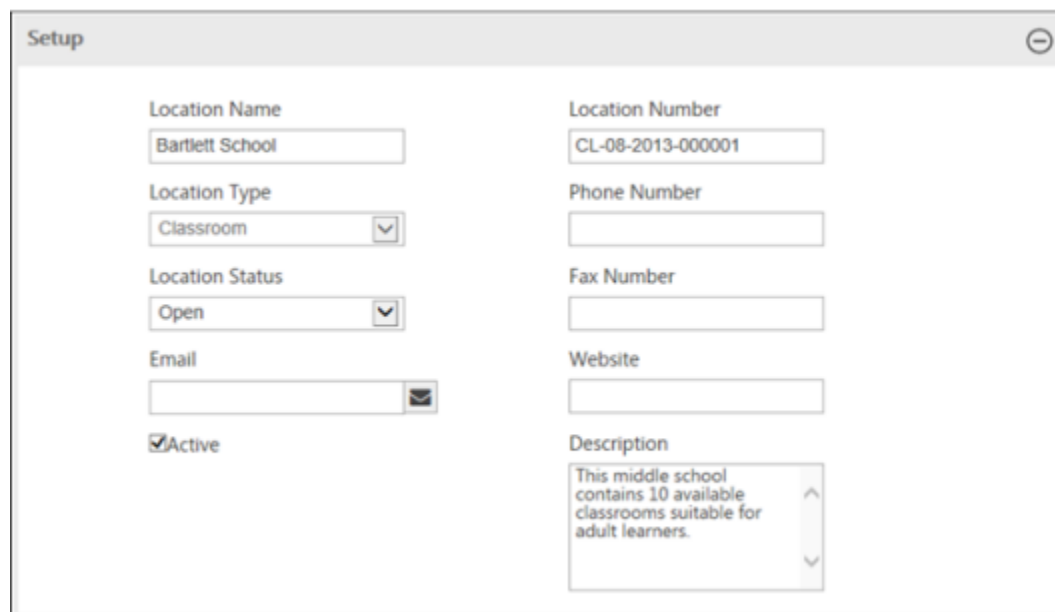# Location

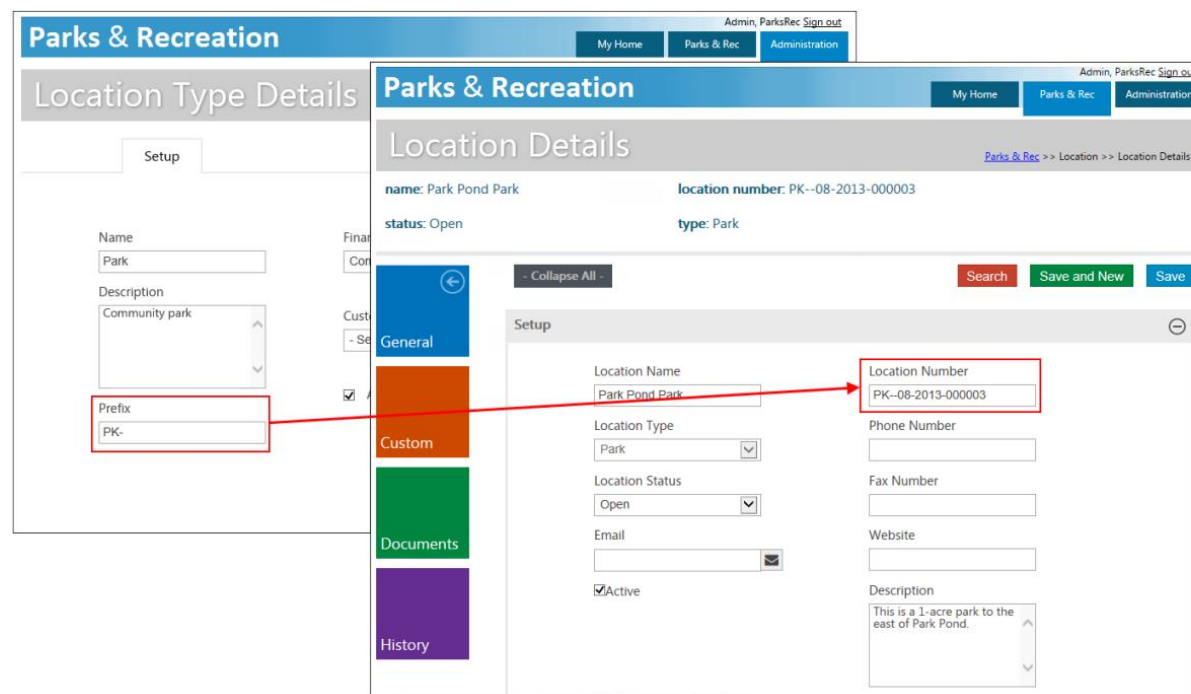Location maintains location records by type and status.

Setup

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

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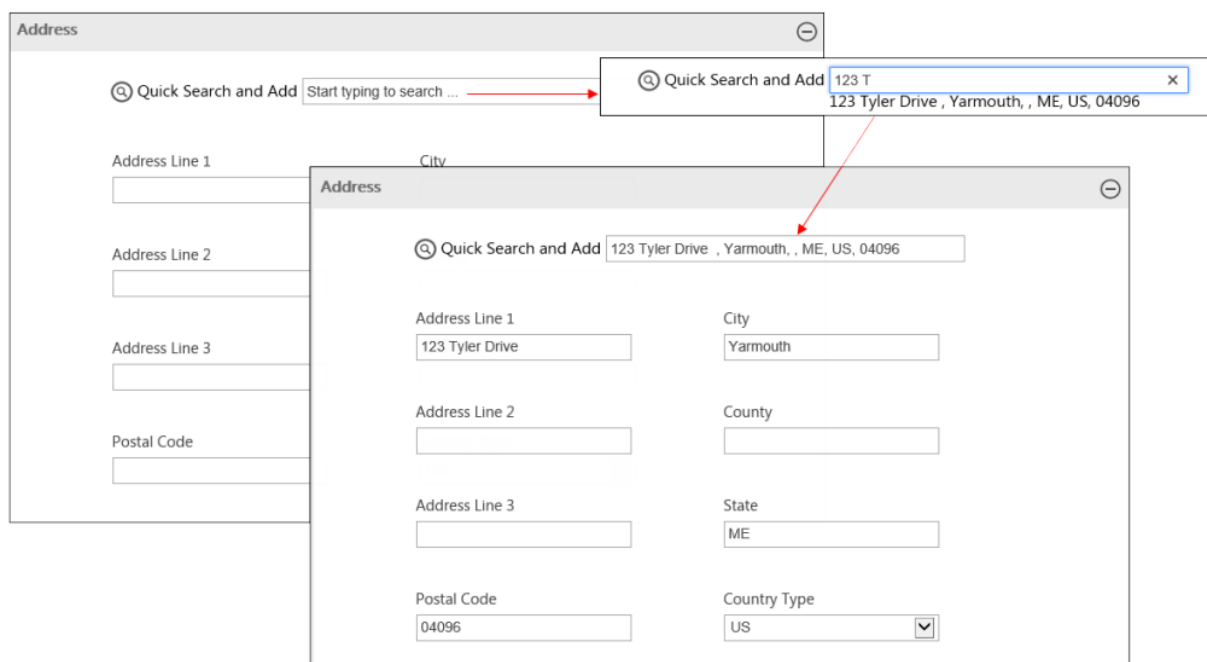
If you clear the *Active* check box for a location, it remains available to existing activity records, but you cannot assign the location to new activities or classes.

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

Address

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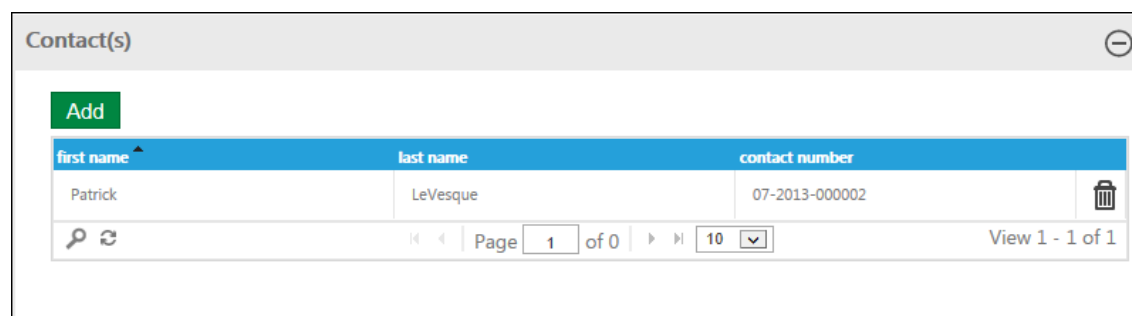

For example, when you type "123 T" in the Quick Search and Add box, the program provides available options matching the data. Select the correct option and the program completes the individual data fields.

Contacts

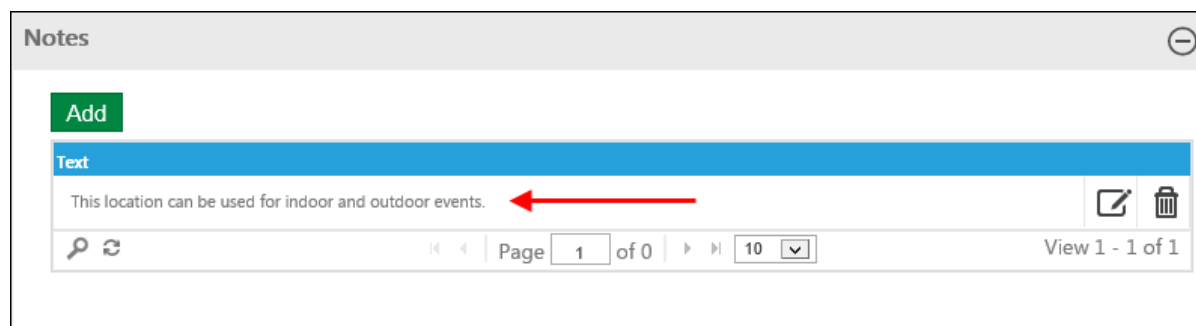The Contacts option provides the name of the individual or individuals responsible for the location:

Notes

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

Hours

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

Day of the week	IsActive	Start time	End time
Sunday	☐	12:00 AM	12:00 AM
Monday	☐	12:00 AM	12:00 AM
Tuesday	☐	12:00 AM	12:00 AM
Wednesday	☐	12:00 AM	12:00 AM
Thursday	☐	12:00 AM	12:00 AM
Friday	☐	12:00 AM	12:00 AM
Saturday	☑	8:00 AM	4:00 PM

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

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

Transaction

Transaction Search

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

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

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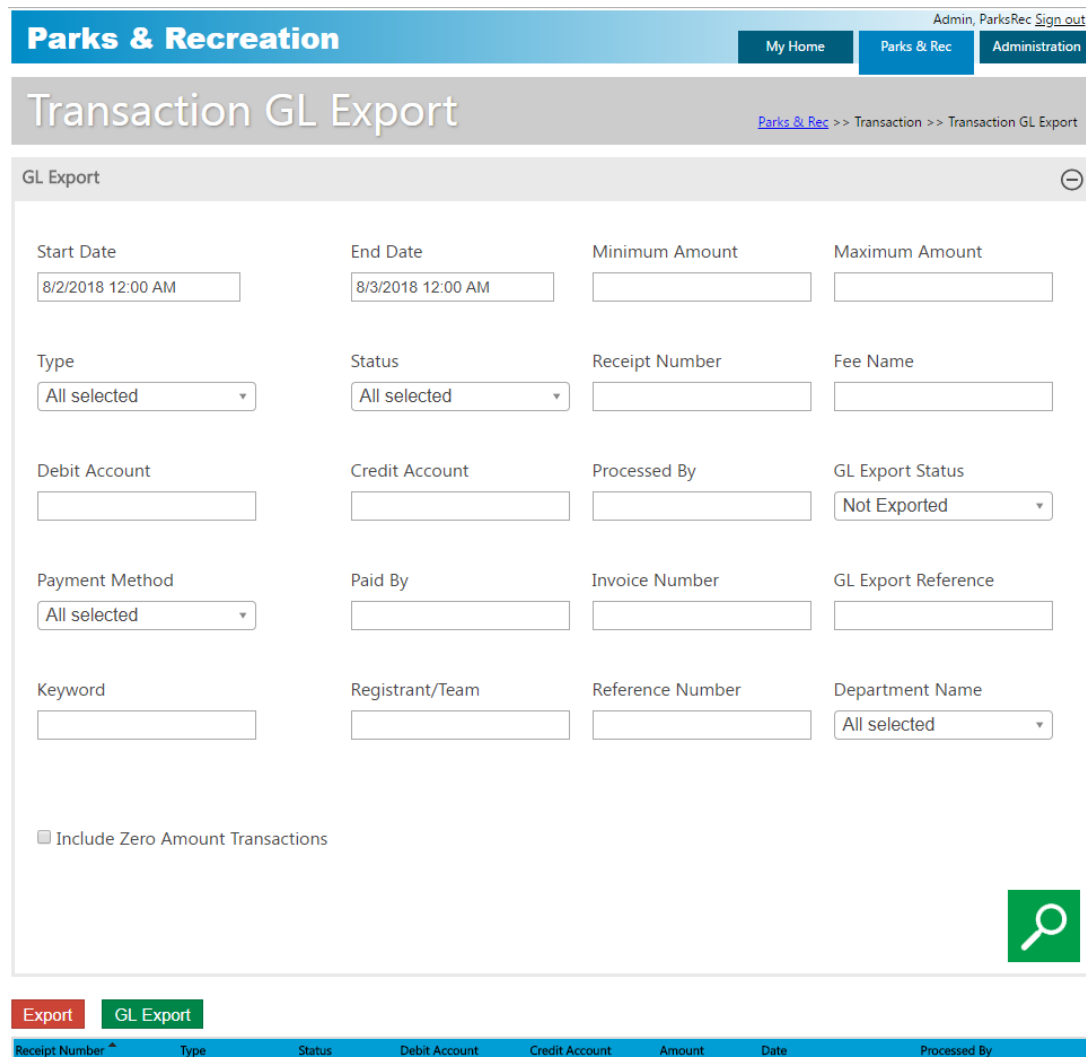
Once you have defined a record set, click **Export** to export the records directly to Microsoft Excel.

GL Export

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

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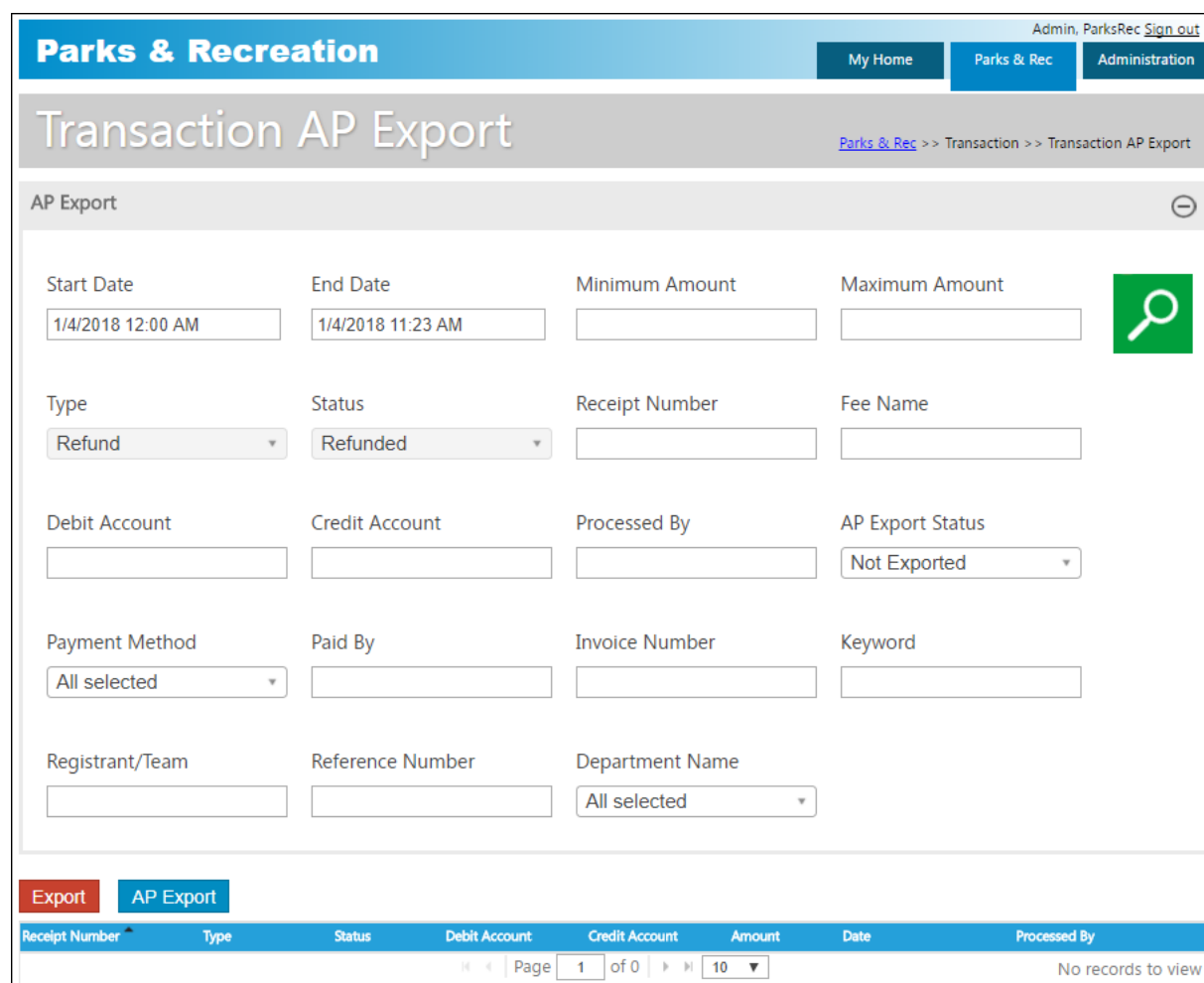
To include $0.00 receipts in the GL export, select the *Include Zero Amount Transactions* check box.

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:

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.
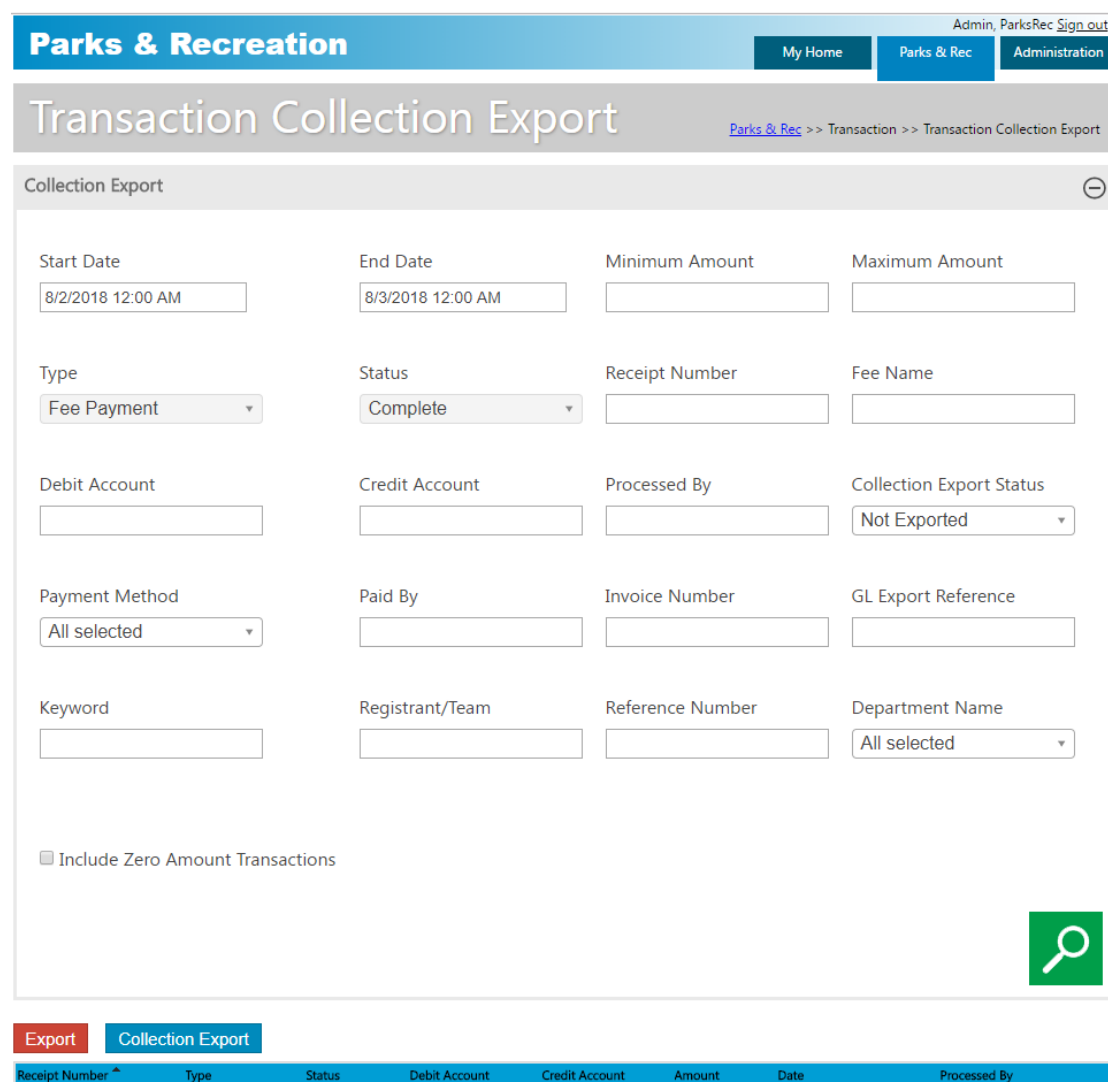
Collection Export

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:

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:
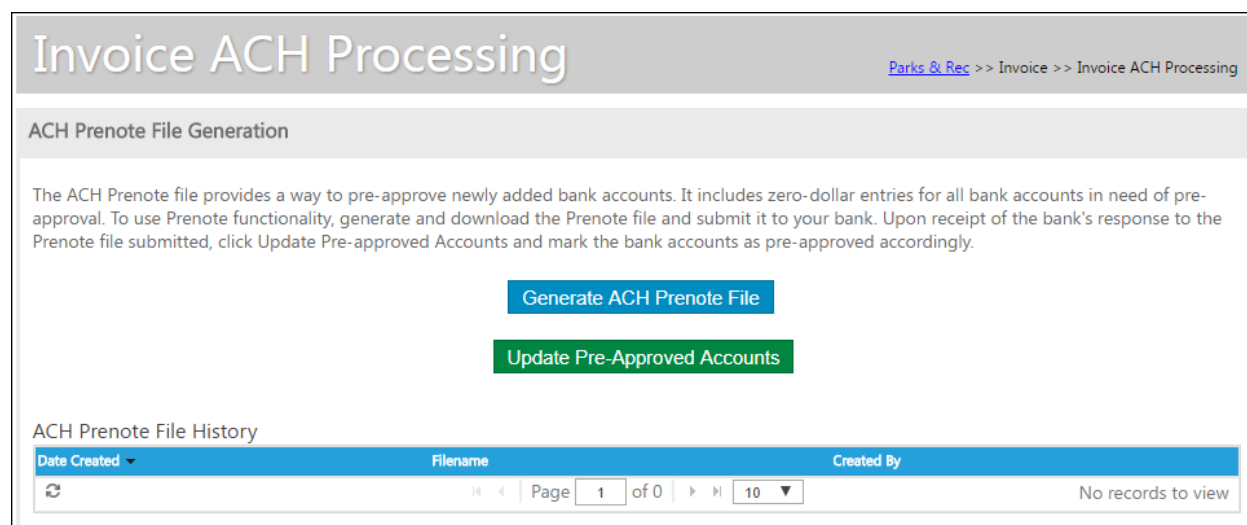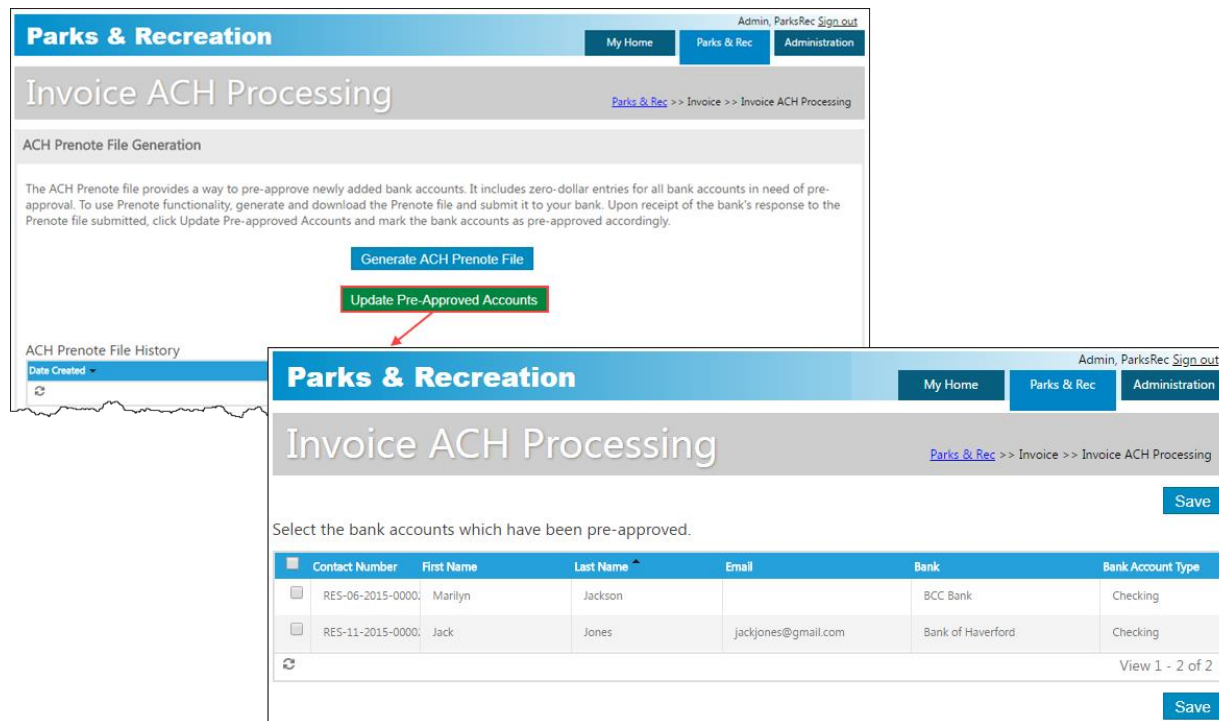

Invoice

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

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:

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

Do you want to open or save **ACH_2018-01-25_08-54-04.zip** (3.96 KB) from **localhost**?   Open   Save ▼   Cancel   ✕
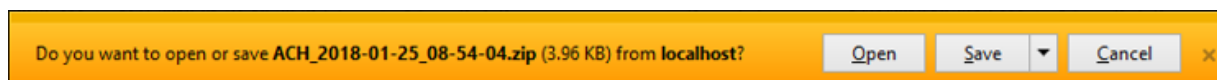
After reviewing the file, you can submit it to your organization's bank.

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

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:

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:

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:

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

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:

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:

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:

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:

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. Non-Re $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:

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

The Summary page also lists available discounts.

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

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:

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:

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:

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

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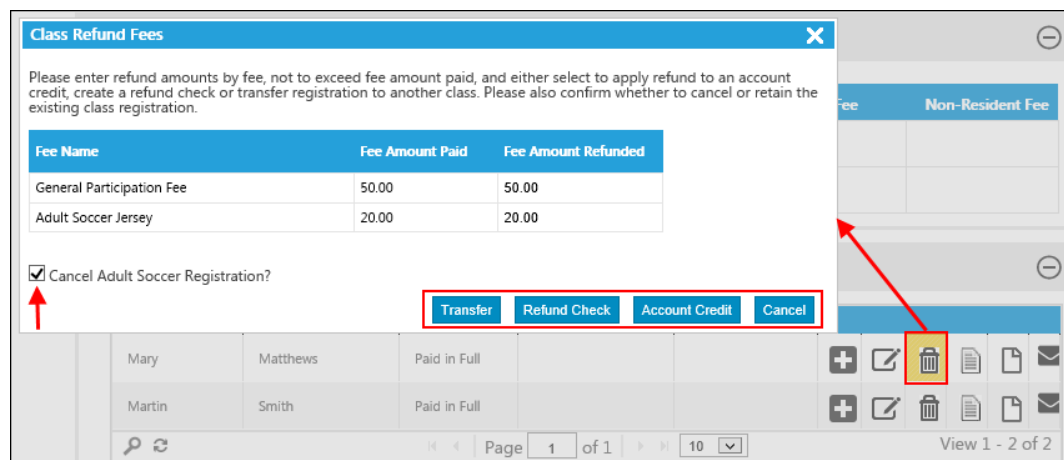
For classes set up to allow waitlists, you can move waitlist registrants to the class registration list as space becomes available. Use the Class Details page to move a contact from a waitlist to a class registration list. When you do so, the program provides the payment options.

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:

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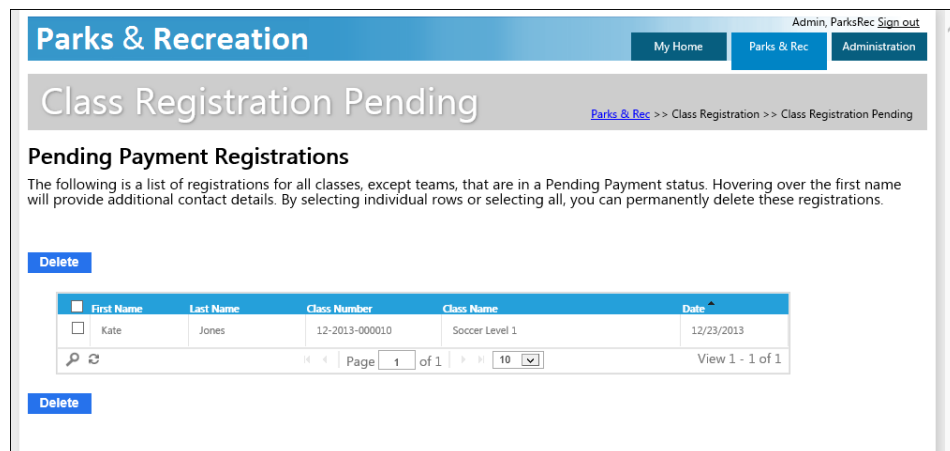
The *Cancel <Class Name> Registration?* check box directs the program to cancel the registration in addition to issuing the refund. If you clear this check box, the Class Refund Fees dialog box refreshes to remove the Transfer option. In this case, the refund is processed, but the class registration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

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

☐ Affton Community Center (ACC)	9 Facilities	VIEW	⌄
☐ Bowling Bowl	6 Facilities	VIEW	⌄
☐ Ebsworth Park	7 Facilities	VIEW	⌄
☐ Faust Park	12 Facilities	VIEW	⌄
☐ Field House	3 Facilities	VIEW	⌄
☐ Foreside 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:

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:

The Rental Reservations calendar opens:

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

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

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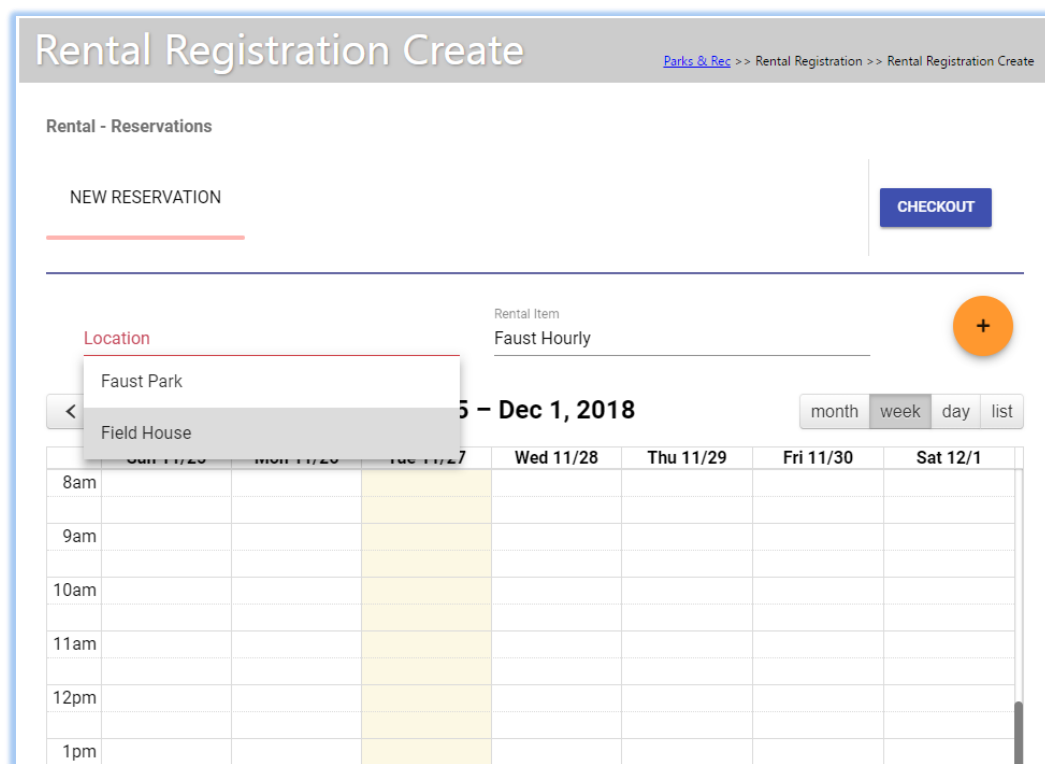
Note: The types of fields on this dialog vary according to the facility reservation type, i.e., whether it is hourly, half day or daily, and only the times that have not been reserved already display on the time drop-downs.

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

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:

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

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

Rental Details & Acknowledgements

BACK   NEXT

Affton Community Center (ACC) - Fitness Room

Fitness Room

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

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.

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

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

Available Add - Ons

Available Add - Ons

Account Credit Add On - $15.00

Quantity
1

Supplemental Data

Account Credit Add On - $15.00

Quantity
1

Supplemental Data

Add Adult Registration - $5.00

Quantity
1

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:

Add Payer

The *Add Payer* field is the last step of the rental registration create process. This step also displays the registration date:
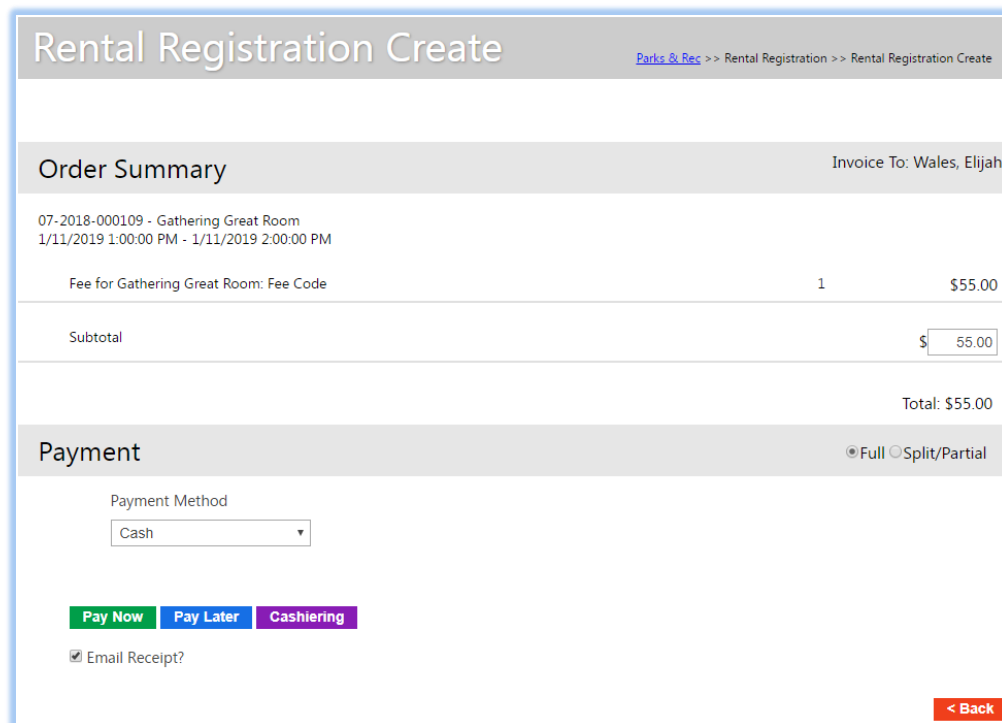
After selecting the payer, click **NEXT**. Confirm the current order, and click **Next** again.

The program displays a summary page for review and payment:

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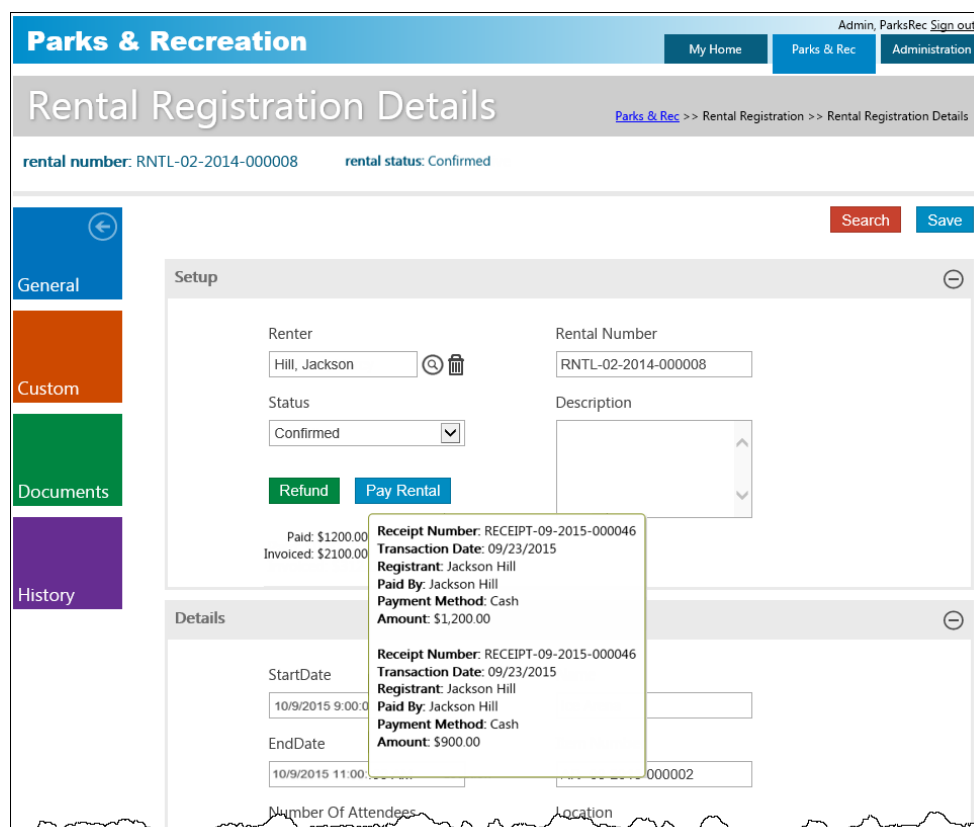
The program requires you to confirm that partial payment is being taken. The partial payment is applied to the rental, and any remaining balance is invoiced.

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):

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:

Refund options are:

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

- Transfer—Transfers the refund amount to a new registration. This option is not available when the *Cancel Rental* check box is not selected.

- Refund Check—Submits the refund to check processing.

- Account Credit—Stores the credit balance with the contact record to be used for a rental or class registration. This option is only available if the pay method defined for the fee includes the Account Credit option.

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

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

When you complete the refund, the *Status* field on the Rental Registration Details page resets to Refunded and the **Refund** button is no longer available:
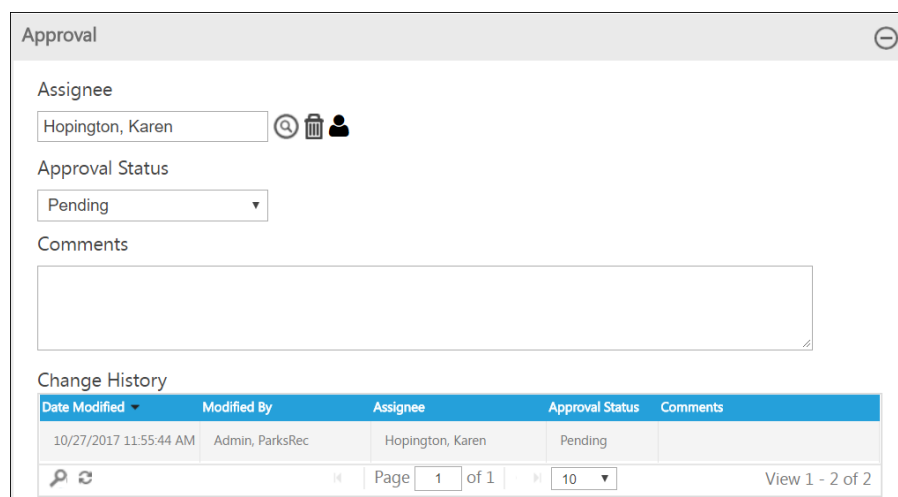
The Approvals section of the Rental Registration Details page allows you to manage the approval process for rentals of facilities or items that require an approval. An authorized administrator can assign the approval process to the appropriate staff member, who can approve or reject the reservation using the *Approval Status* field:

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**:

When you click **Pay Rental**, the program displays the Summary box, from which you can select or cancel add-on items for the rental:
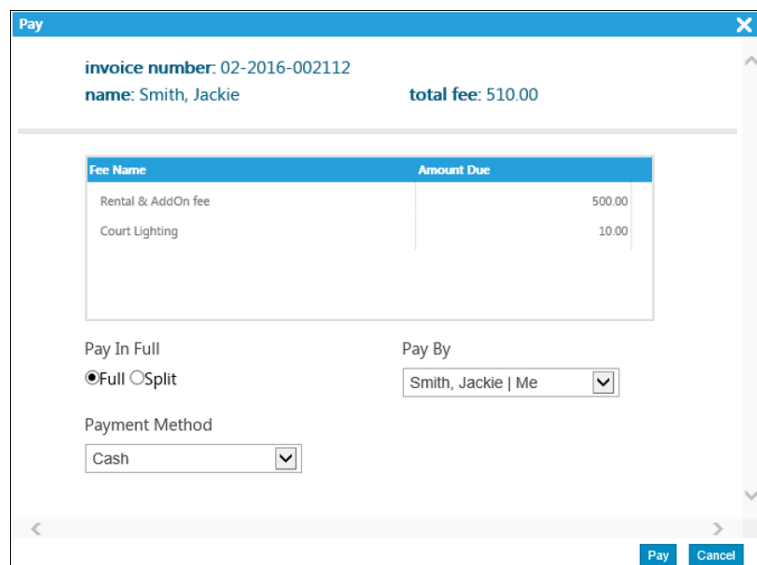
When you click **OK**, the program displays the Payment dialog box:
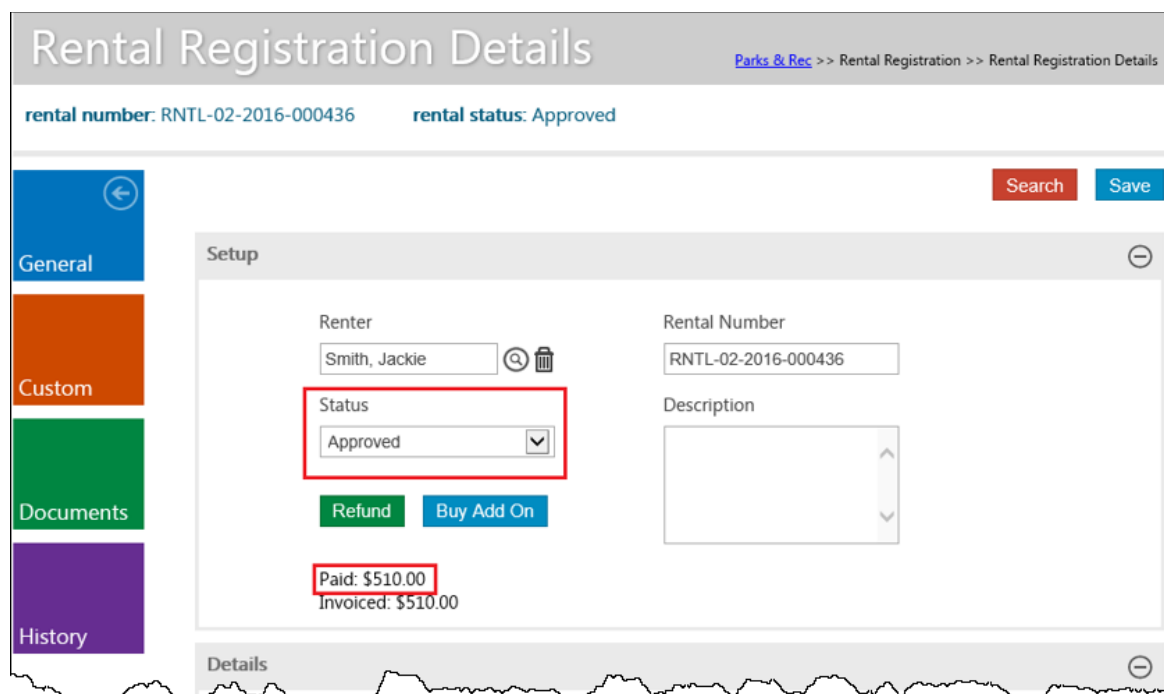
Verify the payment details and click **OK**.

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

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

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:
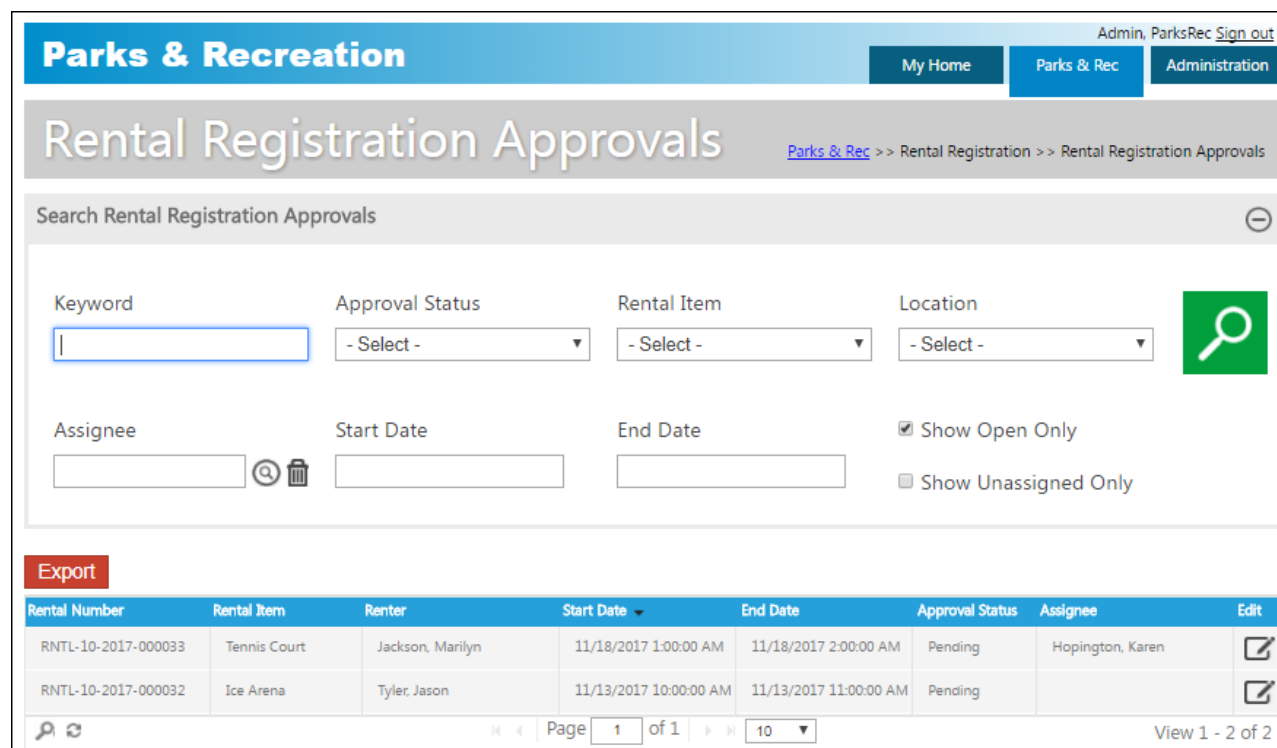
Rental Registration Approvals

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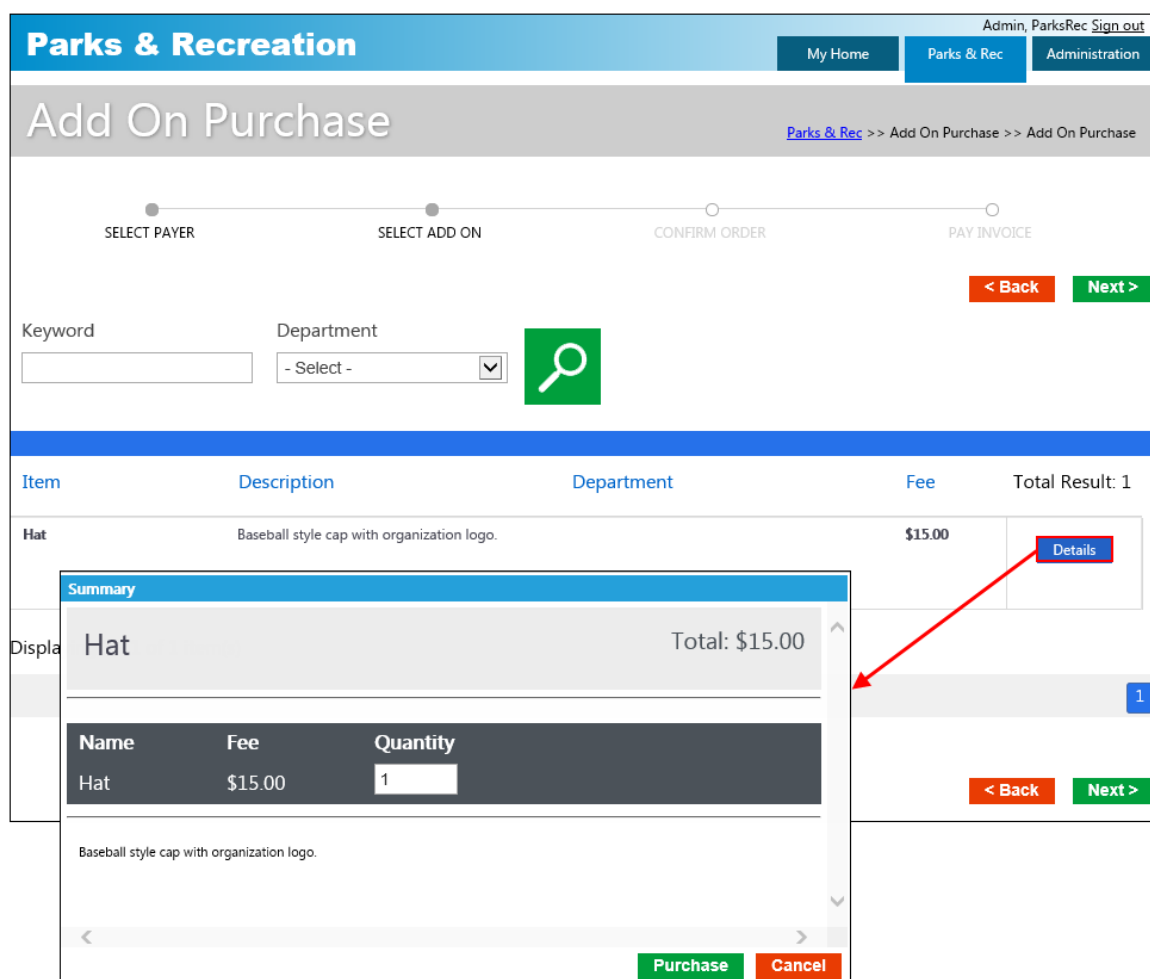
Clicking the **Edit** button for an individual rental registration opens the Rental Registration Details. The Approvals section of Rental Registration Details allows staff members to manage the approval process for the rental reservation.

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:

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:

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

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

Setup Time (minutes)

15

Take Down Time (minutes)

30

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

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

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

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

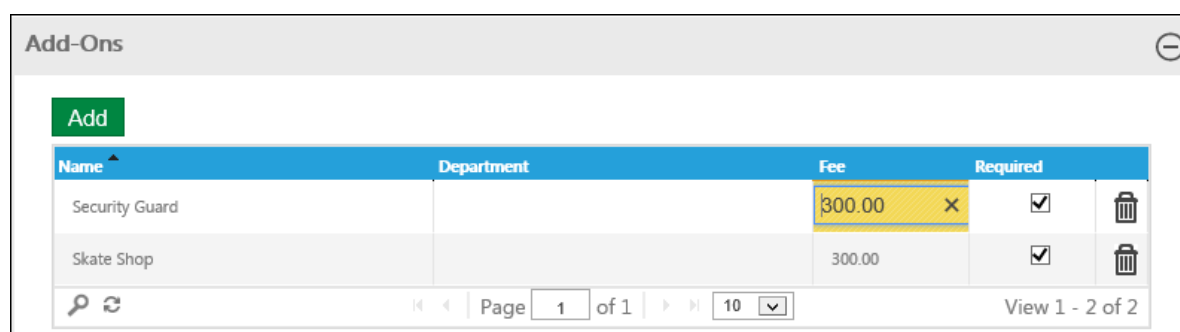| Field	Description
Require Approval	If selected, enables the approval workflow process for rental reservations for this facility or item, and requires approval on rental reservations before payment can be taken. Reservations that require approval are shown on the Rental Registration Approvals page.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

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

Add On

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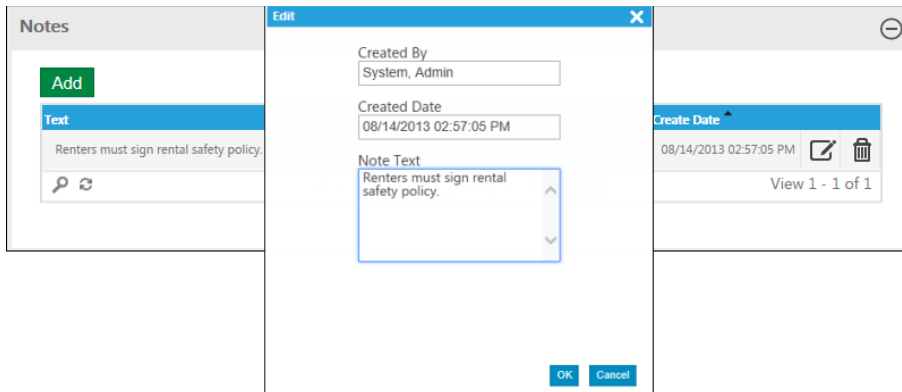

To make an add-on required, select the *Required* check box for the add-on item. In this case, the Required box on the Details page of the portal displays a default value of one (1) and the user cannot change this. If an add-on item or service is not required, the value of this box is zero (0).

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

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

Notes

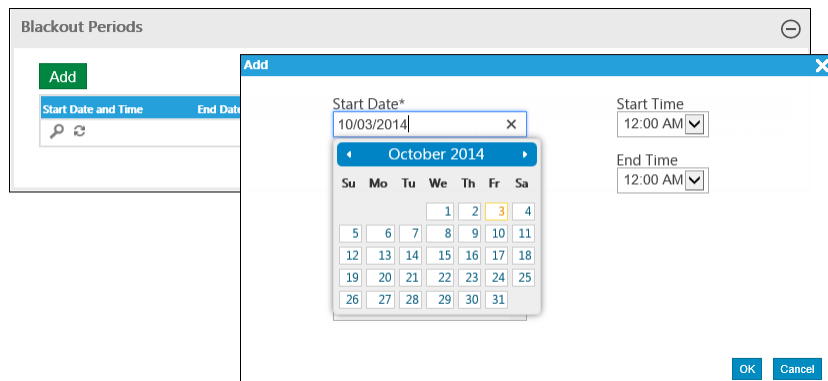Notes provides additional information for the team. Click **Add** or the edit button to create or maintain notes:

Blackout Periods

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

Hours

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

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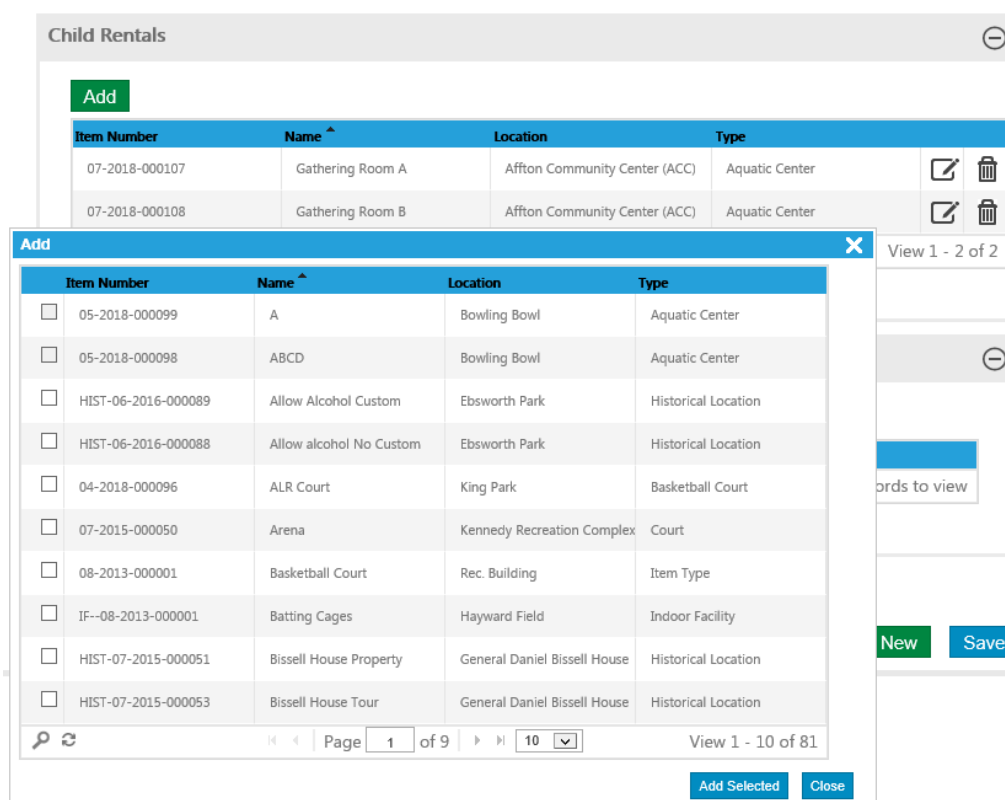
Child rentals may be added, edited and removed from the grid.

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

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:

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

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

The 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:

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

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:

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:

Reimbursement

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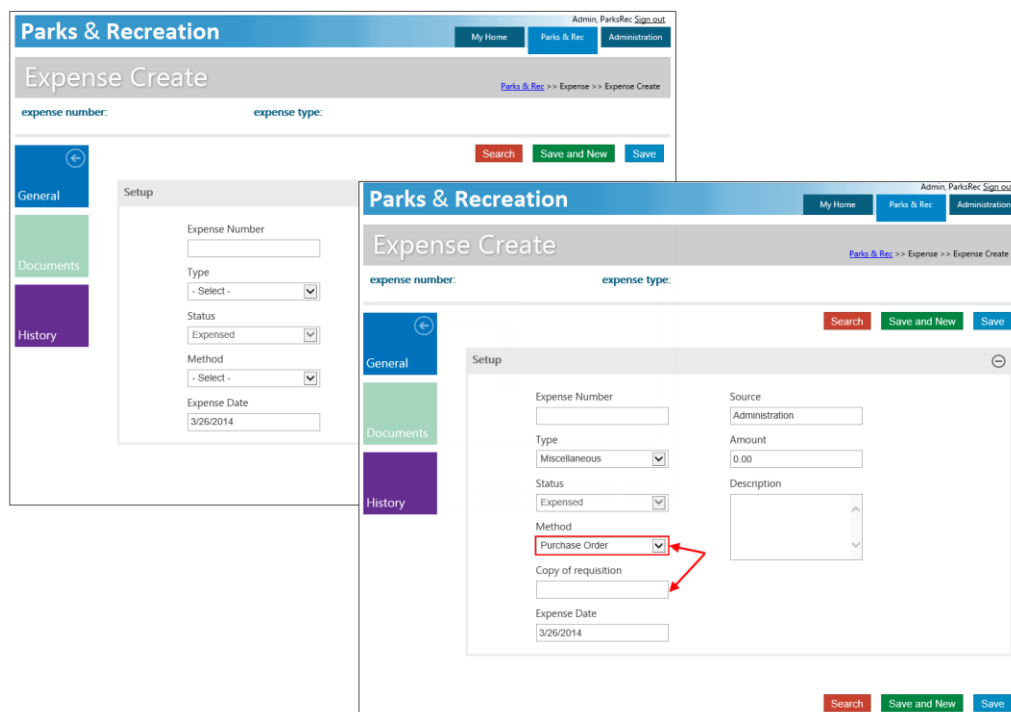
Expense

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

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

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

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:

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:

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:

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:

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:

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:

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:

Membership Members

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

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:

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

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:

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:
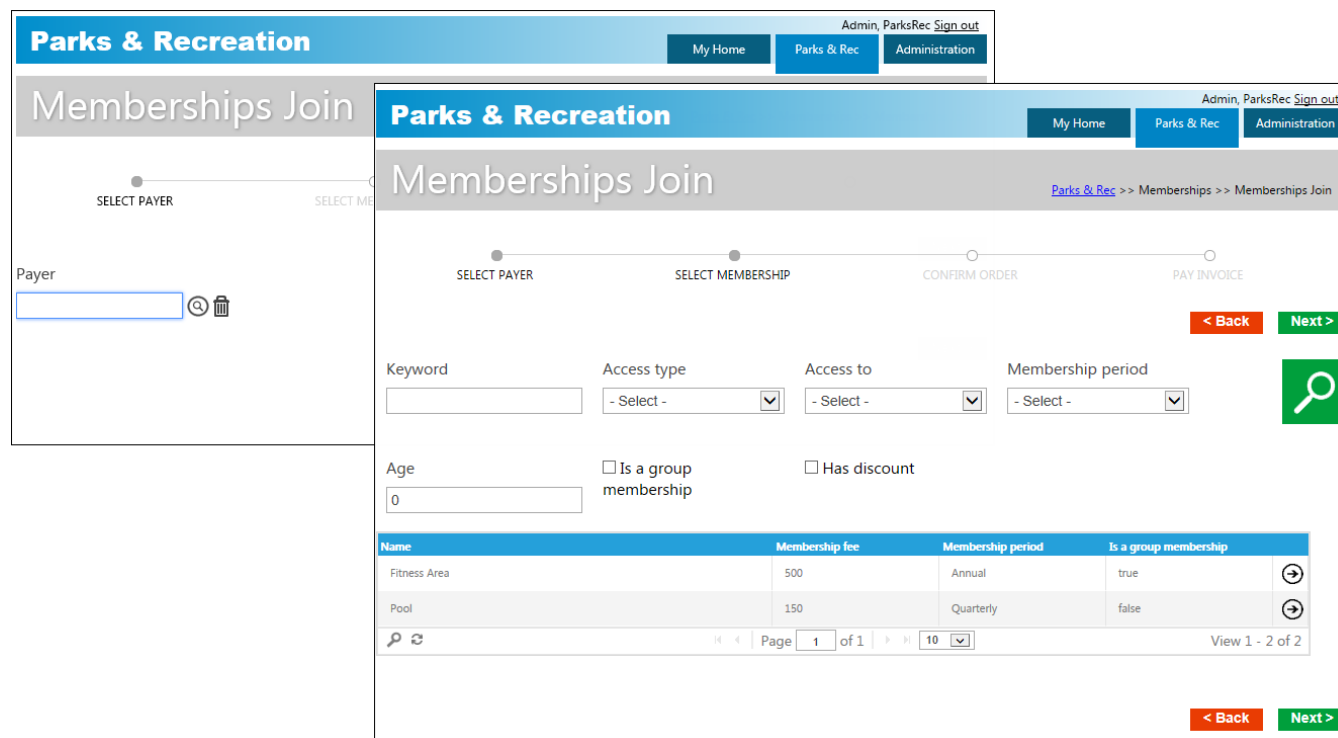
Join

Once memberships have been created, use the Join option to assign contacts to the membership:
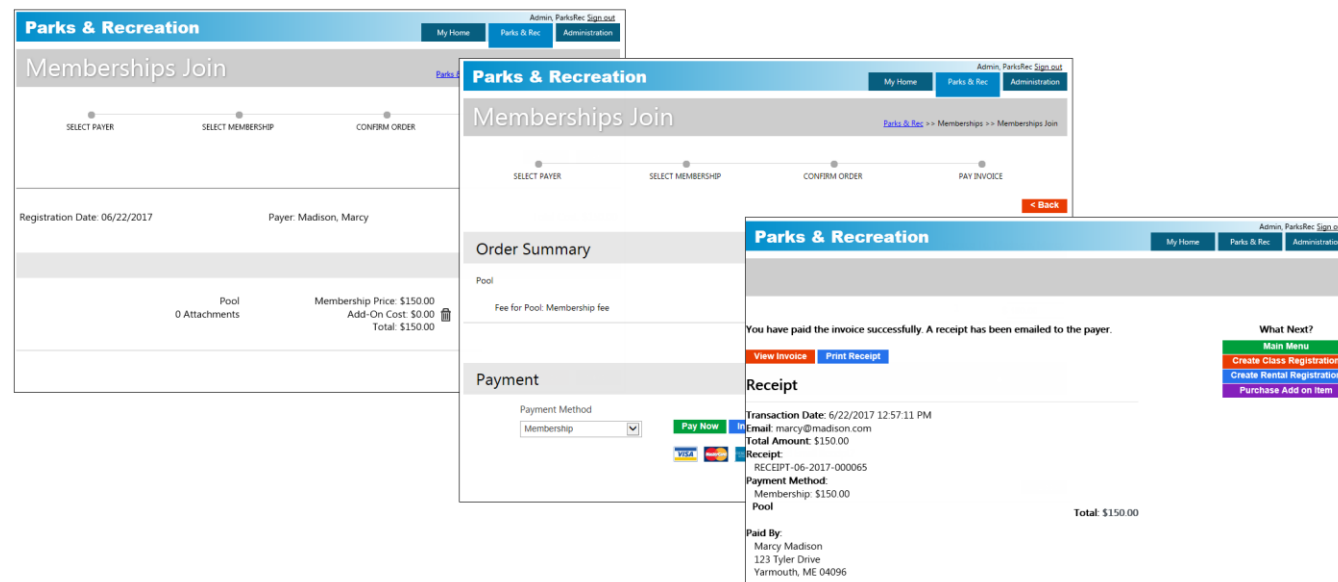
When you complete membership registrations, the Order Summary page identifies the membership type and amount, along with the options to pay now, pay later (receive an invoice) or submit the transaction to Cashiering:

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:
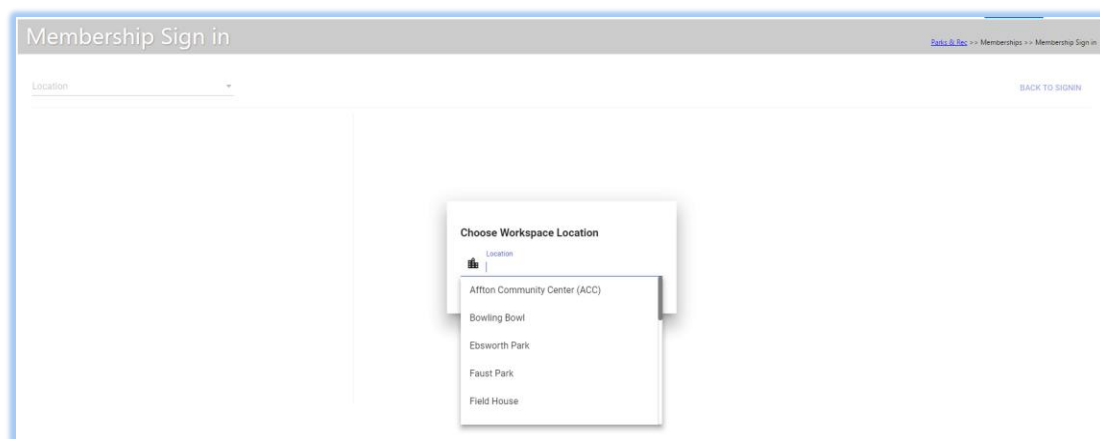
Once you have selected a location, the main Membership Sign In page displays:
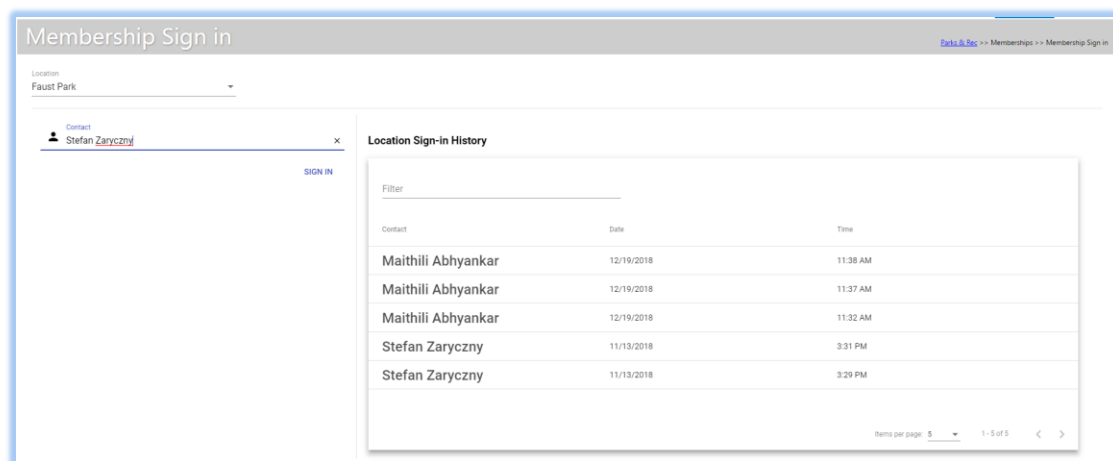
A **Location Sign-in History** displays in the right panel of the page, showing a list of the contacts who have signed in, along with the dates and times of sign-in.

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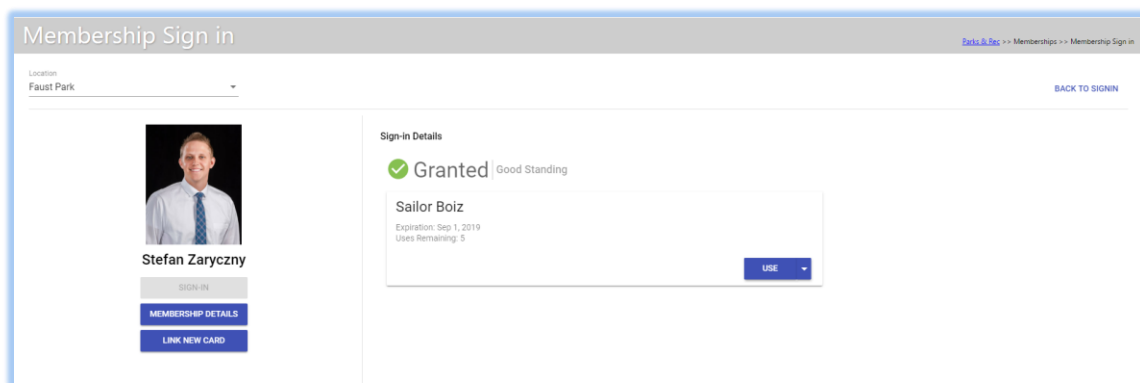
The **Sign-in Details** show the membership providing access to the location, the membership expiration date and the number of uses remaining. If the contact has multiple memberships, the one that expires first is shown, and usage is deducted from that one.

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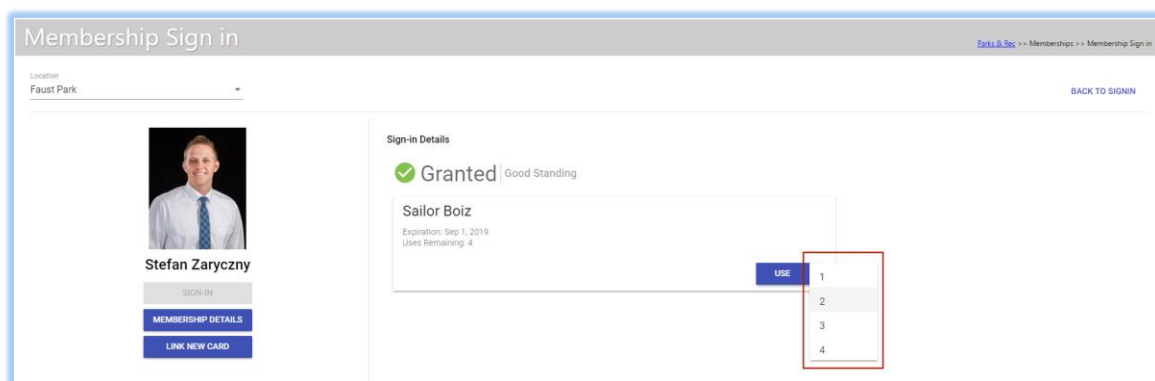
The number you select appears in parentheses on the **USE** button:

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:

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:

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:
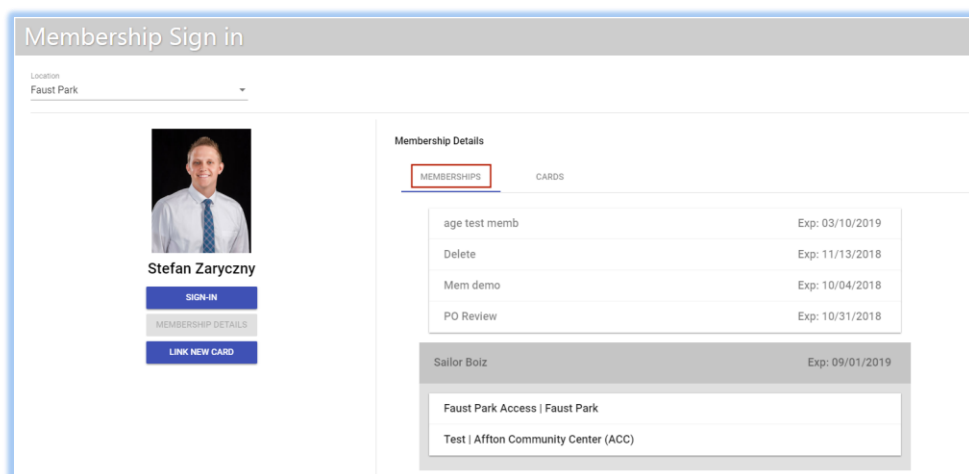
Privileges and locations also appear on individual cards. To view the expiration date, uses remaining, logged uses and the last logged use of a privilege, click the corresponding card to expand it:
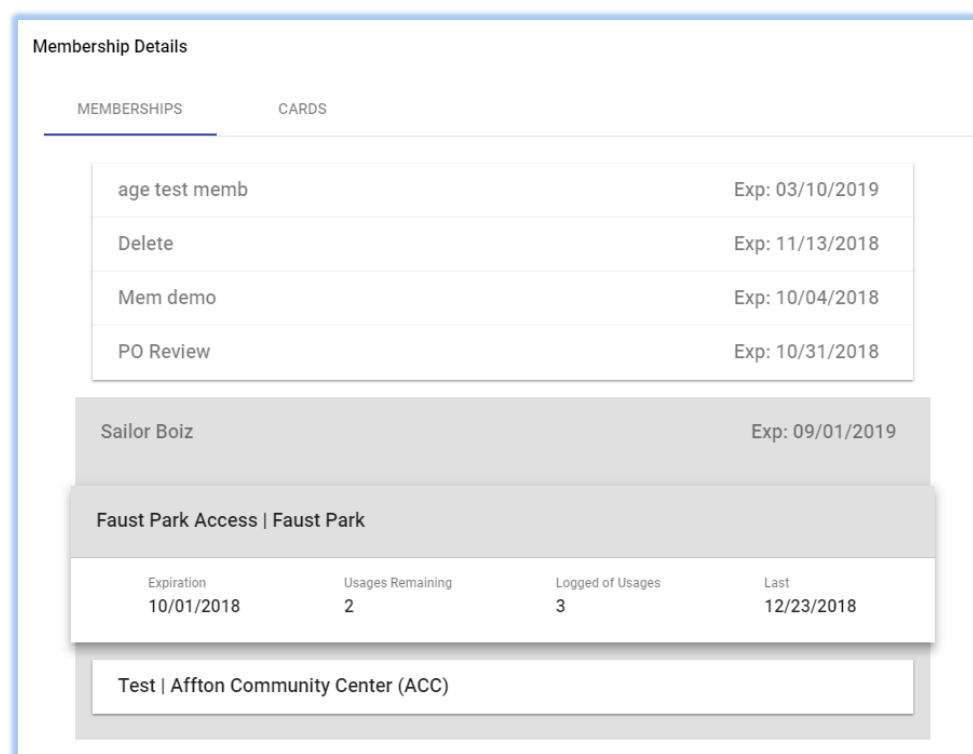
Membership card numbers and their issued dates display on the **Cards** tab:

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:

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

123456789

44566

555555

444444

Link Card

Card Number
778899

Scan for easy enter!

CANCEL   LINK CARD

PRINT A CARD   LINK NEW CARD

Administration

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

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

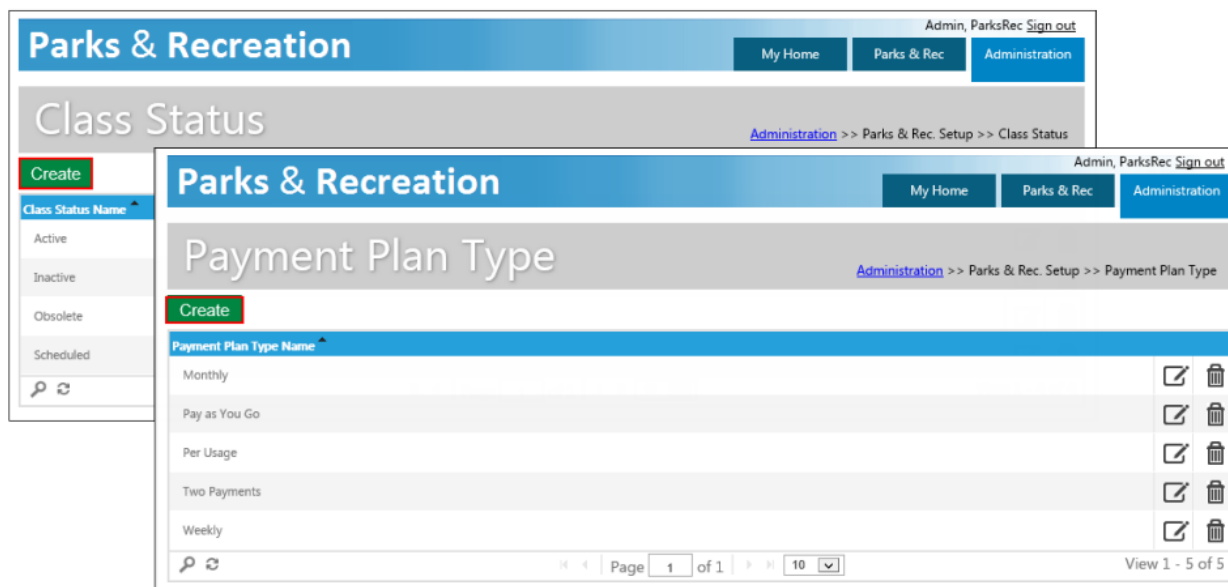| Category	Description
Payment Method	Defines the accepted payment methods.
GL Account	Maintains general ledger account details for recreation programs.
Adjust Reason	Specifies the reason an item is adjusted. The reason cannot contain more than 20 characters of text.
Delete Reason	Identifies the reason 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 **Rights** tab provides the permissions available to assign roles.
User	Maintains records for individual users, who are assigned to established user roles.
User Import	Provides an import option for a comma-separated values (.csv) file containing user records.
Department	Maintains department categories for the organization.
System Settings	Maintains system, email, and report settings for the Parks and Recreation application.
Portal Settings	Maintains the settings for the citizen portal of Tyler Parks and Recreation. Settings include customized logo and background options, as well as messaging specific to your organization or current activities.
GIS Settings	Defines the URL and map details that manage the map display on the main page, including the area of interest and zoom scale settings.
Integration Settings	Specifies the type of export file created for the general ledger (GL) export option in Transaction on the **Parks & Rec** tab.
System Log	Provides a log for system activity, which can be exported directly to Microsoft Excel.

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

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:

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:
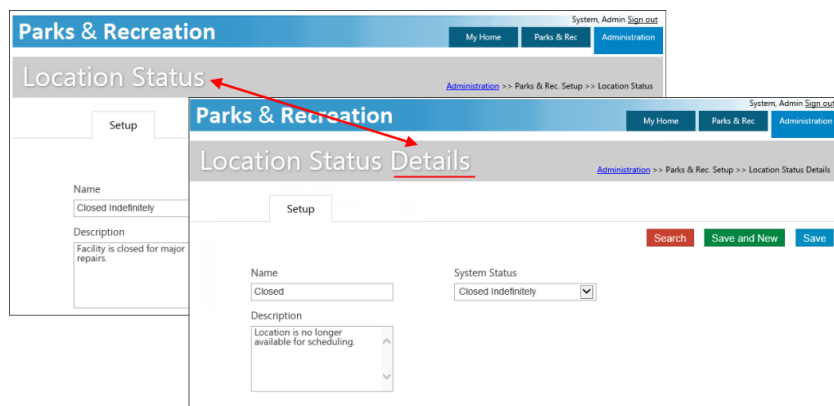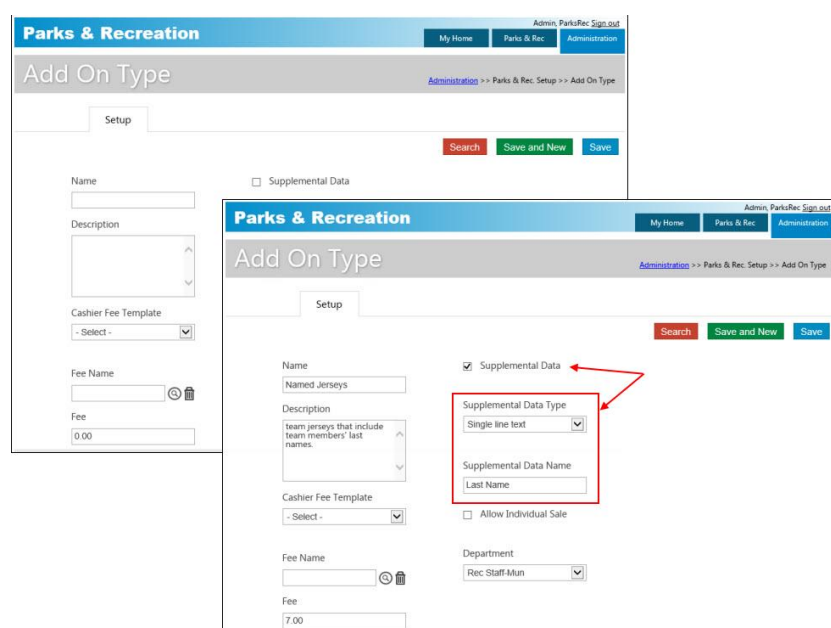

Several detail pages include the System Status list. This status is recognized by the Parks and Recreation application for processing. However, you can create user-defined variations for a status that provides additional details. For example, if the system status for an instructor is Inactive, you can 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.
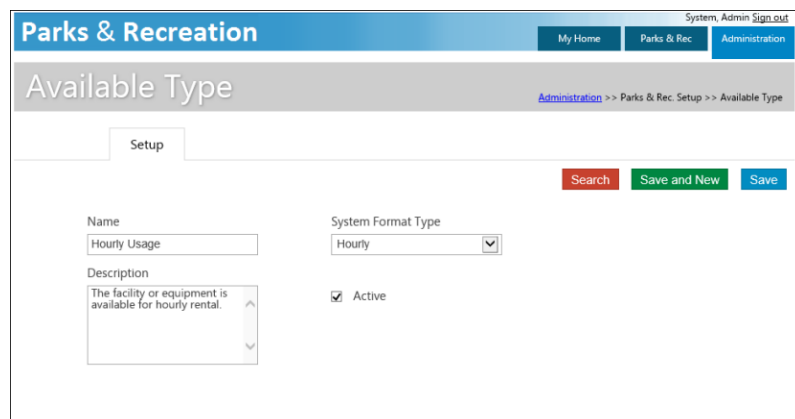
If you select the *Supplemental Data* check box, you must complete the Supplemental Data Type list and the *Supplemental Data Name* box:

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:
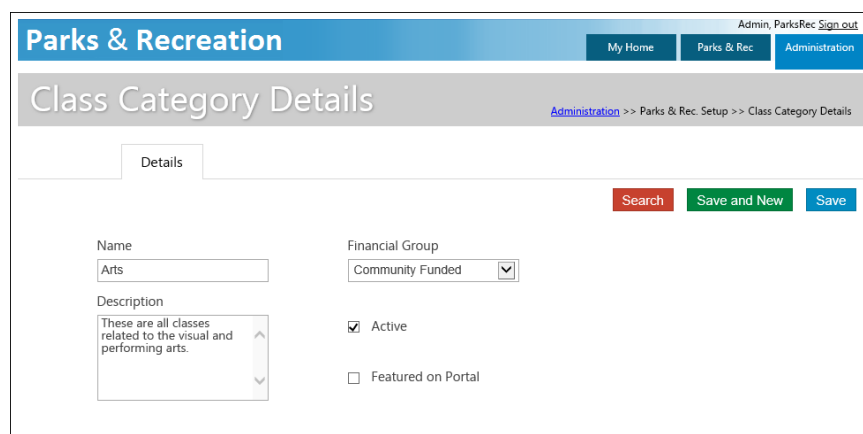
System Format Type options are not available for update.

Class Category

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

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

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

Class Group

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

Class Status

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

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 registered individually, and then assigned to a team. For Team class types, the Registrants pane on the Class Details page is replaced by the Teams pane:
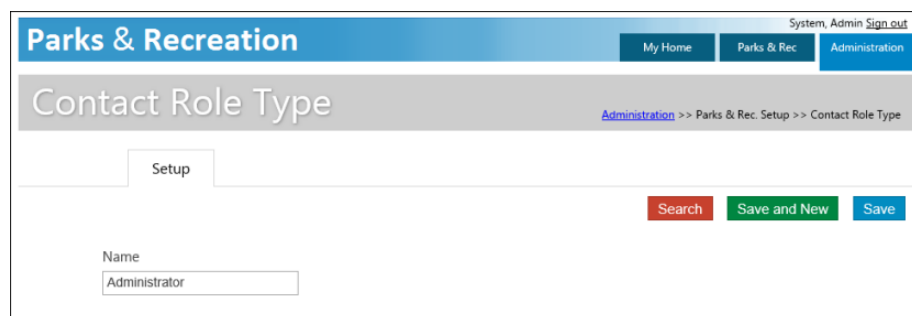

If you select a value for the Custom Field Layout list, the program assigns the custom layout to all classes to which this class type is assigned.

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

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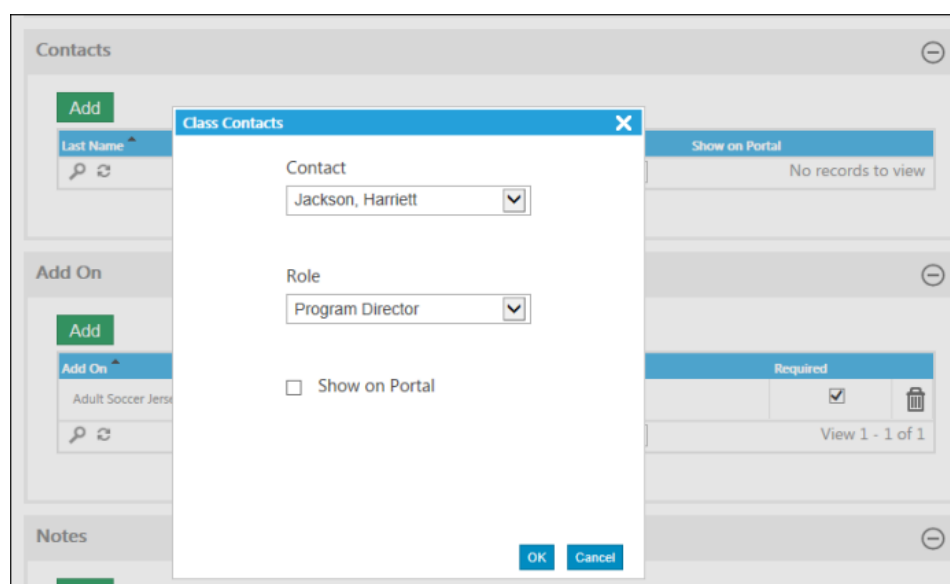
Contact Role Type

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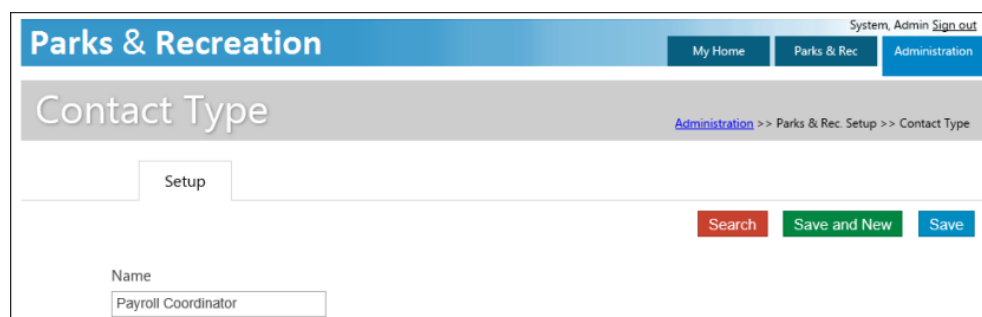

When you assign contacts to a class or activity and you click **Add**, the Class Contacts dialog box includes the Role list, where you can select the applicable role for the contact:

Contact Type

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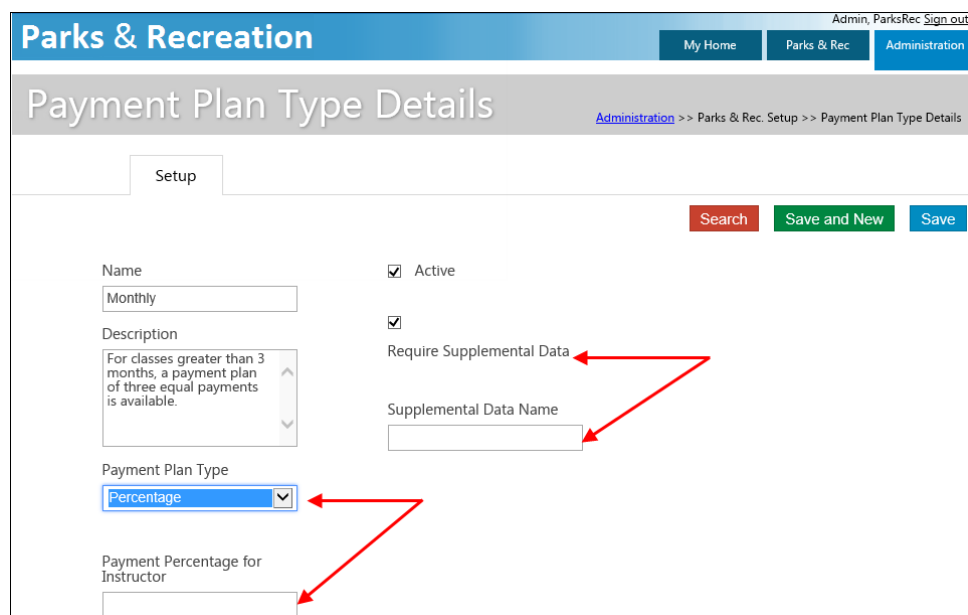
Payment Plan Type

Payment Plan Type creates user-defined payments plans that can be associated with program offerings. Available payment plan types are determined by your organization.
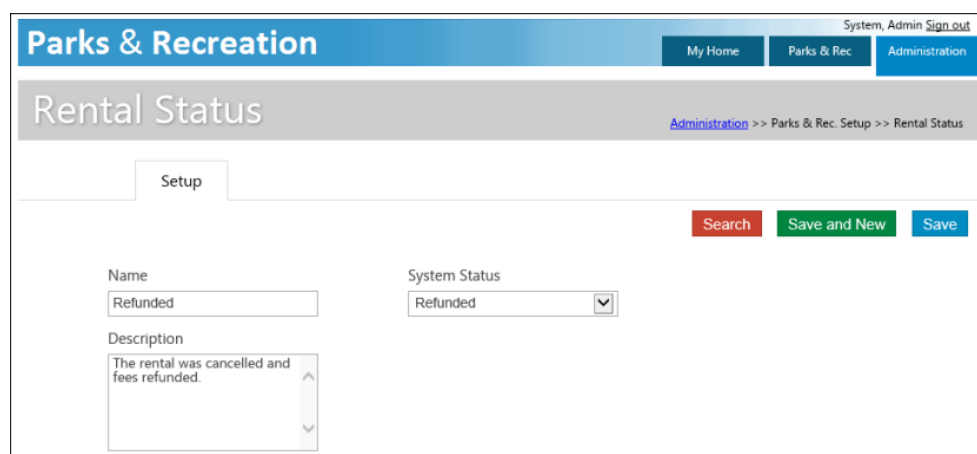
If you select the *Require Supplemental Data* check box, you must complete the Supplemental Data Name box:

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.
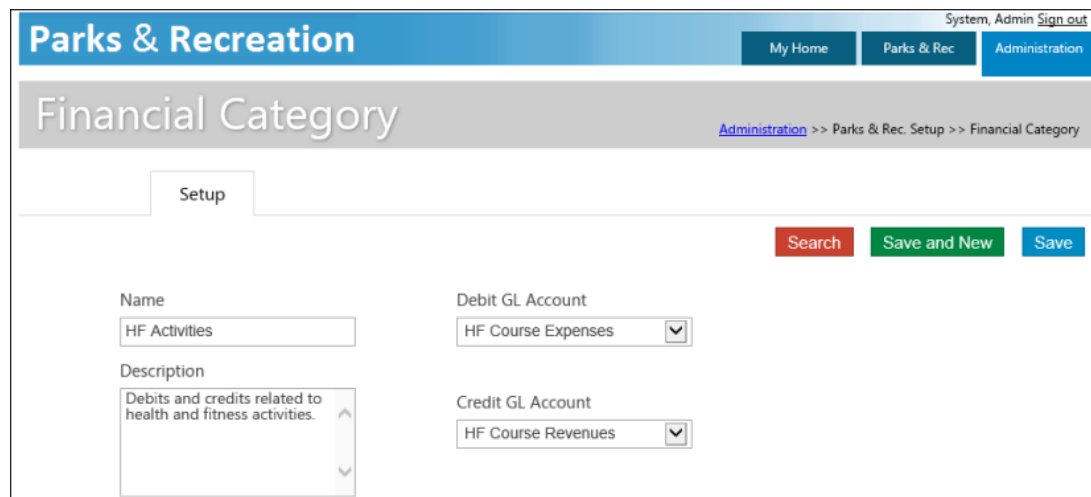
Rental Status

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:
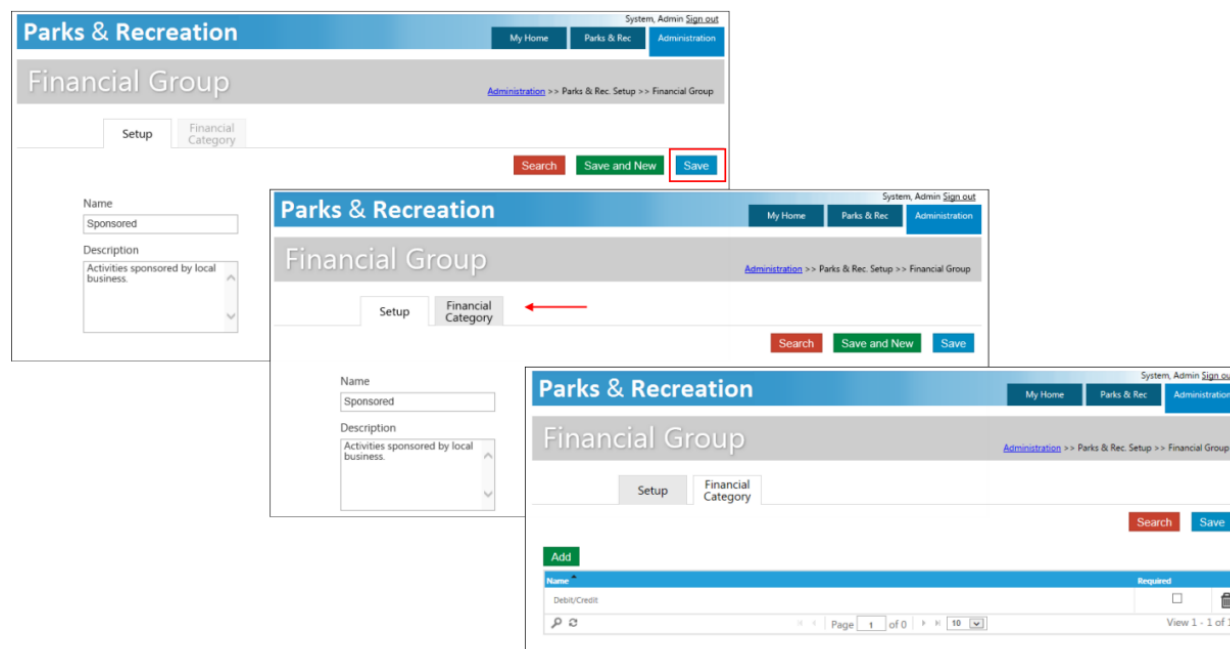

Financial Group

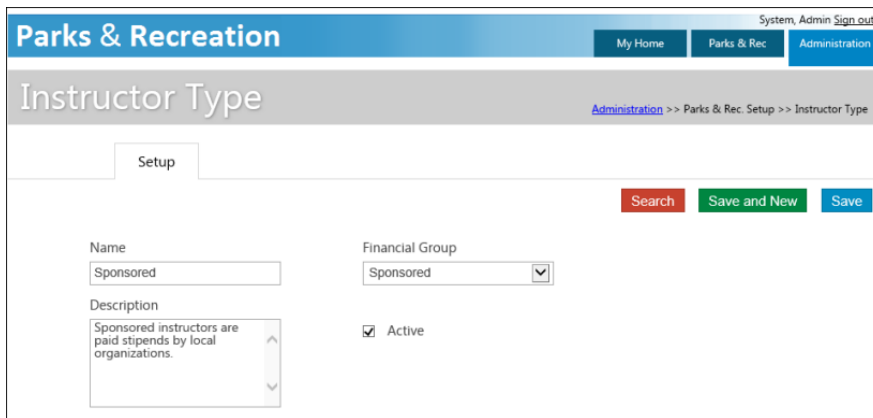Financial Group maintains groups for program-associated financing. When you create financial groups, you can assign them to specific financial categories:
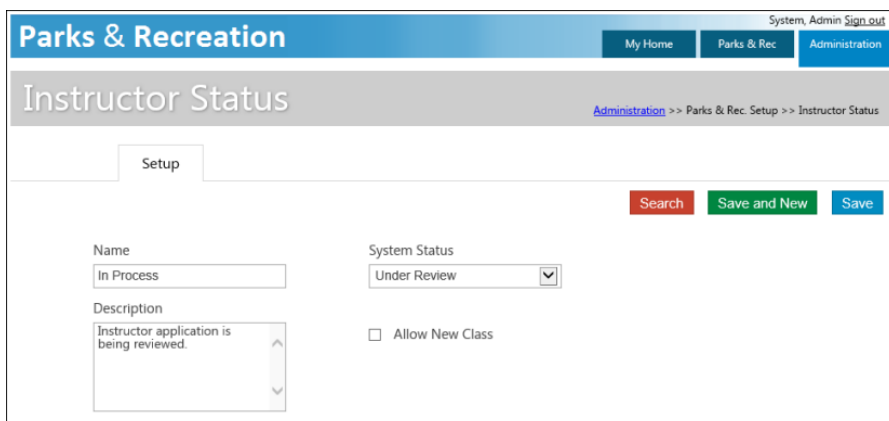
Instructor Type

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

Instructor Status

Instructor Status identifies status codes for program instructors:

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

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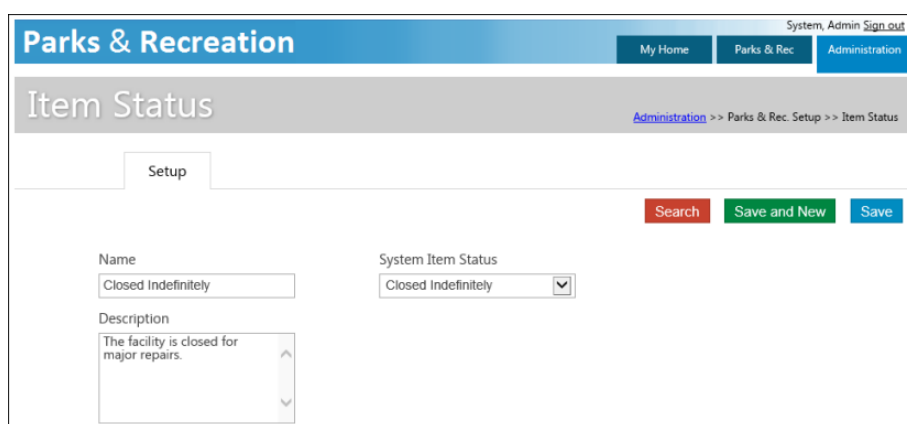
Location Status identifies the status of locations where programs are offered:

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:

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:

Disclaimer

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

Schools

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

Team Role

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

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:
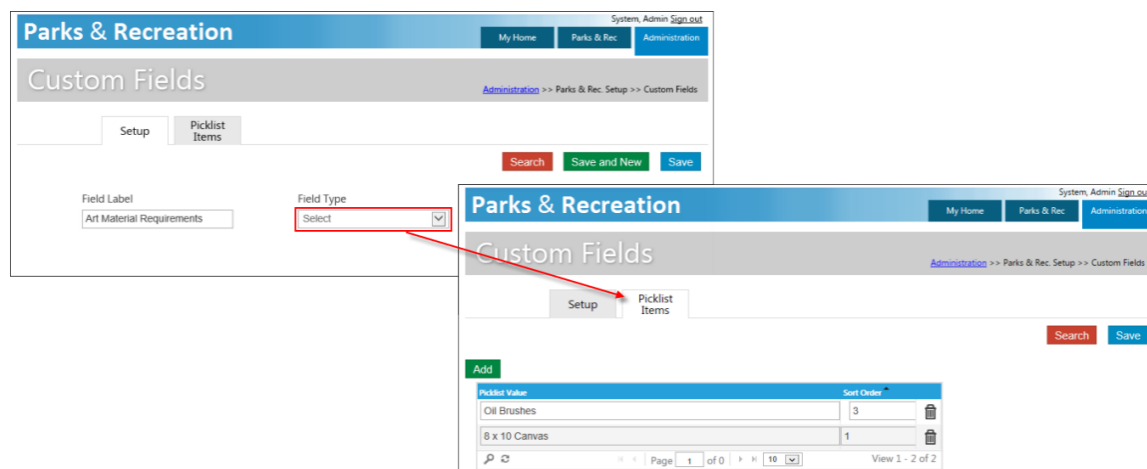
Custom Fields

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:

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:

Custom Field Layouts

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

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:
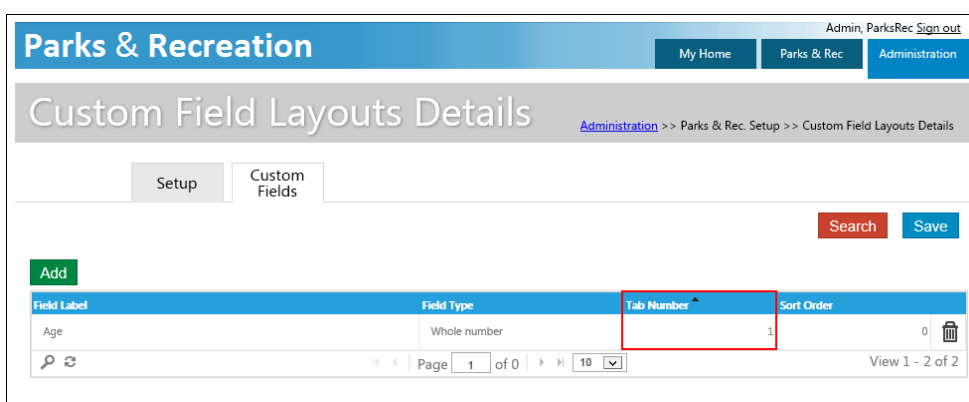
In this case, when you display the **Custom Fields** tab, the *Tab Number* field always displays Tab 1:
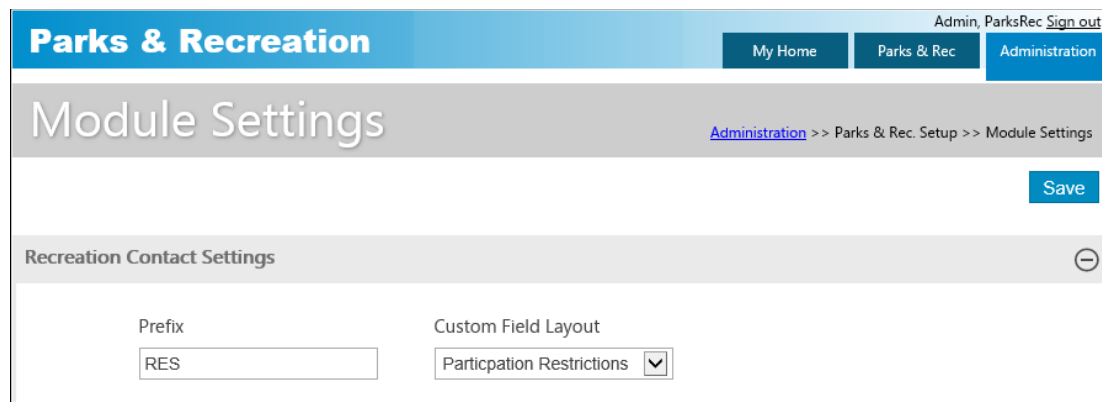
Module Settings

Module Settings defines a prefix for recreation contact numbers:
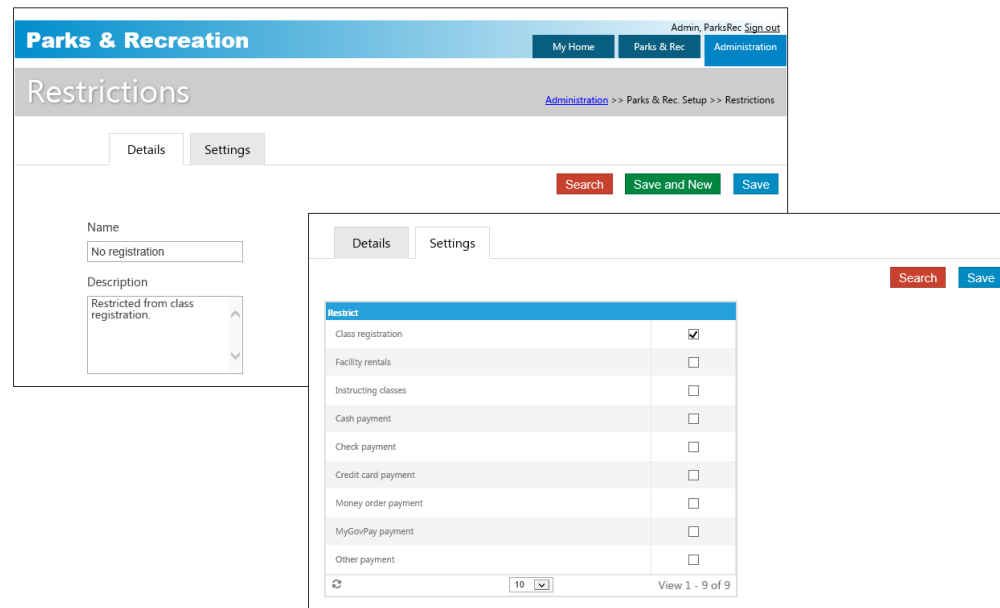
The Custom Field Layout lists affect what displays for the Custom options for Contact Details. The Recreation Contact Custom Field Layout identifies the custom fields that are displayed in the Custom option for Contact Details.

Restrictions

Restrictions manages restrictions that you can assign to contacts, preventing them from completing registrations, renting facilities, serving as instructors, and so on. You can also restrict registrants from using specific payment types:

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

Cashier Setup

The Cashier Setup pages define the accounting settings associated with activities. On these pages, you can define a fee schedule, identify expense types, and establish payment methods for your organization.

ACH Settings

ACH Settings establishes the automated clearinghouse (ACH) information needed for recurring bank draft billing and ACH payments for recurring memberships:
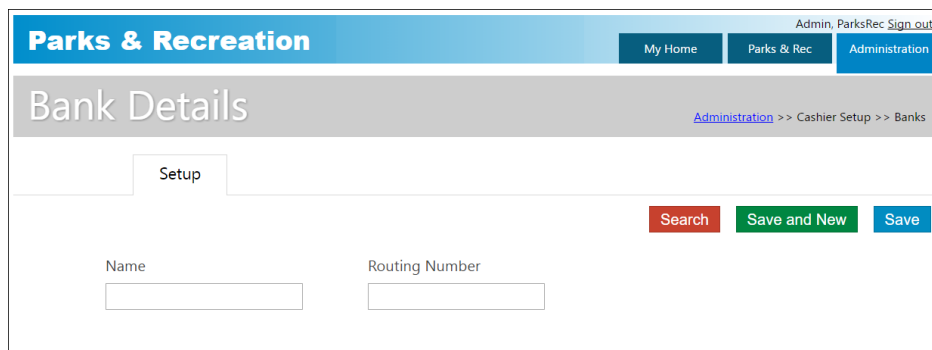
Selecting the *Require Prenote* check box enables the ACH Prenote File section of the ACH Processing page, and also makes the *Pre-Approved* check box available on the Contact Details page.

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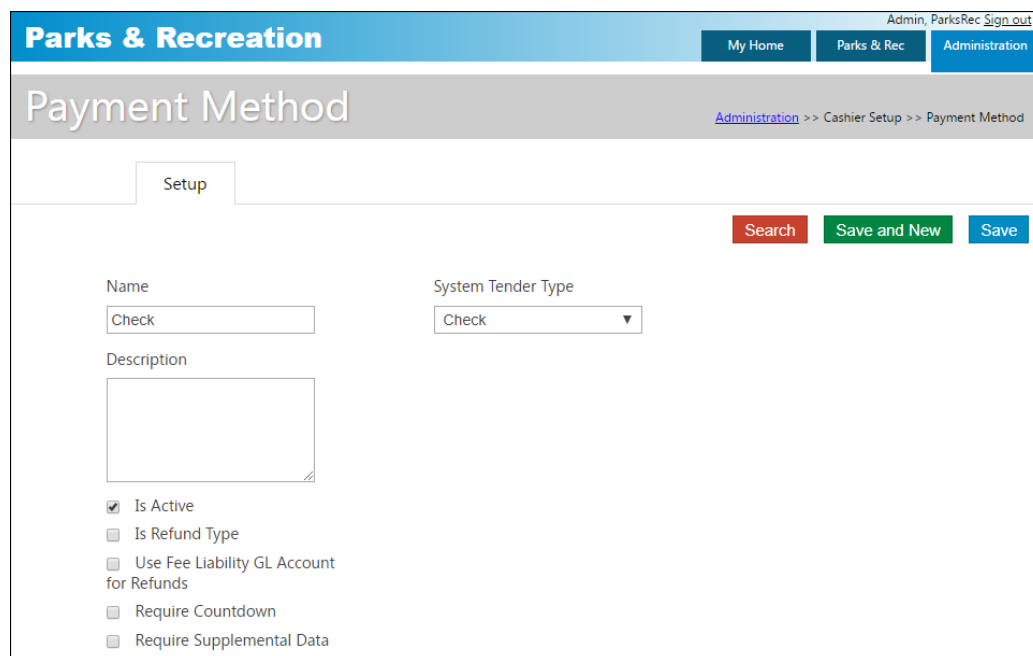
Banks establishes the names and routing numbers of the banks that are available in the Parks and Recreation application:
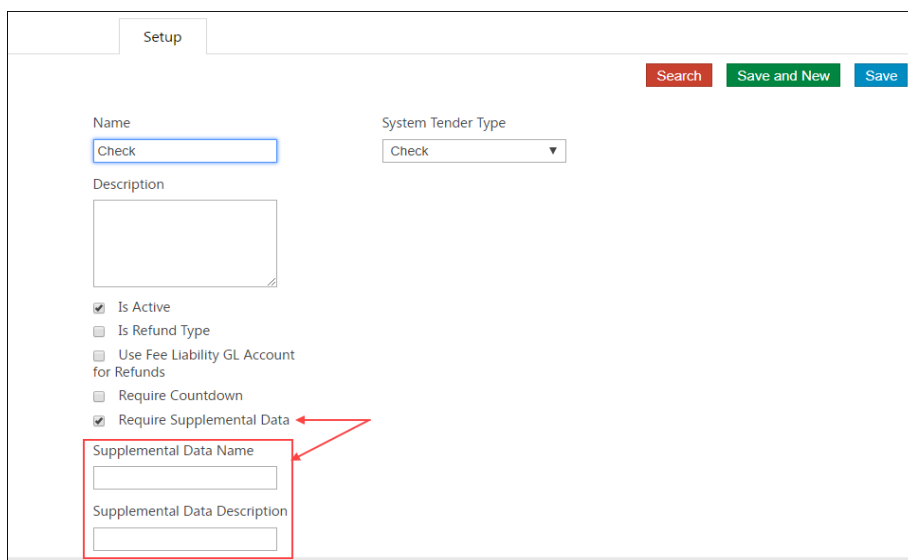
Payment Method

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

- 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:

Text entered in the *Service Fee Support* field appears whenever BridgePay is selected as the *Payment Method* on the citizen portal.

Note: The merchant collects the service fee; BridgePay facilitates that process.

In the rental registration create process, the service fee displays above the total in the Order Summary section, and additional fee information and the phone number for BridgePay Support display in the Payment section:

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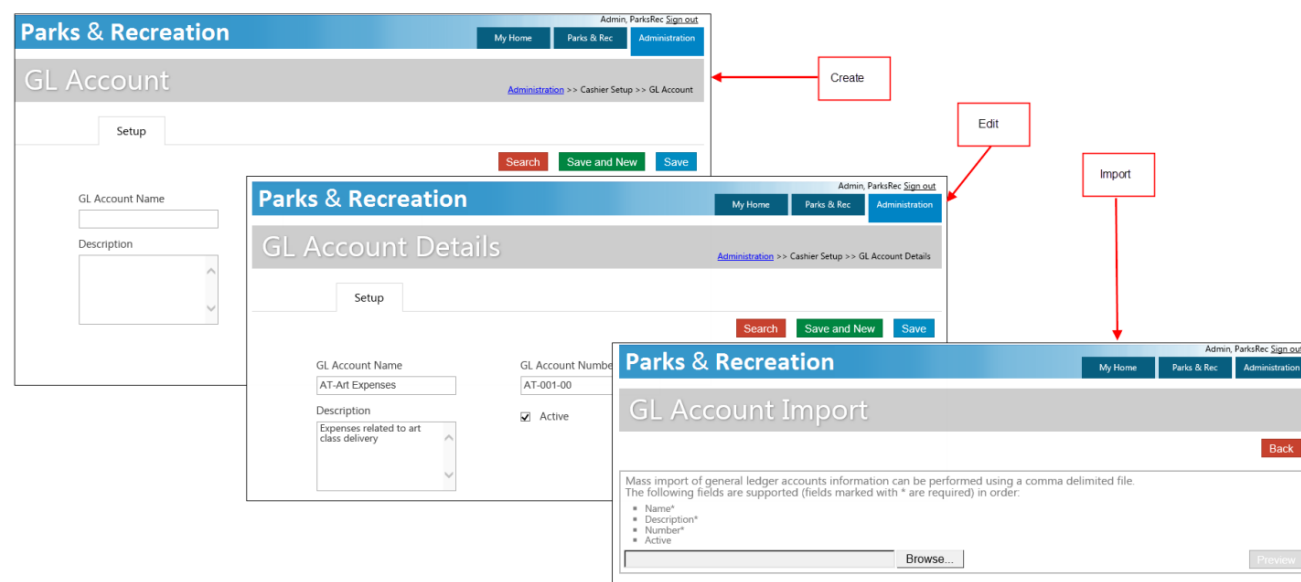
The options for the System Tender Type list are not available for update.

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:

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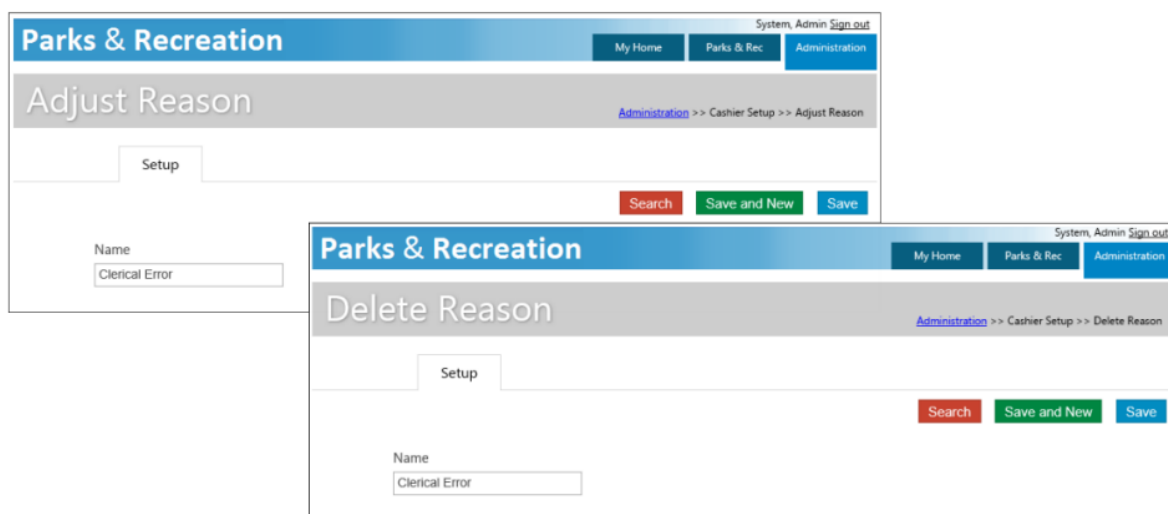
Adjust Reason/Delete Reason

The Adjust Reason and Delete Reason options establish reason codes for transactions that are adjusted or deleted:
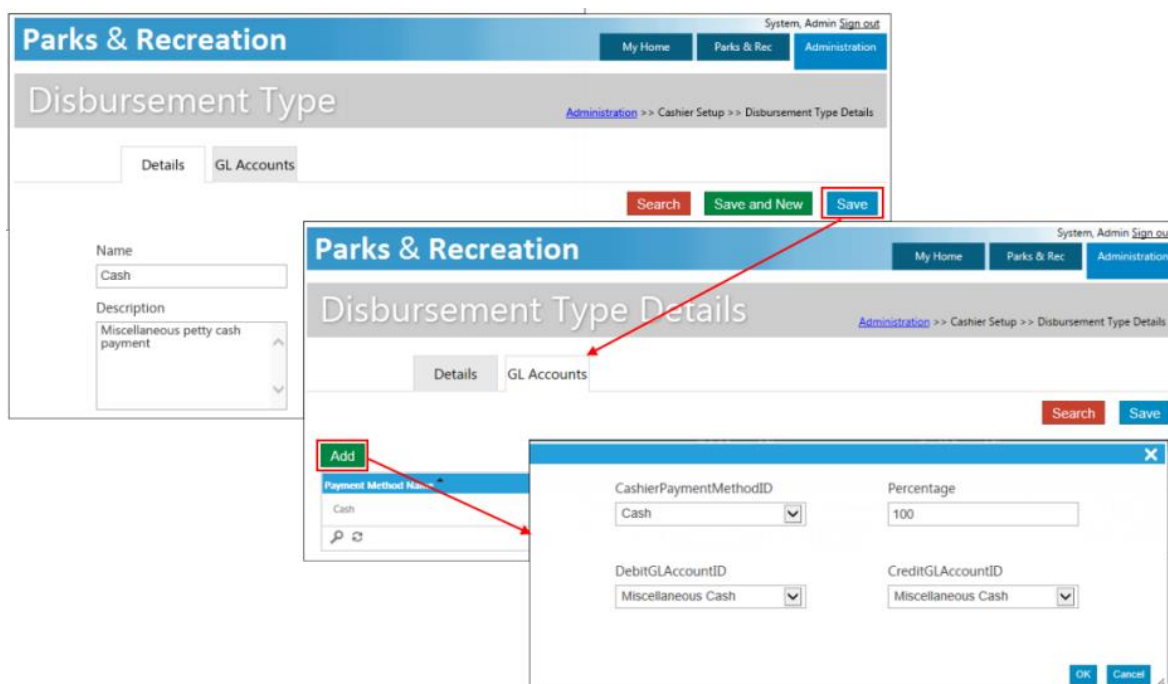
Adjust and delete reasons cannot contain more than 20 characters of text.
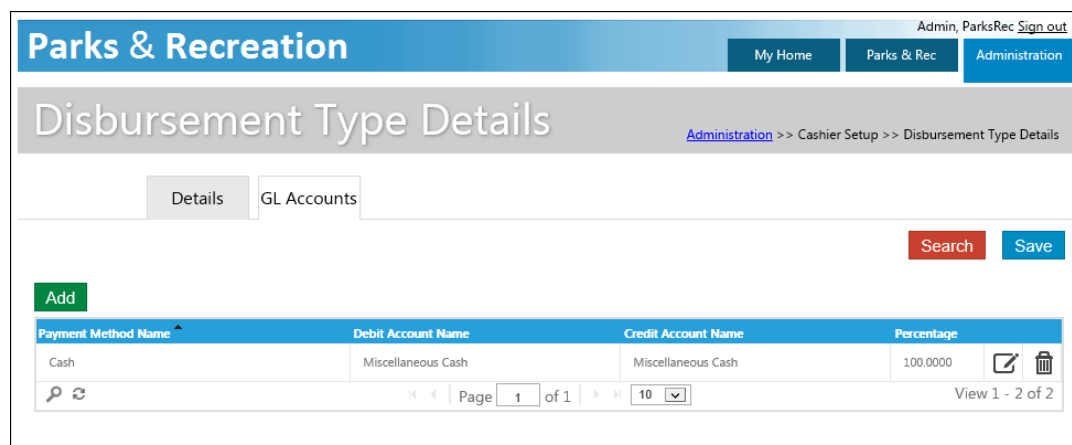
Disbursement Type

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:

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:
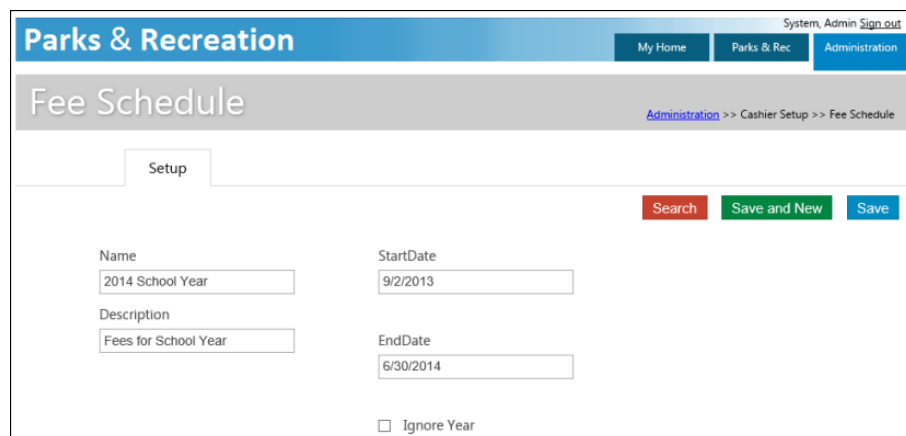
If a disbursement type is not currently in use, you can delete the record. If you attempt to delete a disbursement type that is actively being used by a Class Type Expense Disbursement, Contact Instructor Expense Disbursement, or Rental Item Expense Disbursement, the application displays an error and 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:

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:
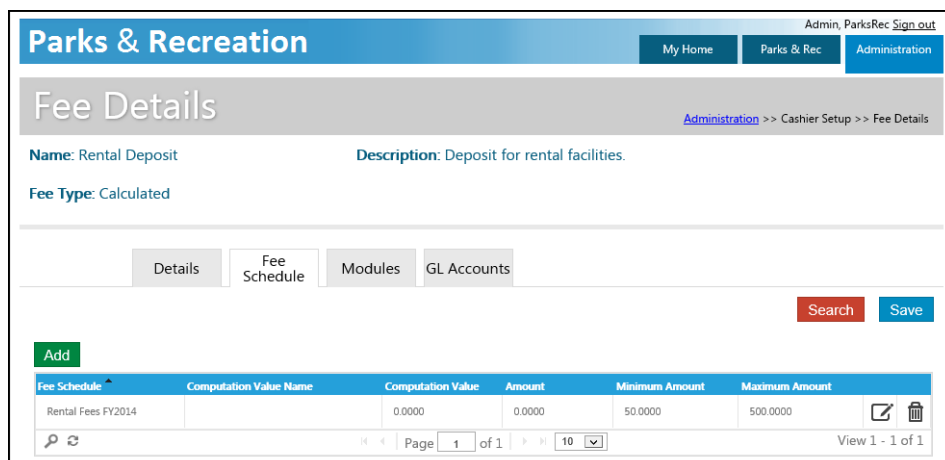
The *Liability GL Account* field allows you to associate a liability account with a fee. In order for the specified account to be used for refunds of this fee, the check box for *Use Fee Liability GL Account for Refunds* must be selected in the Payment Method Details for the payment method used with 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:
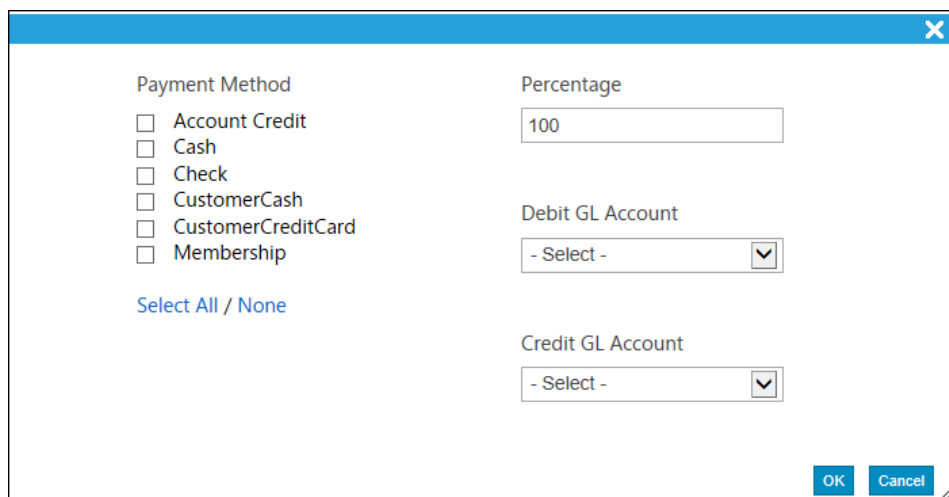
You may set up a fee as a percentage or an amount (flat fee).

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:
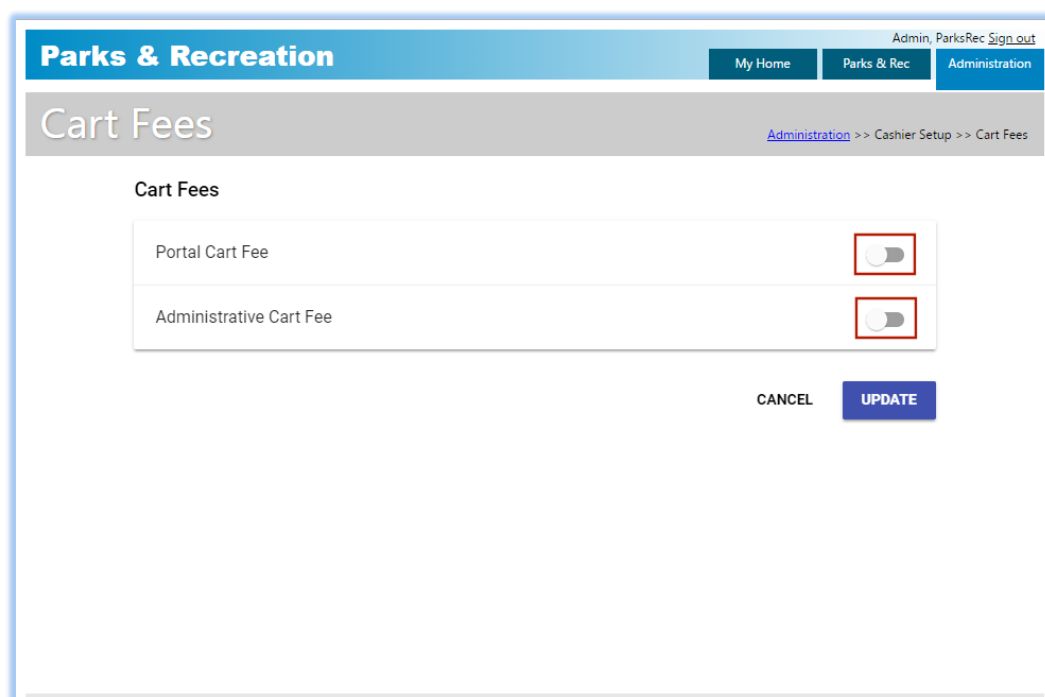
When you add the payment method, the default value of the *Percentage* field is 100; this field is required and must contain a value of 0.0001 to 100, inclusive. You must assign a general ledger account for each fee associated with a payment method.

Cart Fees
The Cart Fees option lets you set up cart fees on the administrative and citizen portal sides:
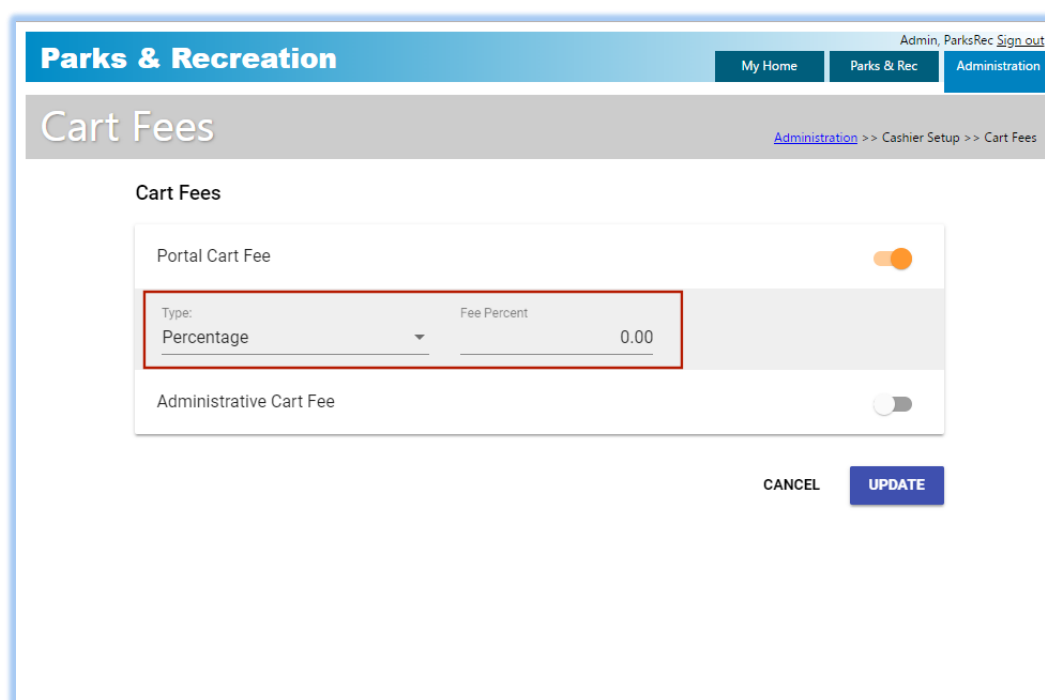
The **Portal Cart Fee** and **Administrative Cart Fee** appear on individual cards. To set up either cart fee, click its corresponding button on the right side of the card.

The card expands to display two fields side by side:

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

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

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

Portal Cart Fee

Fee Template

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

The **Fees** tab on the Details page includes the *Is Base Fee* check box. Use this check box to identify at least one fee on the template as the base fee for the class or rental. This allows payment processing to distinguish between base fees and administrative, add-on, tax, or other fees.

Expense Type

Expense Type categorizes expenses into user-defined groups:
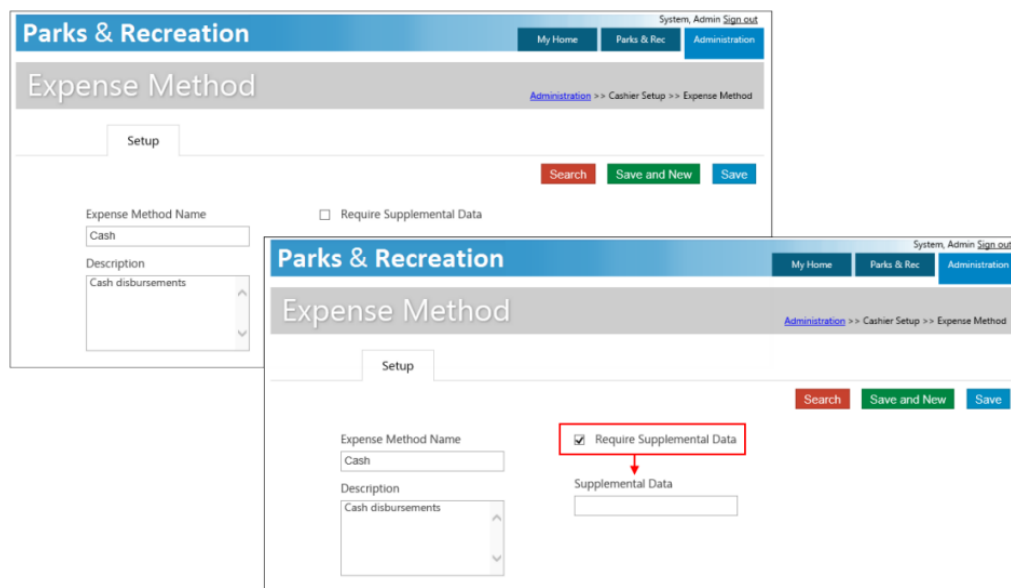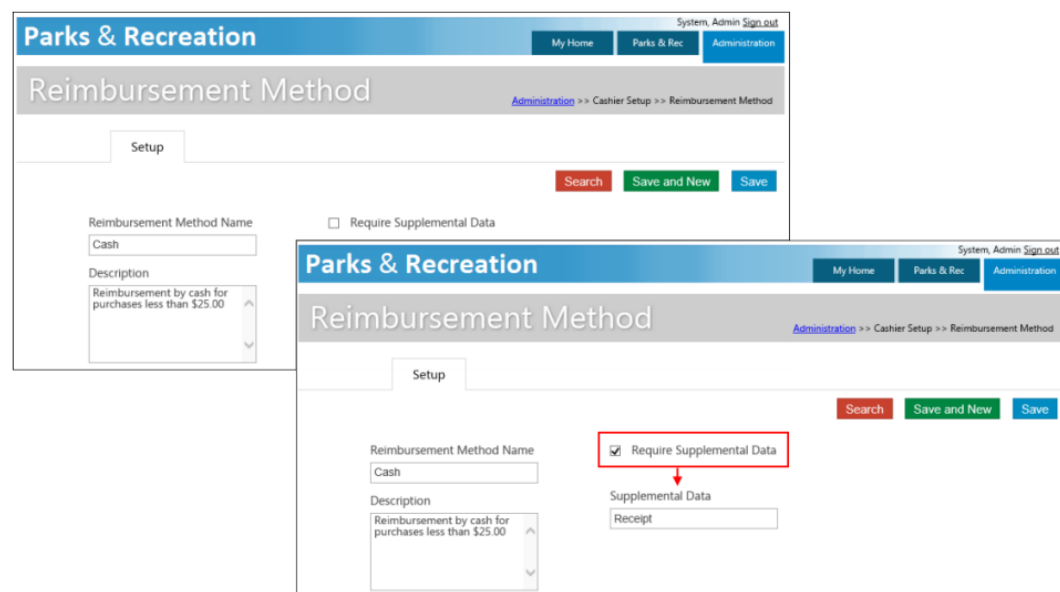
Expense Method

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:

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:

Cashier Status

Cashier Status provides status codes for payments:

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:

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

Setup

Search

Name*
60 & Older

Description

Discount Type*
Age

From Age
60

To Age

Dollar Amount
1.00

Percentage

Start Date*
05/25/2018

End Date
06/07/2019

☑ Available to Classes

☑ Available to Rentals

☑ Available to Memberships

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

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 4.00 $ or 10.00 %

↑ ↓ 🗑
Family Member #3 [   ] $ or 15.00 %

↑ ↓ 🗑
Family Member #4 [   ] $ or 20.00 %

Family Member #5 [   ] $ or [   ] % Add
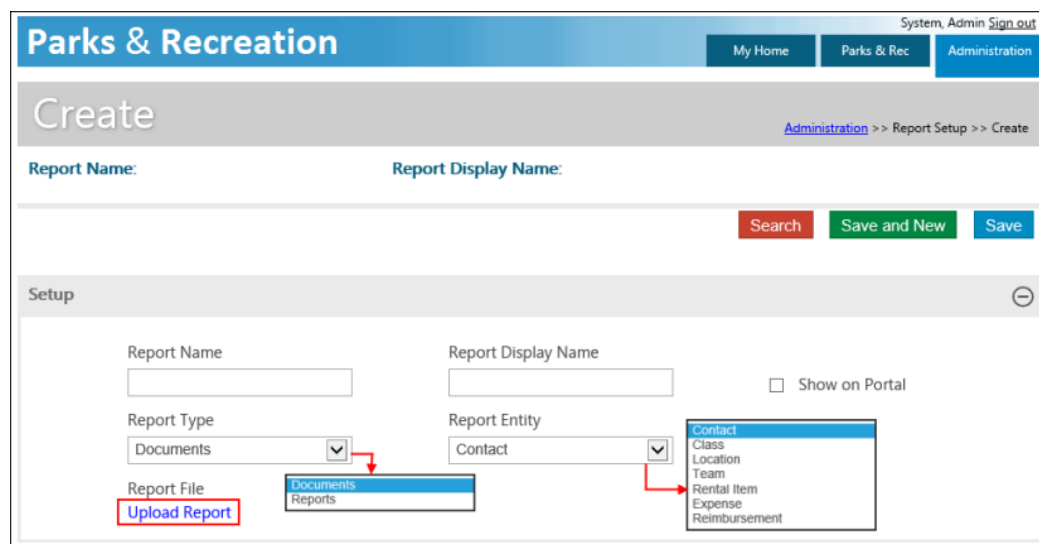
Save and New   Save

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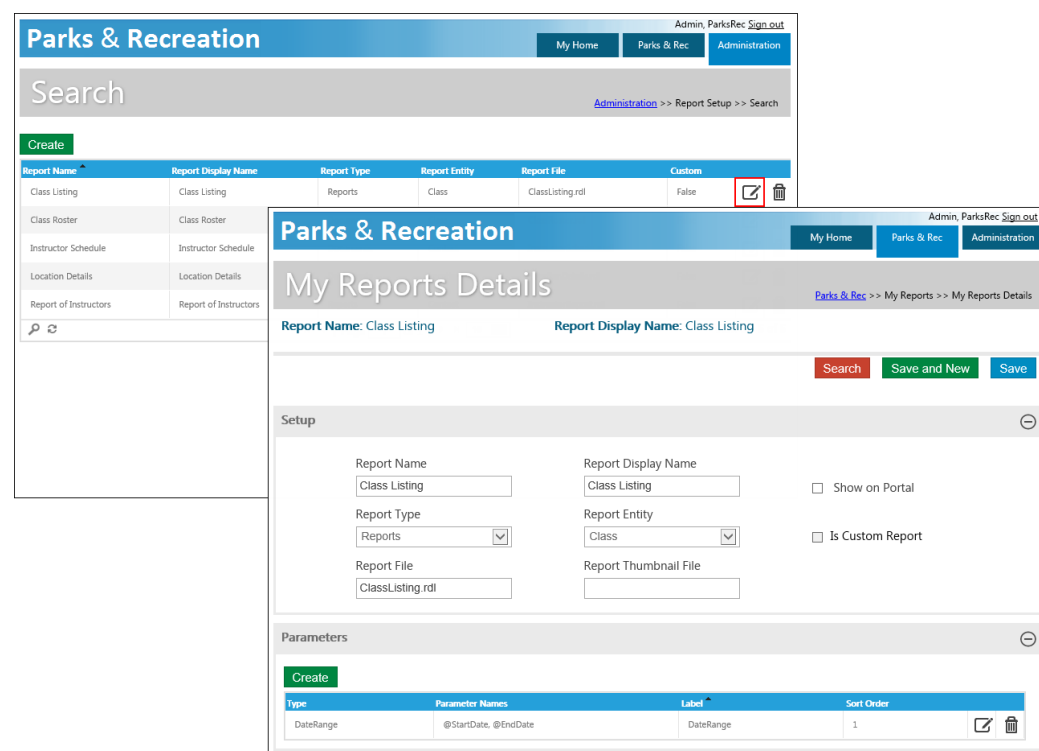
Reports are created and maintained using Microsoft SQL Server Report services (SSRS) and made available in Tyler Parks and Recreation using the Create Report option.

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

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:
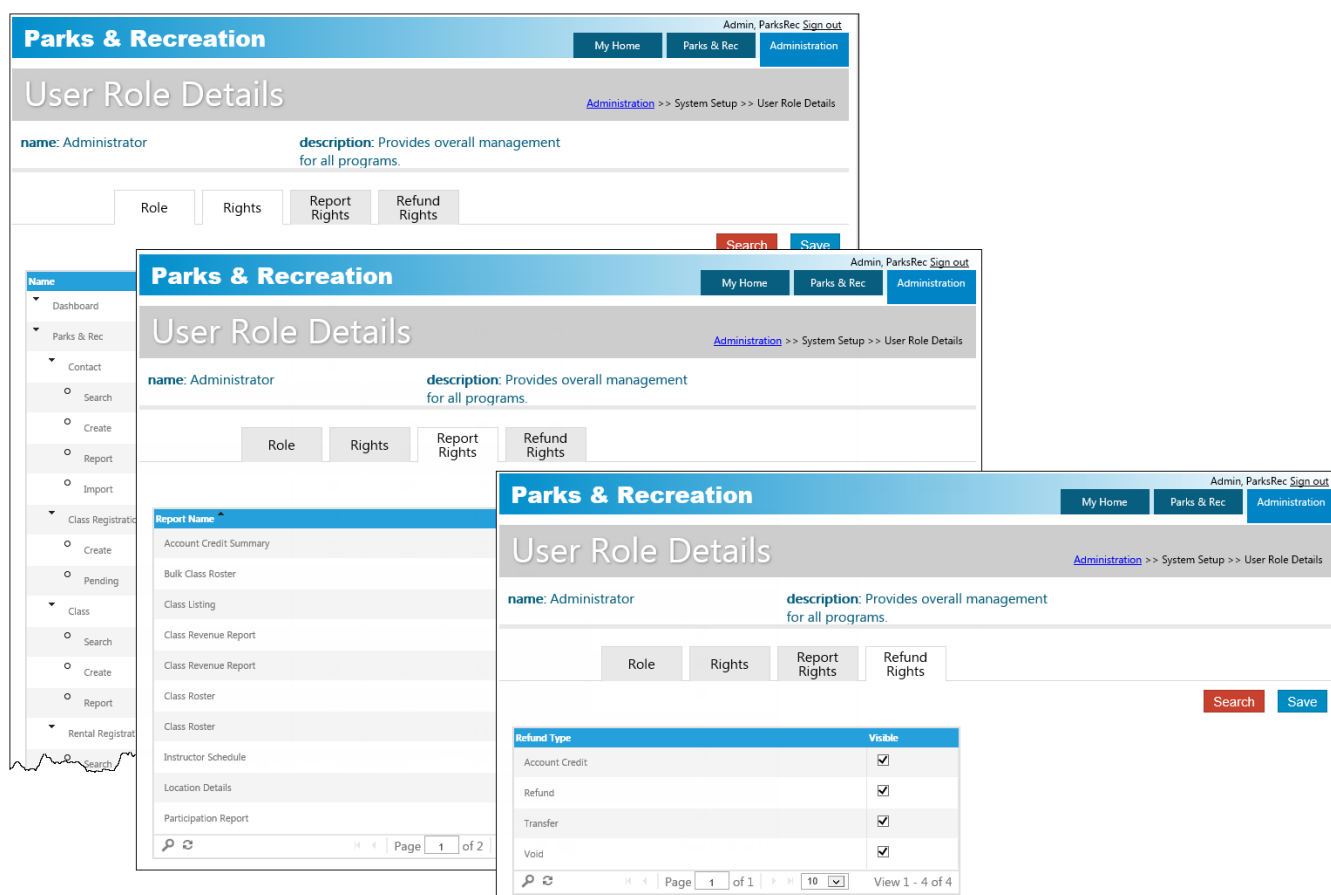
The *Allow Sensitive Contact Information* check box, if selected, restricts a user's access to sensitive information in contact records and reports. When you save a role, the **Rights**, **Report Rights**, and **Refund Rights** tabs are accessible:

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

Refund rights assign permission to issue a refund, transfer, void, or account credit. When a user clicks Delete for class or rental registrations that are paid, only those options that correspond to the user roles permissions are available. If no refund rights have been assigned and a user is deleting a pending payment/invoiced registration, the user can still remove the registrant/rental record as no refund is made. However, if no refund permissions are granted and a registration has been paid, the program displays a message to the selected user that he/she cannot complete the refund process.

User

User maintains individual user records. Once you create and save a user record, the **Departments** tab is active, and the Change Password option is available. Use the **Department** tab to assign the user to a defined department. For example, if you created a user record for the payroll clerk, you could assign that record to the Payroll department. The *Primary* check box indicates the user's primary department. The first department assigned to a user is automatically selected as their primary department, but you can change this if you assign more than one department to a user:

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:
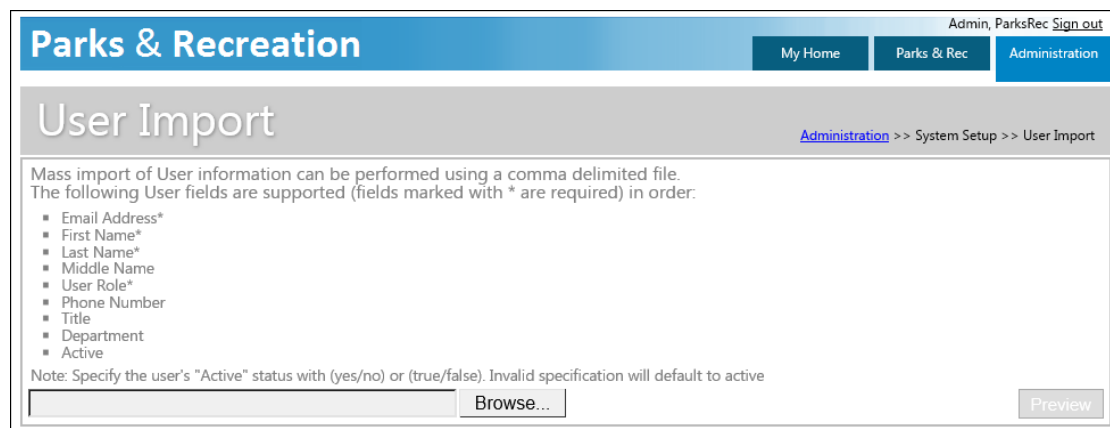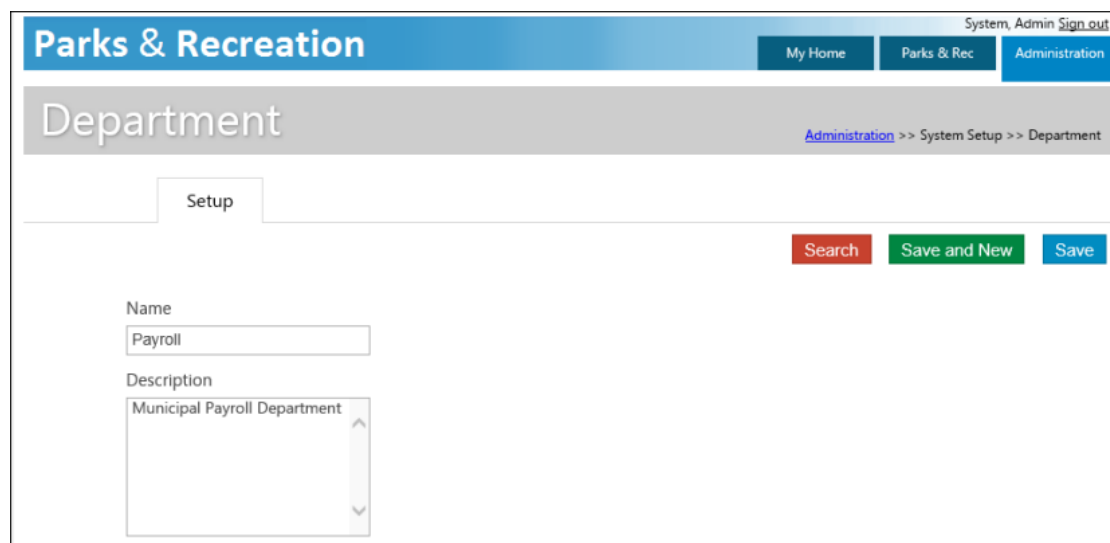
User Import

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

Department

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

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:

Setting	Description
Time Picker Interval	Determines the time intervals for class registrations. The minimum interval is 5, which allows classes to be scheduled using 5-minute intervals. For example, a class can be scheduled to begin at 5:05 or end at 7:35.
Time Zone	Indicates the time zone for your organization.
Page Size in Admin Site	Assigns the page size for all Administration groups.
File Storage Service Endpoint	Specifies the endpoint URL for your file storage service. If your organization uses Tyler Cashiering for payments, use the *File Storage Service Endpoint* field to specify the URL for your Tyler Cashiering application.
Portal URL	Specifies the portal URL. For the *Pay Now* and *Unregister* links to work correctly in the Waitlist Message Email Template, this entry is required.

Setting	Description
Allow More than 100% GL Allocation	Directs that on the Fee Details page, you can assign more than 100% from one payment method to more than one general ledger account.
Payment Demo Enabled	Provides a means for Implementation to test payment processing without completing an actual, real-time payment process.
Contact Phone Required	If selected, requires users to enter at least one telephone number to a contact record when they add a new contact or update an existing one.
Remove Heat Map	If selected, removes the map from the Parks and Recreation Administration Dashboard.

Password Settings

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

Setting	Description
Password Minimum Length	Defines the minimum number of characters a password must contain.
Max Failed Login Attempts	Specifies the maximum number of failed login attempts allowed before the user is locked out.

Setting	Description
Password History	Identifies the number of new passwords that must be set before a previous password can be used; for example, if *Password History* is **3**, when a user sets a new password, the last three passwords cannot be used.
Require Upper Case	Select if password must contain at least one uppercase character.
Require Numeric	Select if password must contain at least one numeric digit.
Require Symbol	Select if password must contain at least one symbol (#, *, %, etc.).

Residence Verification Settings

The Residence Verification Settings define the resident verification service used for GIS location verification or provides the specific cities that define your organization residency restrictions:

For contact records, the *Resident Verification Service* field stores the URL for a GIS utility that verifies the contact's residency.

If your organization does not use a GIS verification service, the value of the *Resident City/Cities* or *Resident County/Counties* field determines whether the contact is identified as a resident or nonresident. If the user enters a value that 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.
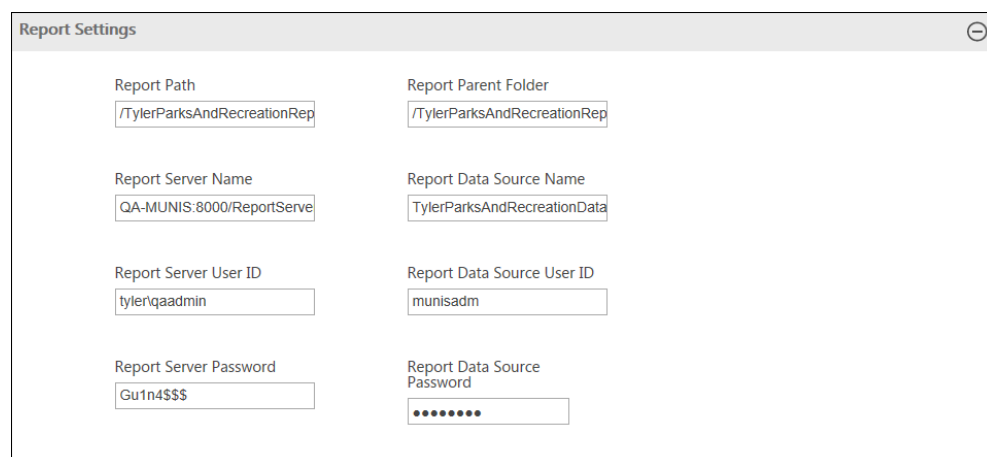
Email Settings

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:

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:

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:

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.
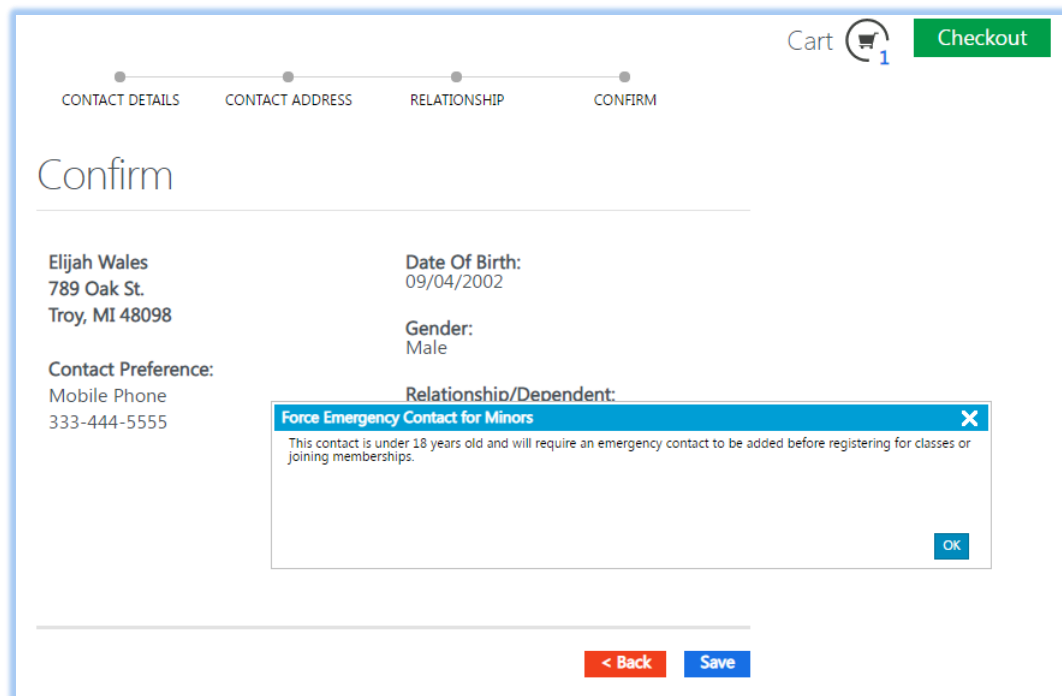
Registration Settings

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

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:

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:

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:
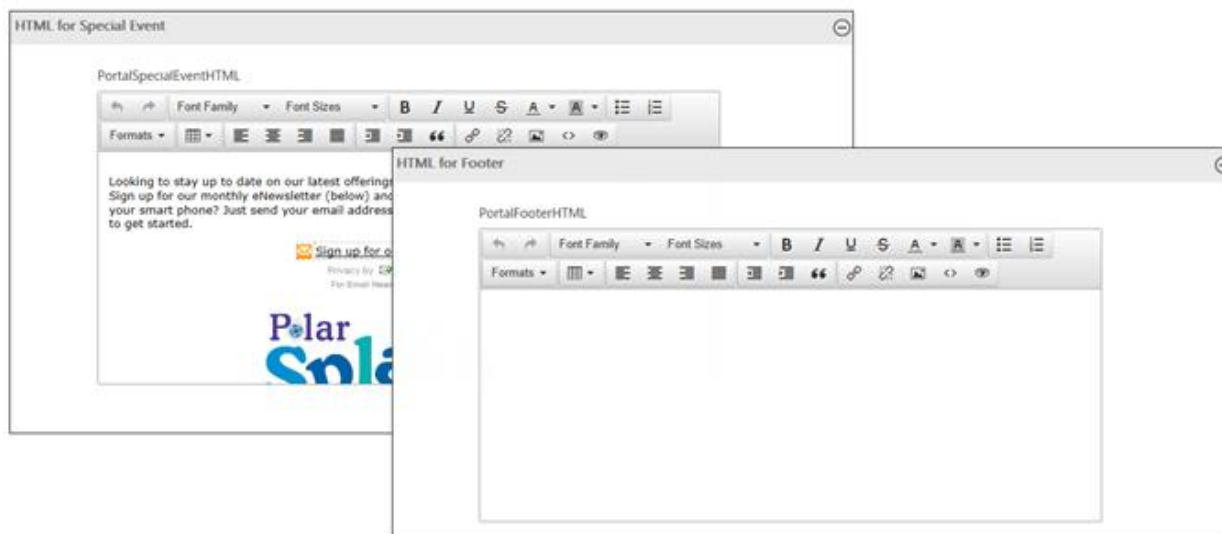
Box Settings
The Box Settings group assigns activities or events that display on the portal sign-in page. Currently, PortalRentalBox fields 1 through 3 and Portal ClassBox fields 1 to 3 are not used. The PortalClassBox4 value defines the left action button on the main portal page and the value of the PortalRentalBox4 defines the right action button:

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:

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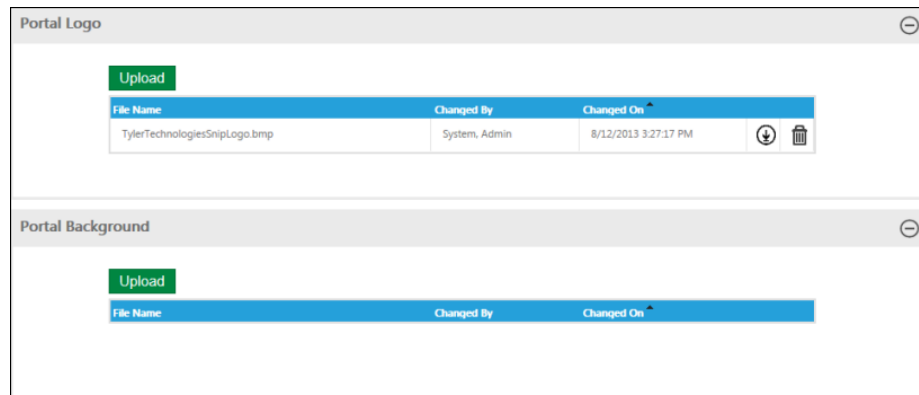
The Hyperlink Settings group assigns hyperlinks to the media bar on the main portal page. Currently, the media bar displays all options, even if you do not provide a hyperlink value. In this case, if a user clicks one of the media options, there would be no system response to the action:

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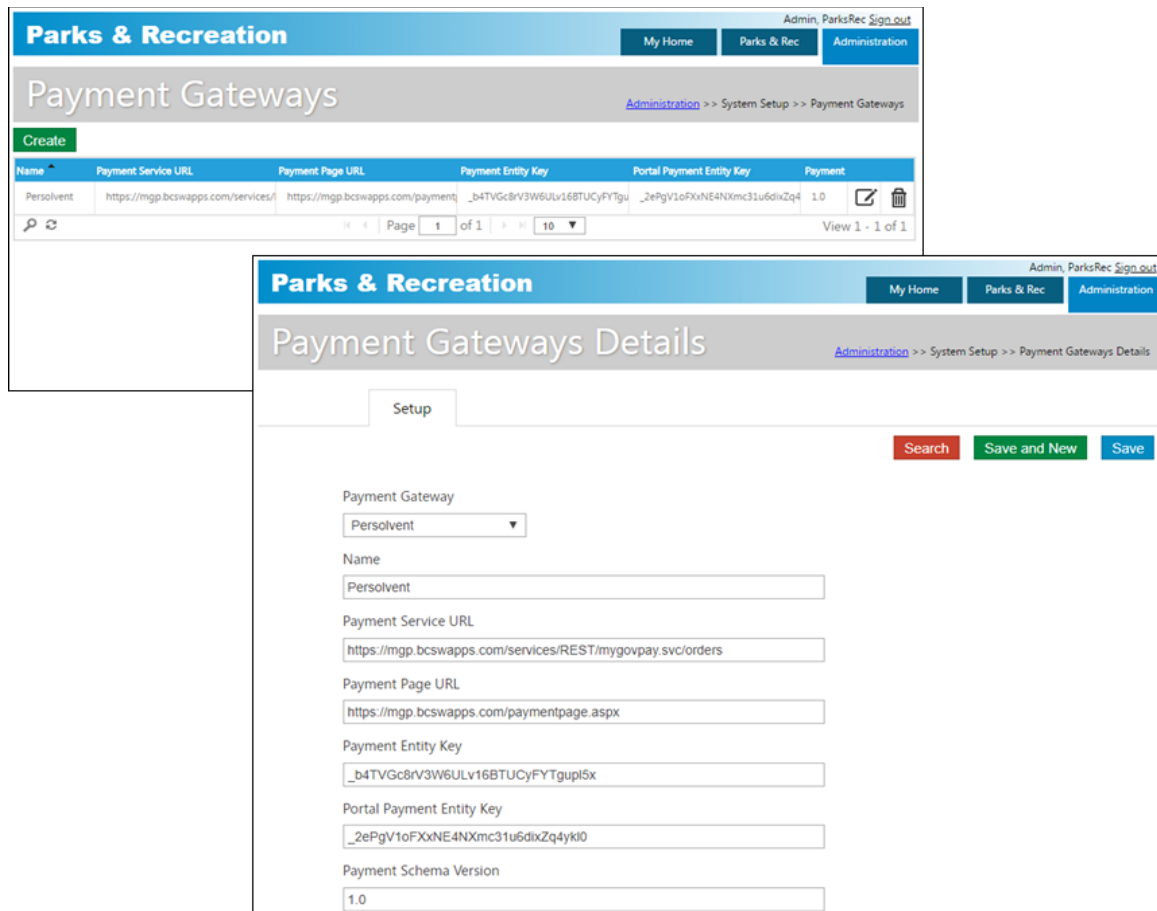
The logo has maximum width and height settings in order to maintain the aspect ratio of the image. If an uploaded image is larger than 230 px by 80 px, it is automatically cropped.

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:

During the registration payment process, selecting the **Pay Now** button creates a transaction with an "Unfinished" status, and a contact is added to the class only after a successful payment is made. For the OpenEdge payment gateway only, if a payment is denied by the merchant, the transaction status is updated to "Declined." If a payment is made successfully, the status is updated from "Unfinished" to "Paid in Full," and the contact is added to the class.

Payment Gateways used for credit card payments in the back office or portal will need redirect URLs provided:

BackOffice

- BackOffice Service: *Domain/PaymentsProcessing*
- BackOffice Success: *Domain/PaymentsProcessing/Success*
- BackOffice Cancel: *Domain/PaymentsProcessing/Cancel*

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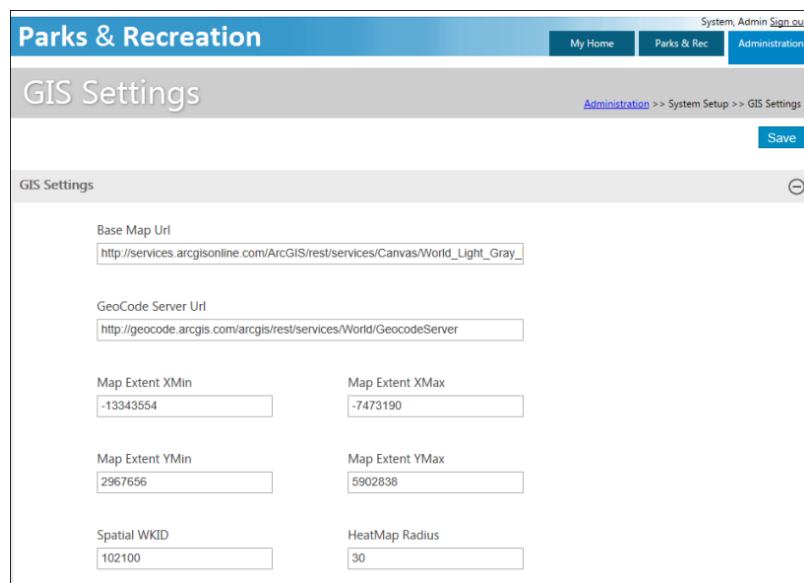
All portal redirects from payment gateways need to reference the Tenant ID after the domain name. By default, Tenant ID = ***Home***

- *Domain/**TenantID**/PaymentsProcessing*

- *Domain/**TenantID**/PaymentsProcessing/Success*

- *Domain/**TenantID**/PaymentsProcessing/Cancel*

GIS Settings

GIS Settings defines the map and heat map details that provide visual location information on your organization's **My Home** tab:

Integration Settings

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

GL Export Settings

For the GL Export Settings, the Type list determines the format for the export file:

- File-CSV—Creates a standard comma-separated values (.csv) export file.

- File-Munis—Creates a general ledger import file compatible with the Munis Import Journals program.

- Service-Munis GL—Uses web services to create a journal entry in the Munis General Journal Entry/Proof program.

- File-TXT—Creates a text export file. This option applies to Redding, CA, organizations.

- File-Incode—Creates a general ledger export file compatible with Tyler Incode requirements.

- File-Eden—Creates a general ledger export file compatible with Tyler Eden requirements.

The available fields vary according to the type of file that you select:
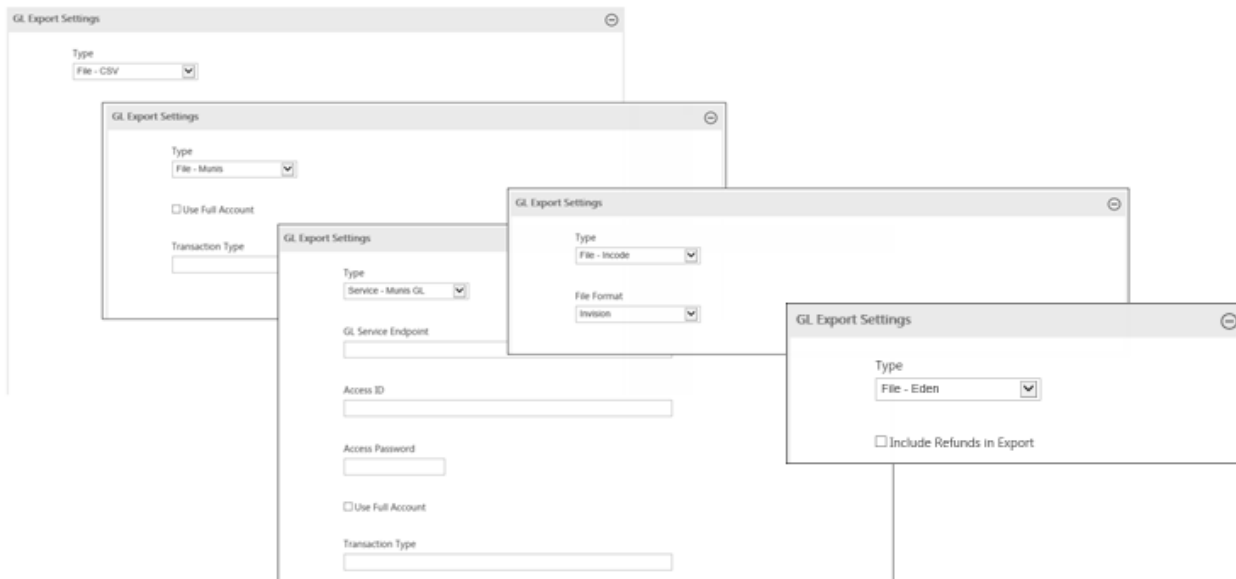
The current date is appended to the end of export file names. This date is also captured as part of the export reference for the transaction.

For each Munis export type, you must ensure that the general ledger accounts in Tyler Parks and Recreation match valid accounts in Munis. The accounts must be in the same format (that is, org/obj/project or full account). The default format is org/obj/project. Select the *Use Full Account* check box on either setup page to use the full account format for the export files.

If you select File – CSV, you must specify the file prefix that is used in the export file name.
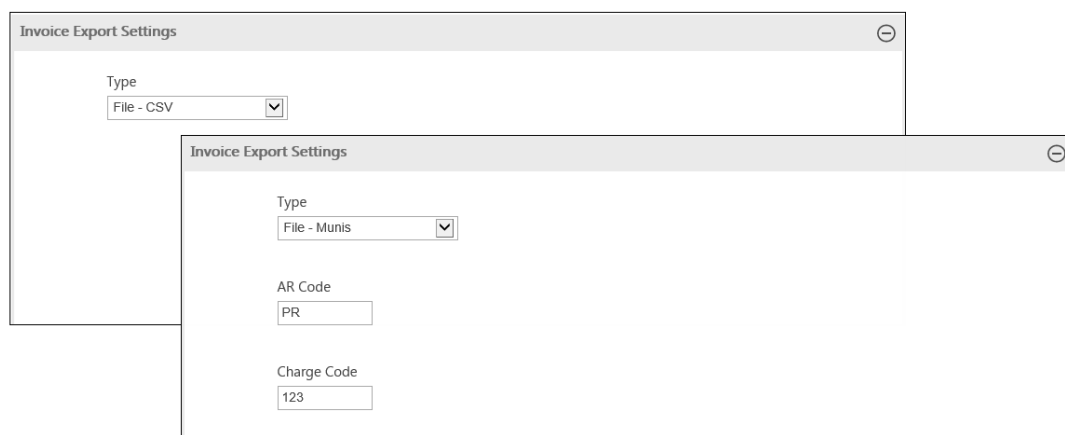
If you select Service–Munis GL, you must specify the service endpoint for the Munis general ledger in the GL Service Endpoint box, and you must provide the Munis web service user name and password.

For each Munis type, the Transaction type box indicates if the transactions are actual (A) or encumbrance (E).

When you select File-Incode from the Type list, general ledger transactions can be exported to a file that can, in turn, be imported into Tyler Incode V.X Financials or Invision file. When you select File–Incode, select the applicable format from the File Format list.

Invoice Export Settings

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

Charge Code Settings

Charge Codes Settings enables Tyler Parks and Recreation fees to be associated with Munis charge codes:
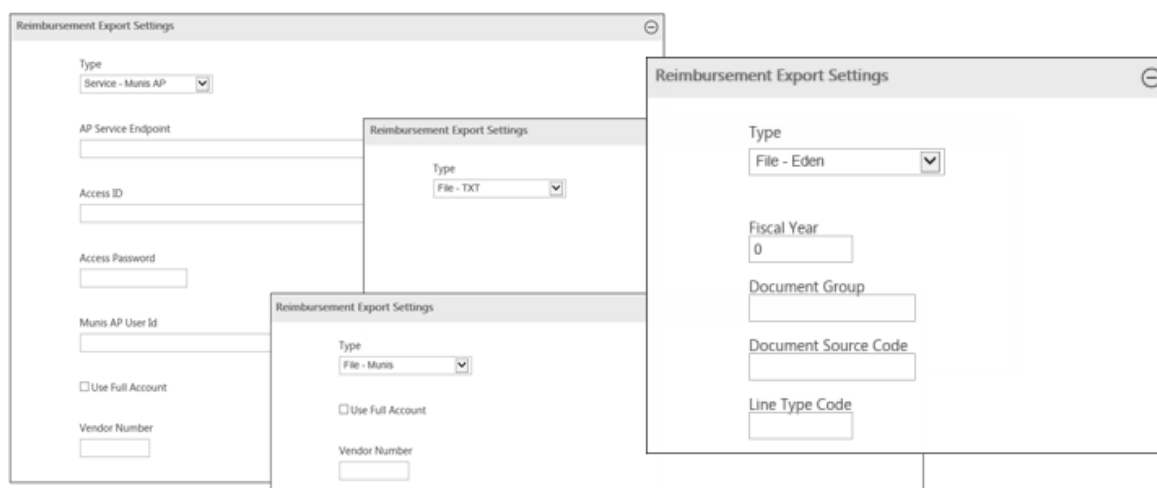
- Fixed–Munis—The AR Code and Charge Code boxes are available. Use the boxes to define the Munis accounts receivable code and charge code for the exported invoices.

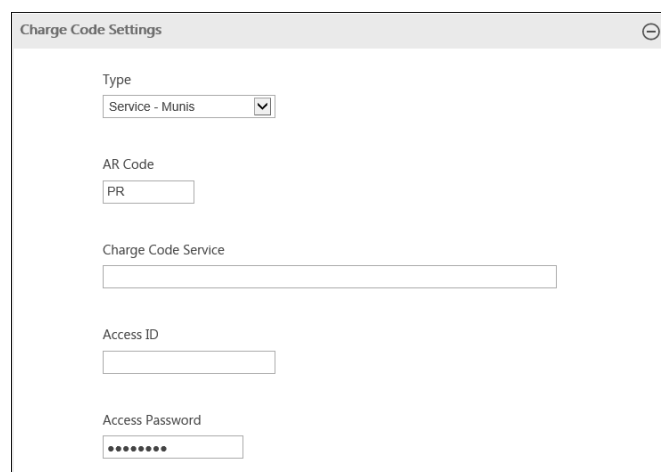- Service–Munis— The *AR Code*, *Charge Code Service*, *Access ID,* and *Access Password* fields are available. The *Charge Code Service* field allows you to enter the service endpoint URL, which should be designated as a Munis web service. In this case, the *Charge Code* field is available on the Fee Details page. This list allows you to assign Munis charge codes to fees.
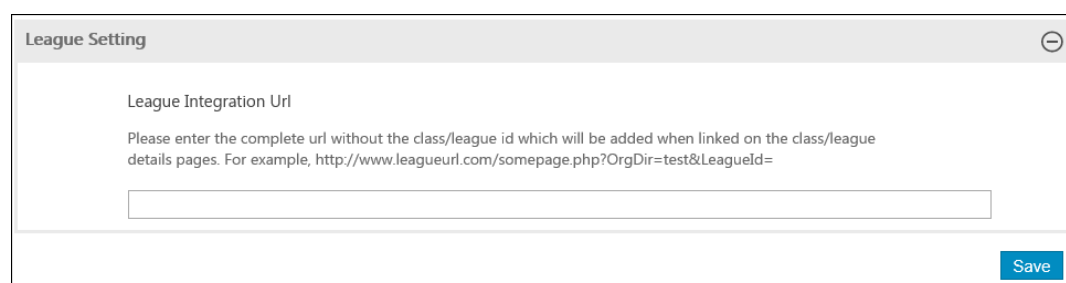
Reimbursement Export Settings

Reimbursement Export Settings defines the reimbursement export files. Settings include File–TXT (Redding, CA specific), Munis flat file for AP Invoice import, Munis Service using AP Invoice web service (V10.4 and higher), and File–Eden, which creates an export file for import to Tyler Eden. The Reimbursements list in Transactions provides the option for exporting instructor payments to accounts payable:

League Settings

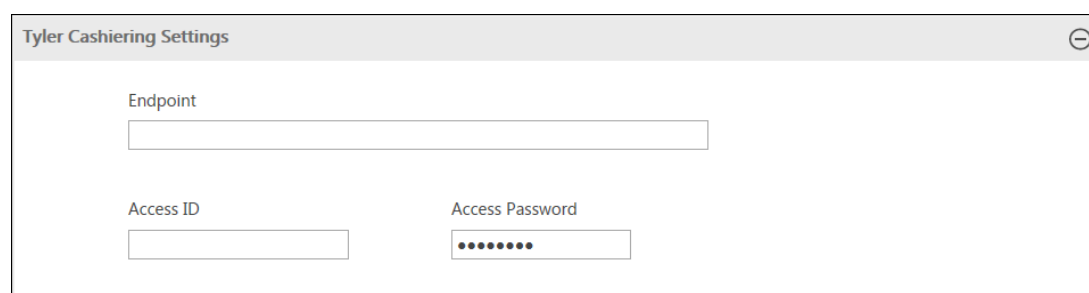Tyler Parks and Recreation integrates with QuickScores to facilitate league management. On the Integration Settings page, the League setting allows you to input the entire league URL:

The URL does not include the class ID, which will be added when you link the class from the Class Details page for a team event. For example, the initial URL setting will be http://www.quickscores.com/Orgs/PrintSchedule.php?OrgDir=demo&LeagueID=. When linked on Class Details, the class ID is added, making the URL http://www.quickscores.com/Orgs/PrintSchedule.php?OrgDir=demo&LeagueID=6733.
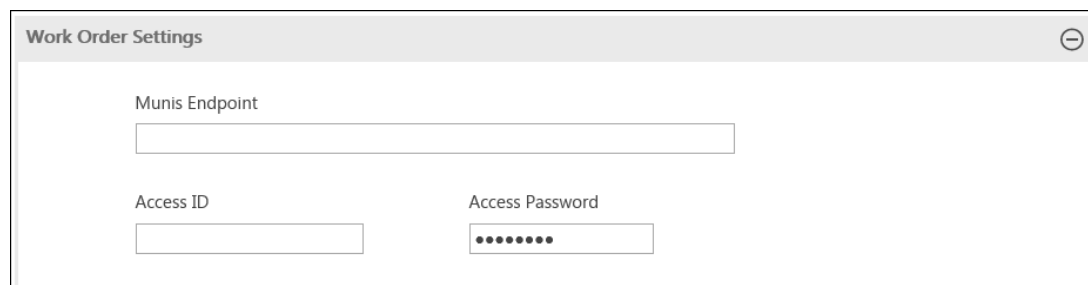
Tyler Cashiering Settings

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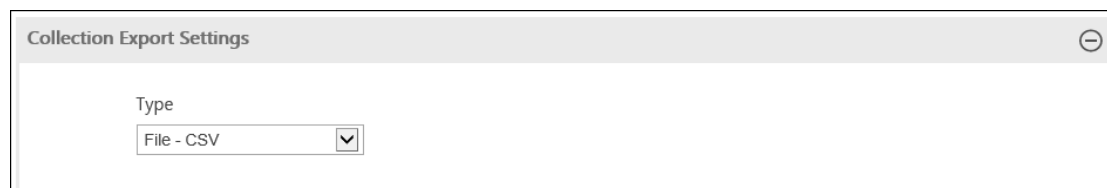
Work Order Settings

Tyler Parks and Recreation integrates with Munis Work Orders to allow you to create work orders related to rental items. The *Munis Endpoint*, *Access ID*, and *Access Password* fields store the integration access values for the integration:

Collection Export Settings

The Collection Export Settings define the type of export file created by the Collection Export, either a .csv file or an Incode Financials file. The Collection Export creates a file of Tyler Parks and Recreation payment information that may be used in balancing your organization's daily deposit:

System Log

System Log provides details for your organization's Parks and Recreation application. Use the Keyword, Start Date, and End Date boxes to define the search criteria for the log results. You can use the Keyword box to search by event ID or user email address in addition to keywords. When you click the **Search** button, the table refreshes to display the search results:

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

Tyler Parks and Recreation Citizen Portal

Once you have completed the required setup, the citizen portal provides citizen access to the Tyler Parks and Recreation application. The user interface for the application varies according to the settings defined in the System Setup programs.

When you access Tyler Parks and Recreation, the application assesses your browser and displays a message if it detects a browser that does not provide optimal compatibility.

Key components of a citizen-facing page are easy access to the current list of activities, a registration option, as well as a shopping cart with a check out option. Your organization can determine how to present these features and can also customize graphics that display. The following is an example of a citizen portal home page:
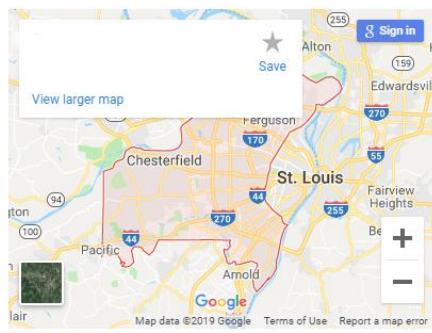
On the main portal page, your organization can promote up to six individual activities. The images automatically scroll until a viewer hovers the pointer over the image, which stops the scrolling and allows viewers to read the course description. (See the Class option on the **Parks & Rec** tab for details on creating the scrolling image option.)

The Activity Guide section of the portal provides links to your organization's defined class categories. Providing this information online creates an environmentally friendly means of offering your activity guide. The available activities are provided according to the Class Category setup option on the **Administration** tab.

In addition to the Activity Guide section, the portal page footer provides a customizable section where your organization can promote their news and events. These items can include hyperlinks, images, or even a live map with custom features embedded.

The Stay Connected banner provides links to social media and data feeds. Use the Hyperlink Settings section on the Portal Settings pages to define which, if any, of these options to include, along with the appropriate links to each.

The portal page footer provides user-defined information for your organization. For example, you may provide a copyright statement for your application or contact information for your citizen users.

Portal Sign In

The Portal Sign In page accepts a citizen's user name and password. The Sign Up Now option allows new users to create a contact record. The program prompts the user to complete profile, bill address, and email information. When the user saves the record, a contact record is created within the Parks and Recreation application:

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

Checkout

Keyword

Location

- Select -

Class ▲

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

Baseball Fundamentals
Location: Affton Communit
Center (ACC)
08-2018-000458
Status: Open

Cart

Continue Shopping

Coaching Clinic

Location: Field House
Type: Flag Football
Gender: Male
Age Range: 1 - 70
Class Number: 311604
Registration Dates: 6/8/2
Dates: 6/8/2018 - 6/12/2
Times: Sun/Tues 00:05:00
Available Discounts: 60 &
Tyler Employee , Employe
Remove

@tylertech.com | Main | Profile | Sign Out

County Parks and Rec

Cart

Checkout

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.