Tyler Parks and Recreation

What's New in 2019.1

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Contents

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CONTACT SEARCH AND MERGE

Parks & Rec > Contact > Search

The Contact Search page has been redesigned to give you a more intuitive, versatile searching and filtering experience, along with contact merging functionality:

The page contains a left panel for searching and filtering and a right panel for viewing and managing the search results. When you first open the page, the right panel contains all contacts in the system, displaying a maximum of 100 per page.

The bottom-right of the page shows the range of 100 in view (1 to 100, 101 to 200, etc.), the total number of contacts, the page number, total pages and chevrons for moving forward and backward one page at a time or moving directly to the first or last page:

You may narrow the results and find what you need quickly using the search and filter panel.

SEARCH AND FILTER PANEL

In the search and filter panel, use the *Keyword* field to find contacts by name, address, age, email or associations. As you type in the field, the results panel continually refreshes to contain only the contacts whose data matches what you type, presented in alphabetical order by contact name:

Below the *Keyword* field are check boxes for contact **Location** (*Resident* or *Nonresident*) and **Roles** (*Employee*, *Coach*, *Instructor*, *Active Member*), with the number of potentially matching records shown in parentheses next to each item:
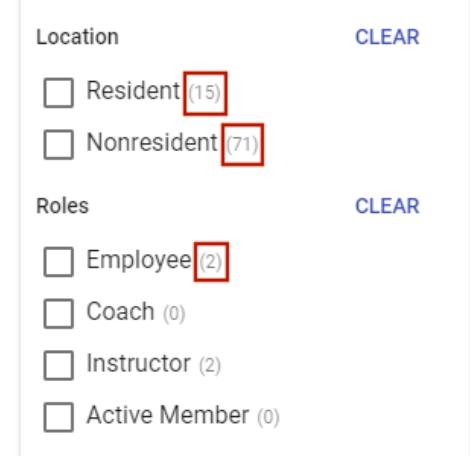
To filter the results, select the check boxes next to the appropriate items. The right panel refreshes with the results for those selections only. Selecting a check box reduces the results to the number of pages shown in parentheses and affects the numbers next to the other items; for example, in the image above, selecting *Resident* would eliminate the *Nonresident* contacts from the grid and might reduce the number of potentially matching contacts who are employees or instructors:

Note: Active Member results are based on contacts who have active memberships.

To clear **Location** or **Roles** selections, click the corresponding **CLEAR** button.

SEARCH RESULTS PANEL

The search results panel contains the contact records with data matching the *Keyword* and check box selections in the search and filter panel. If the *Keyword* is blank and all check boxes are deselected, the grid contains all contact records in the system, sorted alphabetically by contact name.

CONTACT MERGE

Located in the top-right corner of the search results panel, the **MERGE** button lets you merge two contact records into one. It is enabled only when two contacts have been selected in the results panel:

Note: This button is available only to users who have *Create*, *Update* and *Delete* rights selected for the *Search* component on the **Rights** tab of the User Role Details page in System Setup (Administration > System Setup > User Role > Edit > Rights).

If the results panel contains only one of the contact records you want to merge, select the record, and use the search panel to find the second one. The first record remains selected and moves to the top of the grid.

Once you have selected the records to merge, click the **MERGE** button. A dialog opens with the two records shown side-by-side:
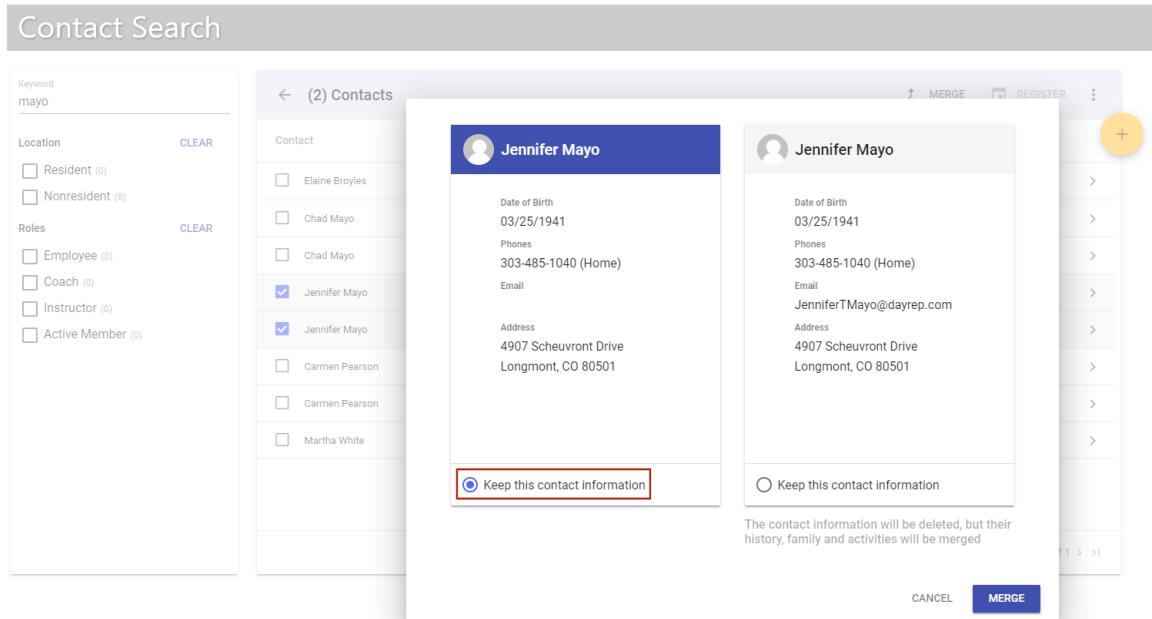
By default, the first record selected is shown on the left with its header highlighted in blue and the *Keep this contact information* radio button selected. If you continue with the merge, the contact information on the right is deleted, but all history, including registrations, transactions, family members, contacts and activities, associated with that record is transferred to the record on the left.

If you want, you may switch the direction of the merge by selecting the *Keep this contact information* radio button on the record on the right.

If the record being deleted contains contact information, such as *Phone* or *Email*, that is not on the record being retained, it moves to the record being retained.

When you are ready to merge the records, click the **MERGE** button. A dialog asks you to confirm you want to proceed with the merge, noting the action cannot be undone:
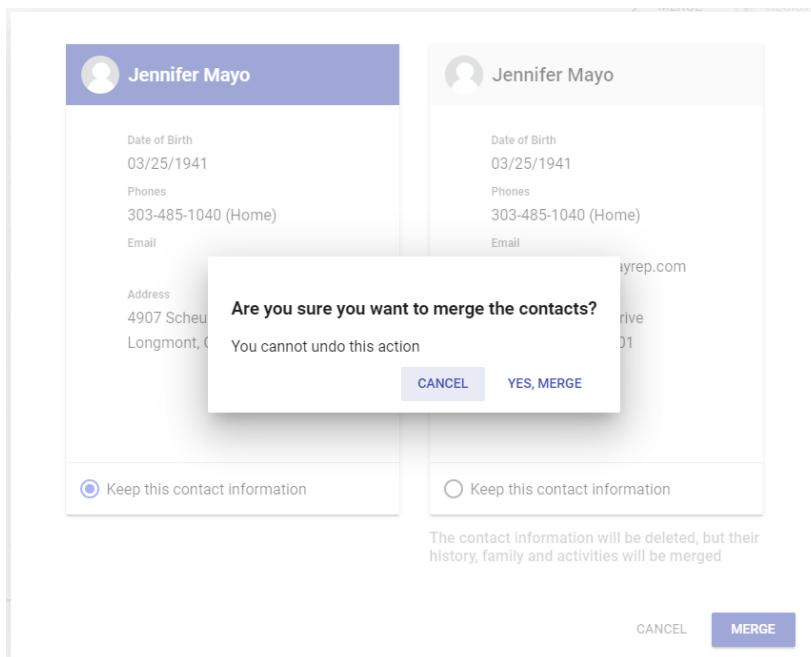
If you want to proceed, click the **YES, MERGE** button.

When the merge completes, the Contact Search results panel refreshes, giving you the option to view the Contact Detail record by clicking the **VIEW CONTACT** button that appears briefly below the panel or the chevron ❯ that appears on the far-right side of the merged contact's row:

To view a comparison of the merged changes, click the **History** button on the left side of the Contact Details page.

CONTACT REGISTER

Located to the right of the **MERGE** button, the **REGISTER** button lets you register a contact for a class. It is enabled when the contact has been selected in the results panel. Clicking the **REGISTER** button opens the Class Registration Create page, with the selected contact assigned as the *Payer*:

If necessary, you may select a different payer before continuing with the registration process.

Note: The **REGISTER** button works for one contact at a time. Selecting more than one contact in the results panel disables the button.

EXPORT AND UPDATE

Located to the right of the **REGISTER** button, the vertical ellipses ⋮ opens a menu that gives you options to **EXPORT** and **UPDATE** contact search results data:
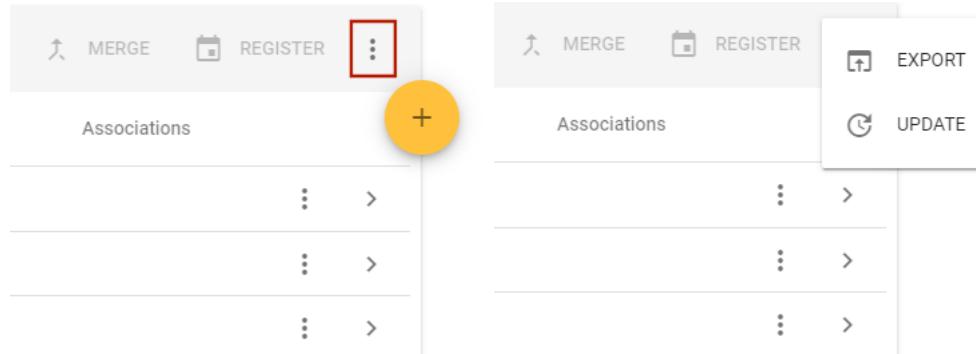
These options function as they did in prior versions of the software; note, however, that regardless of whether you select a subset of contacts, updating and exporting affect all contacts displayed in the search results panel.

DELETE AND REGISTER

The vertical ellipses ⋮ on the right side of each contact row opens a menu that gives you options to **Delete** the contact and **Register** the contact for a class:

ADD CONTACT

If you want to add a contact, click the orange plus button on the top-right side of the results panel. The Create Contact dialog opens:

First Name, *Last Name*, *Contact Preference* and *Date of Birth* are required. The *Contact Preference* selection drives the remaining entries required.

After completing the information in this dialog, click **NEXT**. If the first and last name and one other item on the dialog match another contact already in the system, a duplicate prevention dialog opens, showing

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the new contact on the left and the original one on the right. If an entry on the new contact duplicates one on the original, a *Same as new contact* tag appears to the right of the duplicate entry on the original:
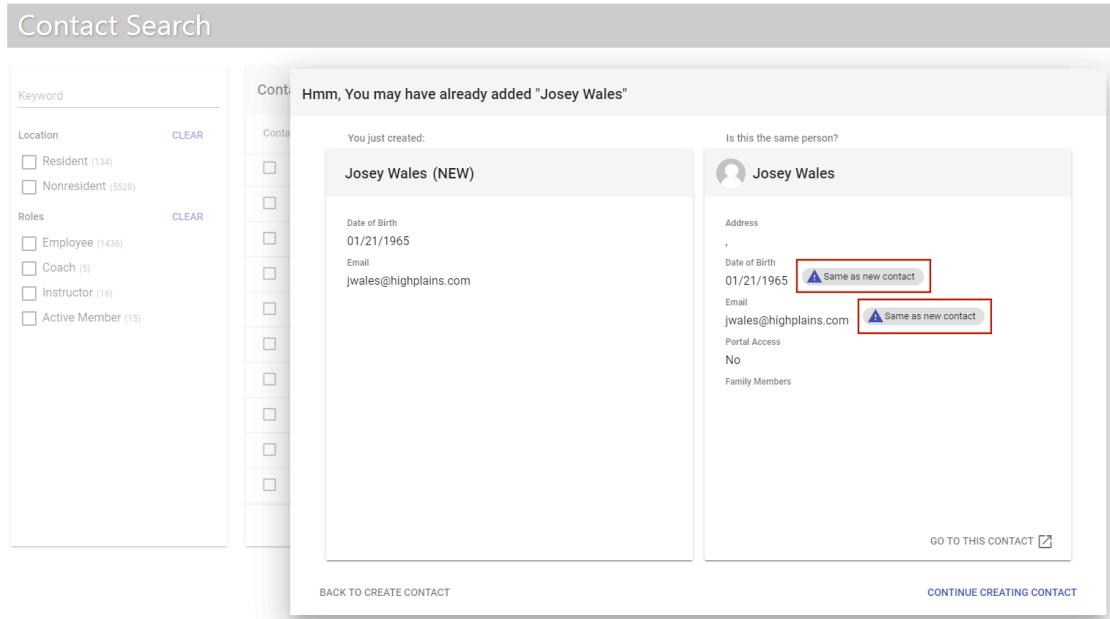
From the duplicate prevention dialog, you have the options to navigate to the Contact Details page of the original contact, return to the Create Contact dialog or continue the process of creating the new contact:
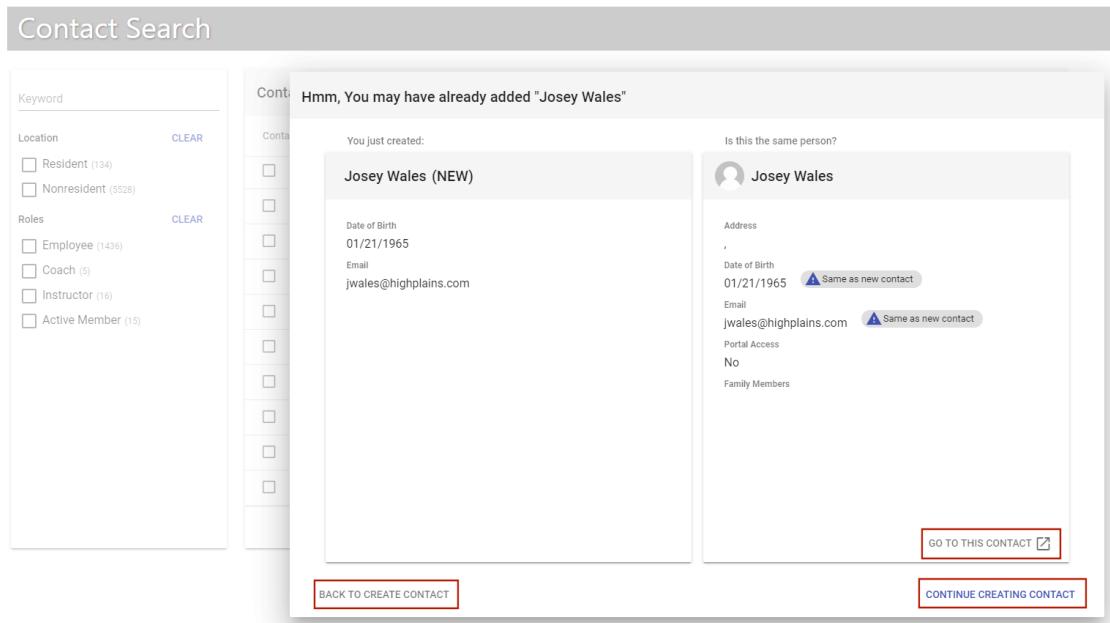
- **GO TO THIS CONTACT**: This link discards the new contact and takes you to the Contact Details page of the original contact. A confirmation dialog asks you to confirm whether you want to proceed to the original contact.

- **BACK TO CREATE CONTACT**: This link returns you to the Create Contact dialog, with your current entries still in place.

- **CONTINUE CREATING CONTACT**: This link takes you to the main Contact Details page to complete the contact create process.

EMAIL TEMPLATES

Administration > System Setup > Email Templates

An *Email Templates* option has been added to the **System Setup** menu in Administration. This option provides a central location for the email templates used to draft custom emails that are sent automatically when various events occur.

Templates formerly housed on the System Settings page (*Administration > System Setup > System Settings*) have been moved to this location, and templates for new events have been added:
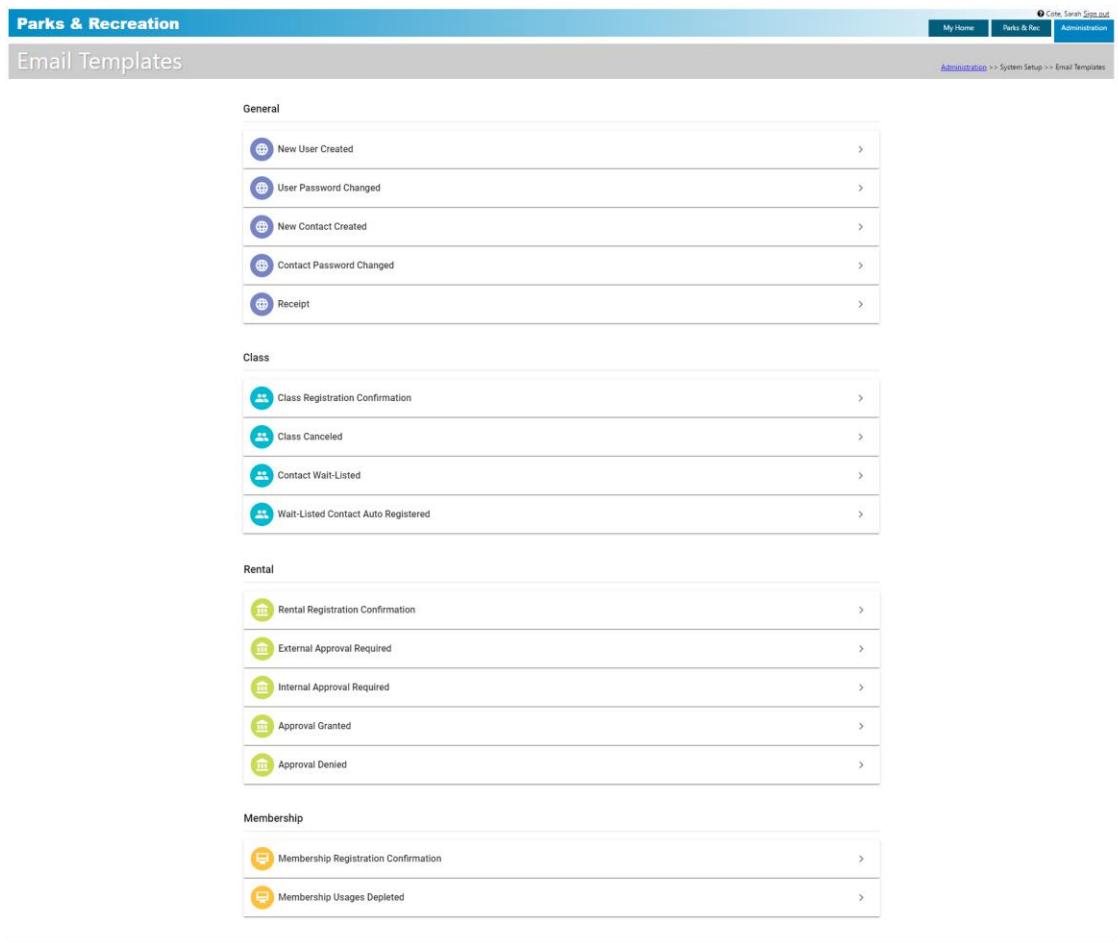
Email categories are **General**, **Class**, **Rental** and **Membership**. Templates within each category appear on individual cards.

The following templates are provided:

Category	Template	Recipient
General	*New User Created*	User
	User Password Changed	User
	New Contact Created	Contact
	Contact Password Changed	Contact
	Receipt	Payer
Class	*Class Registration Confirmation*	Payer
	Class Canceled	Payer
	Contact Wait-Listed	Payer
	Wait-Listed Contact Auto Registered	Payer
Rental	*Rental Registration Confirmation*	Payer
	External Approval Required	Payer
	Internal Approval Required	Payer
	Approval Granted	Payer
	Approval Denied	Payer
Membership	*Membership Registration Confirmation*	Payer
	Membership Usages Depleted	Payer

To set up or edit a template, click the chevron ❯ on the far-right side of the card. A page containing the template opens:

A summary of the type of event that triggers the template to be sent appears below the template title. Below the summary is the template itself, where you fill in the *From* and *Subject* fields and draft the content of the email.

Use the icons in the header of the text editor to format and stylize your text and add images and links. Click the **Custom Tags** icon to select from a drop-down of information placeholders used to populate emails linked to the template:
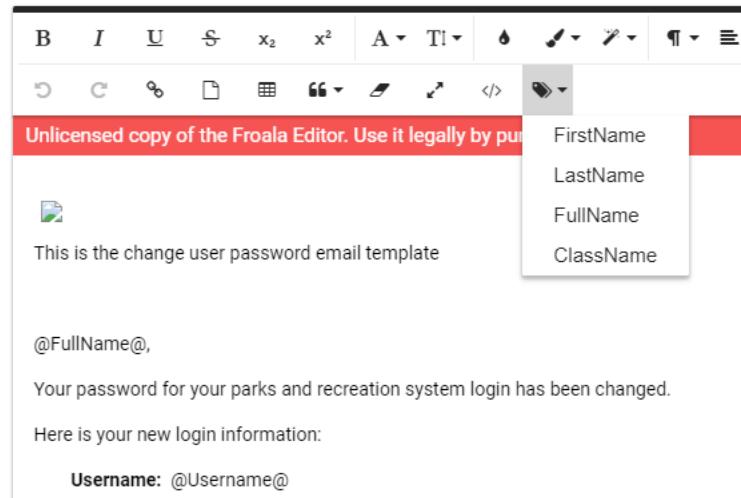
Any placeholder may appear multiple times in the template. Within the body of an email, only the items selected from the drop-down are replaced with system-generated text.

If you are setting up the **Internal Approval Required** template, an *Additional Emails* field is available below the template:

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Use this field to enter the email addresses of back office personnel who should receive an email notifying them each time an event requiring internal approval occurs. This feature eliminates the need to navigate to a separate approvals page to search for internal approval requests.

Note: If a registration requires internal approval, the registrant does not receive a registration confirmation email until approval occurs.

To review an actual email before finalizing the setup or edit, type the appropriate email address in the *Test Email* field below the email template, and click **SEND TEST EMAIL**. A confirmation pop-up appears to let you know the email has been sent:
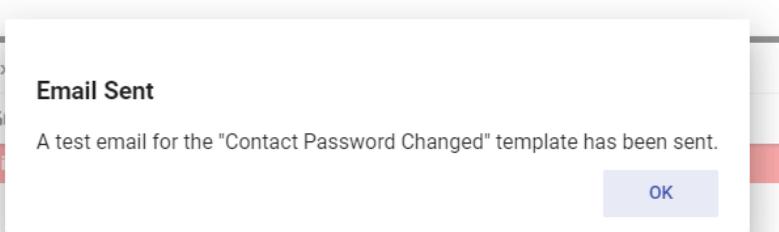
Click the **Active/Inactive** toggle at the top-right of the page to make the template active or inactive:

← **Contact Password Changed**

Use this template to draft an automated email that notifies contacts when their Parks and Recreation login passwords have changed.

Active

← **Contact Password Changed**

Use this template to draft an automated email that notifies contacts when their Parks and Recreation login passwords have changed.

Inactive

To save the template, click the **SAVE** button below the template.

ERP INTEGRATION

Administration > System Setup > Integration Settings

INTEGRATION SETTINGS

FINANCIAL SYSTEM SELECTION

The Integration Settings page has been redesigned to let you specify the financial system at a global level instead of at each export level:

Your selection from the *Financial System* drop-down in the top-right corner of the page determines what exports appear on individual cards below the selection.

EXPORT FILE AND SERVICE SETUP

To set up an export file or service, click the corresponding export card to expand it:
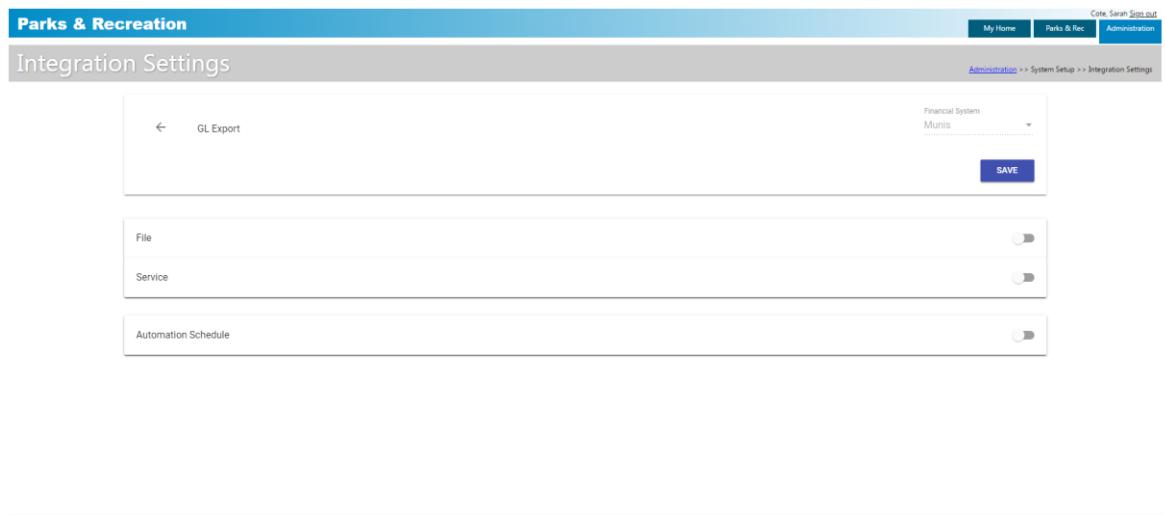
To have a **File** or **Service** generated from the export page, move the corresponding toggle button to the right, and click the **SAVE** button under the *Financial System* field:
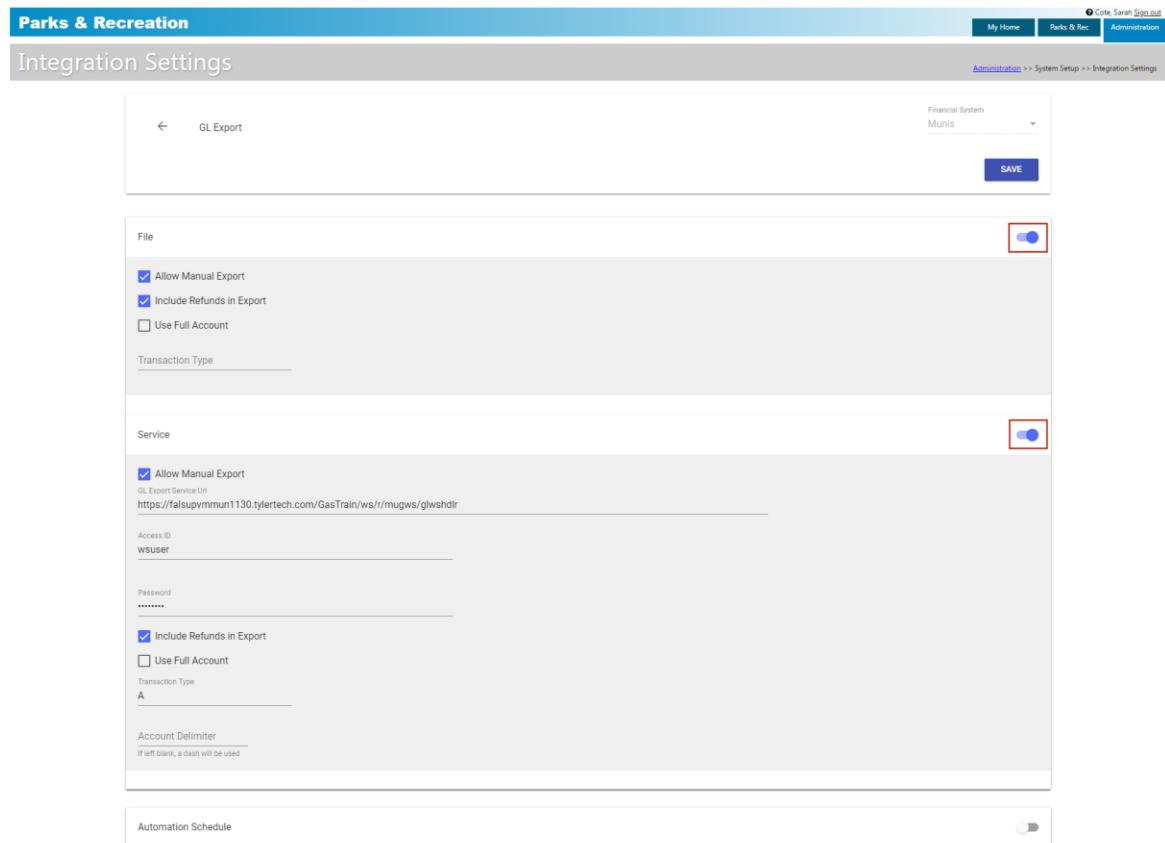
Depending on the financial system selected, additional fields may be available on the **File** and **Service** cards. The availability of the **File** and **Service** cards themselves also depends on the system selected.

The **Service** card always contains fields for the selection of a destination URL, user name and password.

Use the *Allow Manual Export* check box on the **File** and **Service** cards to enable and disable manual export buttons on the corresponding export pages:

Selecting this check box on the **File** card enables a green export button on the corresponding export page with the word *File* in parentheses. Selecting the check box on the **Service** card enables a green export button with the word *Service* in parentheses. Selecting the check box on both export types enables both export buttons, one for file and one for service, as shown below:

Those using the Munis charge code service can verify their service and the returned charge codes directly from the Integration Settings page:
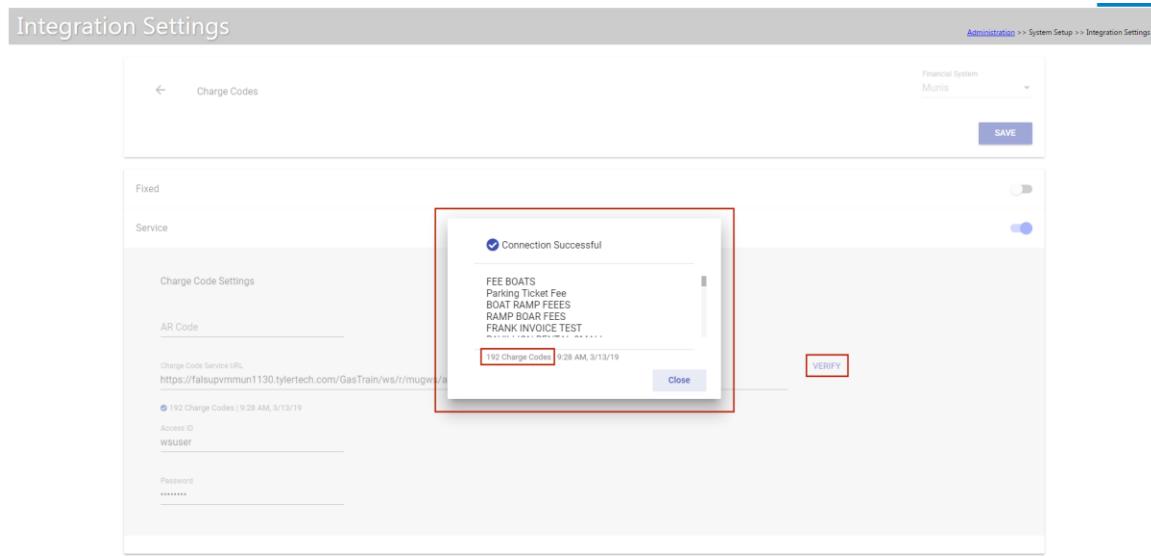
The charge codes returned will be available for selection in the *Charge Code* drop-down on the individual Fee Details pages in Administration.

AUTOMATION SCHEDULE

The new Integration Settings page also provides an **Automation Schedule** card that lets you automatically generate a file or a service on existing exports and tie it to a schedule; for example, you may have an export file run on a selected day of the week and time and dropped into an available file path location on the server:
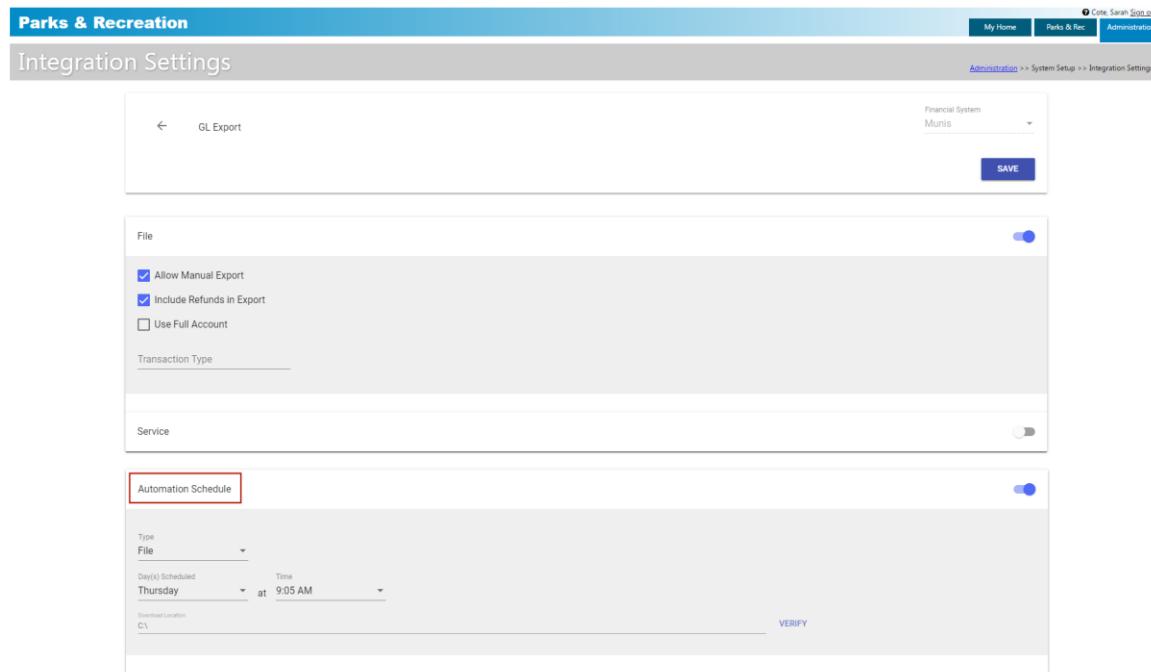
For the **File** or **Service** option to be available as a selection in the *Type* field, the toggle must be in the active position on the corresponding card:

To verify the server containing the file is able to drop the file into the *Download Location* specified or, in the case of a service, the https request is able to reach the URL specified, click the **VERIFY** button. You will receive a message telling you whether the location is valid:
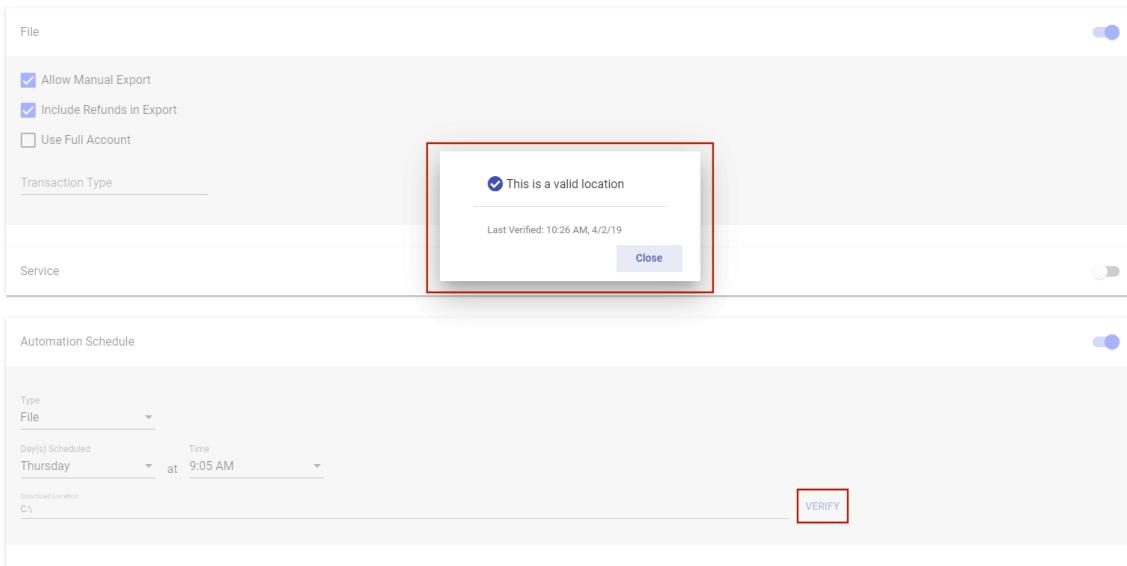
An invalid message instructs you to make sure the application has create and update access to the location.

Note: You may set up an automation schedule for a file or a service, not both.

To save your selections on the Integration Settings page, click the **SAVE** button under the *Financial System* field.

VIEW SYSTEM LOGS

A new **View System Logs** button opens a System Logs page containing export history, with each export displayed on a card:

Each card shows the type of export, the method (file or service and manual or automated), the number of records exported, the date and time of the export and the status of the export.

STATUS KEYS

File Method	
Status	**Description**
✅	**Success**: File generated and successfully dropped into location, if one was named.
❌	**Error**: Drop location not available or accessible.

Service Method	
Status	**Description**
✅	**Success**: Request sent, analyzed and accepted.
❌	**Error**: Request sent, no response; not able to generate https request; not able to make connection with server; or, after generated and analyzed, error found.

ACTION MENU

Click the vertical ellipses ⋮ on the far-right of any system log card to open an action menu with options to view and download export details:


System Logs

| Type	Method	Records	Timestamp	Status	
Collection	A	File	5	3/20/2019 08:28 AM	✅ CSV_File_Export_03-20-2019…	View / Download
GL	A	File	16	3/19/2019 02:40 PM	✅ Eden File Export 03-19-2019	
GL	A	File	35	3/19/2019 11:20 AM	✅ Eden File Export 03-19-2019	
Collection	A	Service	1	3/18/2019 03:45 PM	❌ Error exporting transaction d…	⋮
Collection	A	Service	0	3/18/2019 11:45 AM	✅ Payments Sent: 0 Payments l…	⋮
Collection	M	Service	33	3/18/2019 09:07 AM	❌ Error exporting transaction d…	⋮
Collection	M	File	33	3/18/2019 09:07 AM	✅ Munis_File_Export_03-18-20…	⋮
Collection	M	Service	3	3/18/2019 09:05 AM	❌ Error exporting transaction d…	⋮

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VIEW FILE

For a file, the **View** option opens a pop-up that shows the date of the export, whether it was run automatically or manually, the parameters used to run the export and the result—in this case, the name of the actual file created. If the export was run manually, the name of the user who ran it displays:

VIEW SERVICE

In addition to providing the same information as the file pop-up, the service pop-up includes details of the actual request that was sent:

MISCELLANEOUS

ZERO-DOLLAR MULTI-FAMILY DISCOUNT

Administration > Cashier Setup > Discount

The **Multi-Family Discount Setup** group of the Discount Details page has been modified to let you have steps with zero-dollar discount amounts:

ZERO-DEFAULT ATTENDEES RENTAL REGISTRATION CREATE

Parks & Rec > Rental Registration > Create > Checkout

The default entry for the *Number of Attendees* field on the Rental Details & Acknowledgements step of the Rental Registration Create process has been changed to *0* to require the user to remove the value and enter the correct number of attendees before continuing:

AUTO-UPDATE RELATIONSHIP/DEPENDENT INFORMATION

Citizen Portal > Profile > Relationships/Dependents > Add/Edit

If the *same as parent/guardian* check box is selected on the Contact Details or Contact Address page of a relationship/dependent and the parent's/guardian's information changes later, the changes are incorporated automatically on the relationship's/dependent's record:

CONTACT DETAILS   CONTACT ADDRESS   RELATIONSHIP   CONFIRM

Contact Details

* Indicates required fields

☑ same as parent/guardian

first name*
Rebel

Contact Preference*
Unspecified ▼

middle name

Home Phone

last name*
Wales

Mobile Phone

Date Of Birth (mm/dd/yyyy)*
04/03/2002

Work Phone

Gender*
Male ▼

Alternative Phone

School
- Select - ▼

Email Address

Grade
- Select - ▼

Next >

RENTAL EVENT DESCRIPTION

Parks & Rec > Rental Registration > Search > Edit

Parks & Rec > Rental Registration > Create

The *Description* field in the **Setup** group of the Rental Registration Details page has been renamed as *Event Description*:

An *Event Description* field also has been added to the Rental Details & Acknowledgements page of the Rental Registration Create process:

The *Description* column on the export file generated from the Rental Registration Search page also has been replaced with *Event Description*.