Fall 2021 Updates Webinar Outline (10/8/21)

All examples are on the Demo Training Site (please call client services if you need access). Demo Training site was refreshed around July 1.

Latest and Greatest

- Our new Knowledge Base (help area) is live! Check the question mark at the top of the page, in each nav area, or below the management home page quick utilities.

POS

- The Refund Invoice area of the facility portal defaults to today's date and has time fields.
- A payment type, user, and location filter dropdowns are available in the facility portal Refund Invoice area.
- Accountless POS barcode scans are now included in the membership scan report, which has been renamed to access scan report.

Activities

- Requirements tab of activities/memberships shows if custom forms have been received with details.
- If custom forms are filled out but not associated to the registration, they can be associated from the activity/membership requirements tab.
- If custom form fields were not set to show on roster at the time they were filled out, they can be updated from the form itself.

Advanced Activities

- Advanced activity schedules may be modified up to 30 days from the last date of the activity. Note that registrations are attached to particular dates.
- Single day pricing options of advanced activities can now be limited on how close to the activity date a registration can occur.

Rosters

- New columns on standard attendance sheets include signature, health check, and time.
- Advanced activity attendance sheets have age/grade display, signature, time, & health check options & also display filter choices on print.
- A max visits setting can be added to standard/team activities that tracks visits via digital sign in and shows when max is reached.

- Questions on activities can be marked to show on digital sign in sheets for staff use with seeing and noting pickup persons.

Reservations & Requests

- When hiding a permit until reservation is paid, the permit will email automatically even if payment declined then paid or paid in credit.
- Matrix and block fees do not appear in reservations if the date is in conflict or excluded unless that status is resolved.

Reports

- Multiple items can be selected at once on the program payment/balance summary report to see combined information on export.
- A total is displayed for the date range at the top of the Authorize.net settled transactions report.
- All sales reports (except facility) have been confirmed to now be running by invoice data instead of payment data with non-sales data removed.
- The program sales report filters out waitlists by default, but they can be included via checkbox.
- The program sales by zip code and program income by zip code reports will use billing zip codes if residency by zip code is not on.
- The program income report shows payment information down to the transaction level on click-through, which includes payment notes if present.
- The digital sign in report includes a total of sign-ins, sign-outs, and absences, if applicable, when viewing a certain day.
- The custom AMS transaction export report includes transactions for all item types vs. just registrations (for those with AMS financial software).
- A JE version of the Munis export exists in addition to the AR version on the same financial report. Please contact us for setup.

Checkout

- Public and management checkout for activities holds seats as soon as the item is in the cart, regardless of whether high demand is used.
- Simplification: Public and management checkout for standard and team activities allows multiple account members to be selected at the same time, including eligibility checks.
- If a team has reached its seat cap before someone is registered into it during checkout, they will be alerted and asked to choose another.
- If required fields are not completed when a custom form is submitted, those fields will highlight with red text to show which were missed.

Memberships

- Photos can be uploaded into membership top-level descriptions, similar to what programs do.
- If a membership has no active lengths (i.e. all expired or all inactive), it will appear under inactive memberships in the membership list.
- Membership lengths may be made inactive from inside a membership. If there are no registrations, the type may be deleted as well.

Accounts

- When using residency by zip code, auto-residency detection may be overridden on accounts (residency also updates on zip code changes).
- When transferring weeks on an account's advanced activity registration, associated due dates will change to be relative to the new reg dates.
- The back-to-card refund window for credit card transactions has been extended from 120 days to 180 days to match Authorize.net's window.
- An interim screen has been added to the cancellation process to more clearly show what will happen at the end of the refund/credit.

General

- The public side main and account navigation areas now have submenus in the hamburger menu when viewed on a mobile device for easier access and less scrolling.
- The public side 'how to register' page has new text/video to match the new registration process.
- You can change the name of your gateway.
- All passwords (customers and management) must be at least 12 characters long (inc. new accounts, password reset, temp password, new members, login edits, etc.) in response to enhanced security.

Number of Characters	Numbers Only	Lowercase Letters	Upper and Lowercase Letters	Numbers, Upper and Lowercase Letters	Numbers, Upper and Lowercase Letters, Symbols
4	Instantly	Instantly	Instantly	Instantly	Instantly
5	Instantly	Instantly	Instantly	Instantly	Instantly
6	Instantly	Instantly	Instantly	1 sec	5 secs
7	Instantly	Instantly	25 secs	1 min	6 mins
8	Instantly	5 secs	22 mins	1 hour	8 hours
9	Instantly	2 mins	19 hours	3 days	3 weeks
10	Instantly	58 mins	1 month	7 months	5 years
11	2 secs	1 day	5 years	41 years	400 years
12	25 secs	3 weeks	300 years	2k years	34k years
13	4 mins	1 year	16k years	100k years	2m years

Example:

- MX Merchant payment processing
- Digital Membership Cards- COMING NEXT WEEK!

Tips and Tricks

- Embed PDF in program area - Example
- Embed Youtube Videos in text editor
  - These are located in your Help Files/Knowledge Base on management side

Reminders

- We have a Musco connection available to send your event schedule to ControlLink for lighting control
- Need receipt printers, card scanners, sneeze guards, or other equipment? Visit our POS portal
- Our Constant Contact partnership can give you a discount on email advantages, marketing and more.

Help Us Help You Grow

- See what we're working on from Misc > Think Tank Issues.
- Request changes from Misc > Change Requests.
- Ask what others are doing in Misc > Discussion Board.
- View more updates by visiting our Twitter feed.
- We care about your feedback and would love your Facebook Review: https://www.facebook.com/MyRecDept/reviews/