Summer 2022 Updates Webinar Outline (6/21/2022)

All examples are on the Demo Training Site (please call client services if you need access). Demo Training site is refreshed in January and July.

System Wide- Refreshers

- 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.
- New user setting feature where admins can choose what users have access to (or which navigation tabs they can access). (Custom User Privileges)
- We have a new email for client services: **support@myrec.com**, and for billing inquiries: billing@myrec.com.

Activities & Advanced Activities

- Pricing options were combined into single day, weekly, monthly, & entire session with 'per day' & 'multi day' functions in weekly & monthly.
- Seat tracking was added to the standard activity Registrations tab to view when seats were held and released for all attempts.
- Buffers can be seen on management-side activity schedules by clicking a checkbox from the schedule tab.

Facilities and Reservations

- When creating mgmt side reservations, a schedule's due dates can be applied to other schedules that exist then in the creation process.
- Single-schedule reservations will pre-fill the deposit setting if previously set on the facility involved.
- When a matrix is used for fees on mgmt reservations, the fees involved can be edited during the creation process, even if not advanced.
- An 'add facility' link is now on reservations to add dates at a new facility on the same permit group & invoice, including requirements.
- A default buffer can be set on facilities, which will override any global buffer for reservations.
- Reservation buffers are represented in availability charts and when viewing reservation dates (if selected).
- Quick adds now display on public facility activity/reservation lists and as own link in the Reservations+ tab of facilities.

- Facility questions for reservations and requests can have a secret answer set to restrict access to those who know the correct response.
- Facility questions can be hidden from public reservations and requests while still applying to the mgmt side for notes and tracking, etc.
- Reservation date restrictions set on a facility can have a value of zero to allow same-day reservations.
- A checkbox has been added to facility's rental info tab to allow public reservation date restrictions to apply to facility requests as well.
- Excluded dates in reservations can be updated to be un-excluded from the reservation listing.
- Icons have been added to the date list on reservations to view basic information on last modification.

Email and Text Blasts

- The text blast system has been updated to use direct SMS service instead of email to text and no longer requires provider entry. Nothing new for you, just better!

Reports

- Files generated from report exports now contain the name of the report and some filter settings before the export data for reference.
- Informational programs have been added to the program catalog page. Program catalog options have been combined into one custom report.
- Membership, activity, & adv activity balance reports can be viewed by program-level to aid in seeing membership/program balances at once.
- Bar graphs & pie charts were updated to more modern bar graphs in dashboard reports. Older financial report pie charts were deprecated.
- The balance due by account report also includes a section for accountless balances, such as in POS.
- Online processing fee totals filter by budget group on the outer layer of the budget group income summary.
- When viewing the balance due by reservation report, balances can be seen by all facilities or 1 facility, which breaks down areas as well.
- Balance notes can be added to invoices (mgmt side view only) that will appear in all balance due reports.
- Balance due by advanced activity report shows balances for specific week/month registrations of the date range when clicking an activity.

Accounts

- When modifying times on a reservation, a box can be checked to see all dates in the reservation group then select and edit them together.
- Reservation deposits may be returned from any reservation in a permit group, but only once.

What's Coming

- We are dedicating this year to improving our infrastructure to make the experience for you and your customers even quicker with smoother registrations (see Spring Dev Newsletter for specifics, but here's a sneak peek)
- We have plans to update the public programs list area with easy-to-access categories. Take a look at Misc > Upcoming Changes to learn more.

You can and should (on your mgmt home page):
- Update your home page photos with buttons
- Check the Updates for the newest functionality weekly
- Sign up for our Quarterly Newsletter
- Attend quarterly live webinars

Reminders

- We have a Musco connection available to send your event schedule to ControlLink for lighting control.
- Need receipt printers, card scanners, or other equipment? Visit our POS portal – also check out the equipment guide for all items tested to work in our system.
- 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 > Upcoming Changes.
- Request changes from Misc > Change Requests.
- Ask what others are doing in Misc > Discussion Board.
- Check us out on Instagram, Twitter, Facebook and Linked in.
- We care about your feedback and would love your Facebook Review: https://www.facebook.com/MyRecDept/reviews/