RecDesk Director

User guide

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Welcome

Welcome to **RecDesk Director** online help. Here you will find all you need to get started with RecDesk and begin managing your organization's day to day operations. If you have further questions and do not find the answers here, please send an email to support@recdesk.com and we'll be sure to get you the information you need.

Getting Started

Getting started with RecDesk is **easy**. One way to do it is to *jump right in* and start adding your *Programs, Facilities and Memberships*. You'll find the layout and flow of RecDesk very intuitive and easy to use. Don't worry, ***you're not going to break anything*** and if you make a mistake you can simply go back and perform another edit and save. For those of you who prefer a bit more of guidance, here's our recommended list of things to do:

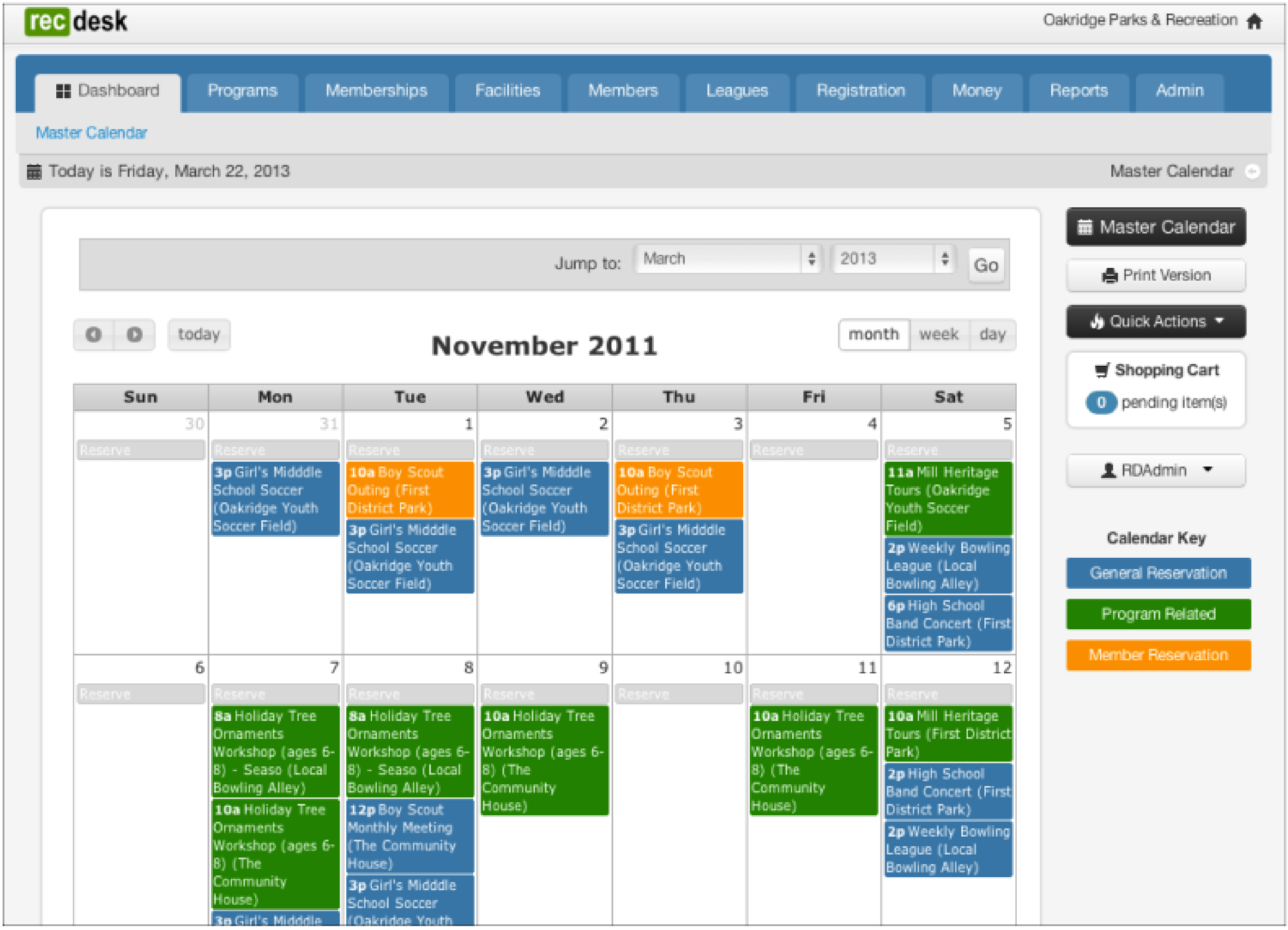
- Set up your Custom Lists - see Managing Custom Lists
- Create your Facilities - see Creating and Modifying Facilities
- Add Some Programs - See Creating and Modifying Programs
- Create Membership Definitions (if applicable) - See Creating and Modifying Membership Definitions
- Practice registering people for Programs - see Registering people for programs
- Try reserving a Facility - see Reserving Facilities
- Enroll someone in a Membership - see Enrolling Members
- Add some more Administrators to RecDesk (you deserve some Help!) - see Adding RecDesk Users
- Print out some Reports

Have at it and have fun!

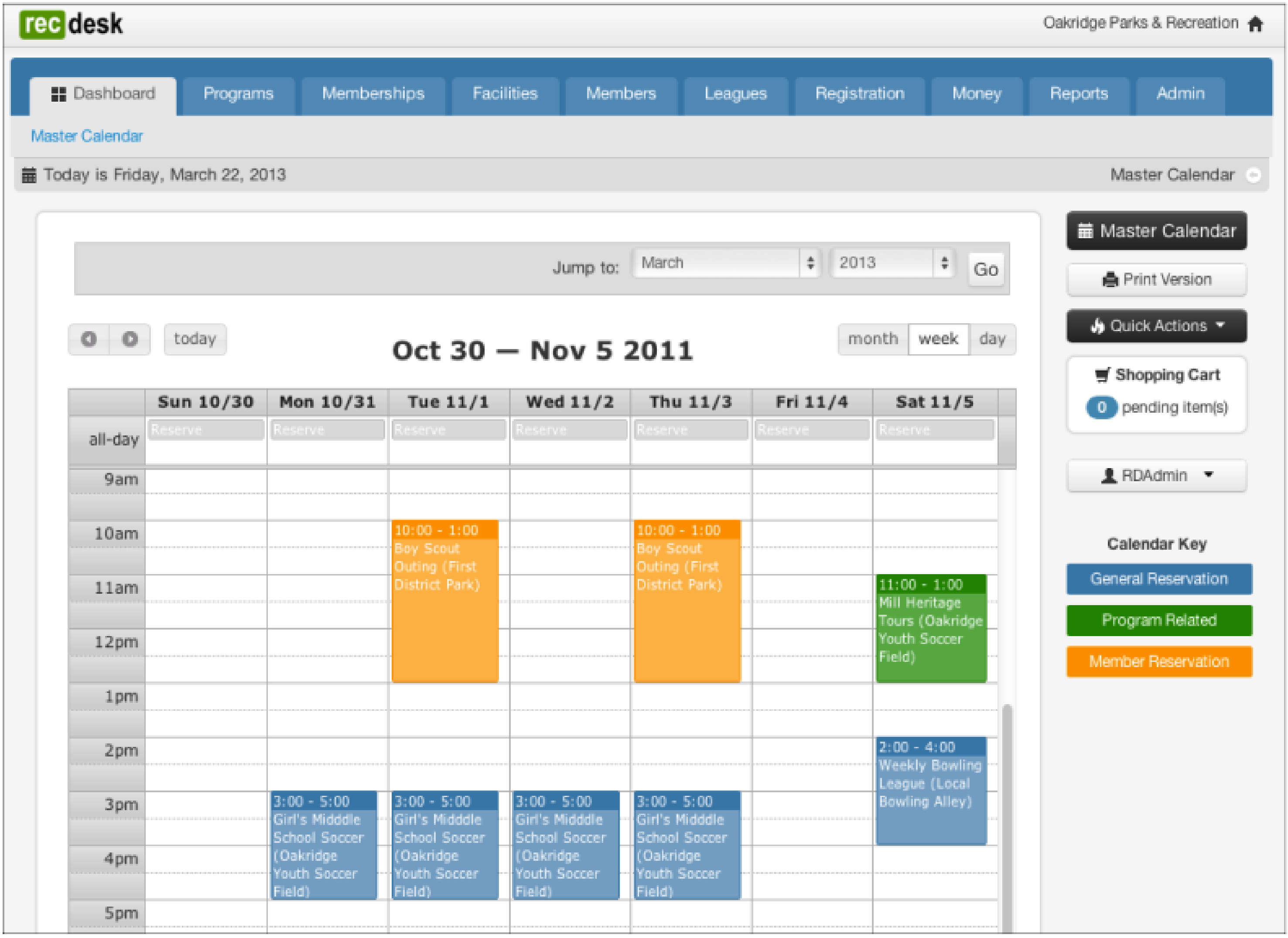
Master Calendar

One of the central features of RecDesk is the **Master Calendar**. This offers you a high-level overview of what is going on at your organization at any given point in time. It tracks *Program schedule dates*, general *Facility Reservations* and Member initiated *Facility Reservations*. There are *Monthly, Weekly and Daily* views. Each Facilty also has its own more focused ***Usage Calendar***, similar to the Master Calendar. See [Facility Usage Calendar](#).

Master Calendar Monthly View



Master Calendar Weekly View


rec desk
Oakridge Parks & Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Master Calendar
Today is Friday, March 22, 2013
Master Calendar
Jump to: March 2013 Go
today
Oct 30 — Nov 5 2011
month
week
day
Sun 10/30
Mon 10/31
Tue 11/1
Wed 11/2
Thu 11/3
Fri 11/4
Sat 11/5
all-day
Reserve
9am
10am
11am
12pm
1pm
2pm
3pm
4pm
5pm
10:00 - 1:00 Boy Scout Outing (First District Park)
10:00 - 1:00 Boy Scout Outing (First District Park)
11:00 - 1:00 Mill Heritage Tours (Oakridge Youth Soccer Field)
2:00 - 4:00 Weekly Bowling League (Local Bowling Alley)
3:00 - 5:00 Girl's Midddle School Soccer (Oakridge Youth Soccer Field)
3:00 - 5:00 Girl's Midddle School Soccer (Oakridge Youth Soccer Field)
3:00 - 5:00 Girl's Midddle School Soccer (Oakridge Youth Soccer Field)
3:00 - 5:00 Girl's Midddle School Soccer (Oakridge Youth Soccer Field)
Master Calendar
Print Version
Quick Actions
Shopping Cart
0 pending item(s)
RDAdmin
Calendar Key
General Reservation
Program Related
Member Reservation

Frequently Asked Questions

Program and Registration Related FAQs

How do I copy (clone) a Program?

You can copy/clone a Program to create a new on. It will copy all Program attributes (including Fees plus Custom Questions) but will not copy over schedule or roster information. Heres' how to do it.

1. Select the Program from the Program List page
2. Put the Program into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Click on the Create **New Program Exactly Like This One** button
4. Change any attributes that need changing and click **Save**

How do I transfer someone from one Program to another?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Select the Transfer to another program button at the bottom-right
5. A drop down list of active Programs will appear. Select the appropriate Program and click **OK**.

How do I switch a registration from one family member to another?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Select the desired family member from the *Family Member* drop down list and click **Save**.

How do I cancel a Program Registration?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have a **Remove** button to the right-most side of the row. Click the button.
4. Be sure to click through to the Payment link after cancelling the registration to issue a refund.

How do I update responses to Custom Questions on registrations?

1. Go to the *Program* where the person is Registered and click on the *Roster* tab
2. Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
3. Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
4. Update the Custom Question answers as appropriate and click **Save**.

Member Related FAQs

How do I combine (merge) duplicate Member accounts?

Over time, duplicate Member accounts may be created for the same Member. Combining duplicate accounts is easy:

1. Go to the Member tab and search by Last Name for the Member you would like to merge into another **
2. Select that Member and then click the **Edit** button to put that Member into *Edit Mode*
3. Click on the **Merge this Duplicate Member With Another** button at the bottom-right
4. Enter the first few characters of the last name of the Member being merged to and select it from the list. Click on the **Merge Now** button. That's it. Please note that this action cannot be reversed so please pay careful attention to the profiles being merged from/to!

**** Please not that if one of the accounts has a RecDesk Community portal Login ID and Password associated with it that the customer still uses, this is the account the duplicate should be merged into. Otherwise, the RecDesk Community login credentials will no longer be valid.**

How do I assign a RecDesk Community User Id and Password to someone who was initially entered into RecDesk in-house (via RecDesk Director)

1. Go to the Member tab and search by Last Name for the Member you would like to assign an online Id to
2. Select that Member and then click the **Edit** button to put that Member into *Edit Mode*
3. Click on the **Create Online Id For RecDesk Community Site** button all the way at the bottom
4. Enter the desired **User Name** and **Password** and click **Save**
5. Communicate what the User Name and Password is to the member

How do I set up the criteria to determine Resident versus Nonresident

See Setting Up Residency Requirements

Money Related FAQs

What are Partial Payments

Partial Payments allow you to defer all or a portion of a Payment for collection at a later date. See Partial Payments.

How do process payments that are for incidental things (not Registrations/Reservations/Memberships)

See Receive Payment

What's the difference between the *RecDesk Credit Card* payment method versus the *Internal Credit Card* one?

The **RecDesk Credit Card** payment method is the one that will allow for integrated credit card processing against your merchant account. This is the most commonly used method for credit card payments.

The **Internal Credit Card** method is for recording credit card payments that are performed using legacy methods such as a card swipe in your office using older equipment or for something such as Square if your taking mobile payments for certain things. Internal Credit Card payments **are not** processed through RecDesk, but specifying this payment method allows you to record and track these transaction in RecDesk.

Administrative Related FAQs

How do I create new Users for RecDesk Director?

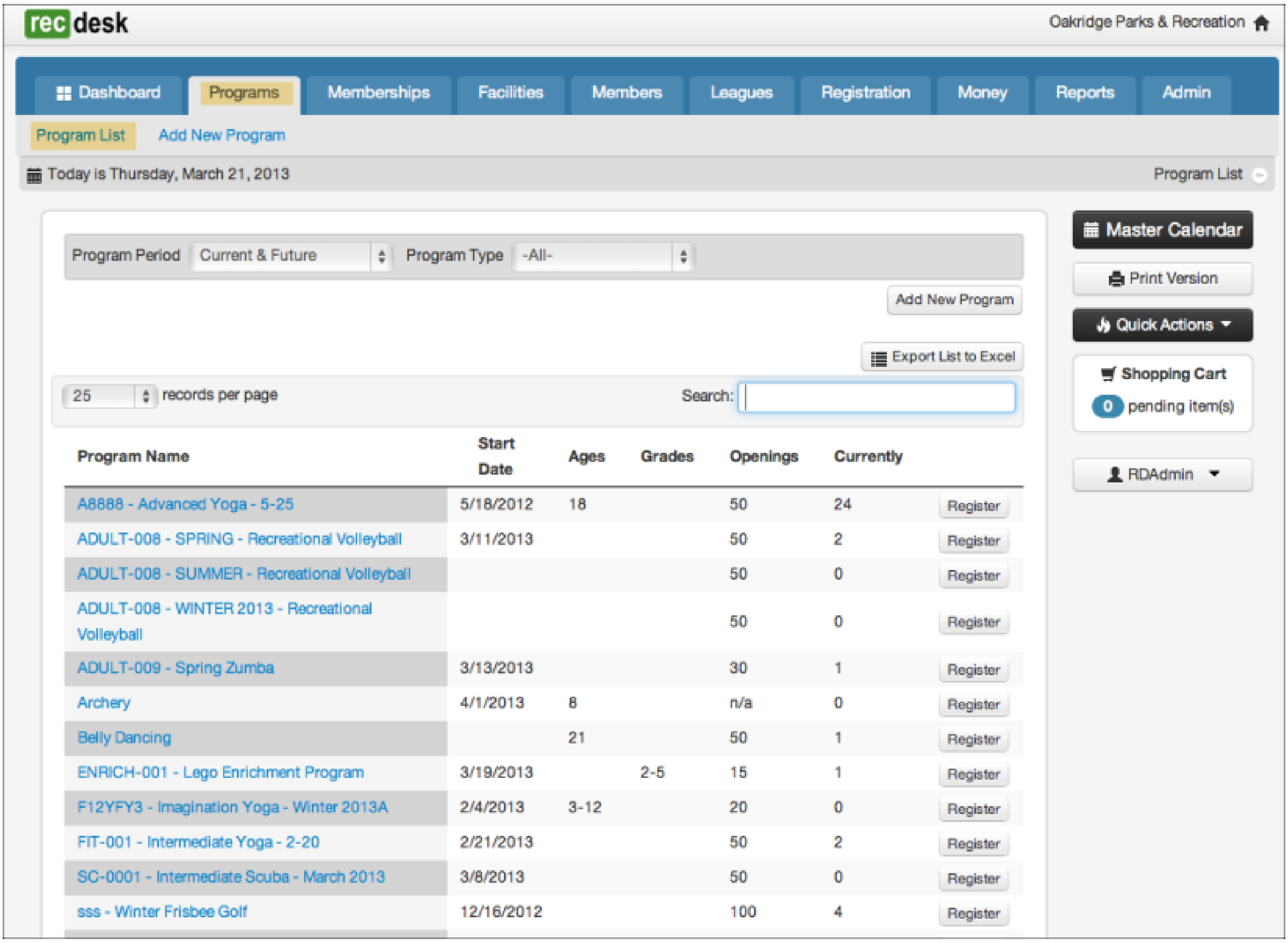
See Adding RecDesk Users

Programs and Registrations

The Program List

The **Program List** page shows all *Current & Future Programs* by default. This would be any Program that has at least one date on its schedule that is greater than or equal to today. Programs that have not had a schedule set up for them will also appear here.

Previous Programs can be viewed by selecting Past Programs from the Program Period drop down. For a complete list of fields on the Program List page see Program List Fields

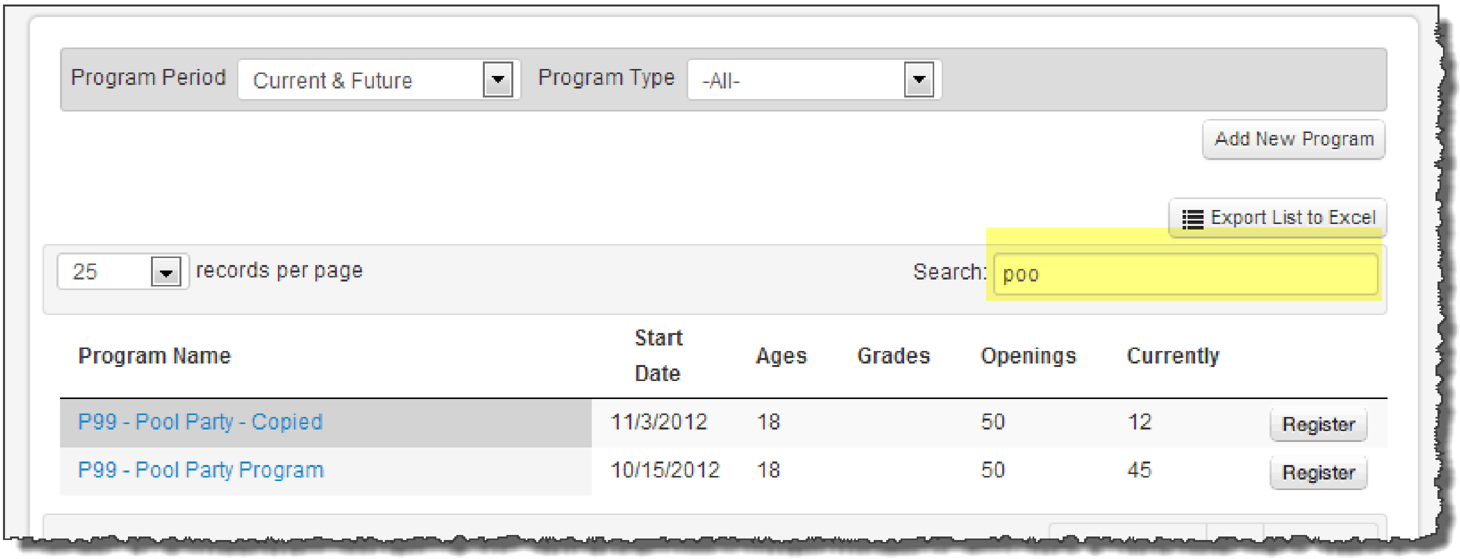


Filtering Programs

Programs can be filtered in one of two ways (or in combination).

- **Program Period** - select All, Current & Future or Past Programs from the Program Period drop down

- **Inline Filter -** Simply start entering characters into the Search field and the list will be filtered immediately


Program Period
Current & Future
Program Type
-All-
Add New Program
Export List to Excel
25
records per page
Search:
poo
Program Name
Start Date
Ages
Grades
Openings
Currently
P99 - Pool Party - Copied
11/3/2012
18
50
12
Register
P99 - Pool Party Program
10/15/2012
18
50
45
Register

Creating and Modifying Programs

Adding **new Programs** and modifying existing ones begins on the The Program List page. To add a new Program, click on *Add New Program* from the Program submenu or the *Add New Program* Button. To **modify and existing Program**, simply click on it from the Program List page and click the Edit button.

Prerequisites - Before adding a Program, you should create *Program Types, Fee Types and General Ledger Accounts* that are appropriate for you organization. See Managing Custom Lists.

For a complete list of Program related attributes see Program Fields.

Basic Workflow

- Assign the Program a Name, Program Type and optionally, a Subtype and/or Custom Program Code

- If you would like the Program to be available for **Online Registration** make sure the *Online Registration* and *Show on Portal* checkboxes are checked

- If you would like **Online Registration** to only be available for specific *window of time*, enter an *Enrollment Begin Date* and/or *Enrollment End Date*. These dates only impact Online Registration. You will always be able to register individuals in-house (via RecDesk Director) at any time.

- Enter an instructor (optional) and Description for the Program. The public will see the **Description** on the RecDesk Community portal.

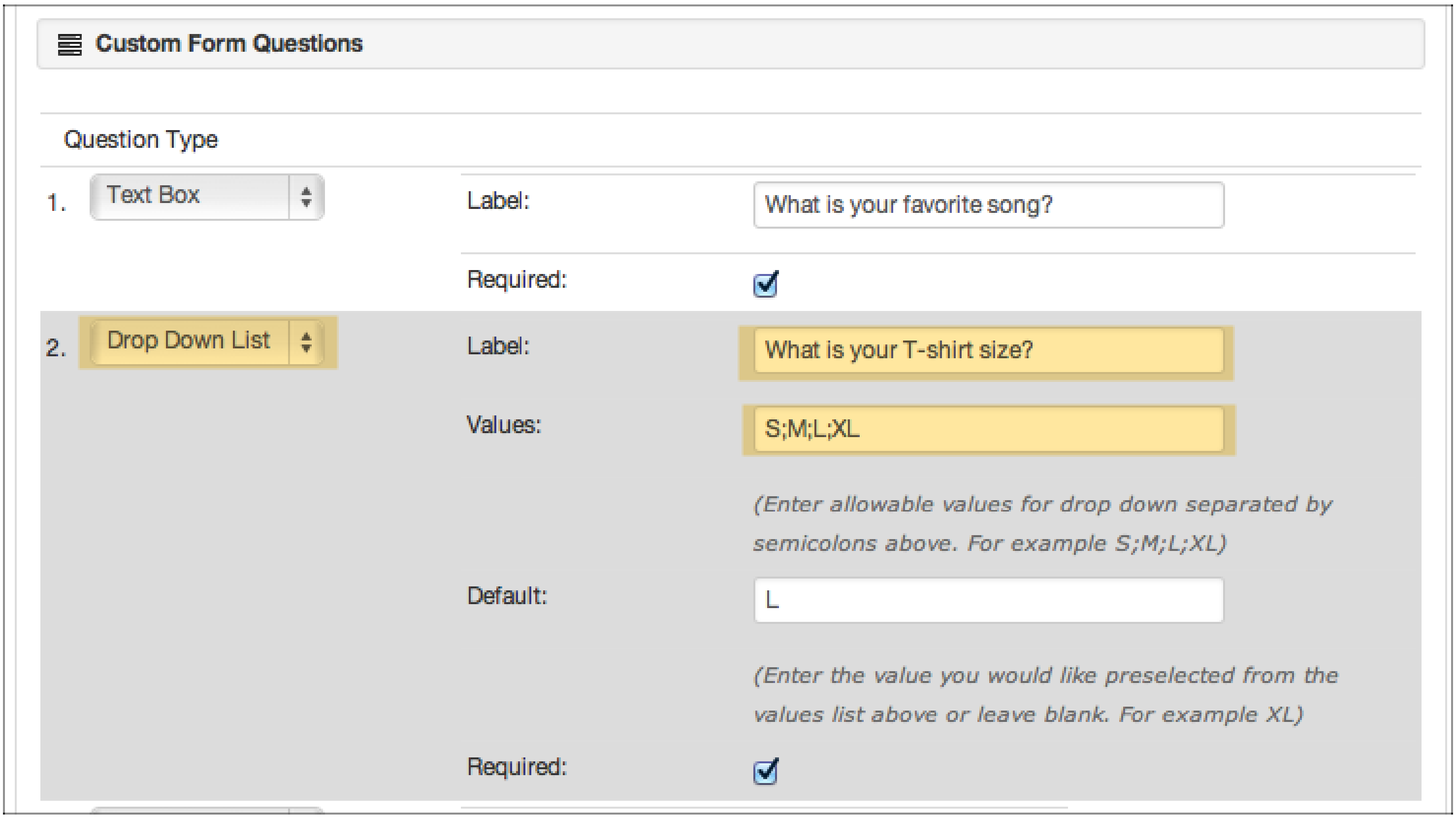
- You may optionally assign a GL Account code to this Program

- **Demographics**
    - This section allows you to communicate what demographic this Program is targeted towards. All attributes in this section are optional and are for informational purposes only (with the exception of **Enrollment Maximum** - see below)
    - If you enter a value into **Enrollment Maximum**, online registration will be cut off as soon as that limit is reached. Prospective registrants will be given the option to get on a **Wait List**. Enrollment beyond the *Enrollment Maximum* limit can be performed in-house within RecDesk Director.

- **Fees** - Up to 12 different fees may be assigned to a Program (Resident, Non-resident etc)
    - You can choose whether or not a Fee appears on the RecDesk Community portal side by simply checking or unchecking the Show Fee on Portal checkbox. You may opt to allow processing of scholarship or special rate fees by mail-in or in-house registrations only.
    - Fees can be set to be applicable to ***Only Residents*** or **Only Nonresidents**. See Setting Up Residency Requirements

- **Custom Questions -** Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Responses to these questions then appear on the Detailed Roster. See the Custom Questions section of Program Fields for more detailed information.

Example of defining a Custom Question for asking t-shirt size



- Click **Save**

- Continue on to Program Schedules

Program Schedules

Once you have created your initial Program definition, it is time to create a schedule for the Program. This allows you to not only assign dates and times the Program but also what Facility(ies) those dates and times are associated with. These dates will then appear on the Master Calendar. If updating a Schedule, select the Program from the The Program List and click on **Edit**.

Setting up a Single Date

- Click the **Add Single Date** button
- Enter a **Date**
- Enter a **Start Time**
- Select a **Facility** (optional)
- Click **OK**
- If the schedule looks good, click **Save**

Setting Up Recurring Dates

- Click the **Set Recurring Schedule** button
- Set *Start* and *End* time
- Pick the **recurrence pattern** *(Daily/Weekly/Monthly*)
  - Select details of repeating schedule. For instance, if Weekly was chosen, select the days taht apply such as M/W/F
- Select the schedule **Range** by setting a *begin date* and then either ending after a *fixed number of occurrences* or on a *specific date*
- Choose a **Facility** where this series of events will occur

- Click on **OK**

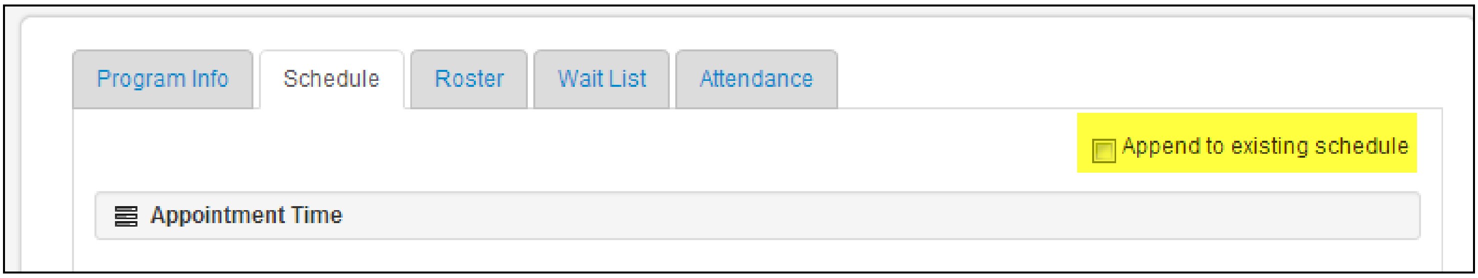
- You will be presented with a **list of schedule dates** generated from the previous steps. These have **not** been saved yet. You now have the opportunity to change or delete specific dates due to hoidays or other reasons.

- Click **Save**

Appending Dates to an Existing Schedule

By **default**, when you set up a recurring schedule **it will overwrite** the existing Schedule. In some instances you may want to simply ***append*** another recurring schedule to an existing one. This may be because the times/days and/or Facilities differ across the recurring dates.

To append to the schedule, simply check the ***Append to existing schedule*** checkbox and set up the new schedule as outlined above.



Registering people for programs

Registering people for Programs within RecDesk Director can be initiated in one of two ways:

1. Go to The Program List page and click the **Register** button to the right of that Program

2. Click on the **Registration** tab on the main navigation bar up top

Then, once your brought to the registration page:

- Select the individual who is registering for the Program
    - If they're already in RecDesk click **Search** and then choose them from the list by clicking the **Select** button
    - or, click Add New to add member profile

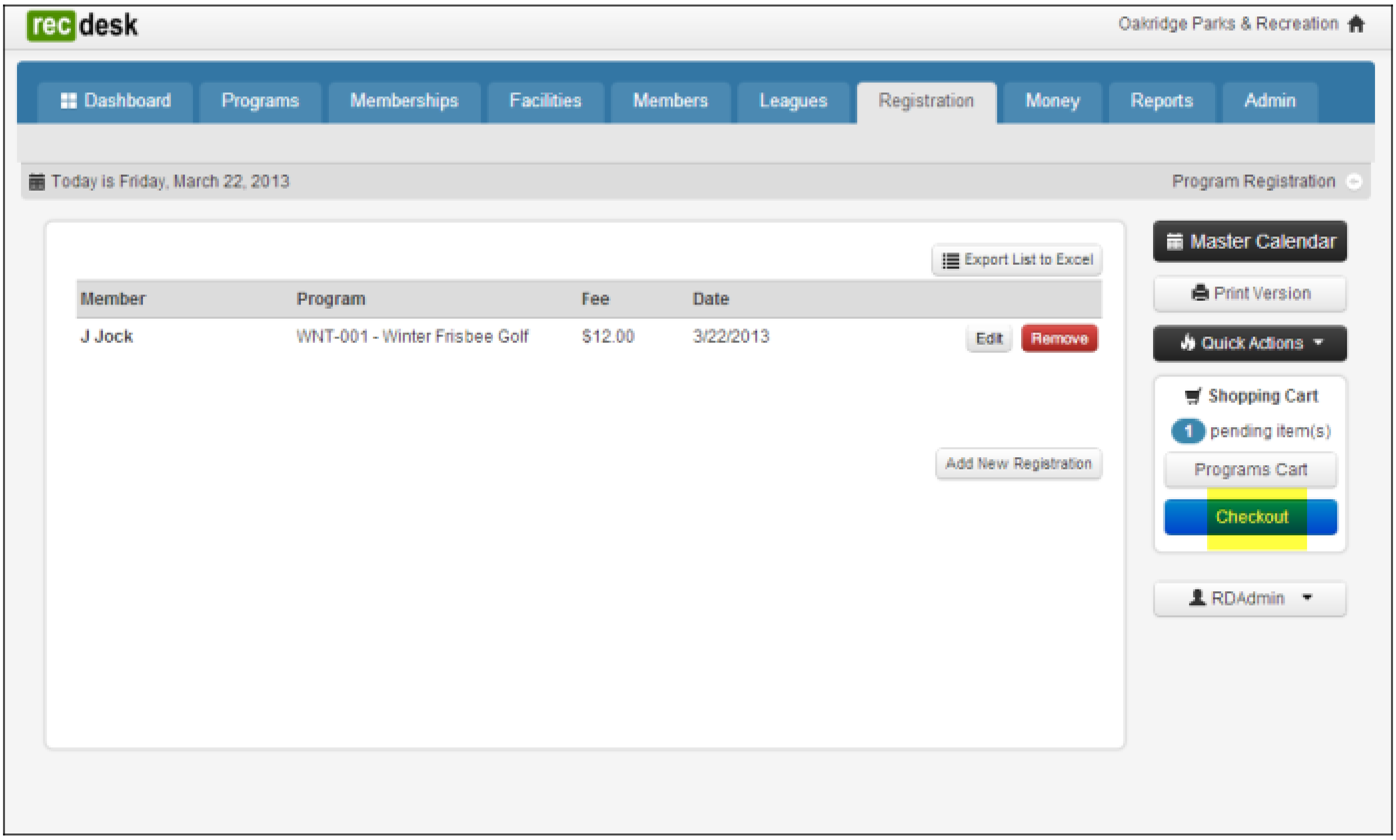
- Select the **Program** from the list (it will be already selected if registration was initiated from the Program List page)

- Select the **Fee Type**. The amount will be automatically set but **can** be overridden here.
-
- Enter **Note** (optional)

- Answer any *Custom Questions* (see Program Fields) that were defined for the Program

- Click **Save**

- The registration is now in pending status and in the **Programs Cart**. At this point, more registrations can be added or you can click on the **Checkout** button to process the Payment (see below)


rec desk
Oakridge Parks & Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Today is Friday, March 22, 2013
Program Registration
Export List to Excel
Member
Program
Fee
Date
J Jock
WNT-001 - Winter Frisbee Golf
$12.00
3/22/2013
Edit
Remove
Add New Registration
Master Calendar
Print Version
Quick Actions
Shopping Cart
1 pending item(s)
Programs Cart
Checkout
RDAdmin

Auto-Fill Custom Question Responses

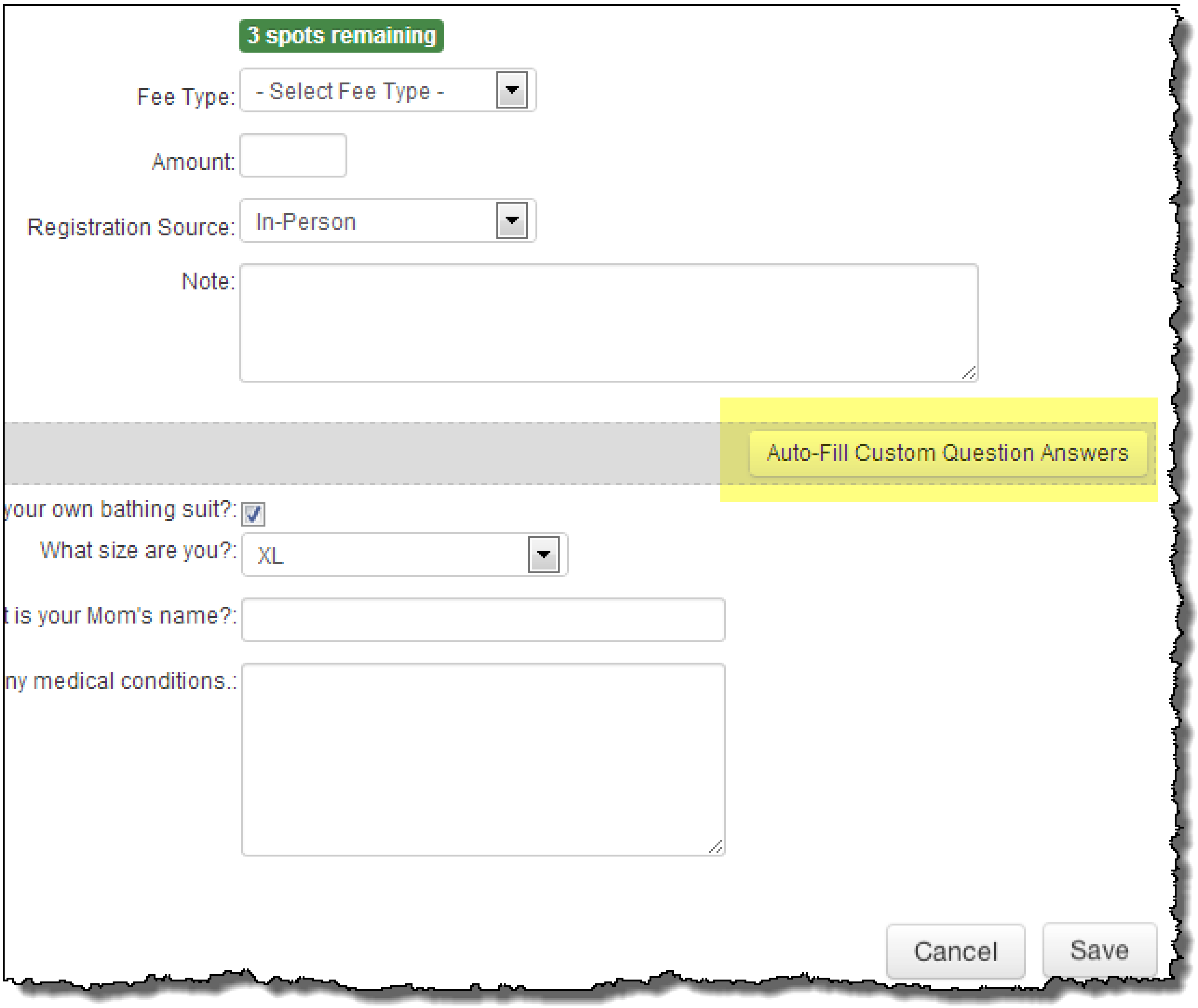
Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Another example might be *Who is authorized to pick your child up from camp?* The responses can be in the form of a textbox, multi-line textbox, drop down list or check box. See the Custom Questions section of Program Fields for more detailed information.

A common scenario is that many of the same custom questions are asked across different programs while registering an individual (and/or family members) for multiple programs that will be processed in the same batch (shopping cart session). As a way to facilitate entry of these responses, RecDesk provides an ***Auto-Fill*** Custom Question Answers button that will use previous custom question responses to pre-fill responses for new registrations in the same session.

If there are auto-fill responses available for the session, the **Auto-Fill Custom Question Answers** button will appear. Simply click that to auto-fill any previously answered custom questions of the same type (see below). The following rules apply as to what responses can be auto-populated based on previous responses:

- Must be the same custom question response type (textbox, multi-line textbox, drop down list or check box)
- The question text must be EXACTLY the same (case-sensitive)
- For drop down lists, the list of possible responses must be EXACTLY the same (case-sensitive)

Example of the Auto-Fill Custom Question Answers button on program registration


3 spots remaining
Fee Type:
- Select Fee Type -
Amount:
Registration Source:
In-Person
Note:
Auto-Fill Custom Question Answers
your own bathing suit?:
What size are you?:
XL
t is your Mom's name?:
ny medical conditions.:
Cancel
Save

Working with Rosters

You can work with the **Roster** of a particular Program by selecting that Program from the Program List page and then clicking on the Roster tab. The Roster is an aplphabetized list of all program registrants.

Printing Rosters

- Click on the **Actions** button

- Select *Simple Roster* or *Detailed Roster*

- The report will appear and can then be printed or exported to a PDF, Word or Excel

Exporting Rosters to Excel

- Simple Roster export - click on the **Export List to Excel** button

- Detailed Roster export
    - Click on the **Actions** button
    - Select Show All Columns
    - click on the **Export List to Excel** button

Emailing Program Participants

- Click on the **Actions** button

    - Option 1: **Email All Participants**
        - This will open up your *default email client* (i.e. Outlook, Outlook Express) and pre-fill the To: list with the email addresses of all participants and any family member that is designated as Head of Household
        - Type email and send as you normally would

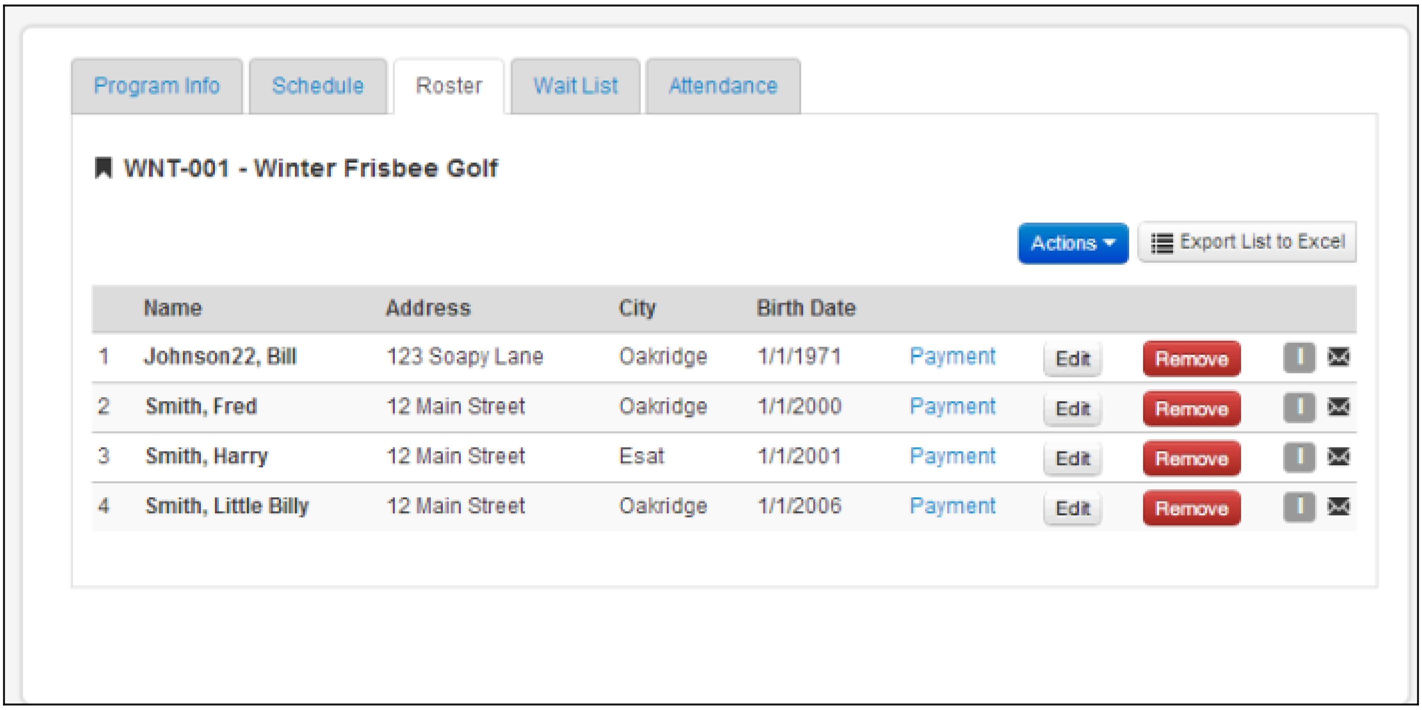
    - Option 2: **Show Email Addresses**
        - This will open a pop-up with the email addresses of all participants and any family member that is designated as Head of Household. You can then copy/paste this list as required

Updating Roster Entries

Individual Roster entries (including answers to Cutsom Questions and registered Family Member) can be updated by placing the Roster into Edit Mode

- Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
- Each entry on the *Roster* will now have an **Edit** button to the right-most side of the row. Click the button.
- Update the appropriate fields and click **Save**

Roster in Edit Mode



Cancelling Registrations

- Put the *Roster* into **Edit Mode** by clicking on the *Edit* button on the top-right, just below the tab.
- Each entry on the *Roster* will now have a **Remove** button to the right-most side of the row. Click the button.

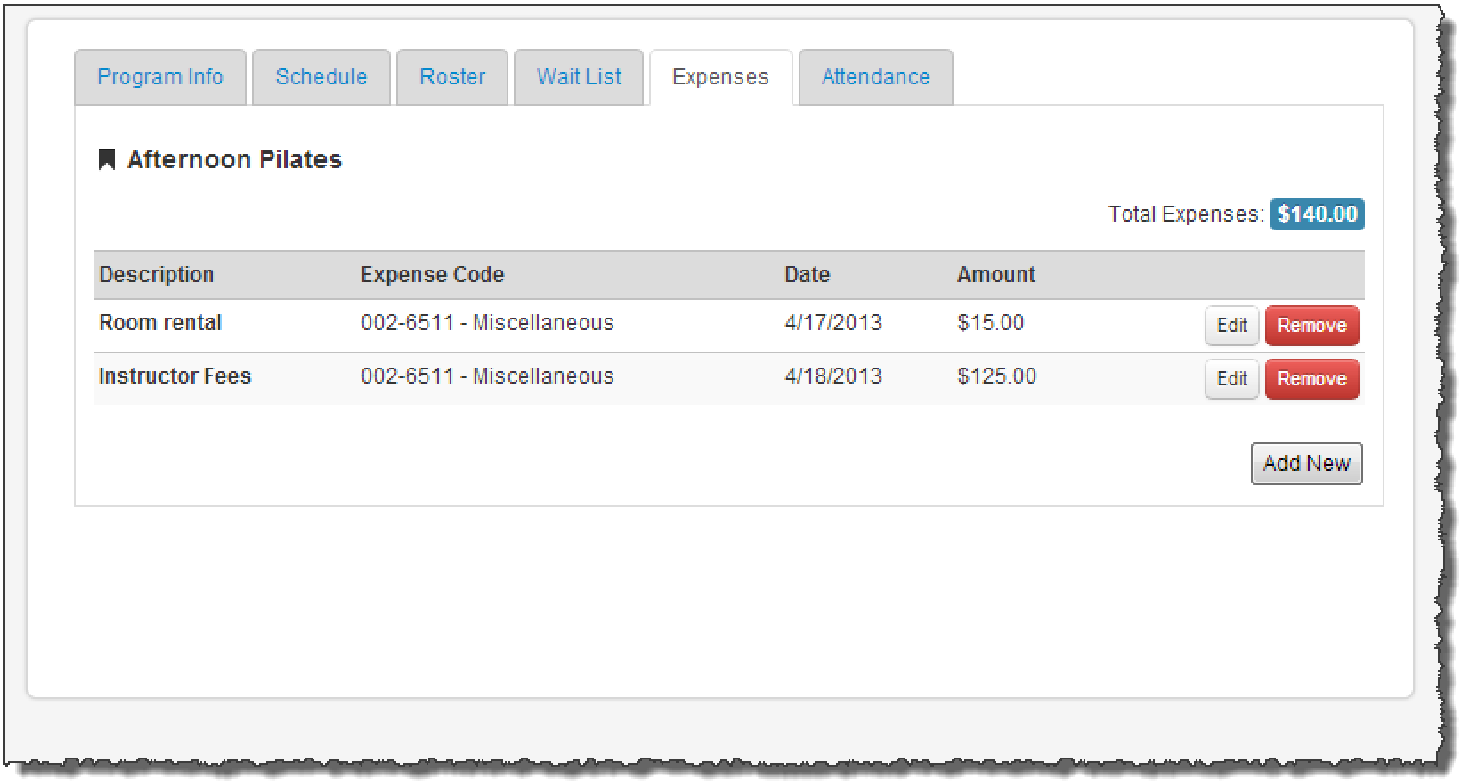
Wait Lists

When a Program is **full** (reached *Enrollment Maximum* - see Program Fields), you can Add prospective registrants to a **Wait List** by going to that Program and clicking on the *Wait List* tab. Click the **Add to Wait List** button, type in the first few characters of the member's Last Name and choose them from the drop down list. Member's will be added to the list in the order they're entered.

If a spot then opens up, you can initiate a Registration from the Wait List by clicking on the **Register** button and following the workflow at Registering people for programs. Once the registration has been processed by going through the checkout process it will automatically be removed from the Wait List.

Program Expense Tracking

RecDesk gives you the ability to track **expenses** (ties back to GL Account Codes) for purposes of reporting on full Profit and Loss (P&L) on your Programs. To record an expense, simply navigate to the Program from the Program List. Once there, click on the expenses tab as shown below. You will then be able to Add/Edit/Delete Expenses as required.



Taking Attendance

You can take attendance for a given schedule date of a Program by going to that Program and clicking on the **Attendance** tab. Select the ***Take Attendance*** link to the right of the date you want to take attendance for. There will then be a two column list. On the left will be all registered members of the program. Click the **Add** button to mark them as attended and move them to the *Attendees* column. Clicking the Remove button will take them off the Attendees list and place them back into the Eligible Registrants list.

Appendix

Program List Fields

Program List Fields

- **Program Name** - Name assigned to the Program
- **Start Date** - The first calendar date on the Program's schedule
- **Ages** - Targeted age group (if specified)
- **Grades** - Targeted age group (if specified)
- **Openings** - Maximum Enrollment
- **Currently** - Current Number of Registrants

Program Fields

Program Fields

General

- **ID** - Internal RecDesk Id assigned to Program
- **Name** - Descriptive name given to Program
- **Program Type** - The Program Type assigned to this Program. Program Types allow you to organize programs in a way that makes sense for your organization. See Managing Custom Lists
- **Program Subtype** - Further way to categorize Programs. See Managing Custom Lists
- **Custom Program Code** - This is an optional code that you can assign to a Program. It usually corresponds to a catalog/brochure Id or it can be used to give contextual information around season or year.
- **Online Registration** - Check this box to make Program available for online registration. Default is checked.
- **Show on Portal** - Check this box to make Program appear on RecDesk Community portal. Default is checked.
- **Show on Calendar** - Check this box to make Program schedule appear on the Director and Community master calendars. It is most often checked, but may be unchecked if you're using a Program to track registrations/usage outside of the normal workflow. Default is checked.
- **Enrollment Begin Date** - The date when online registration is opened to the public. If this is left blank, online registration will be available up until the last scheduled date of the Program.
- **Enrollment End Date** - The date when online registration is closed to the public. If this is left blank, online registration will be available up until the last scheduled date of the Program.
- **Instructor** - Name of instructor

- **Description** - Brief description of the Program

Accounting

- **General Ledger Account** - The GL Account associated with this Program. See Managing Custom Lists

Demographics

- **Gender** - Male or Female. Informational only.

- **Enrollment Minimum** - Minimum number of people required for Program to be implemented. Informational only.

- **Enrollment Maximum** - The maximum number of persons allowed to register for a Program. Once this maximum has been reached, online registration will no longer be available and registrants will be allowed to get onto a Wait List.

- **Grade Minimum** - Target minimum grade. Informational only.

- **Grade Maximum** - Target maximum grade. Informational only.

- **Age Minimum** - Target minimum age. Informational only.

- **Age Maximum** - Target minimum age. Informational only.

Fees

- **Fee Type** - The Fee Type assigned to this fee. See Managing Custom Lists

- **Amount** - The dollar amount of the fee.

- **Show on Portal** - If checked, this Fee will appear on the Community Portal for online registrants to see. If left unchecked, it will be able to be used internally in RecDesk Director but not on the Community Portal. An example of when it might be left unchecked is for a *Scholarship* type fee that requires some form of verification before registering.

- **Residency Restriction** - Options are: *None, Residents Only* and *Nonresidents Only* (Default *None*)

Custom Questions

Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Responses to these questions then appear on the Detailed Roster. There are four distinct flavors of Custom Questions depending upon the nature of the question. Answers can be in the form of:

Text Box - Simple free form answer.

- **Label** - The question being asked
- **Required** - Check this to require a response

Multi-Line Text Box - Simple free form, multi-line answer.

- **Label** - The question being asked
- **Required** - Check this to require a response

Drop Down List - A pick list of answers (i.e. t-shirt size: S,M,L,XL)

- **Label** - The question being asked
- **Values** - A semicolon delimited list of possible answers. At registration time, this list is transformed into a drop down list. A sample list of values for our t-shirt drop down might be: **S;M;L;XL**
- **Default** - A default value for the drop down list. It must be one of the values in the semicolon delimited list above. For example, **XL**.
- **Required** - Check this to require a response

Checkbox - A simpel Yes/No answer

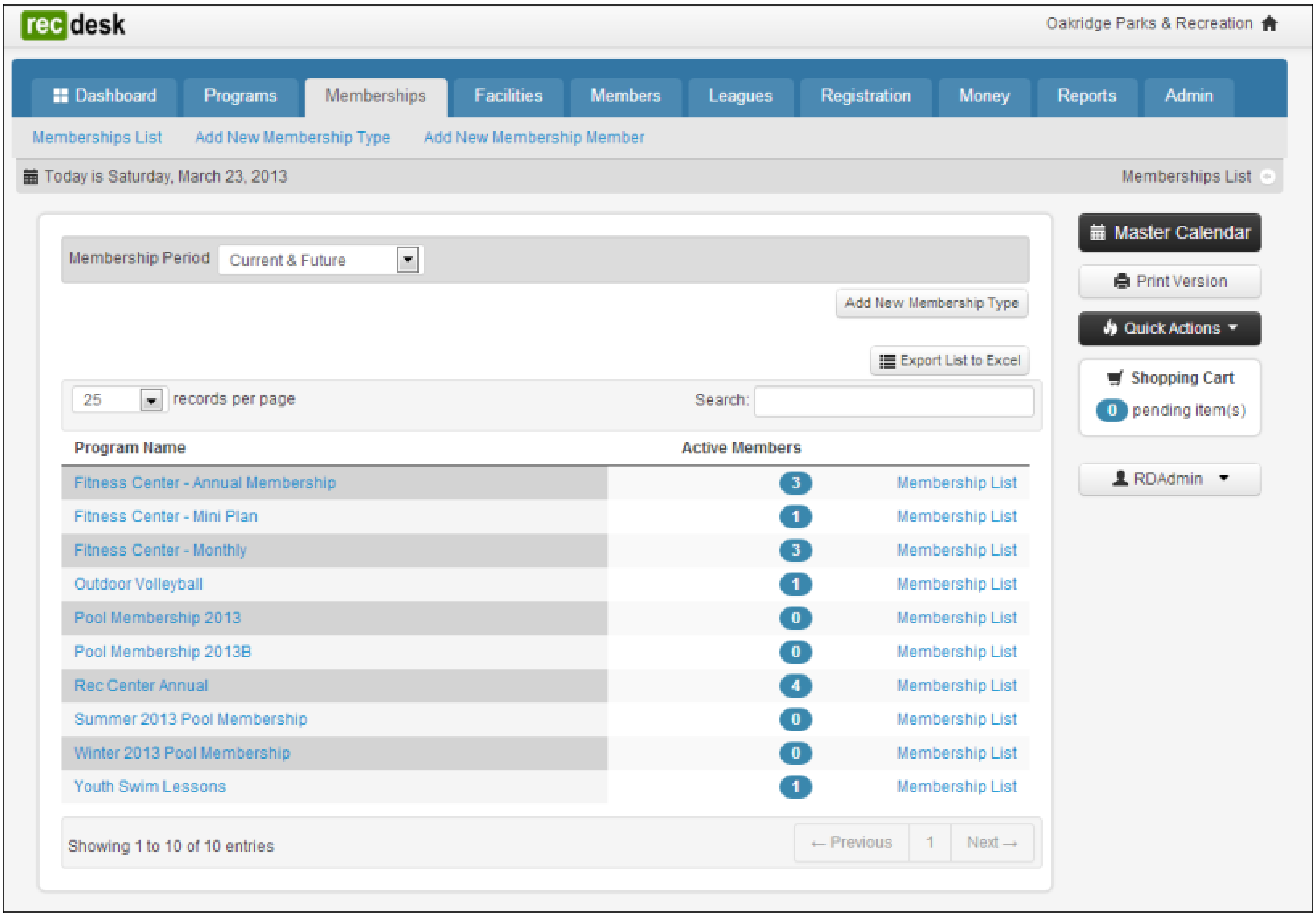
- **Label** - The question being asked
- **Checked** - Select checked to default response to *checked*.

- **Required -** Check this to require a response

Memberships

The Memberships List

The Membership **List** page shows all *Current & Future Membership Definitions* by default. These would be any Membership that has a Membership Period of Open (Ongoing) or a Membership Period of Definitive Start and End Date with an End Date greater than or equal to today. Previous Membership Definitions can be viewed by selecting Past Memberships from the Membership Period drop down.



Creating and Modifying Membership Definitions

Adding **new Membership Definitions** and modifying existing ones begins on the [The Membership List] page. To add a new Membership Definition, click on *Add New Membership Type* from the Memberships submenu or the *Add New Membership Type* Button. To **modify and existing Membership Type**, simply click on it from the Membership List page and click the *Edit* button.

Prerequisites - Before adding a new Membership Definition, you should create *Program/Membership Types, Fee Types and General Ledger Accounts* that are appropriate for you organization. See Managing Custom Lists.

For a complete list of Membership Definition related attributes see Membership Definition Fields.

Basic Workflow

- Assign it a *Name* (i.e. *Summer 2013 Pool Membership), Membership Type* and optionally, a *Subtype* and/or *Custom Membership Code*

- Set the **Membership Period**. For things such as Rec Center Membership types, it may not have and end date and be considered *Open*. A seasonal Pool Membership would probably be set to *Definitive Start and End Date*.
    - **Open** (Ongoing) - Select this if the Membership is ongoing
    - **Definitive Start and End Date** - Select this for Memberships that are seasonal in nature (i.e. Beach Membership, Student Gym Membership)
        - Set the Begin Date and End Date

- Set the *Default Membership Duration* - This determines what the default duration of the membership is when you enroll new Members. There are two components: a **number** and a **time type** component *(Day(s), Week(s), Month(s) , Year(s))*. As an example, if you set this to **6 Month(s)** and a member enrolls on 2/1/2013, the initial start and end dates for their membership will be **2/1/2013 - 7/31/2013**. This can be overridden.

- If you would like the Membership to be available for **Online Enrollment** make sure the *Online Enrollment* and *Show on Portal* checkboxes are checked

- If you would like **Online Enrollment** to only be available for specific *window of time*, enter an *Enrollment Begin Date* and/or *Enrollment End Date*. These dates only impact Online Enrollment. You will always be able to enroll individuals in-house (via RecDesk Director) at any time.

- Enter a Description for the Membership Definition. The public will see the **Description** on the RecDesk Community portal.

- You may optionally assign a GL Account code to this Membership

- **Demographics**
  - This section allows you to communicate what demographic this Membership is targeted towards. All attributes in this section are optional and are for informational purposes only (with the exception of **Enrollment Maximum** - see below)
  - If you enter a value into **Enrollment Maximum**, online enrollment will be cut off as soon as that limit is reached.

- **Fees** - Up to 12 different fees may be assigned to a Program (Resident, Non-resident etc)
  - You can choose whether or not a Fee appears on the RecDesk Community portal side by simply checking or unchecking the Show Fee on Portal checkbox. You may opt to allow processing of scholarship or special rate fees by mail-in or in-house registrations only.
  - By default, 1 Member is allowed per membership. For things such as **Group or Family Memberships**, this may be overridden by entering the appropriate maximum number of Members in the **Includes up to ___ person(s)** text box.
  - Fees can be set to be applicable to ***Only Residents*** or ***Only Nonresidents***. See [Setting Up Residency Requirements]

- Click **Save**

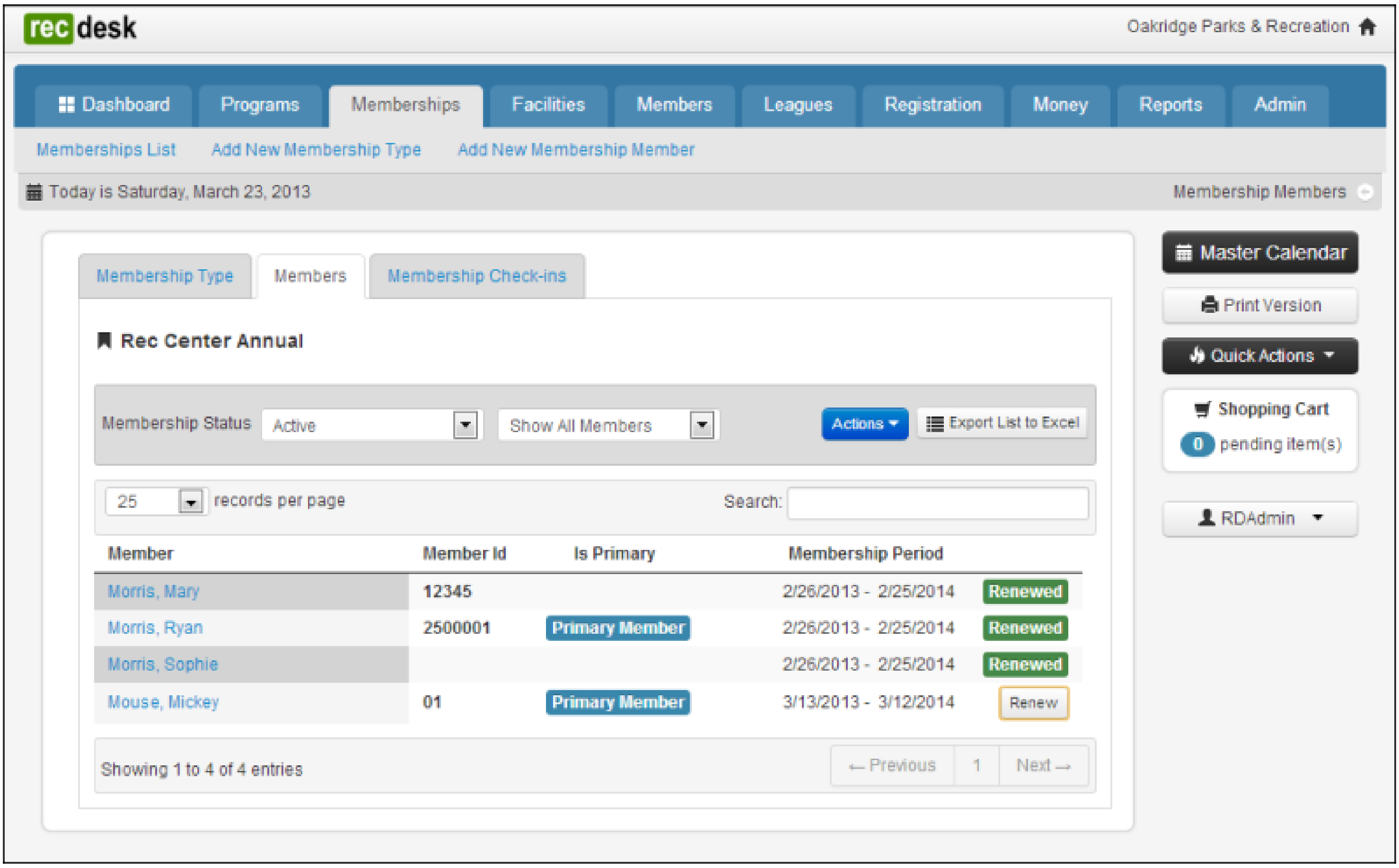
Enrolling Members

New *Membership Members* can be created by selecting **Add New Membership** submenu option off of the *Memberships tab*. See Membership Enrollment Fields for a full list of fields on this page. The general work flow for enrolling new Membership Members is:

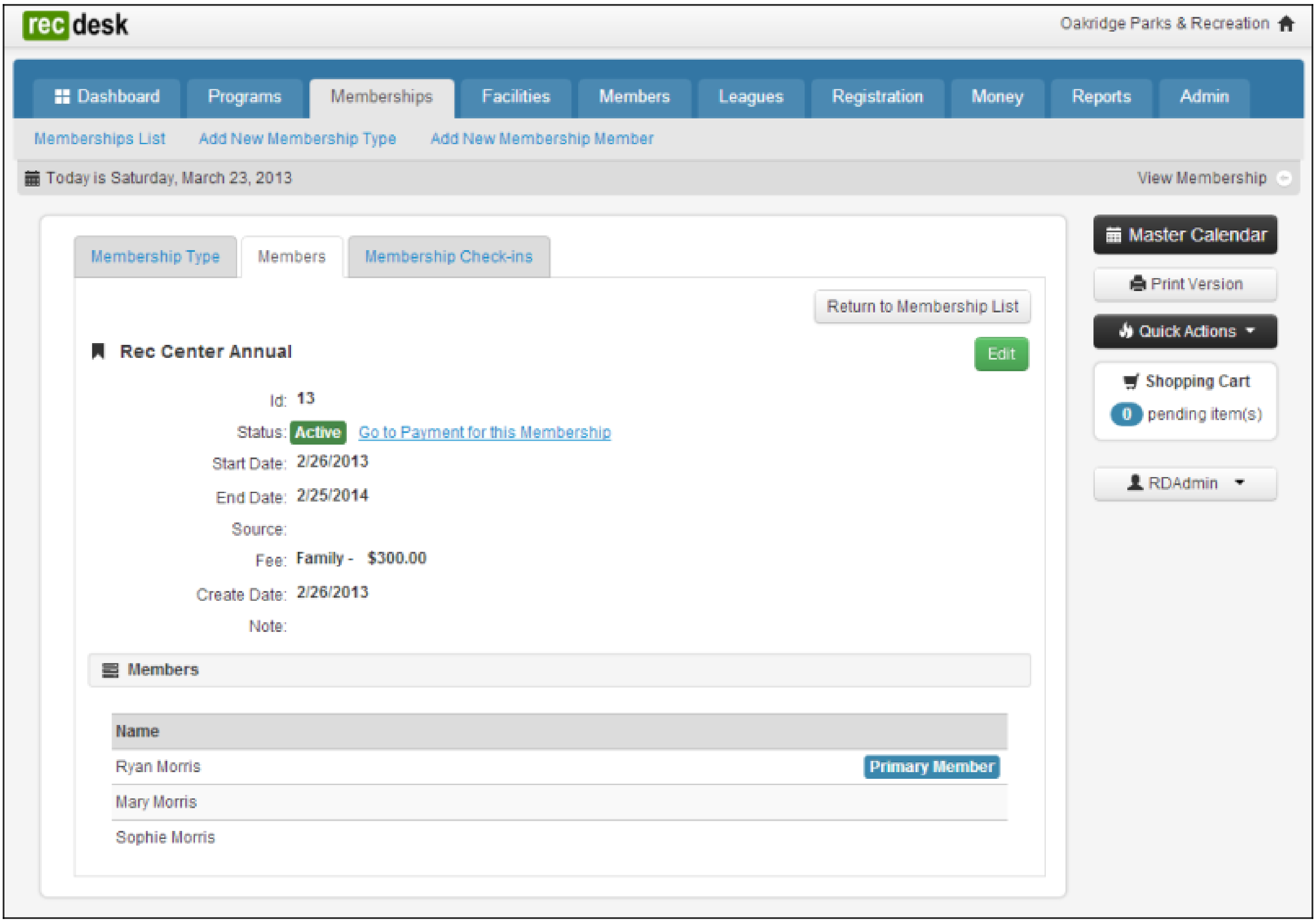
- Select a *Membership* from the Membership drop down list
- Choose a *Fee Type*.
- Change default *Start/End* dates of Membership instance if required.
- Add an optional *Note*
- Select the Member to enroll by clicking Add New Member
- If more than one Member is allowed for the selected Fee Type, repeat step 5 to add more Members to Membership

Working with Membership Members

You can **View, Edit and Renew** Membership Members at any time by going to the The Memberships List page, selecting the appropriate Membership and then clicking the *Members* tab. This is essentially the ***roster*** *of Members*. By default, it will list all *Active Members*. You can also view *Future, Expired and Cancelled Memberships* by selecting that value from the Membership Status Drop Down.



View Membership Details - Click on the Member name



Editing Membership Details

To edit a membership, simply click on the **Edit** button while viewing the Membership Details as shown above

Appendix

<TODO>: Insert description text here... And don't forget to add keyword for this topic

Membership Definition Fields

Membership Definition Fields

General

- **Active Members** - Number of currently active members

- **ID** - Internal RecDesk Id assigned to Membership

- **Name** - Descriptive name given to Membership

- **Membership Type** - The Membership Type (same as Program Type) assigned to this Membership. Membership Types allow you to organize programs in a way that makes sense for your organization. See [Managing Custom Lists]

- **Custom Membership Code** - This is an optional code that you can assign to a Membership. It usually corresponds to a catalog/brochure Id or it can be used to give contextual information around season or year.

- **Membership Period** - The *period* that the Membership definition is good for. For things such as Rec Center Membership types, it may not have and end date and be considered *Open*. A seasonal Pool Membership would probably be set to *Definitive Start and End Date*.
    - **Open** (Ongoing) - Select this if the Membership is ongoing
    - **Definitive Start and End Date** - Select this for Memberships that are seasonal in nature (i.e. Beach Membership, Student Gym Membership)

- **Default Membership Duration** - This will be the *default* duration of the Membership that is assigned when enrolling new Members. It can be defined in terms of Days, Weeks, Months or Years.

- **Online Registration** - Check this box to make Membership available for online registration. Default is checked.

- **Show on Portal** - Check this box to make Membership appear on RecDesk Community portal. Default is checked.

- **Enrollment Begin Date** - The date when online enrollment is opened to the public.

- **Enrollment End Date** - The date when online enrollment is closed to the public.

- **Description** - Brief description of the Membership

Accounting

- **General Ledger Account** - The GL Account associated with this Program. See Managing Custom Lists

Demographics

- **Gender** - Male or Female. Informational only.

- **Enrollment Minimum** - Minimum number of people required for Program to be implemented. Informational only.

- **Enrollment Maximum** - The maximum number of Active memberships for a Membership. Once this maximum has been reached, online enrollment will no longer be available.

- **Grade Minimum** - Target minimum grade. Informational only.

- **Grade Maximum** - Target maximum grade. Informational only.

- **Age Minimum** - Target minimum age. Informational only.

- **Age Maximum** - Target minimum age. Informational only.

Fees

- **Fee Type** - The Fee Type assigned to this fee. See Managing Custom Lists

- **Amount** - The dollar amount of the fee.

- **Includes up to** - The number of people allowed per Membership. The default is **1**. As an exampe, you may have a Fee Type called *Family Membership* that allows **5**.

- **Show on Portal -** If checked, this Fee will appear on the Community Portal for online registrants to see. If left unchecked, it will be able to be used internally in RecDesk Director but not on the Community Portal. An example of when it might be left unchecked is for a *Scholarship* type fee that requires some form of verification before registering.

- **Residency Restriction** - Options are: *None, Residents Only* and *Nonresidents Only* (Default *None*)

Membership Enrollment Fields

Membership Enrollment Fields

General

- **Membership -** The Membership chosen for this Membership enrollment

- **Fee Type -** Membership Fee Type

- **Start Date -** Date when this Membership instance begins

- **End Date -** Date when the Membership instance expires

- **Note -** Note assigned to this Membership instance

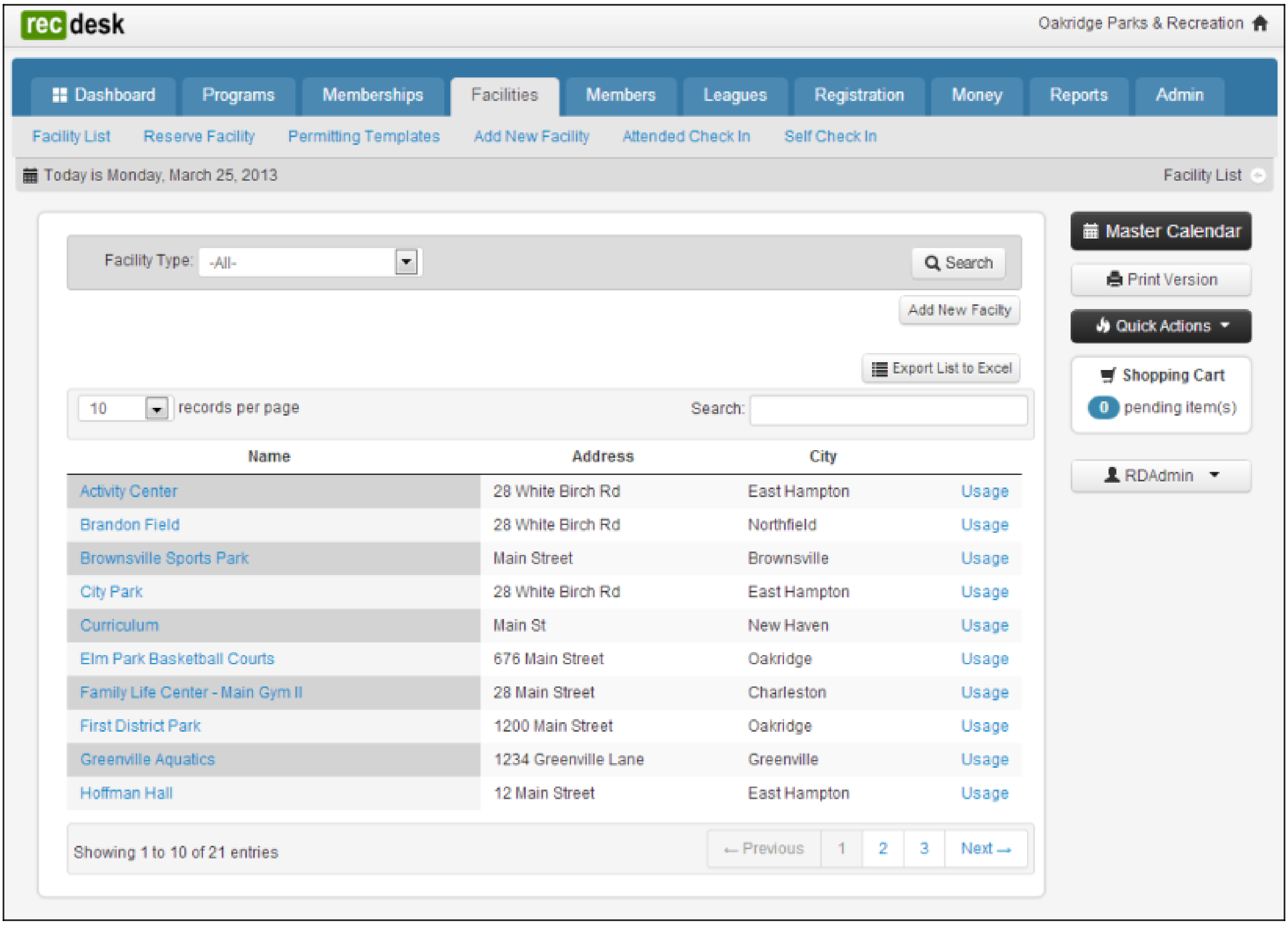
Members

The Members section contains all Members (people) associated with a particular Membership instance

Facilities and Reservations

The Facility List

The **Facility List** contains all facilities you've added for your organization. You can view the whole list or filter by *Facility Type*. To go to the Facility List simply click on the **Facilities** tab.



Creating and Modifying Facilities

Adding **new Facilities** and modifying existing ones begins on the The Facility List page. To add a new Facility, click on *Add New Facility* from the Facilities submenu or the *Add New Facility* Button. To **modify and existing Facility**, simply click on it from the Facility List page and click the Edit button.

Prerequisites - Before adding a Facility, you should create *Facility Types and General Ledger Accounts* that are appropriate for you organization. See Managing Custom Lists.

For a complete list of Facility related attributes see Facility Fields

Basic Workflow

- Assign the Facility a Name and a Facility Type
- If this is a **Primary Facility** (see Facility Fields), then check the Primary Facility check box
- If this Facility is part of a larger Facility, select that Facility from the **Parent Facility** drop down
- Enter **Address Line 1, Address Line 2, City, State** and **Zip Code**
- If you want to associate General Ledger Accounts with reservations for this Facility, select the appropriate accounts from the **Default GL Account - Fee** and **Default GL Account - Deposit** drop downs
- Enter a **Description**, **Note** and **Capacity**
- Check/Uncheck **Show Facility on Portal, Show Hours on Portal** and **Show Calendar on Portal checkboxes**
-
- (Optionally) Choose a **Permitting Template** to associate with reservations for this facility
- Select **Hours of Operation**
- Click **Save**

Reserving Facilities

Facilities can be reserved by navigating to the **Facilities** tab and clicking **Reserve Facility** from the submenu. Alternatively, you can go a specific Facility's [Facility Usage Calendar] and click on **Reserve Facility** for a particular dat The advantage of the latter way is that the Facility and Date will be preselected.

For a complete list of Facility Reservation related attributes see [Facility Reservation Fields]

Basic Workflow

- Select the **Facility** to be reserved and enter the **Use**

- Set **Start Time** and **End Time**

- If reservation is for the entire day, check the **All Day** checkbox

- If this is a *Repeating* reservation check the **Repeat** checkbox
    - If **Daily** selected
        - Choose the *Repeats every* interval
        - Set the **Ends after** occurrences or **Ends by** date
    - If **Weekly** selected
        - Choose the *Repeats every n weeks* interval
        - Select the **days** that it repeats
        - Set the **Ends after** occurrences or **Ends by** date
    - If **Monthly** selected
        - Choose the *Repeats every n months* interval
        - Select the **Repeat by** option
        - Set the **Ends after** occurrences or **Ends by** date

- Set **Group Size** (optional)

- Enter **Description**

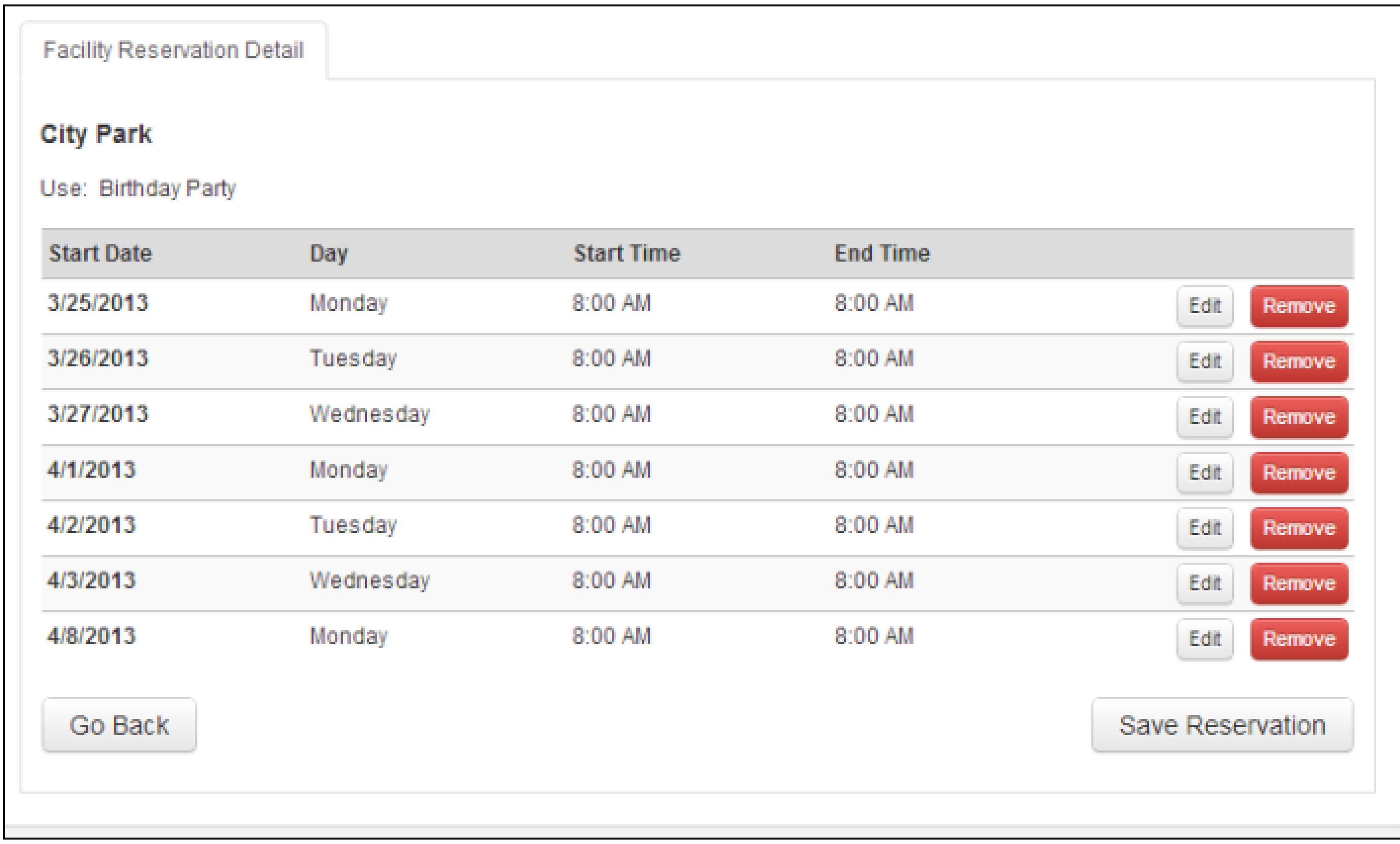
- If this reservation is being made by/for a Member, select them (optional) now
    - If they're already in RecDesk click **Search** and then choose them from the list by clicking the **Select** button
    - or, click Add New to add member profile

- If a **Fee** is being collected for the Reservation, check the Fee Required checkbox, set Fee Type and ent the *Fee Amount* plus *Security Deposit*.

- Click on **Continue**

- You will then be presented with the details of the reservation. You may add/remove/update specific date at this point to account for holidays or other exceptions in a **repeating schedule**. Click **Remove** to dele a particular date and **Edit** to update the time details of a specific date.

Facility Reservation Review


Facility Reservation Detail

City Park

Use: Birthday Party

Start Date	Day	Start Time	End Time		
3/25/2013	Monday	8:00 AM	8:00 AM	Edit	Remove
3/26/2013	Tuesday	8:00 AM	8:00 AM	Edit	Remove
3/27/2013	Wednesday	8:00 AM	8:00 AM	Edit	Remove
4/1/2013	Monday	8:00 AM	8:00 AM	Edit	Remove
4/2/2013	Tuesday	8:00 AM	8:00 AM	Edit	Remove
4/3/2013	Wednesday	8:00 AM	8:00 AM	Edit	Remove
4/8/2013	Monday	8:00 AM	8:00 AM	Edit	Remove

Go Back

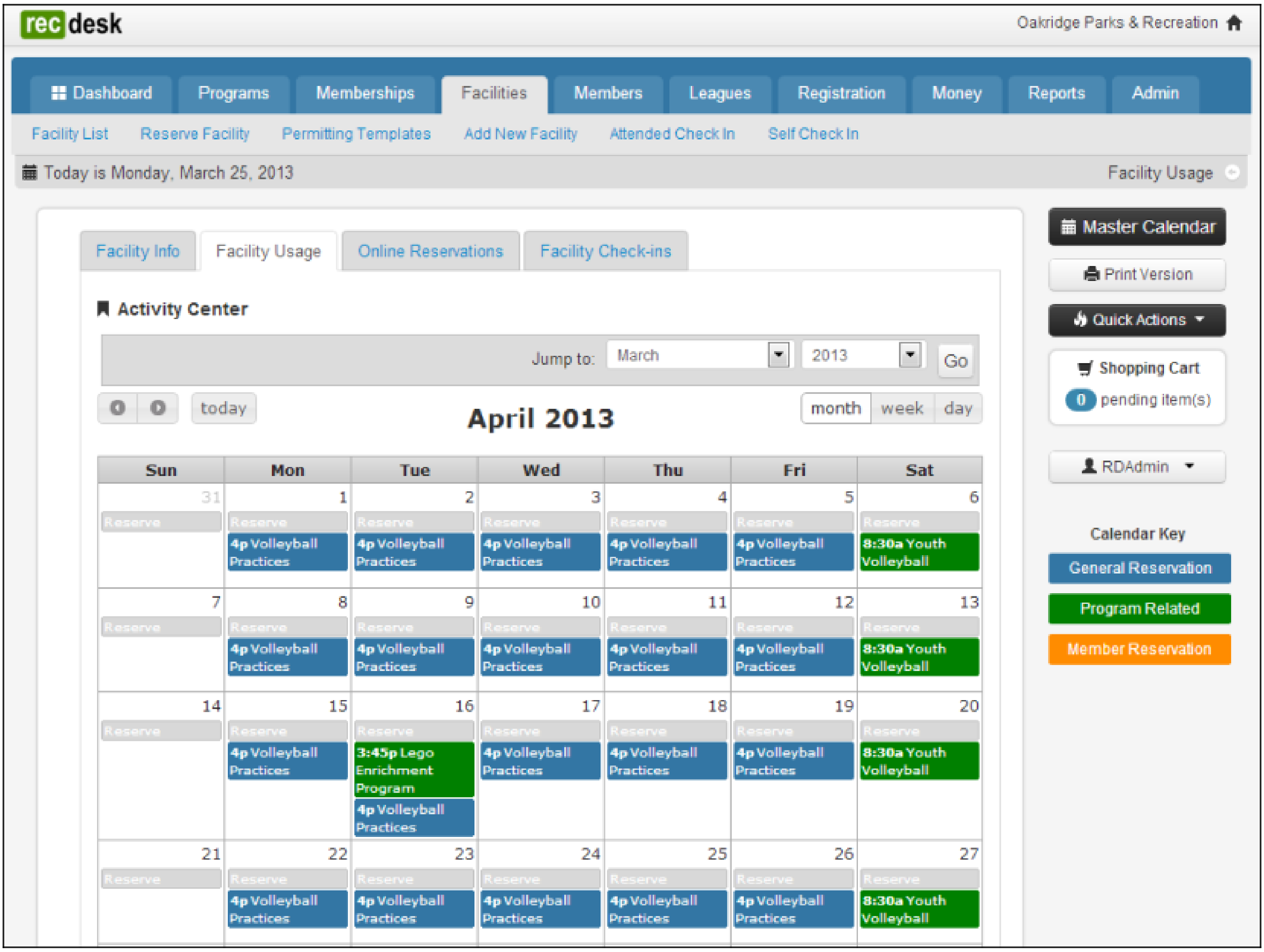
Save Reservation

- Click **Save** reservation

Facility Usage Calendar

The **Facility Usage** calendar shows all activity (Programs, Reservations etc) happening at a particular Facility. This is in contrast to the [Master Calendar] which shows activity for **all** Programs and Facilities. To view the Facility Usage calendar for a Facility go to the facility by selecting it from the [The Facility List] and then clicking the Facility Usage tab.

Facility Usage Calendar

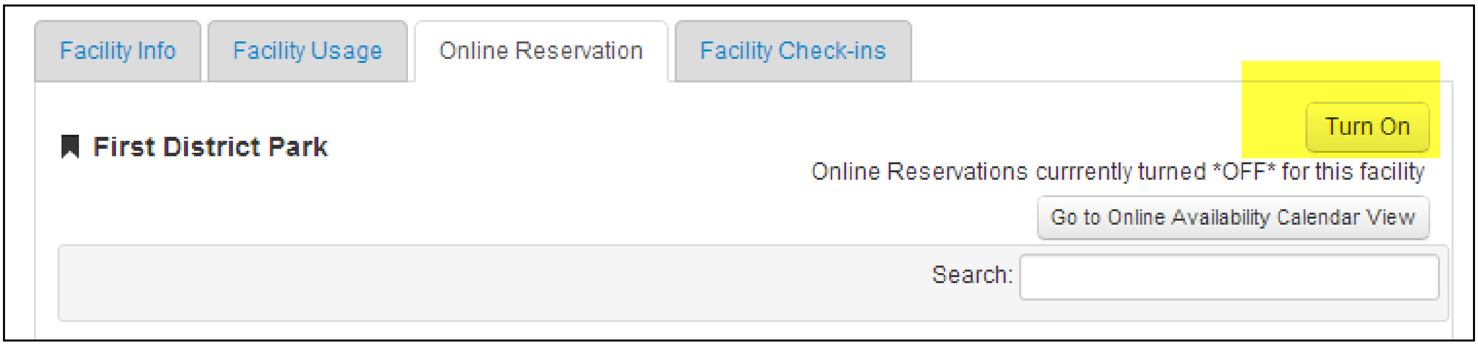


Enabling Online Reservations

By default, Facilities are **not** available for *online reservations*. This feature must be explicitly activated for each facility where this is desired.

Turn On Online Reservations for the Facility

Navigate to the Facility you would like to enable Online Reservations for and click the **Turn On** button



Build Availability Calendars for Online Reservations

Before people can actually reserve facilities online, **Availability Schedules** must be set up. It is these **Availability Schedules** that specify **when** (*dates* and *time blocks*) facilities can be reserved and for **how much** (applicable Fees).

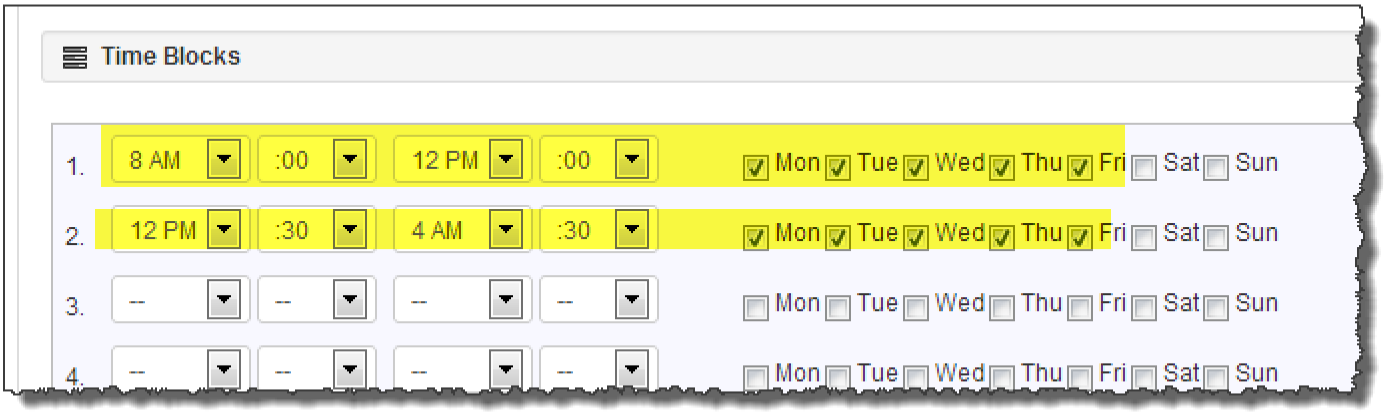
It is common to have multiple Availability Calendars per facility - each named after the associated time block - for example **Hourly Reservations**, **Half-Day Reservations** and **Full-Day Reservations**. Naming them in this manner gives them context when members of the public see them on your *RecDesk Community* portal and when you're working with them in-house.

- To begin, click on the **Add New Availability** Calendar button

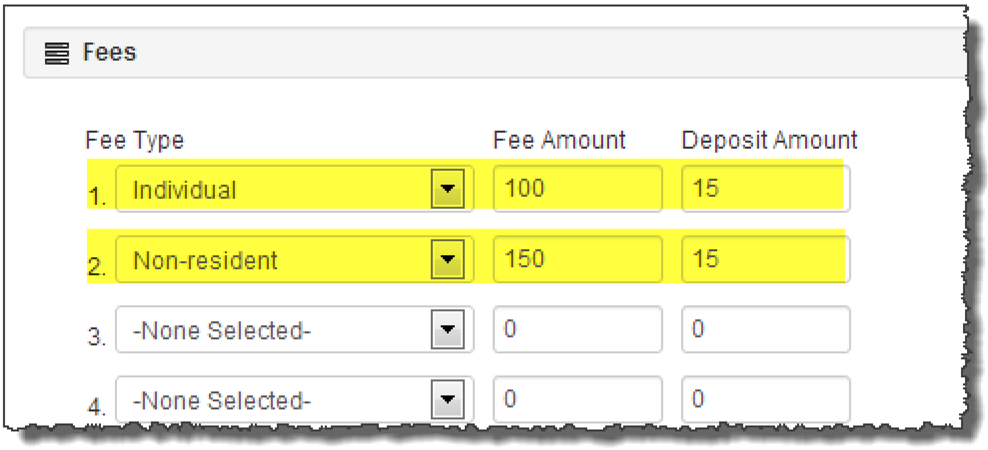
- Enter a **Name** for the Availability Calendar - it is recommended that naming schemes similar to those outlined above are used

- Enter a **Start Date** and **End Date** that this Availability Calendar is in effect for. The length can be no longer than a calendar year and is more commonly *seasonal* in nature.

- Set up the time blocks that apply to this schedule
  - Start Time, End Time and Days of Week it applies
  - Repeat this for each time block available - i.e. if it was a Half Day availability schedule, you might have two time blocks as follows:
    - **8AM - 12PM**, Monday, Tuesday, Wednesday, Thursday and Friday
    - **12:30 - 4:30PM**, Monday, Tuesday, Wednesday, Thursday and Friday



- Assign appropriate **Fee Types**, **Fee Amounts** and **Deposit Amounts (**Fees can be set to be applicable to ***Only Residents*** or **Only Nonresidents**. See Setting Up Residency Requirements)



- Click **Save**

- This Facility will now have a **Reserve button** next to it on the RecDesk Community portal and the public will be able to reserve it based on the *Availability Calendars* that have been set up

Permitting Templates

Permitting Templates are used to define Permits for Facility Reservations. These are customizable depending on your organization's needs. The basic concept is can use your *own verbiage* to define permitting templates and then place **data tokens** within the template so things such as *dates and times, facility name and individual making a reservation* are inserted at report runtime.

You can have as many different permitting templates you'd like and assign them to specific facilities by selecting it from the Permitting Template drop down when Creating and Modifying Facilities. To create a new Permitting Template go to the *Facilities* tab and click *Add New Facility*.

Basic Workflow for Creating Permitting Templates

- Assign a **Template Name**, **Header** and **Subheader**.

- Enter the verbiage of your template as you would like it to display in the **Body** field
  - HTML tags are accepted

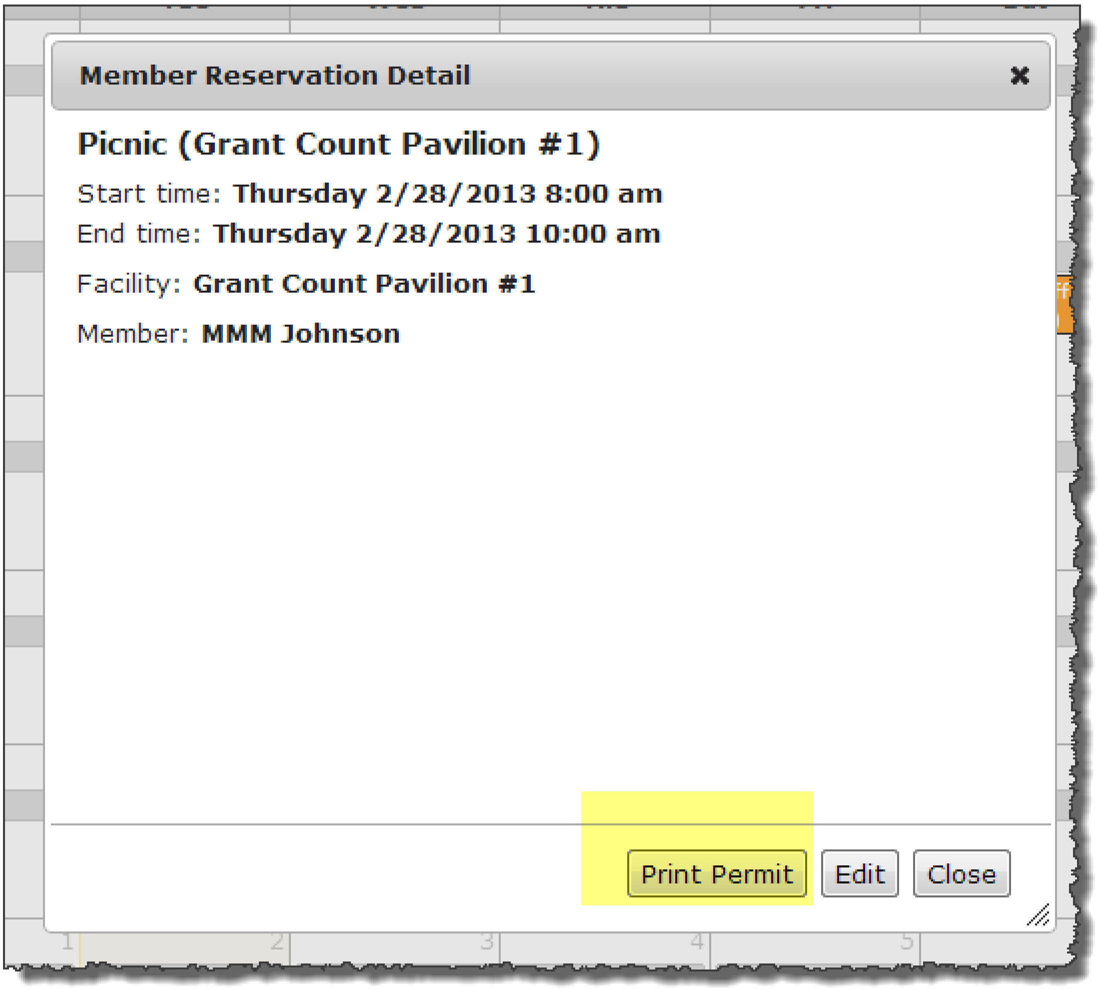
- Insert available data tokens into the **Body** of your template wherever you'd like. Available *tokens* are:
  - *[OrganizationName]*
  - *[FacilityName]*
  - *[FacilityAddressLine1]*
  - *[FacilityAddressLine2]*
  - *[FacilityCity]*
  - *[FacilityState]*
  - *[FacilityZip]*
  - *[ReservationUse]*
  - *[ReservationStartTime]*
  - *[ReservationEndTime]*
  - *[ReservationGroupSize]*
  - *[AllDates] - for multi-day reservations*
  - *[MemberName]*
  - *[MemberAddressLine1]*
  - *[MemberAddressLine2]*
  - *[MemberCity]*
  - *[MemberState]*
  - *[MemberZip]*

- Click **Save**

Assigning Permitting Templates to individual Facilities - see Creating and Modifying Facilities

Printing Permits

- Locate the Reservation on the Calendar (either the Master Calendar or the Facility Usage Calendar) and click on it.
- A pop-up will appear. Click **Print Permit**.

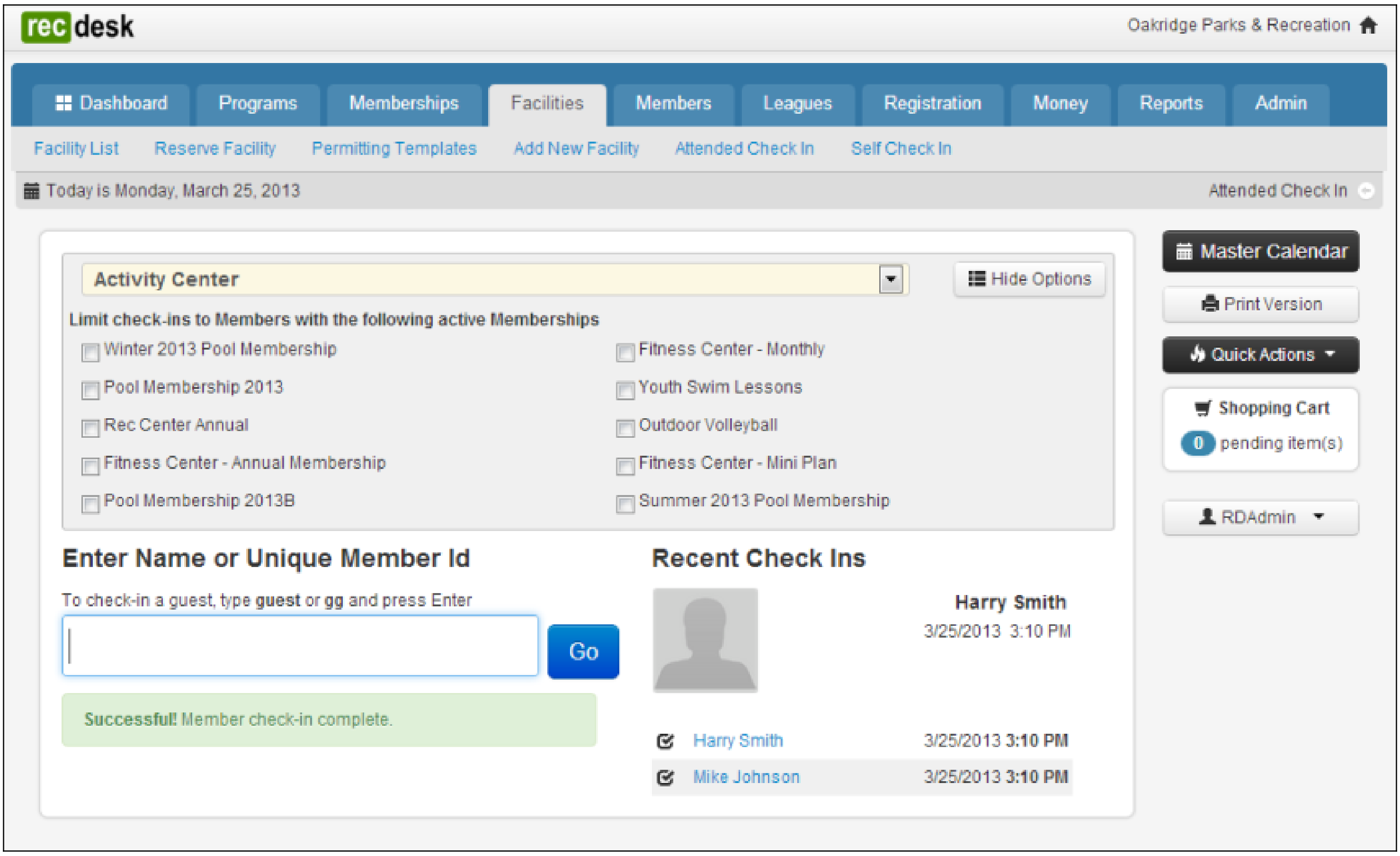


Facility Check-ins

Attended Check-In

One option for Facility check-ins is the **Attended Check-In**. This is normally used when you have someone at the **front desk** with a computer facing them and optionally, a *barcode reader/scanner* that is on the counter and accessible by the public. This allows people walking into your facility to check-in via a barcoded keyfob or id card, or, the counter person can check them in by: a) *Last name* or 2) by entering their *Member Id*.

** **NOTE:** In order for a barcode to be successfully read by the scanner while in *Attended Check-In* mode, RecDesk **must be** on the Attended Check-In page **and** the cursor in the **input text box**.



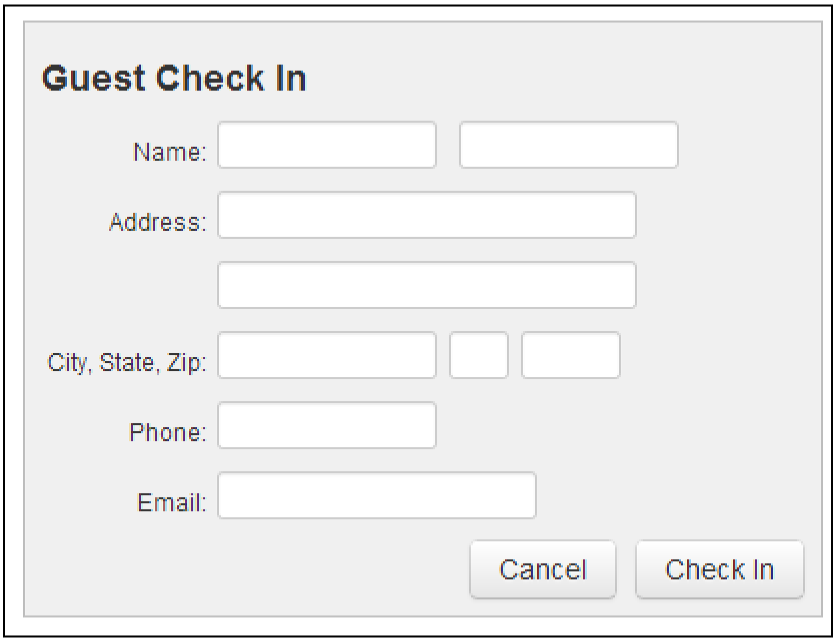
Basic Workflow

- Select a **Facility** from the drop down

- If would like to **limit check-ins** to Members with specific *active* Memberships, select the checkboxes for those Memberships

- **Check in** Members
  - **By Last Name** - enter first few characters of last name and press ***Enter***. Select them from the list by clicking the **Check In** button.
  - **By Member Id** - Enter *Member Id* and press **Enter**
  - **Scan In** - Either the front desk person or the member can scan their barcode

- **Guest Checkins**
    - Type **guest** or **gg** in the text box and press **Enter**
    - Fill out the form and click **Check In**

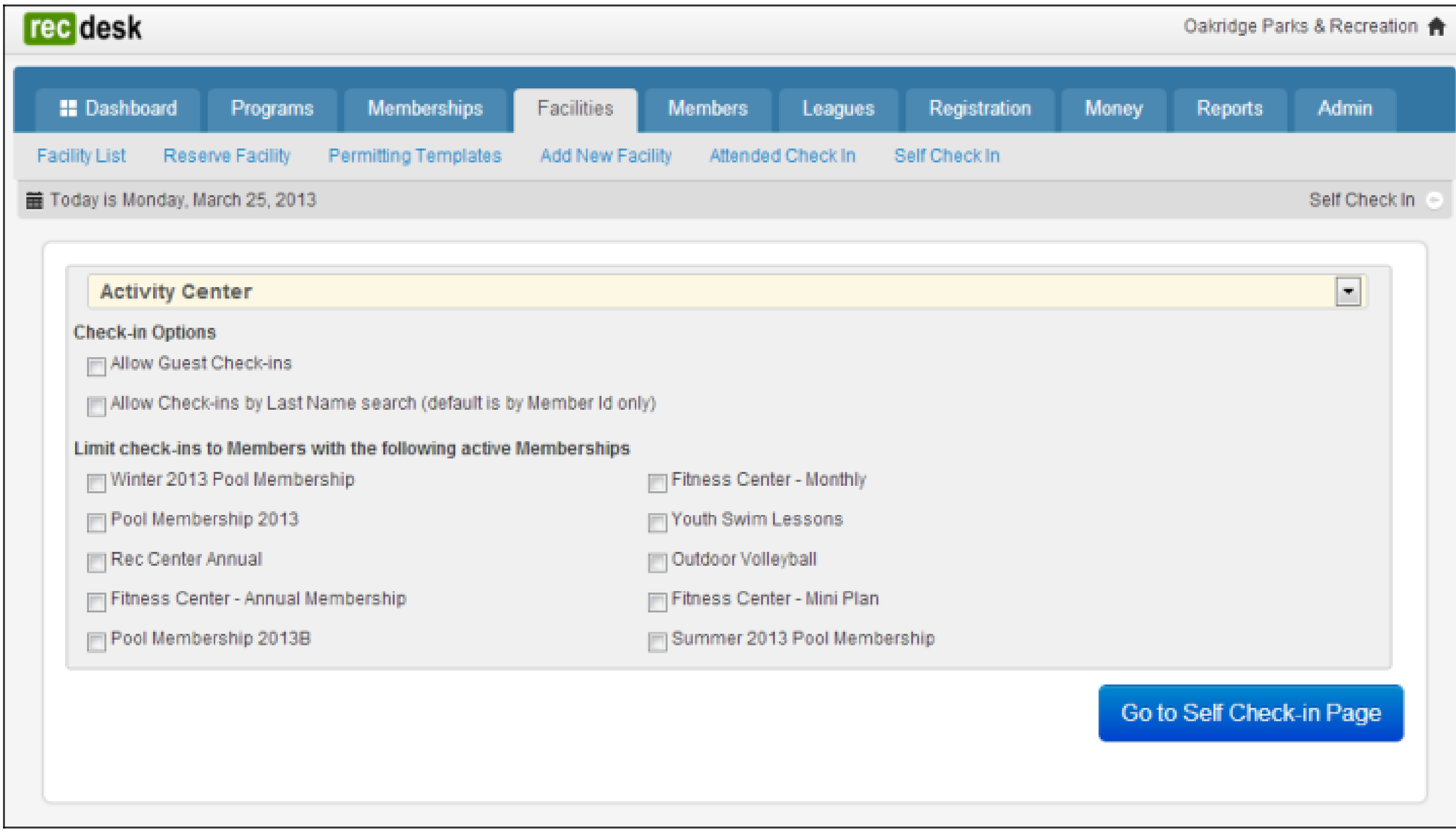


Self Check-In

Another option for Facility check-ins is the **Self Check-In**. This is normally used when you **do not** have someone at the **front desk** and you want members to check themselves in by either manually entering their Member Id or scanning it *barcode reader/scanner.* You can also optionally allow people to check themselves in using their **last name** or as **gues**

** **NOTE:** In order for a barcode to be successfully read by the scanner while in *Self Check-In* mode, RecDesk **must b** the Self Check-In page **and** the cursor in the **input text box**.

Self Check-In Set Up

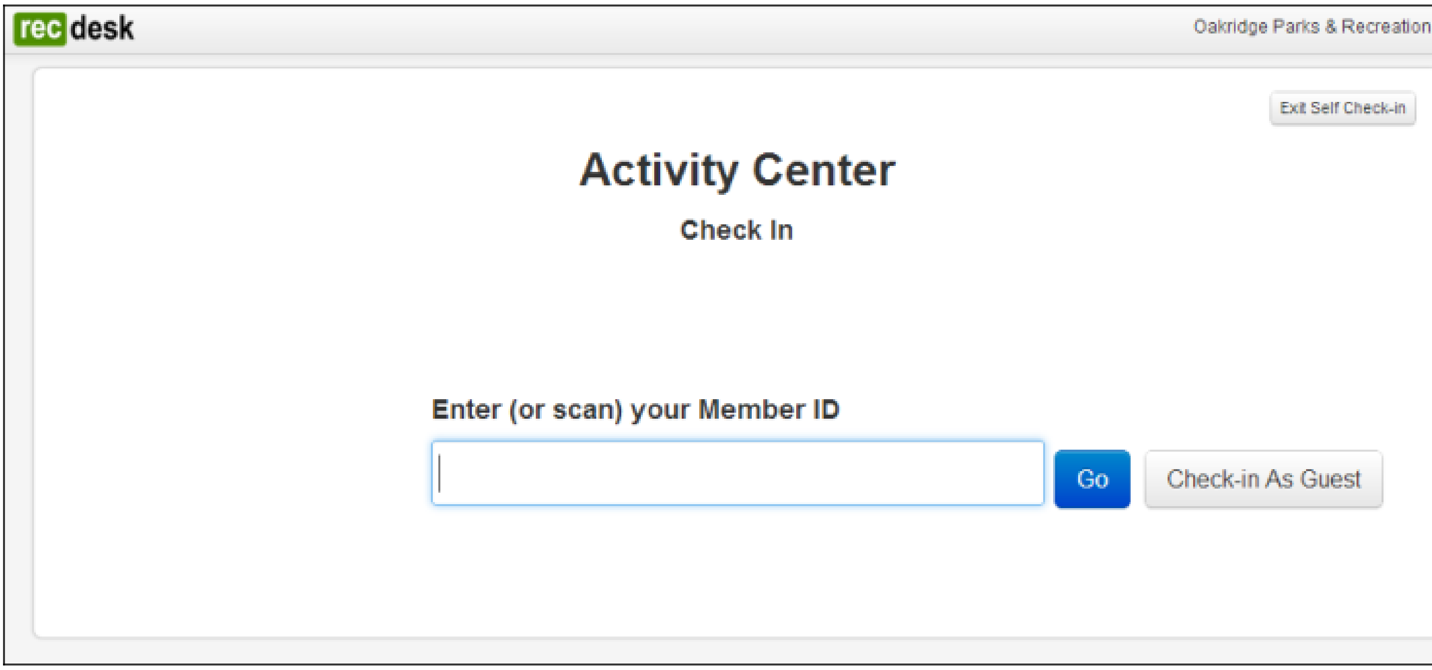


Basic Workflow

- Select a **Facility** from the drop down

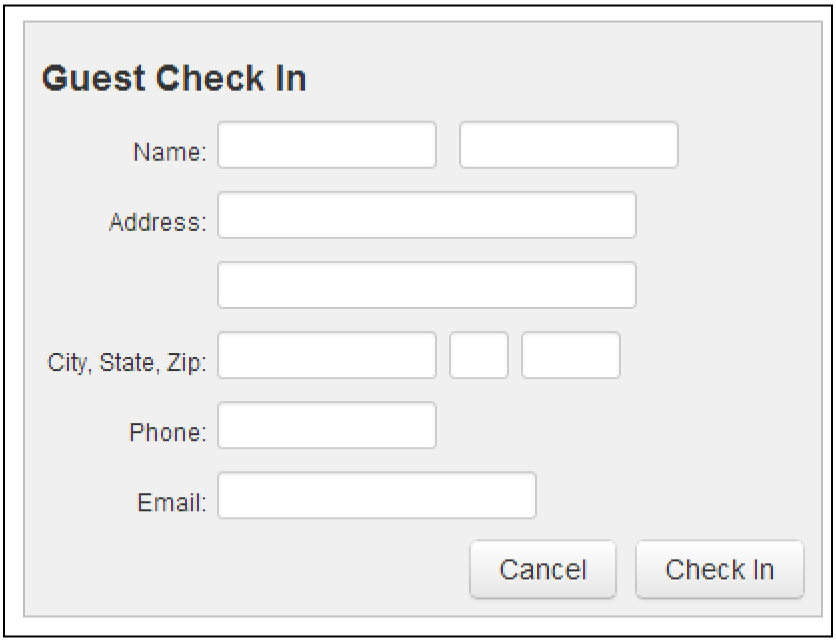
- If would like to **limit check-ins** to Members with specific *active* Memberships, select the checkboxes fo those Memberships

- Click on the Go to **Self-Check-in Page**. RecDesk will now enter ***Self Check-in mode*** and members of public will not be able to access the other administrative features of RecDesk. To exit this mode click **Ex Self Check-in** and enter your RecDesk password.



- **Member Self Check-in**
    - **By Last Name (if allowed)** - Member enters first few characters of last name and presses ***Ente*** They select themselves from the list by clicking the **Check In** button.
    - **By Member Id** - Member enters their *Member Id* and presses **Enter**
    - **Scan In** - Member scans their barcode

- **Guest Checkins -** if allowed
    - Member clicks on **Check-In as Guest**
    - Member fills out the form and clicks **Check In**



Appendix

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Facility Fields

Facility Fields

General

- **ID** - Internal RecDesk Id assigned to Facility

- **Name** - Facility name

- **Facikity Type** - The Facility Type assigned to this Facility. Facility Types allow you to organize facilities in a way that makes sense for your organization. See Managing Custom Lists

- **Primary Facility** - This simply means that it contains other facilities used by your organization. An example might be a Recreation Center with multiple classrooms and multi-purpose rooms. A facility designated as a *Primary Facility* can then be chosen as a *Parent Facility* when creating the separate entries for each of the classrooms/multi-purpose rooms. The advantage is that these newly created facilities inherit the Parent Facility's address and hours of operation attributes and do not have to be reentered. Additionally, when the address and hours of operation for a *Primary Facility* are updated, the updates are reflected in all other facilities that have designated that facility as a *Parent Facility*.

- **Parent Facility** - Choose a *Parent Facility* if this Facility is part of a larger Facility (Primary Facility). See *Primary Facility* above.

Address

- **Address Line 1** - Address of facility

- **Address Line 2** - Address of facility

- **City/Town** - City/Town where facility is located

- **State** - State where facility is located

- **Zip Code** - Zip code where facility is located

Accounting

- **Default GL Account** - The GL Account associated with fees collected for Facility Reservations. See Managing Custom Lists

- **Default GL Account - Deposit** - The GL Account associated with security deposits collected for Facility Reservations. See Managing Custom Lists

Other

- **Description** - Brief description of the facility

- **Note** - General notes about the facility

- **Capacity** - Facility's capacity. Informational only.

- **Show on Portal** - Check this box to make Facility appear on RecDesk Community portal. Default is checked.

- **Show Hours of Operation** - Check this box to make this Facility's *Hours of Operation* appear on the RecDesk Community portal. Default is checked.

- **Show Calendar on Portal** - Check this box to make this Facility's calendar appear on the RecDesk Community portal. Default is checked.

- **Permit Template** - The Permitting Template associated with Reservations made for this facility.

Hours of Operation

The days and hours that the facility is open.

Facility Reservation Fields

Facility Reservation Fields

General

- **Facility** -Facility to reserve

- **Use** - Brief description of purpose of reservation

- **Start Time** - Start date and time of reservation

- **End Time** - End date and time of reservation

- **All Day** checkbox - Check box to designate reservation as full-day

- **Repeat** checkbox - Designate reservation as repeating
  - Options are **Daily**, **Weekly** and **Monthly**
  - **Ends** by - options are after a specific number of *occurrences* or a *specific date*

- **Group Size** - Size of group (optional)

- **Description** - More detailed description of Use

Member Info and Fees (optional)

- **Member** - The Member who is making the Reservation.

- **Fee Required** checkbox - if there is a Fee associated with this reservation, select this check box

- **Fee Type** - Fee type for reservation

- **Fee Amount** - Fee associated with the reservation

- **Security Deposit** - optional security deposit amount

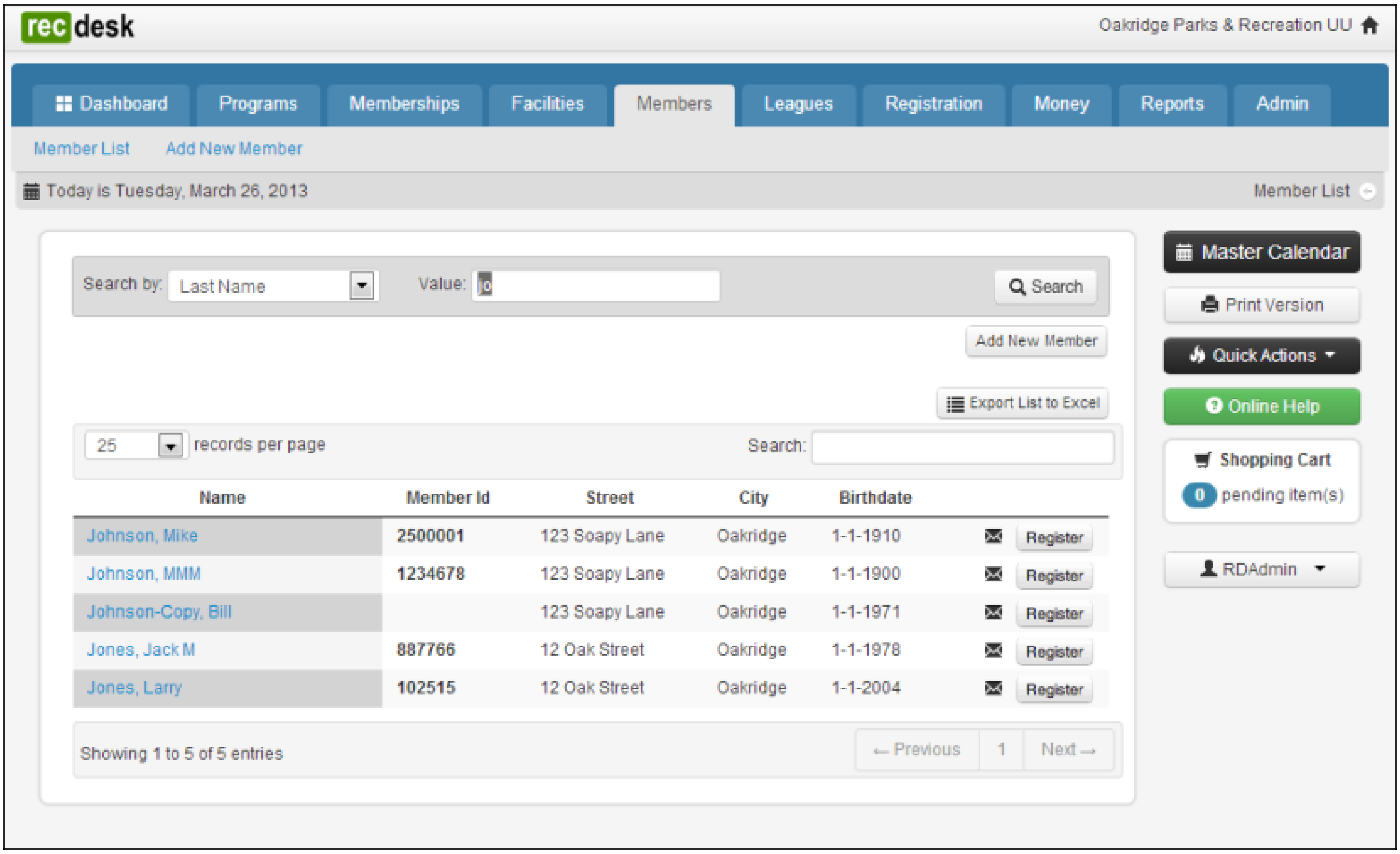
Members

The Member List

Members are the ***people*** in RecDesk. They consist of anyone that has a profile in RecDesk because they *registered for a Program*, *enrolled in a Membership*, *reserved a Facility* or had their profile added by a *family Member*. Members can be **solo** Members or organized into **Family/Group Accounts**. To Search for and work with Members click the Members tab. The default page will be the Member List.

You can Search for Members by: *Last Name, Phone Number, Town or Email Address*

Member List



Creating and Modifying Members

Adding **new Members** and modifying existing ones begins on the The Member List page. To add a new Member, click on *Add New Member* from the Members submenu or the *Add New Member* Button. To **modify and existing Member**, simply click on it from the Members List page and click the *Edit* button. To add a new Family Member to an existing profile, see Organizing as Family Groups.

For a complete list of Member related attributes see Member Fields

Basic Workflow

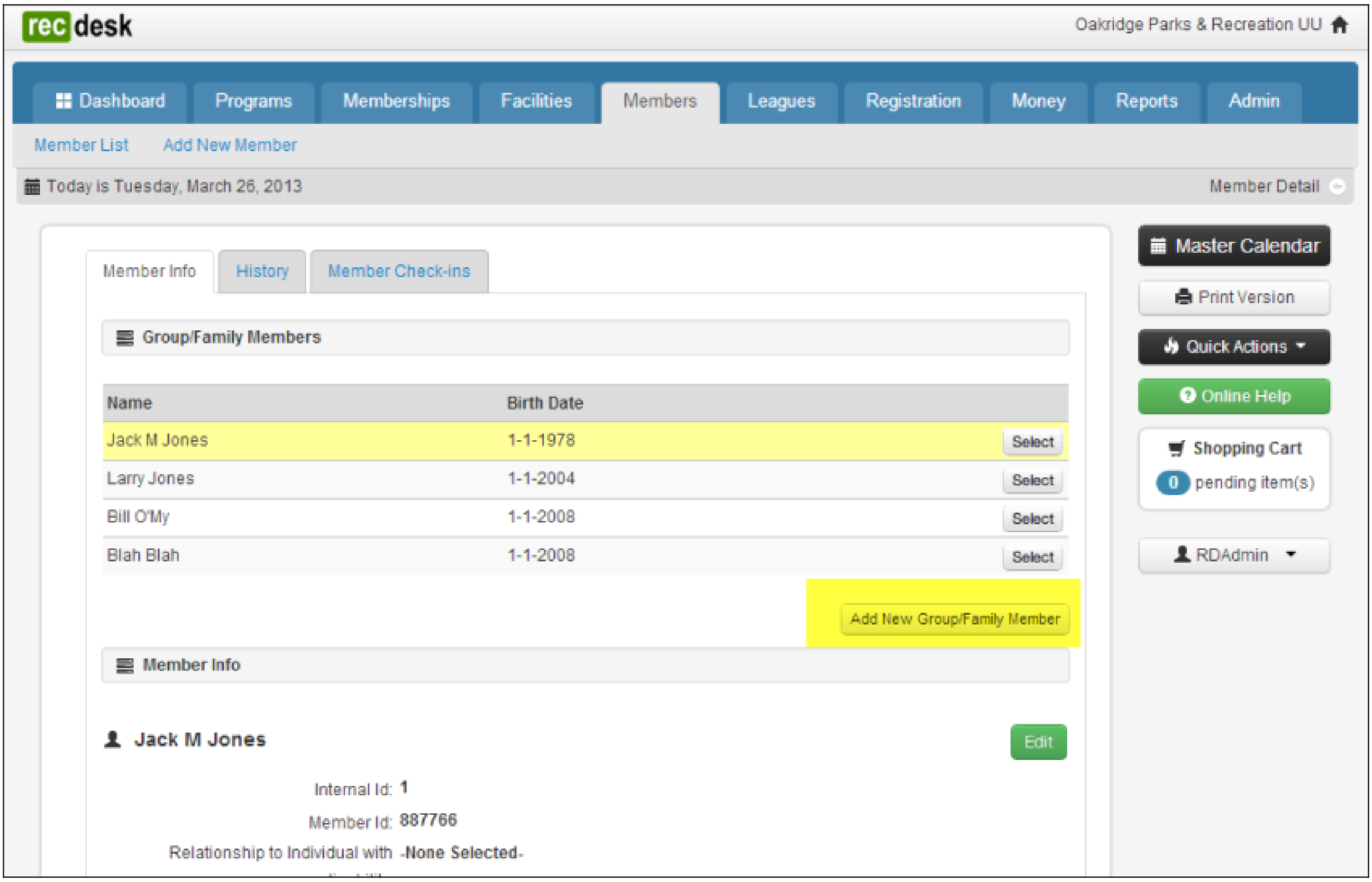
- Assign a **Member Id** (optional) - see Assigning Member IDs (***NOTE: If assigning a Member ID that is encoded in barcode format on a keyfob or ID card, it is best to scan the number in using a barcode scanner to avoid data entrt errors*)
- Enter **First Name**, **Middle Initial** and **Last Name**
- Optionally check member as **Head of Household**
- Select **Gender** plus enter **Email Address**
- By default, the Member will receive emails. Uncheck **Receive Emails** to change this.
- Enter **Address Line 1, Address Line 2, City, State** and **Zip Code**
- Enter **Contact information**
- Optionally, enter **Emergency Contact information**
- Optionally enter a **Member Note**
- Click **Save**

Organizing as Family Groups

Members can be organized into **Family Groups** for convenience. To Add a new Family Member navigate to the profile you would like to add that individual onto and click the **Add New Group/Family Member** button. The advantage to organizing members as a **Family** are:

- After working with one Family Member, other Family Members appear in the subsequent drop downs to limit search time and ease data entry
- Makes searching for and viewing Member history for multiple family members very easy
- Specific members can be marked as *Head of Household* to ensure they receive email correspondence in addition to younger household members

Member Profile with Family Group



Assigning Member IDs

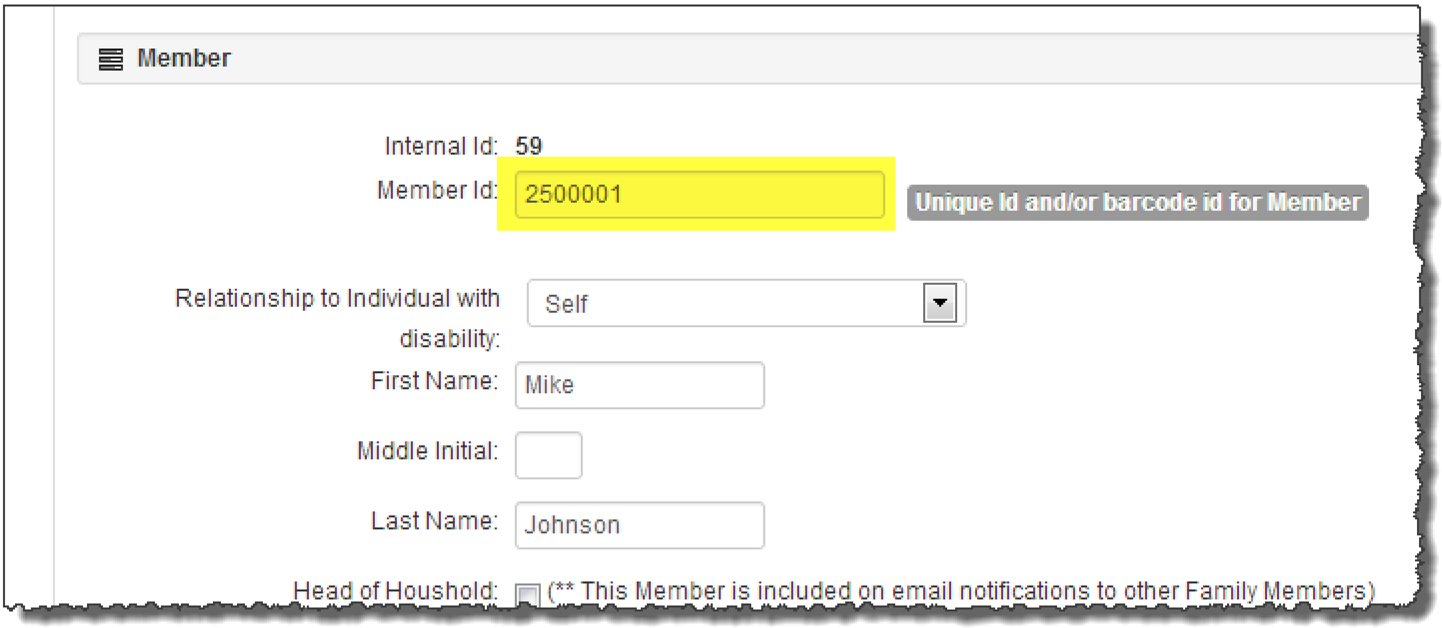
Members can be assigned a Member ID for purposes if uniquely identifying them to process things such as Facility Check-ins. Most often this **unique Member ID** is encoded on *keyfob or ID card* in the form of a **barcode**. This makes it easy for them to scan or swipe a barcode as the enter a facility. But, it can also be used for manual entry as well without the use of a barcode. **Member IDs are optional**.

Member IDs can be assigned in 2 distinct ways

Automatically - We configure RecDesk to automatically assign a Member ID to an individual every time a new Member is created. It is recommended to start off with a **seed value** and then simply **increment by 1** ever time a new Member is created. For instance, if the seed value was 1000, the first Member created in RecDesk would have a Member ID of 1001 and the next ones 1002, 1003 etc. In order to implement this, you tell us that you would like auto-assigned Member IDs and what your seed value should be (1000 is generally a good one) and we'll configure it that way.

Manually - You can also assign the Member IDs manually by editing the Members profile and typing in a Member ID (see Creating and Modifying Members). It must be ***numeric*** and no greater than **999999999**.

Member ID of Member Profile



Appendix

Member Fields

Member Fields

Member

- **Internal ID -** Internal RecDesk Id assigned to member

- **Member Id -** (optional) This is the *official* Member ID of this individual that is either auto-assigned by RecDesk or assigned by the organization. This would be the Id that is used for **Facility Check-ins** as well as what is encoded as barcode on a *membership id card* or *keyfob*.

- **First Name** - Member's first name

- **Middle Initial** - Member's middle initial

- **Last Name** - Member's last name

- **Head of Household -** Designates this member as the *head of household* and they will be included on any emailings/correspondence going out to ther family members regarding Programs. More than one individual may be designated as head of household for this purpose.

- **Date of Birth -** Member's birthdate

- **Email Address -** Member's email address

- **Receive Emails -** Uncheck this to remove member from bulk email list

Address

- **Address Line 1** - Address of member

- **Address Line 2** - Address of member

- **City/Town** - City/Town

- **State** - State
- **Zip Code** - Zip code

Contact

- **Home Phone** - Member's home phone
- **Work Phone** - Member's work phone
- **Mobile Phone** - Member's mobile phone

Emergency Contact

- **Name** - Emergency contact name
- **Phone** - Emergency contact phone

Member Note

- **Note** - Miscellaneous notes abot this member (medical etc). Notes made here will appear in the Detailed Roster so thsi is a good place to put information that needs to be communicated to Program administrators.

Login

- **User Name** - User name assigned to this user for the RecDesk Community portal (online registration)
- **Password** - Password assigned to this user for the RecDesk Community portal (online registration)

Money

Payment Search

You can Search for Payments in RecDesk by going to the Money tab and it will land on the Payment Search page by default. There are three distinct Search By modes:

- **Member Name -** Enter the first few characters of the payer's last name and hit Enter

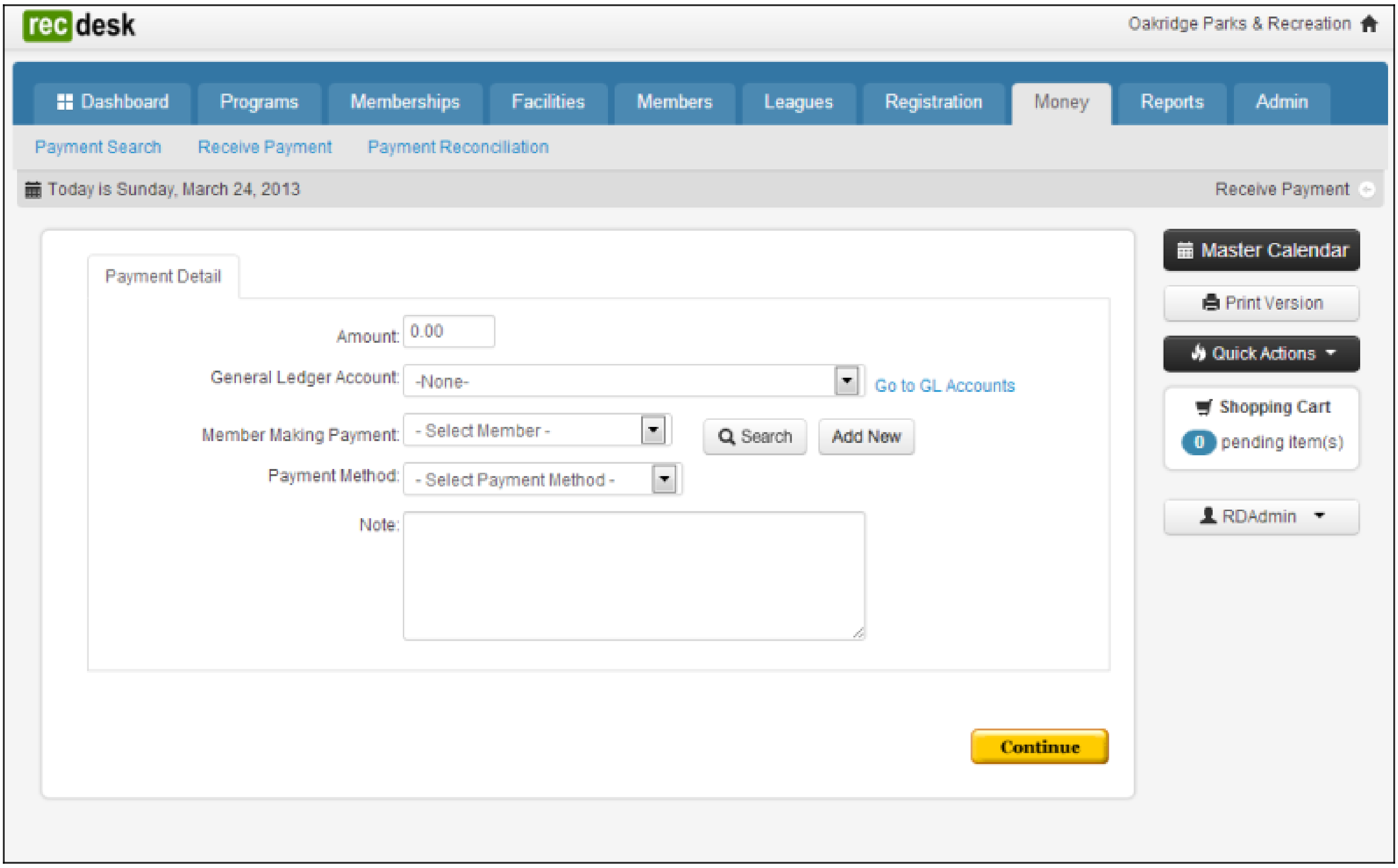
- **Payment ID -** the internal RecDesk ID of the payment

- **All Payments in Partial Status -** this will list all Payments that are currently marked as Partial

Receive Payment

The ***Receive Payment*** option in RecDesk allows you to process and record payments in RecDesk that **are not in the context** of a *Program Registration, Facility Reservation or Membership Enrollment*. These may be incidental payments for things such as t-shirts, fund raising or similar.

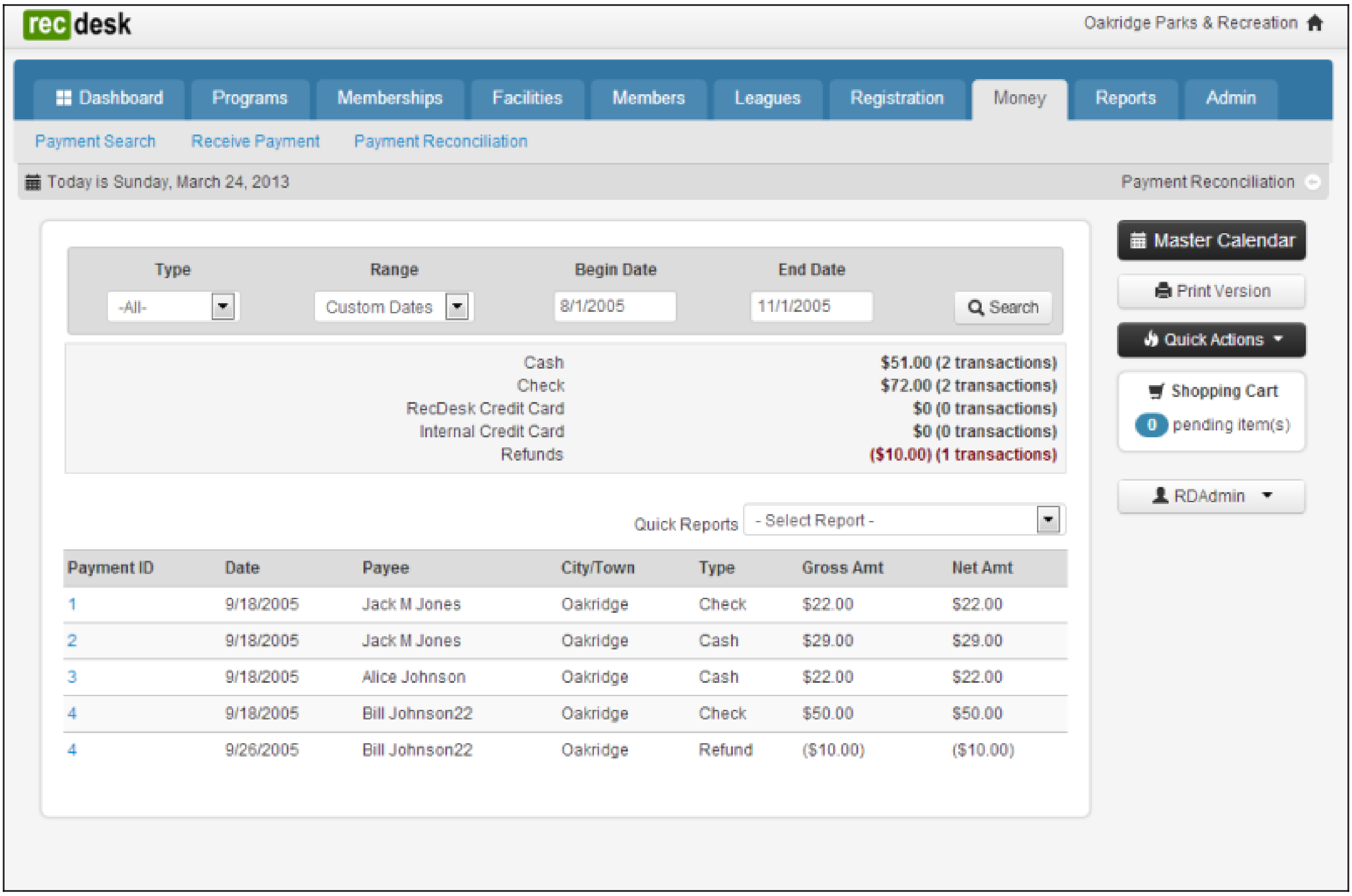
Receive Payment Page



Payment Reconciliation

The **Payment Reconciliation** page gives you a quick and convenient way to view all payments for a particular time period. You can view this page by going to the *Money* tab and then clicking *Payment Reconciliation*. By default, it will show the current day's payments along with totals by payment type (Cash/Check/RecDesk Credit Card/Internal Credit Card)

Payment Reconciliation Page



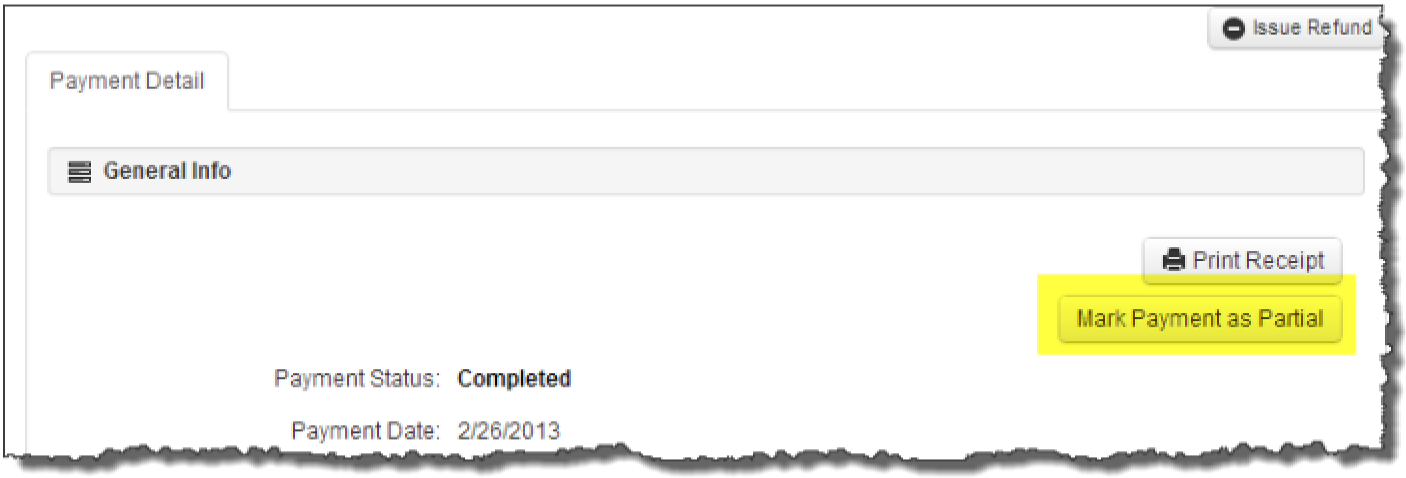
Partial Payments

Partial Payments allow you to defer all or a portion of a Payment for collection at a later date.

Marking Payment as Partial

There are basically two ways you can mark a payment as partial:

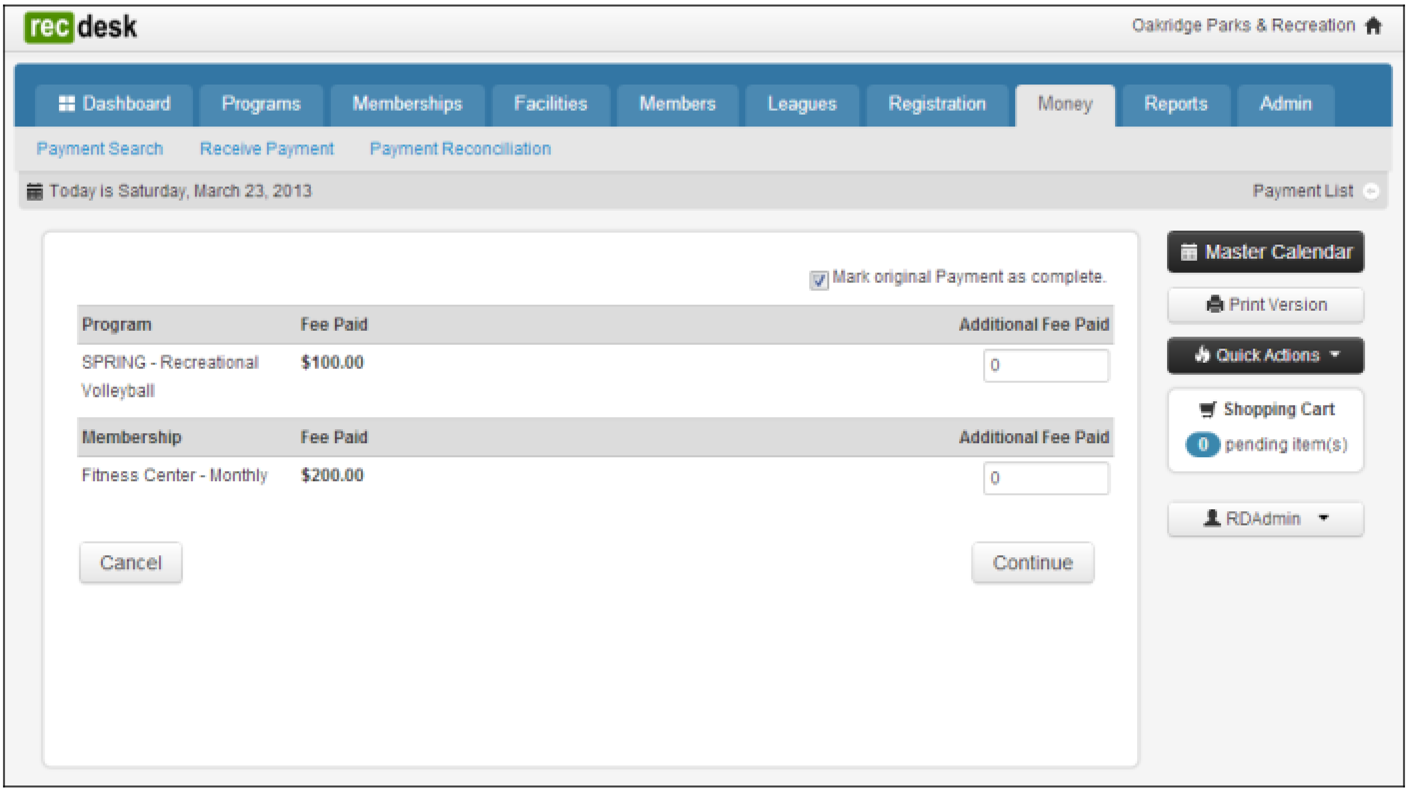
- By selecting the **Mark Payment as Partial** checkbox when the payment is initially being processed
- Or, after the fact, by navigating to the Payment Detail and clicking the **Mark Payment as Partial** button



Processing Partial Payments

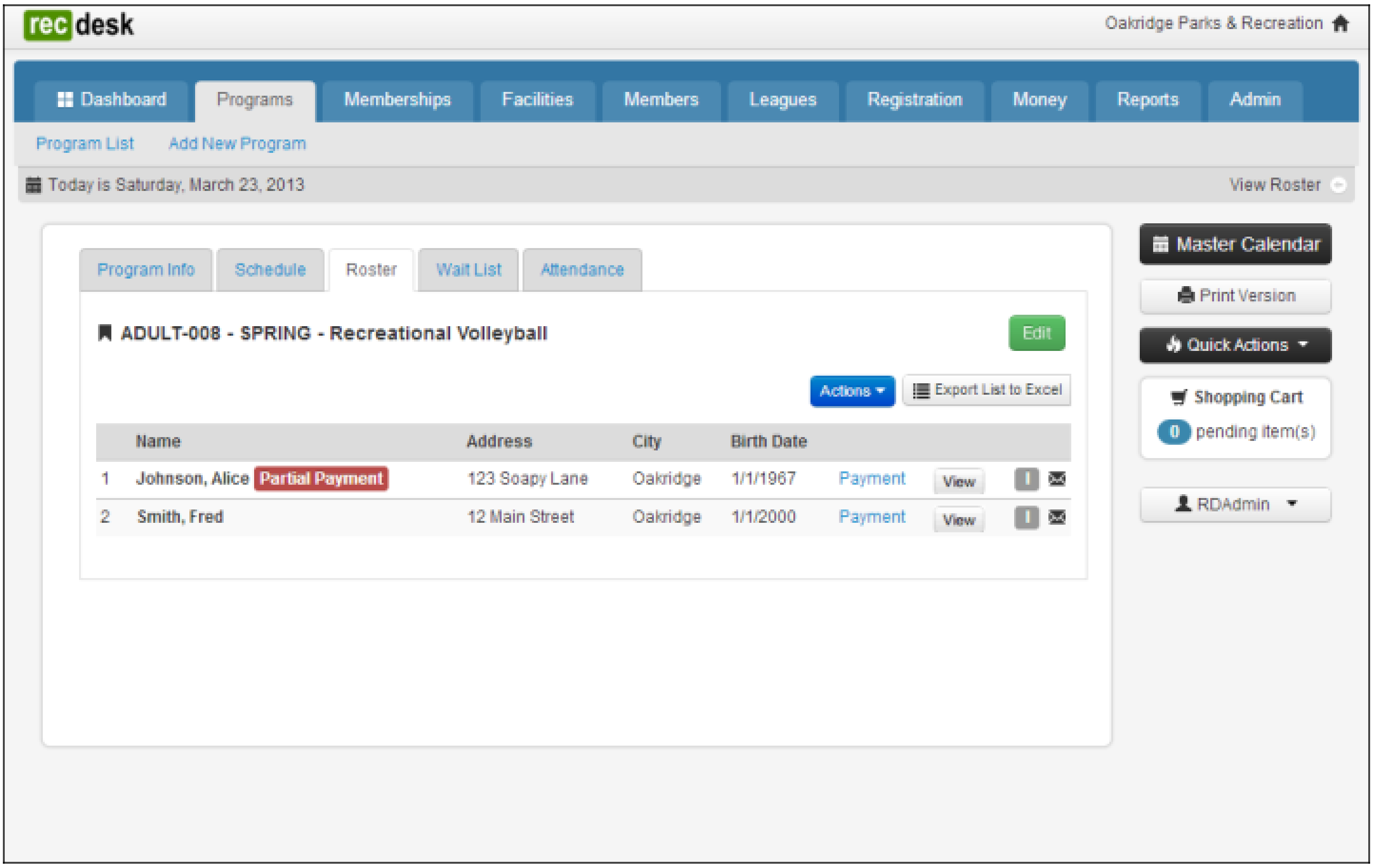
Once a Payment is in partial status it can be processed by clicking **Apply Another Payment**. Conversely, it can be also be marked as complete by clicking **Mark Payment as Complete**. When *Apply Another Payment* is clicked, a page comes up that has all the individual items that were part of the original payment. At this point, new Payments can be applied to these individual items. When the Payment is processed, these amounts will be updated accordingly for the underlying registrations/reservations AND there will be a relationship defined between the original and new payment.

Apply Another Payment Page



Tracking Payments in Partial Status

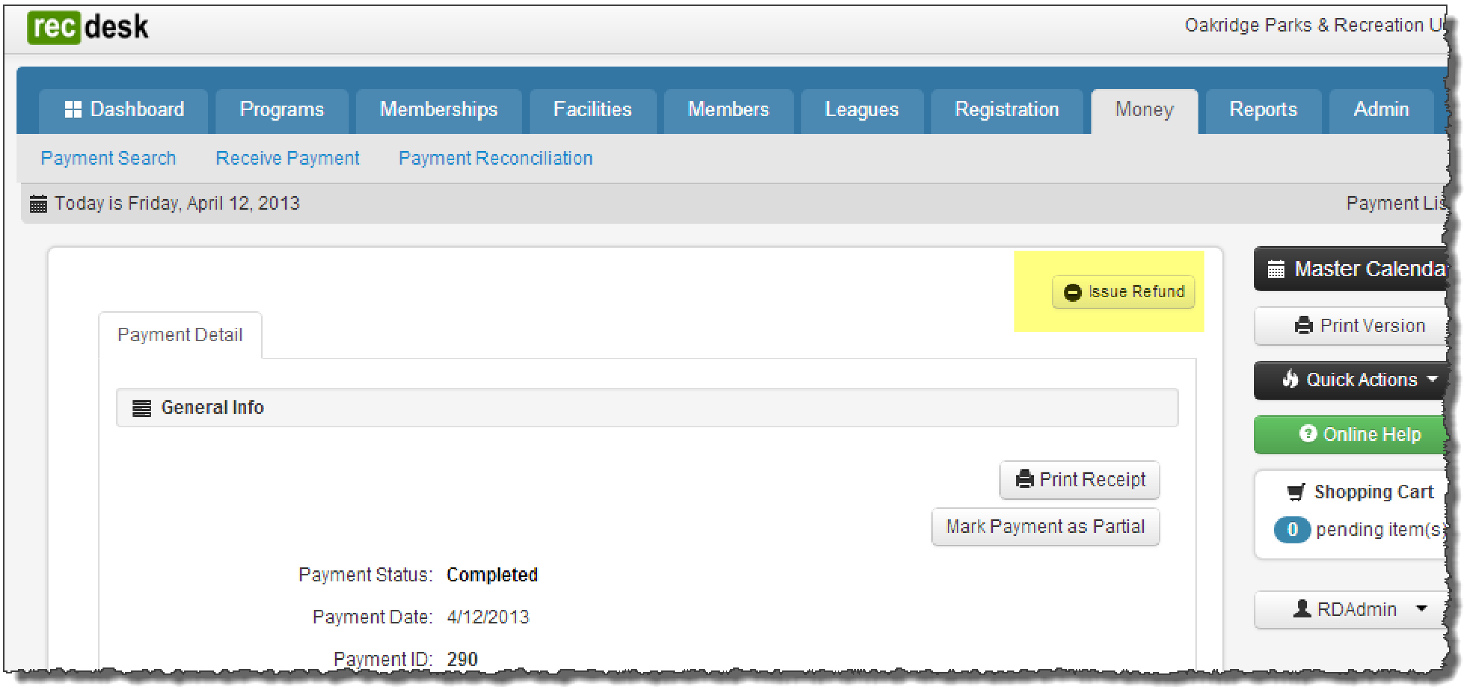
Payments that are in Partial status can be easily tracked and found in RecDesk. The first way is to navigate to [Payment Search]() and set the Search By drop down to **All Payments in Partial Status**. Also, any Reservations or Program Registrations that have a payment that is in partial status will be identified as such. An example of a [Program Roster]() with a payment in partial status is shown below.


rec desk
Oakridge Parks & Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Program List
Add New Program
Today is Saturday, March 23, 2013
View Roster
Program Info
Schedule
Roster
Wait List
Attendance
ADULT-008 - SPRING - Recreational Volleyball
Edit
Actions
Export List to Excel
Name
Address
City
Birth Date
1 Johnson, Alice Partial Payment 123 Soapy Lane Oakridge 1/1/1967 Payment View
2 Smith, Fred 12 Main Street Oakridge 1/1/2000 Payment View
Master Calendar
Print Version
Quick Actions
Shopping Cart
0 pending item(s)
RDAdmin

Refunds

Refunds can be issued by navigating to the ***Payment*** to be refunded via the [Payment Search] page or the View Payment links associated with *Program Registrations, Memberships* or *Facility Reservations*. Once you've navigated to the Payment Detail, click on the Issue Refund button to proceed (see below). You will then be able to issue refunds at the **line item** level for individual payment items.

Please Note: *This records the Refund in RecDesk for reporting and reconciliation purposes but* ***does not*** *refund the actual credit card. This must be done through your Authorize.net, Stripe or PayPal administrative interface.*



Reports

Program Related

Program Report - Detailed

Roster - Simple

Roster - Detailed

Attendance Sheet

Programs Brochure - Extract
A simple report that extracts all relevant information on Programs and schedules that ca then be exported to PDF, Excel or Word and form the basis for a ***print*** catalog of Programs.

Facility Related

Single Facility Usage Report

Multi Facility Usage Report

Money Related

Revenue By Period - Summary

Revenue By Period - Detail

Revenue By Program

Refunds By Period

Payments and Registrations Related

Payment Detail By Period

General Ledger Related

Revenue By Period - Summary

Revenue By Period - Detail

Member Related

Email List

Admin

Adding RecDesk Users

You can add as many Users as you'd like to RecDesk Director. Here's how:

1. Click on the *Admin* tab
2. Select **RecDesk User List** from the sub menu
3. Click **Add New User**

Managing Custom Lists

RecDesk allows you to maintain your own custom categories and lists to help you organize your data in a way that makes sense for your organization. These lists can be viewed and modified by navigating to the *Admin* tab and selecting *Managing Custom Lists*.

- **Program Types** - Program Types allow you to categorize your Programs to fit your organization's unique offerings. These can then be assigned to Programs either when adding or editing them. The Program List page (in both Director and the RecDesk Community portal) can then be filtered by this value. Some examples might be: *Youth Programs*, *Adult Programs* and *Summer Camps*

- **Program Subtypes** - A further way to categorize Programs

- **Facility Types** - Facility Types allow you to categorize your Facilities. These can then be assigned to Facilities either when adding or editing them. The Facility List page (in both Director and the RecDesk Community portal) can then be filtered by this value. Some examples might be: *Ballfield* or *Classroom*

- **Facility Subtypes** - A further way to categorize Facilities

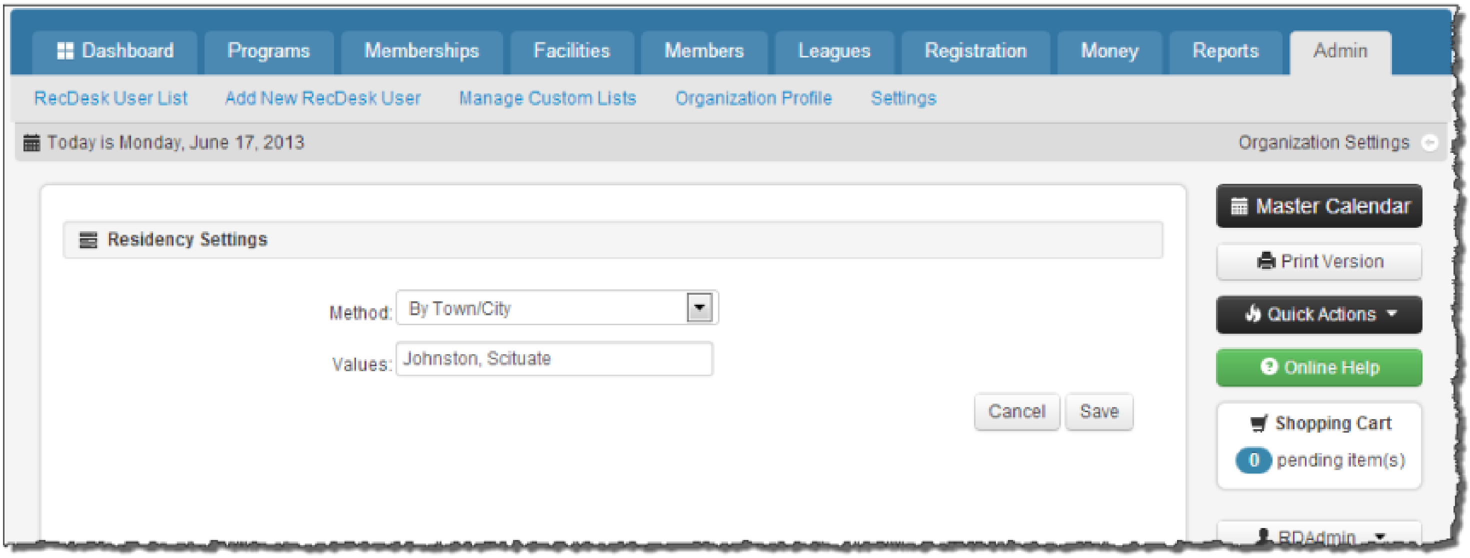
- **Fee Types** - Fee Types are the general labels used to describe *what* a Fee is. These are then assigned to specific Programs (along with a *value*), Membership Types and Facility Reservation schedules. Some examples would be: *Resident*, *Non-resident* or *Scholarship*.

- **General Ledger Codes** - Programs, Membership Types and Facilities (for purposes of Reservations) can be assigned a General Ledger code for Reporting and Accounting purposes. This allows for consistent tie-in with your town/organization's larger finance and accounting framework.

Setting Up Residency Requirements

RecDesk allows you to set up residency parameters based on **Town/City** or **Zip Code** to automatically classify Members as Residents or Nonresidents. Select the **Method** (*Town/City or Zip Code*) and then enter the desired values separated by commas. The example below shows two towns separated by commas. Upon clicking *Save*, the Residency Setting will be applied to ALL individuals with profiles in RecDesk.

The Residency Setting is totally optional and if there is none set, profiles have a default Residency Status of ***Not Set***. If you would like to unset (go back) to this setting after you've already applied a residency scheme, simply clear all entries in the Values text box and hit *Save*. This will revert all profiles back to a *Not Set* status.

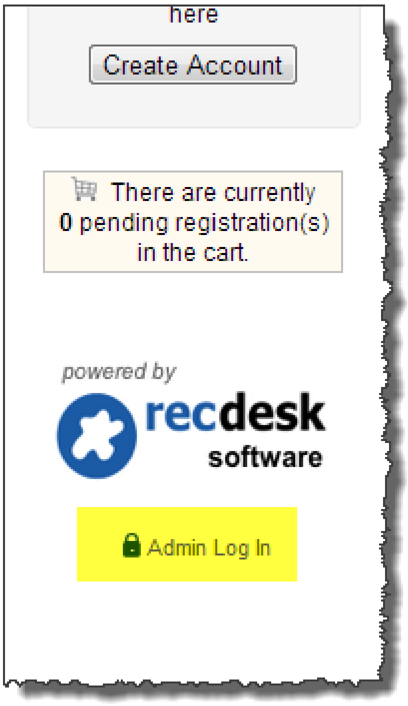


RecDesk Community Portal

Your **RecDesk Community portal** is what the public sees and where they go to see what Programs are being offered and to *register online*. This is in contrast to **RecDesk Director** which is the administrative part of RecDesk that only recreation staff see and work in. The **RecDesk Community** portal also serves as place to share **announcements**, **documents** and other information related to your organization. All Program and Facilities you enter into RecDesk Director are immediately available on the RecDesk Community portal.

Logging In

You may log in to your **RecDesk Community** portal to Add or Update Content or Upload Documents. You will have been assigned a separate User ID and Password for this purpose. Sign in by clicking the **Admin Log In** link in the lower right-hand pane. See below. Once logged in, you will be able to add and edit content as required.

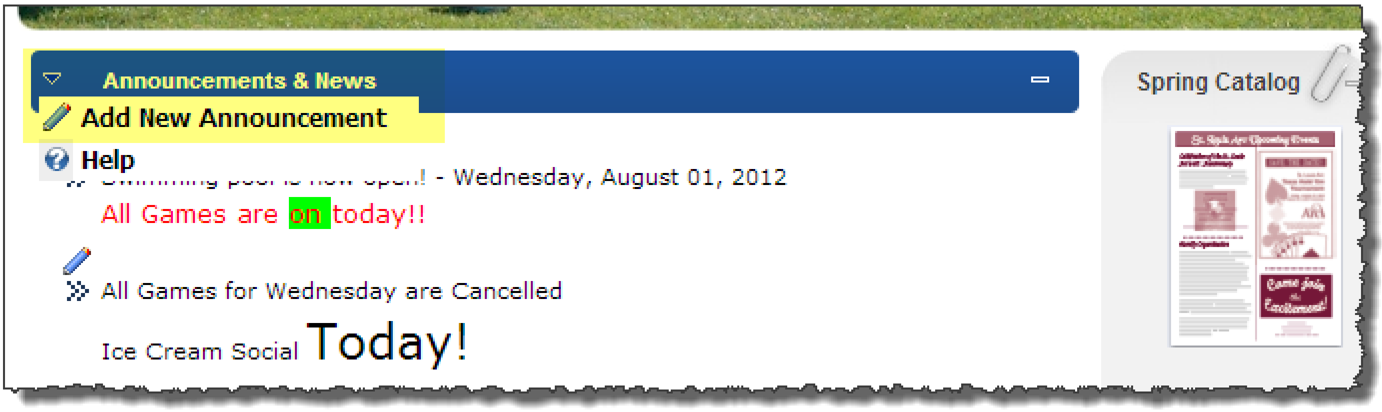


Adding and Updating Content

Announcements

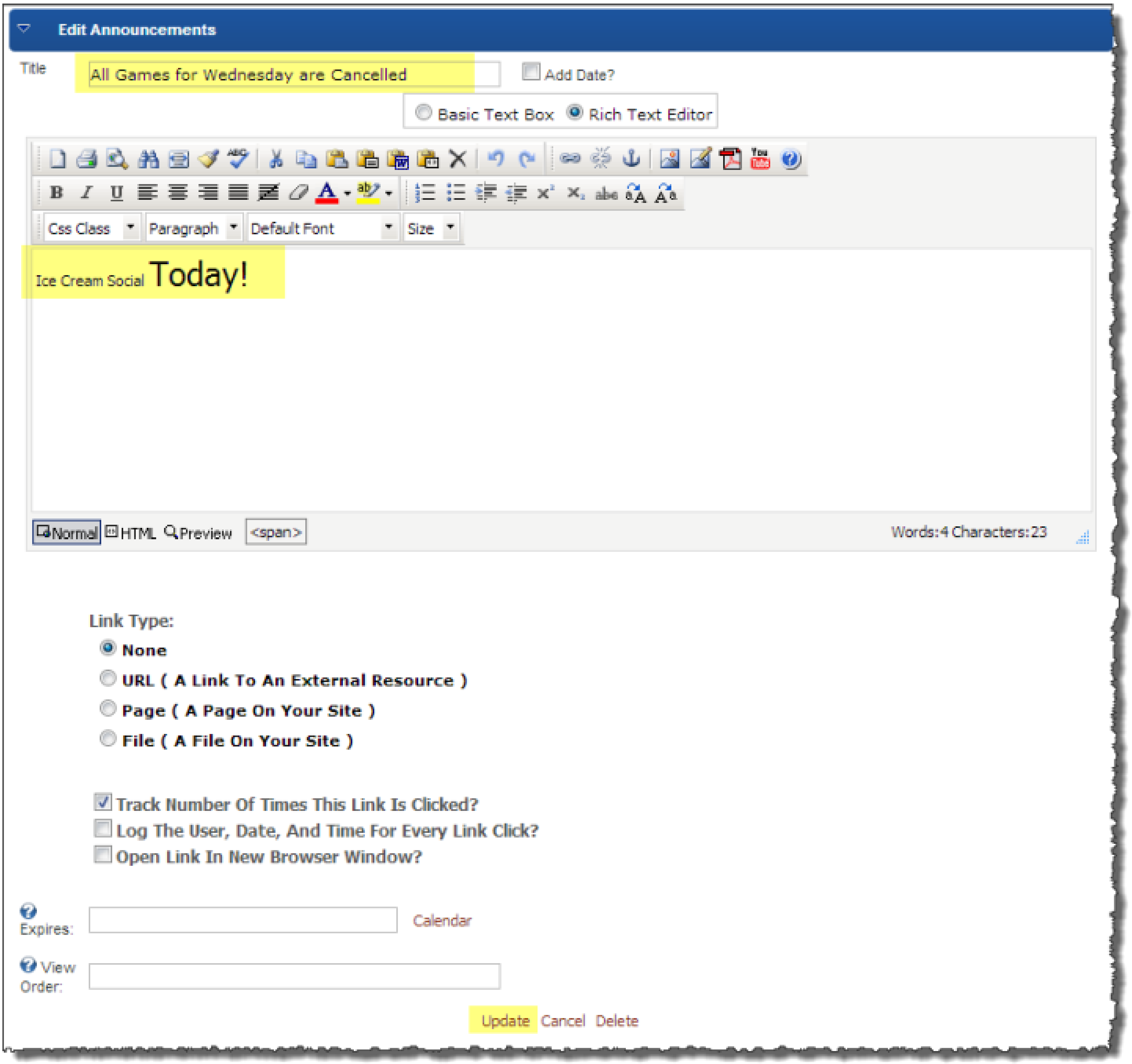
Log in to your Community portal and go to the Home page.

Adding an Announcement - Click on down arrow and then Add New Announcement



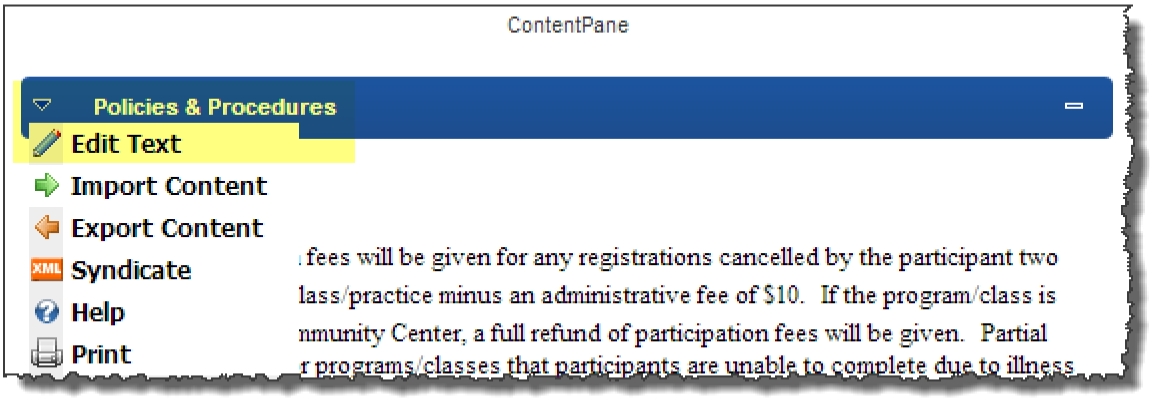
Update an Announcement - Click on the blue pencil icon next to announcement to update

This will bring up the text editor. Add/update the Title, create the content and then click **Update** at the bottom.



Other HTML/Text Based Content

Updating ***HTML/Text based widget*** content is similar to Announcements. Log in to your Community portal and go to the page where the content is you'd like to update. Click on the **down arrow** of the header where the content is and click **Edit Text**. Update the content and Save it the same way as shown above.


ContentPane
Policies & Procedures
Edit Text
Import Content
Export Content
Syndicate
Help
Print
fees will be given for any registrations cancelled by the participant two
lass/practice minus an administrative fee of $10. If the program/class is
nmunity Center, a full refund of participation fees will be given. Partial
r programs/classes that participants are unable to complete due to illness

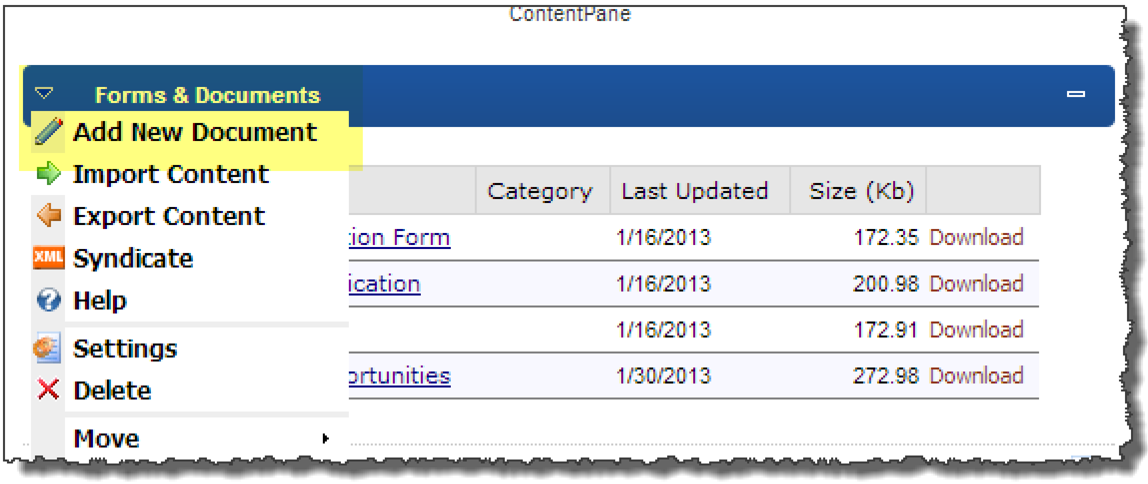
Uploading Documents

RecDesk gives you the ability to **upload documents** to your RecDesk Community portal on any page you'd like via the **documents widget**.

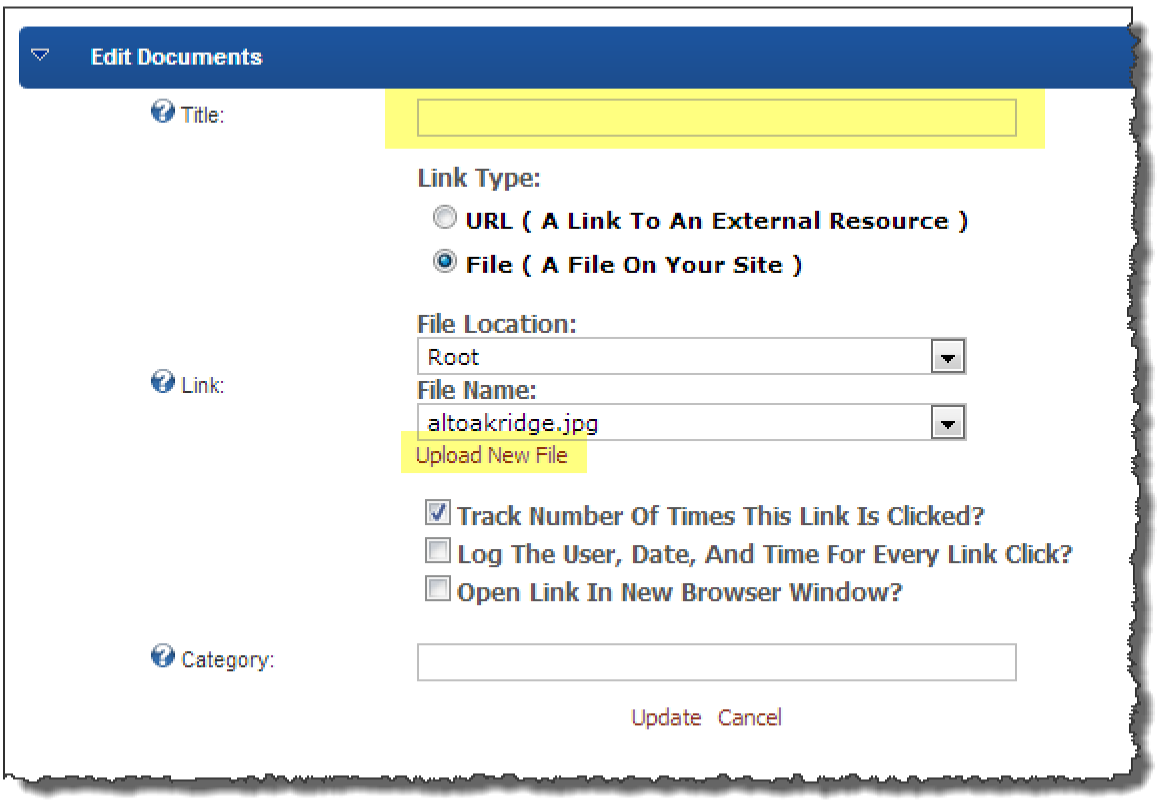
Adding New Documents

1. Log in to your Community portal and go to the page with the **documents widget** on it

2. Click on the down arrow in the header and select **Add New Document**

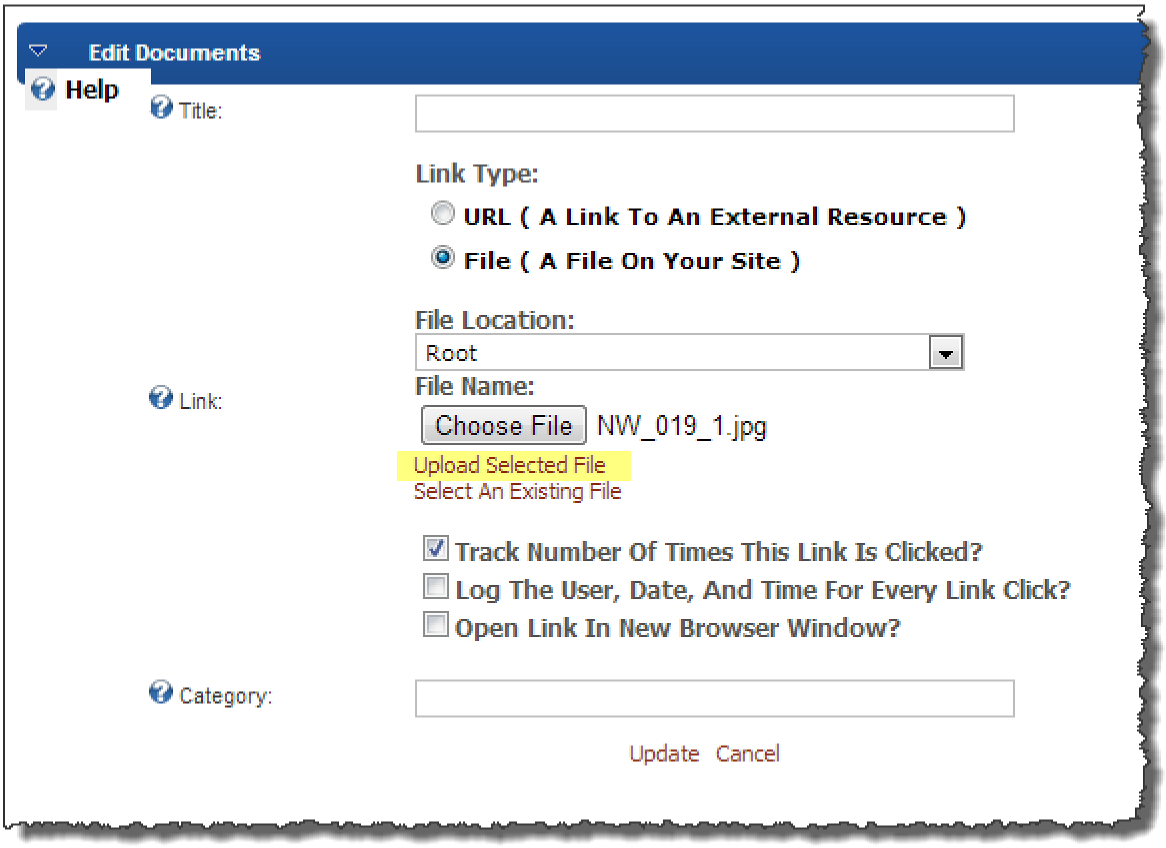


3. Give it a **Title** and click **Upload New File**

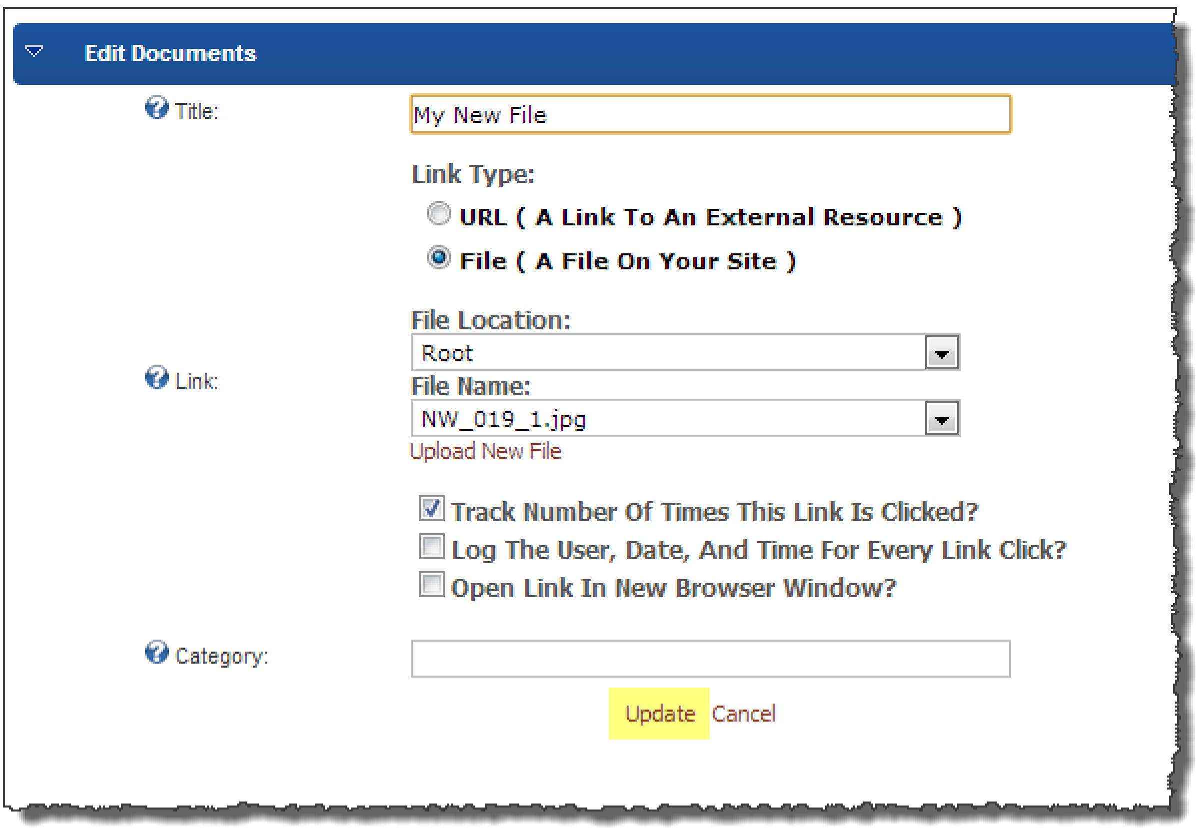


4. Click **Choose File** and select the file from your hard-drive

5. Click **Upload Selected File**



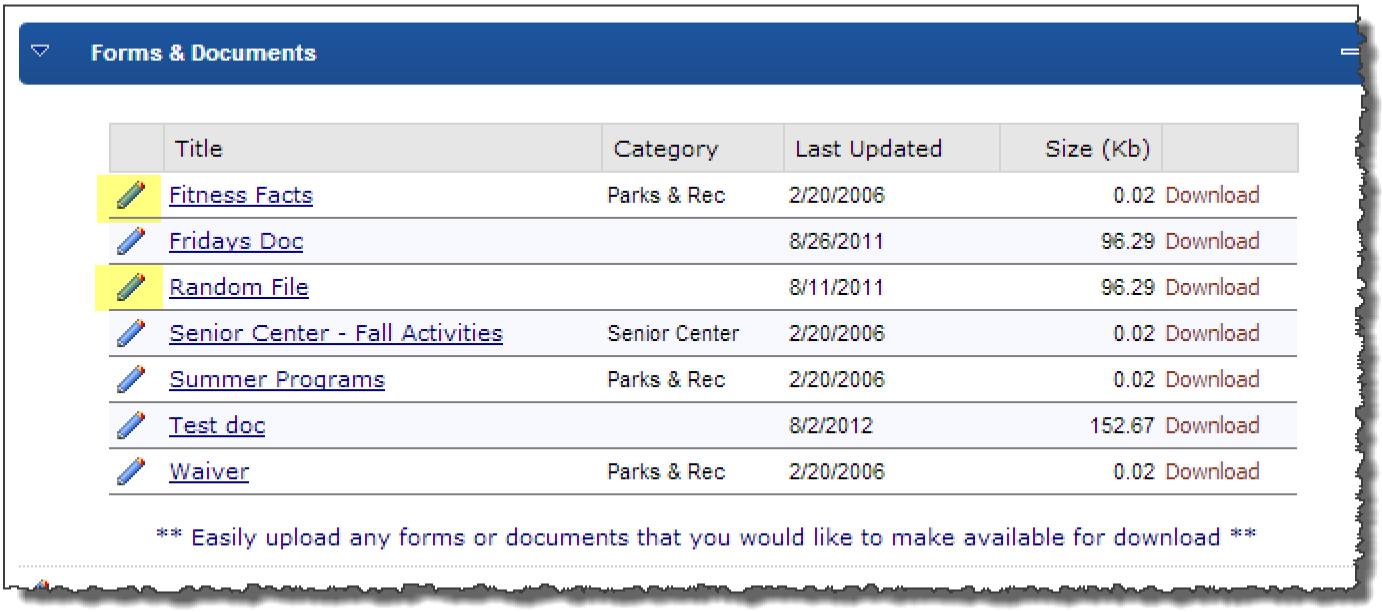
6. Click **Update**...and that's it.



Updating Documents

1. Log in to your Community portal and go to the page with the **documents widget** on it

2. Click on the pencil icon to the left of the document you would like to update



Forms & Documents

	Title	Category	Last Updated	Size (Kb)	
	Fitness Facts	Parks & Rec	2/20/2006	0.02	Download
	Fridays Doc		8/26/2011	96.29	Download
	Random File		8/11/2011	96.29	Download
	Senior Center - Fall Activities	Senior Center	2/20/2006	0.02	Download
	Summer Programs	Parks & Rec	2/20/2006	0.02	Download
	Test doc		8/2/2012	152.67	Download
	Waiver	Parks & Rec	2/20/2006	0.02	Download

** Easily upload any forms or documents that you would like to make available for download **

3. Follow the steps start at #3 above as to how to update and save the document

How Waivers Work

As part of the RecDesk Community portal check out process, online registrants must (*at your Organization's discretion*) **Accept** a *Waiver* prior to RecDesk allowing final payment. You provide the initial verbiage and are then able to maintain and change it moving forward. The basic workflow for online registration is as follows:

1. User adds registrations to their **shopping cart**
2. They click on the **Check Out** button
3. Your **Waiver** verbiage is displayed (see below)
4. If they **Accept**, they continue on to the Payment page. If they **Decline**, they are redirected back to the shopping cart