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 FlexScheduler Reservations

- Enroll someone in a Membership - see Enrolling Members

- Add some more Administrators to RecDesk (you deserve some Help!) - see Adding RecDesk Users

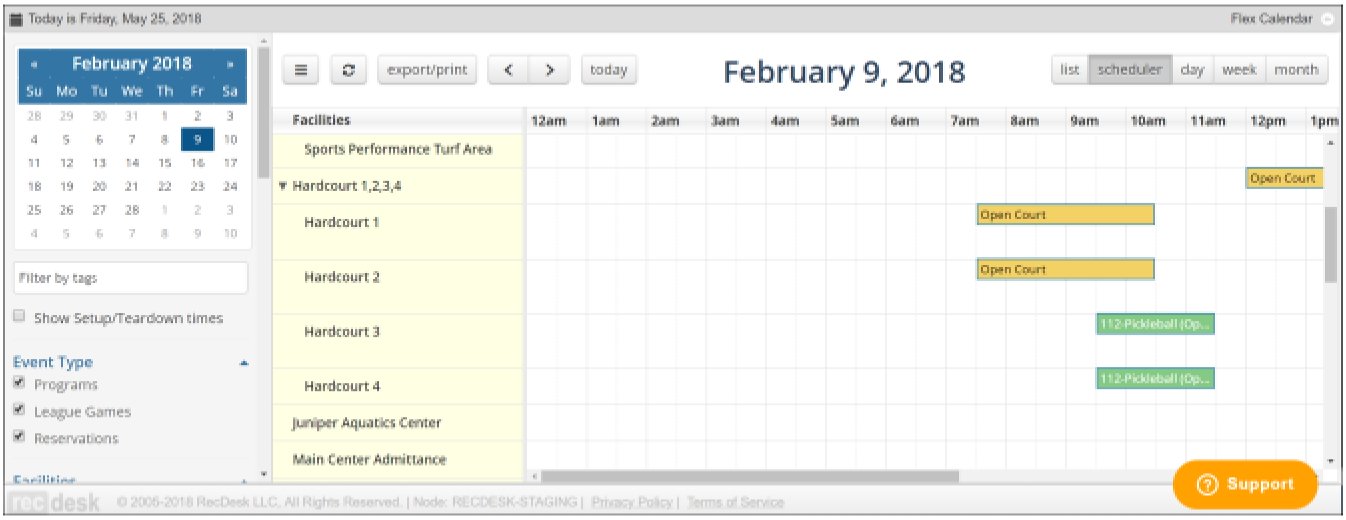
- Print out some Reports

Have at it and have fun!

Flex Calendar

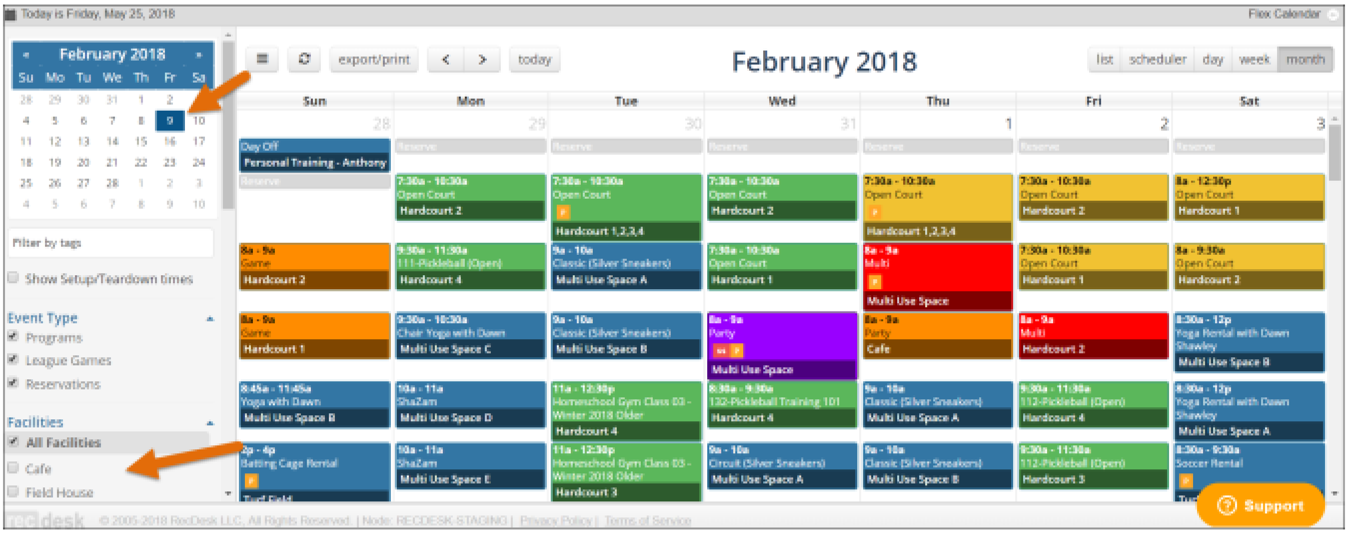
The FlexCalendar will replace the existing Master Calendar. It's a real improvement over the existing Master Calendar in the following ways:

- It includes an ALL NEW **Scheduler View** where you can easily scan for available times across ALL or a sub-selection

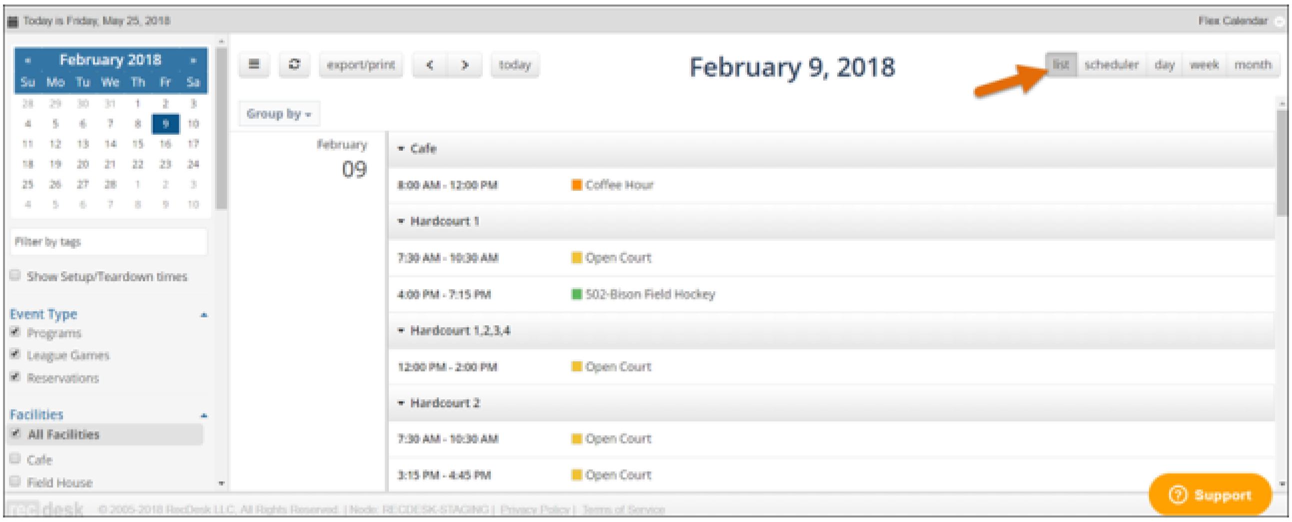


- Easier navigation by specific date using the **Calendar Month Control in the left-hand navigation pane**

- Easier and more robust **filtering by Schedule Type, Facility Tags and Multiple Facilities**



- Includes the ALL NEW List View



- ALL NEW **Wide Screen View** to maximize screen real-estate

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. Click **View/Edit** on the entry you'd like to transfer
3. Click **Edit Registration**
4. Click **Transfer to another program**
5. Select the **Program to transfer to** from the drop down
6. Select the **Fee Type** from the drop down
7. Then click **Do Transfer**.

NOTE: Once Transfer to New Program is complete, you will be redirected to the new Registration Detail. Once there, please verify:

- The Fee Amount(s)
- Custom Question Responses (if applicable)
- Add On Fees (if applicable)

The Transfer Process will make an attempt to map these as closely as possible, but due to differences across Program Definitions, this is not always possible.

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. Click **View/Edit** on the entry you'd like to change
3. Click **Edit Registration**
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. Click **View/Edit** on the entry you'd like cancel
3. Click **Edit Registration**
4. Click **Cancel Registration**, and then click **OK** to confirm**.**

NOTE: Remember to go to the Invoice and then the Payment to issue a refund, if appropriate.

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. Click **View/Edit** on the entry you'd like cancel
3. Click **Edit Registration**
4. Update the Custom Question answers as appropriate and click **Save**.

How do I add a hyperlink to a Program Note?

1. Open the webpage to which you'd like to link. If the page is not online, upload it to your Forms & Documents page of your RecDesk Community portal (see Uploading Documents) and click on it to view it.
2. Open RecDesk Director in another window/tab of your browser, and Edit the program.
3. In the Program Notes field, type all the words up to where you want the hyperlink placed.
4. Then, add this computer code, replacing the bold formatted parts accordingly:

Handbook

where
• **http://org.recdesk.com/recdeskportal......pdf** is the Url of the page you'd like to link to (you can get this by clicking on the tab of your browser where the page is displayed, highlighting and copying the url to the clipboard (Url is in the address bar and starts http));
• color:red is the color of the text;
• text-decoration:underline underlines the text;
• target="_new" opens the hyperlink in a new window;
• and **Handbook** is the text you click on to link to that webpage.

5. Be sure to 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; see Merging Members.

How do I move a Member to a different Household?

Over time, a Member may need to be moved to different Household. Changing a Member's Household is easy; see Moving Member to Different Household.

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

Can I override Residency Status for a Member?

Yes, this can be done while adding a new Member or after they've been added. If you would like to override the Member's Residency Status when adding new Member, simply choose the appropriate override selection from the drop down just below the address header. Once a Member has been added, their Residency Status can be overridden by clicking the ***Override Residency Status*** button when viewing profile.

How do I apply credits to a Household Account?

See Household Credits

Money Related FAQs

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 using older equipment or card swiping for something such as Square if you're 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 transactions in RecDesk.

How do I VOID a Payment or Refund?

See Voids

What Credit Card Readers work with RecDesk?

Any standard USB triple-track magnetic card reader should work fine with RecDesk. *It must be a reader that supports* ***Keyboard Emulation (KBE).*** A sample of some of these can be viewed at Google Shopping. In most instances the reader simply has to be plugged into an available USB port with no further installation necessary.

Administrative Related FAQs

How do I create new Users for RecDesk Director?

See Adding RecDesk Users

How can I hide selected Navigation Tabs in RecDesk Director?

See Show/Hide Director Tabs

Using Tags Effectively

Tags are a useful way to further categorize/organize Members, Personnel/Volunteers and Facilities in your organization. RecDesk provides the basic framework for managing all of these important items, but each department and organization is a bit different with varying needs. This is where Tags come in and can be very useful in tailoring RecDesk to your specific needs. Using tags effectively can make it easier to quickly find and make use of the information you need.

The best way to explain how tags can be useful is with some examples.

Example #1:. Track customers/members with special medical needs by adding a tag named **medic alert**. This tag will then show up on all interactions with customer and can also be used for filtering and searching on Members. These same filters can be applied when creating a recipient list for bulk emails.

Example #2: You have a number of multi-use fields - that can be used for *baseball, soccer, softball, ultimate-frisbee*, *cricket* etc - but not all fields are appropriate for all uses. Create tags named **baseball, soccer, softball, ultimate** etc and assign them to the appropriate facilities. This way, when viewing the Flex Calendar or filtering Facilities on the Facility List page, you can filter the view to include only those with the tags you specify.

Example #3: Your Coach/Volunteer policy requires that all coaches pass a Concussion Awareness online course. You want to track who has/has not completed the training. Create a tag named **concuss-aware** to track who has completed the requirement. (Note: a similar (and perhaps better way) - to do this would be to use the Attach Document feature for Personnel/Volunteers - but the Tags way is illustrative of tags and their flexibility).

Attached Documents FAQ

What is the difference between an *Uploaded Document* and one marked as *On File*?

The most common scenario with attached documents is to upload a file from your local computer and associate it with a Member, Coach/Volunteer or other entity. But, there are instances where an organization may have a hard-copy of a particular document on file in a physical filing cabinet or elsewhere. This is where marking a Document as being **On File** rather than uploading one makes sense. You can still get all the benefits of filtering and searching by Document Types afforded by RecDesk without necessarily having to physically upload one and store it in the RecDesk cloud.

What are Document Types and why should I use them?

Creating and using Document Types makes for a much powerful way to categorize, search and make use of the attached document feature in RecDesk. Assigning a Document type to a file allows you to define expiration policies on specific documents and search for them in a much more refined and useful way. Consider the following two scenarios where a Birth Certificate is uploaded for an individual:

Option 1: Upload a birth certificate without specfying a document type

This works fine in simple cases where you simply need to associate the document with a member and have no specific needs around searching by document type or inquiries about expiration. You can open up the individual's profile at any time and download the related document

Option 2: Upload a birth certificate and set its Document Type to one you created named ***Birth Certificate***

This opens up a whole new set of possibilities. You can now put an expiration date on the document - say 2 years (or any default policy expiration you'd like). It also allows you to do things like:

1. Show me all Members that HAVE a Birth Certificate on file
2. Show me all Members that DO NOT have a Birth Certificate on file
3. Show me all Members that have an EXPIRED birth certificate on file

So, when in doubt, set up Document Types for your most common attached files.

Downloading and Opening Excel Files

RecDesk offers the ability to download many lists (such as Rosters, Memberships etc) in Excel format. Depending on the version of Microsoft Office you have in addition to operating system plus related patches, your system may "block" automatically opening these files as part of it's **Office File Block Policy**. This was first identified in an Office patch that was applied by Microsoft on July 12, 2016.

If you are having issues opening an Excel File downloaded from RecDesk, please take one of the following steps to ***Unblock*** the file(s). You can either set a global setting in Excel, or Unblock them on a per-file basis as noted below. **

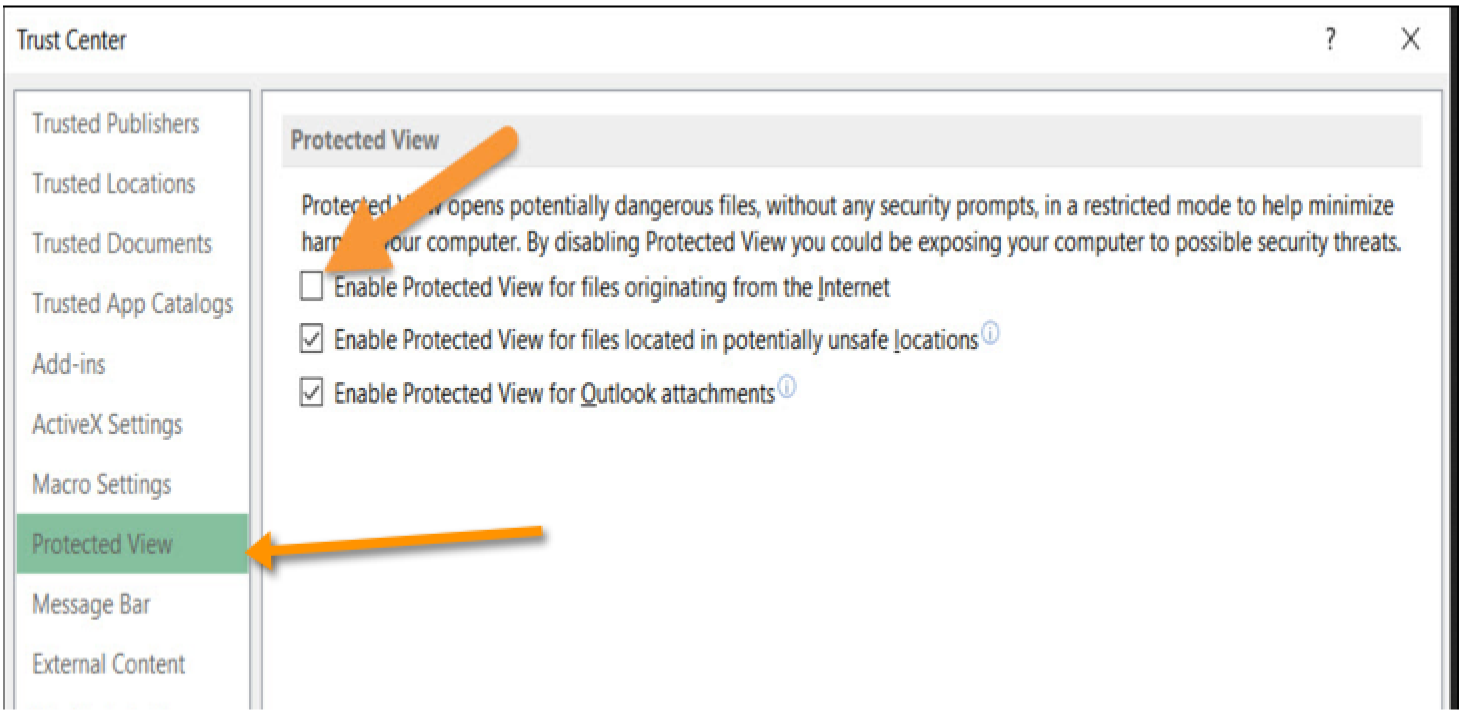
** *Please consult with your IT staff to determine which option is best for your organization*

Related MS Update: https://goo.gl/5ez2nN

Configure Excel to disable Protected View globally

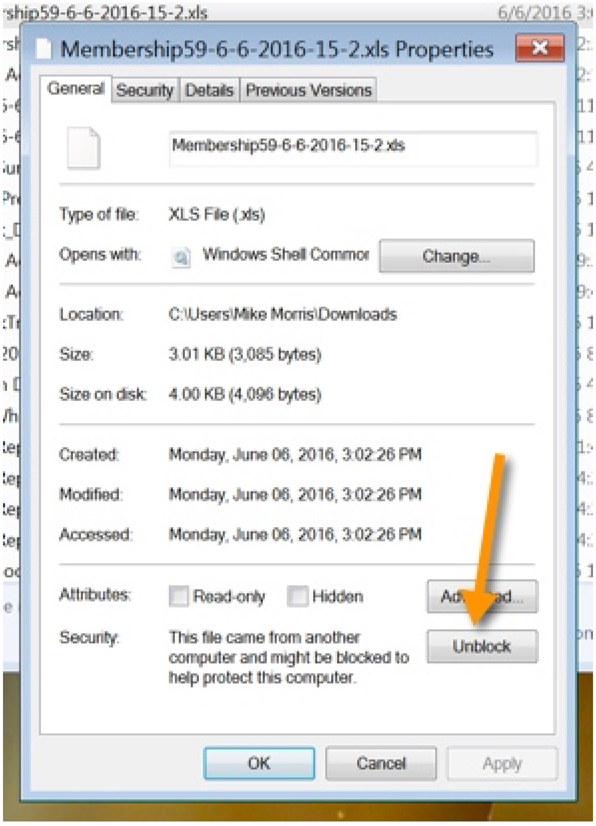
To do this:

1. Open Excel. Click **File** > **Options**
2. Click **Trust Center** > **Trust Center Settings** > **Protected View**
3. Uncheck *Enable protected view for files originating from the internet*
4. Click **Ok**



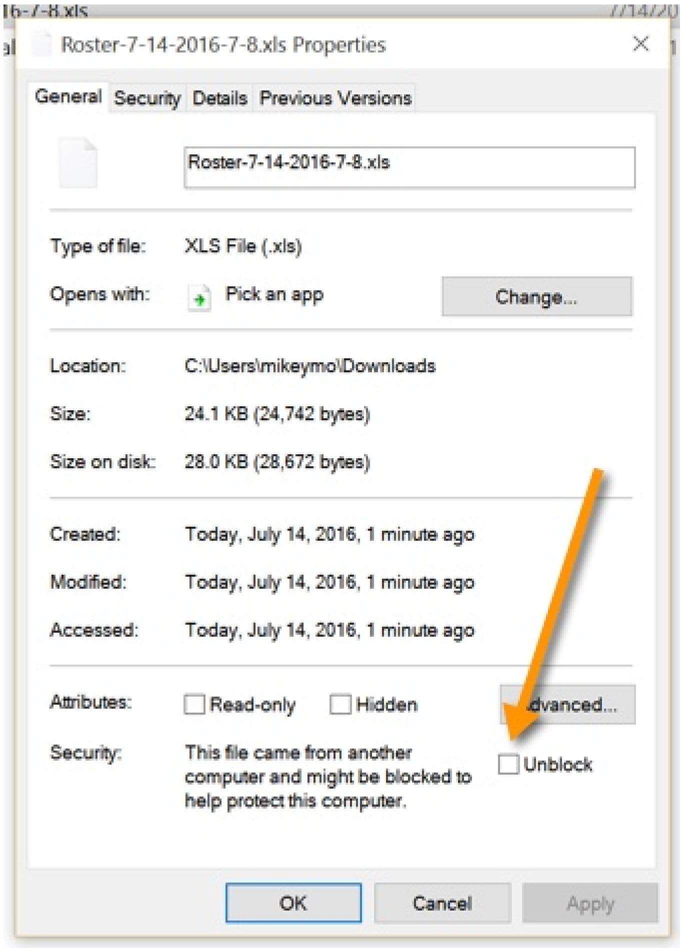
Windows 7 - Per File Basis

Navigate to where the file was downloaded to and find it in your File Explorer (note: this is usually always your Downloads Folder unless you have changed Default). Right click on the file you just downloaded and choose Properties. Click on the Unblock button and then click Apply. You should now be able to open the file.



Windows 10 - Per File Basis

Navigate to where the file was downloaded to and find it in your File Explorer (note: this is usually always your Downloads Folder unless you have changed Default). Right click on the file you just downloaded and choose Properties. Check the Unblock box and then click Apply. You should now be able to open the file.

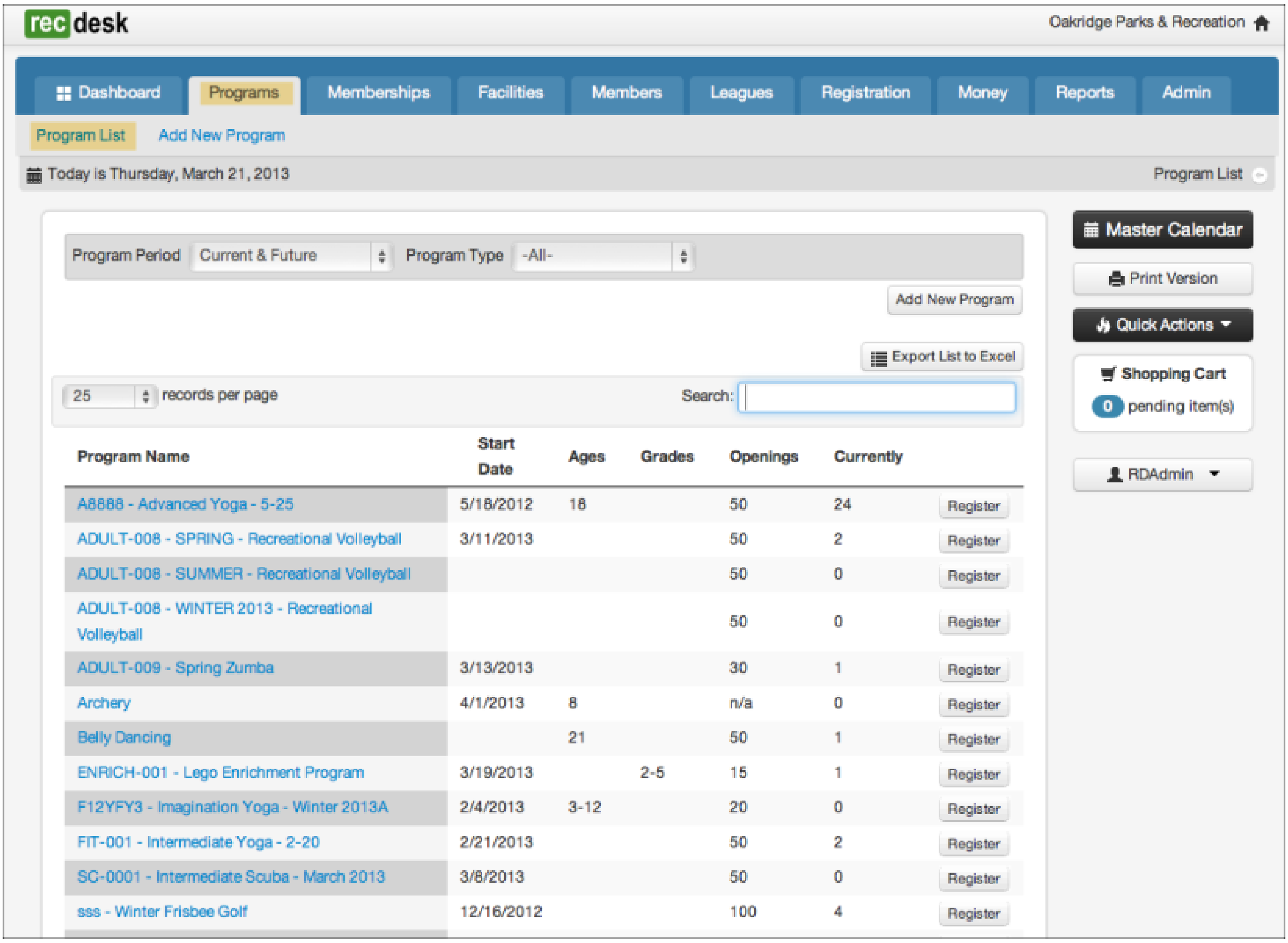

Roster-7-14-2016-7-8.xls Properties
General
Security
Details
Previous Versions
Roster-7-14-2016-7-8.xls
Type of file:
XLS File (.xls)
Opens with:
Pick an app
Change...
Location:
C:\Users\mikeymo\Downloads
Size:
24.1 KB (24,742 bytes)
Size on disk:
28.0 KB (28,672 bytes)
Created:
Today, July 14, 2016, 1 minute ago
Modified:
Today, July 14, 2016, 1 minute ago
Accessed:
Today, July 14, 2016, 1 minute ago
Attributes:
Read-only
Hidden
Security:
This file came from another computer and might be blocked to help protect this computer.
Unblock
OK
Cancel
Apply

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

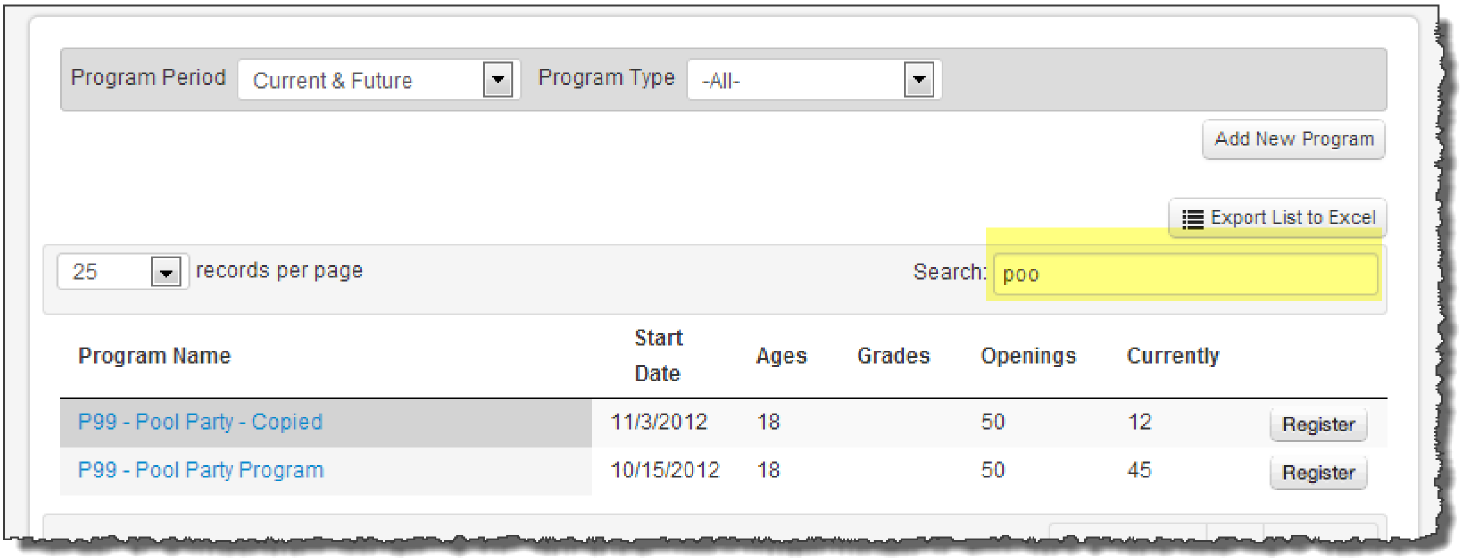


Filtering Programs

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 ***Add New Program*** from the Program submenu or click ***Actions***, then ***Add New Program***. To **modify an 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 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 support for Drop Ins, select either ***Yes - Preregistration Required*** or ***Yes - No Preregistration Required*** from the Drop In Support drop down. See Facility Check Ins for how Drop in Support can be used.

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

- If you'd like to make the Program schedule appear on the Community portal's Program Detail page *AND* on the Community Calendar, check ***Show Schedule on Portal***. The default is checked.

- If you'd like to make the Program schedule appear on the Director Flex Calendar, check ***Show Schedule on Internal Calendar***. 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.

- If you'd like to allow wait listing for this Program once the **Enrollment Maximum** is reached, check ***Allow Wait Listing.*** Default is 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***. You can also optionally ***Set Specific Time(s)*** for one or both of these dates.These date(s)/time(s) only impact Online Registration. You will always be able to register individuals in-house (via RecDesk Director) at any time.

- Specify an **Instructor** only if you want to specify someone who is not on the Personnel/Volunteers List with a Role of Instructor. Otherwise, assign instructors on the Instructors Tab (see Adding Instructors to Programs).

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

- Enter additional **Notes** (optional) for this Program. The public will see the **Notes** on the RecDesk Community portal.

- If you wish to include Notes on the registrant's receipt, check **Include Notes on Receipt**.

- **Accounting**
    - You may optionally assign a **GL Account** code to this Program
    - You may optionally assign a **Sales Tax** rate 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).

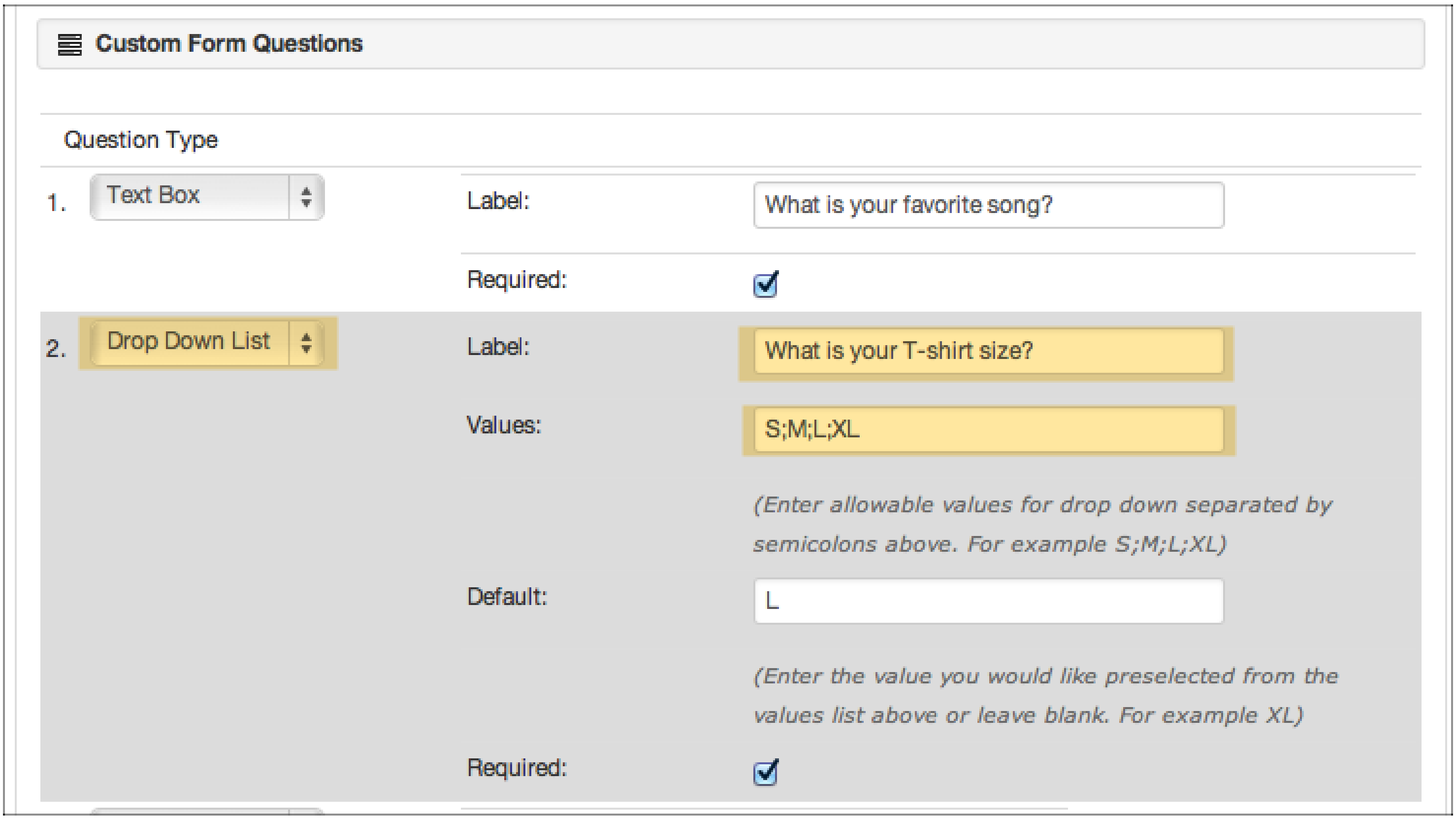
    - If you enter a value into **Enrollment Maximum**, online registration will be cut off as soon as that limit is reached. Prospective registrants will be given the option to get on a **Wait List**. Enrollment beyond the *Enrollment Maximum* limit can be performed in-house within RecDesk Director.

    - **Age Restrictions**
        - You can optionally enter *Minimum and/or Maximum Age* for a program. If you would like this restriction to be enforced on the RecDesk Community portal for online registrants you must also enter a corresponding ***Age as of Date*** for the cutoff.

    - **Fees -** Add all fees under the **Fees** tab (see Program Fees).

- **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 Flex 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 that 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**

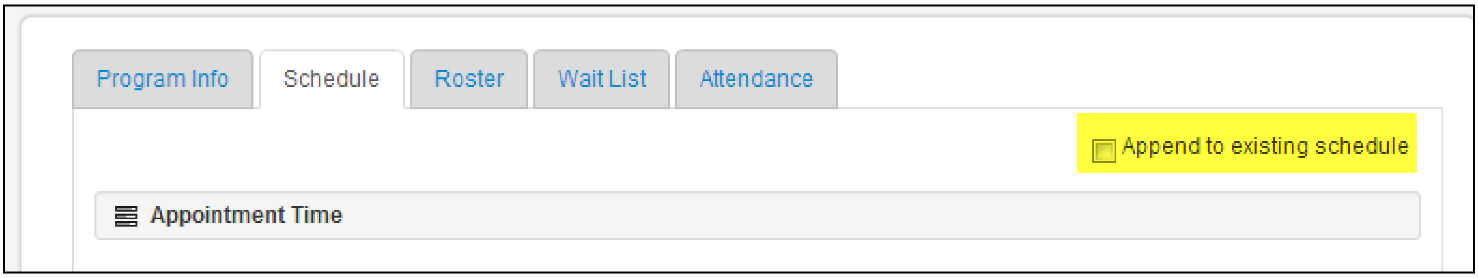
- You will be presented with a **list of schedule dates** generated from the previous steps. These have **not** been saved yet. You now have the opportunity to change or delete specific dates due to holidays or other reasons.

- 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.



Program Fees

Program Fees must be added once you have defined your Program. Registration is not enabled until there is at least one Standard Fee defined. Up to 12 **Standard Fees** (Resident, Non-resident, etc) and 12 **Add-Ons** (After Care, etc) may be assigned to a Program.

Prerequisites - Before adding Program Fees, you should create *Fee Types (Standard Fee Types) and Add-On Fee Types* that are appropriate for you organization. See Managing Custom Lists.

While viewing a Program, navigate to the **Fees** tab and click the **Edit** button.

Community Payment Option

- **Must Pay In Full At Checkout (default)** - All fees for the Program are paid in full by Community Members online.

- **Minimum Deposit Required At Checkout** - Community members have the option to pay the deposit amount OR the full amount due online. After selecting this option, enter Amount of deposit required.

- **May Pay Later ($0 Due at Checkout)** - Community members have the option to pay $0 OR the full amount due online.

Adding Standard Fees

- Select the **Fee Type 1** from the drop down (see Managing Custom Lists)

- Enter the **Amount** of the Fee

- Fees can be set to be applicable to *Only Residents* or *Only Nonresidents* by choosing **Residency Restriction** from the drop down (see Setting Up Residency Requirements)

- You can choose whether or not a Fee appears on the RecDesk Community site by simply checking or unchecking the **Show Fee on Portal** checkbox. (Note: You may opt to allow processing of scholarship or special rate fees by mail-in or in-house registrations only)

- Click ***Show Advanced Options*** if you would like this Standard Fee Type to ***start and/or end at a specific date/time***, and/or to ***restrict*** this Standard Fee Type to ***Members of certain Memberships***.

    - To have this Fee start and/or end at a specific date/time, enter a ***Fee Effective Date*** and/or ***Fee End Date***. You can also ***Set Specific Time(s)*** for one or both dates. These dates/

times only impact Online Registration. The Fee Dates will appear next to the Program Name when registering in-house (via RecDesk Director).

- To ***restrict this Fee to Members of certain Memberships***, simply check off the Membership(s) in which the Member must be currently active in to select this fee (registrants must be current active Members of at least one Membership checked off in order to choose this Fee Type).

- Repeat for all Standard Fees.

Adding Add-On Fees

- Select the **Add-OnType 1** from the drop down (see Managing Custom Lists)

- Enter the **Amount** of the Fee

- Select **Residency Restriction** from the drop down (see Setting Up Residency Requirements)

- You can have this Add-On Fee appear on the RecDesk Community site by simply checking or unchecking the **Show Fee on Portal** checkbox.

- Repeat for all Add-On Fees.

Assigning Forms to Programs

FlexForms built via the FlexForms Builder can be assigned to Programs for completion at the time of in-house or online registration (see [The FlexForms Builder]). This is done by clicking on the **Forms** submenu for a Program, then clicking the **Edit** button.

Prerequisites - Forms must be built using the [The FlexForms Builder] prior to assigning them to Programs.

Basic Workflow

- Check off the **Form(s)** that are required to be completed at the time of registration
- For each Form checked, choose:
  - **Requirement Type:**
    - **New Form Each Time -** Use this Requirement Type if you would like Program Registrants to have to fill out a new instance of this form for each registration - regardless of whether they've filled out the same form for a prior registration.
    - **Shared:** Use this Requirement Type if you would like Program Registrants to only have to fill this form out ONCE. This means that if they have a prior instance of this form that has already been completed, they will not have to fill it out again. They will however have the opportunity to update it. This is common for fairly static information like Health Assessments**.**
  - Optionally check off **Allow Partial Completion** to allow Online Registrants to proceed through the Check Out process without having to completely fill out all required form elements (less common) **.
- Click **Save**.

** Note: All Forms required for ***In-house Registrations*** are allowed to be partially completed

Adding Instructors to Programs

Instructors can be added to Programs. This is done by clicking on the **Instructors** submenu for a Program, then clicking the Add Instructor button.

Prerequisites - To make an Instructor available in the drop down list below, they first need to be added on the Personnel/Volunteers List page with a Role of Instructor. See Adding/Editing Personnel/Volunteers.

Basic Workflow

- Choose an **Instructor** from the drop down (see Adding/Editing Personnel/Volunteers)
- Optionally, add a **Note** on this Instructor
- Click **Save**.

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 you're 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.

- Optionally check off any or all **Add-Ons**. The amounts will automatically show but **can** be overridden.

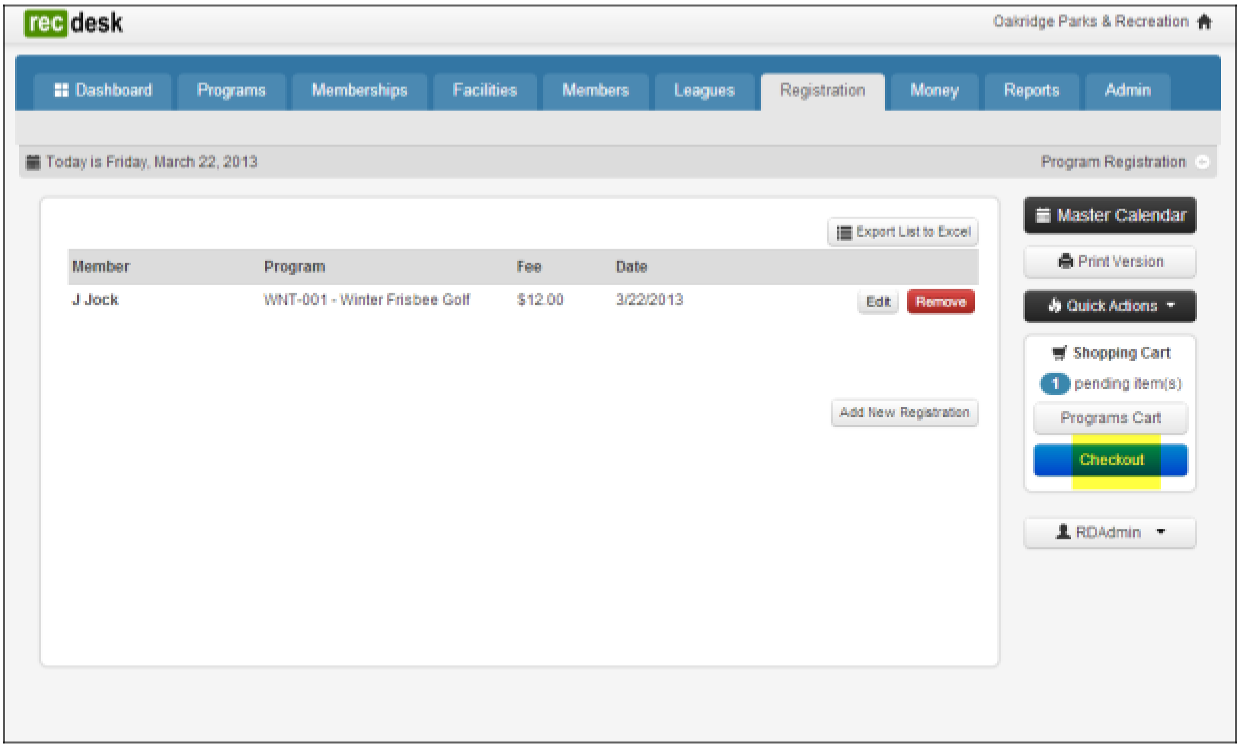
- Select the **Registration Source** from the drop down

- 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

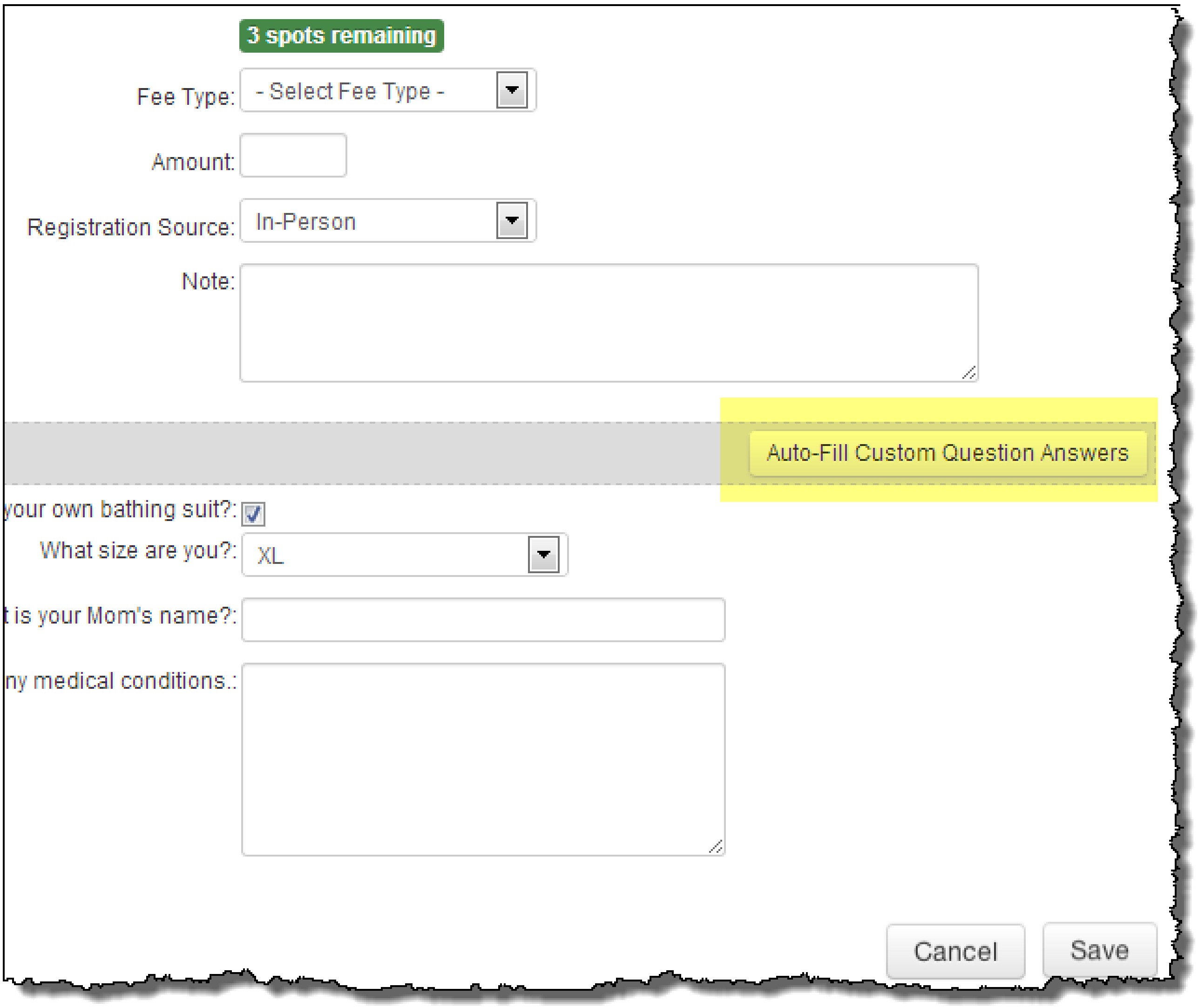
Custom Questions are used to collect further information from registrants at the time of registration. A common Custom Question might be: *What is your t-shirt size?* Another example might be *Who is authorized to pick your child up from camp?* The responses can be in the form of a textbox, multi-line 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 alphabetized list of all program registrants.

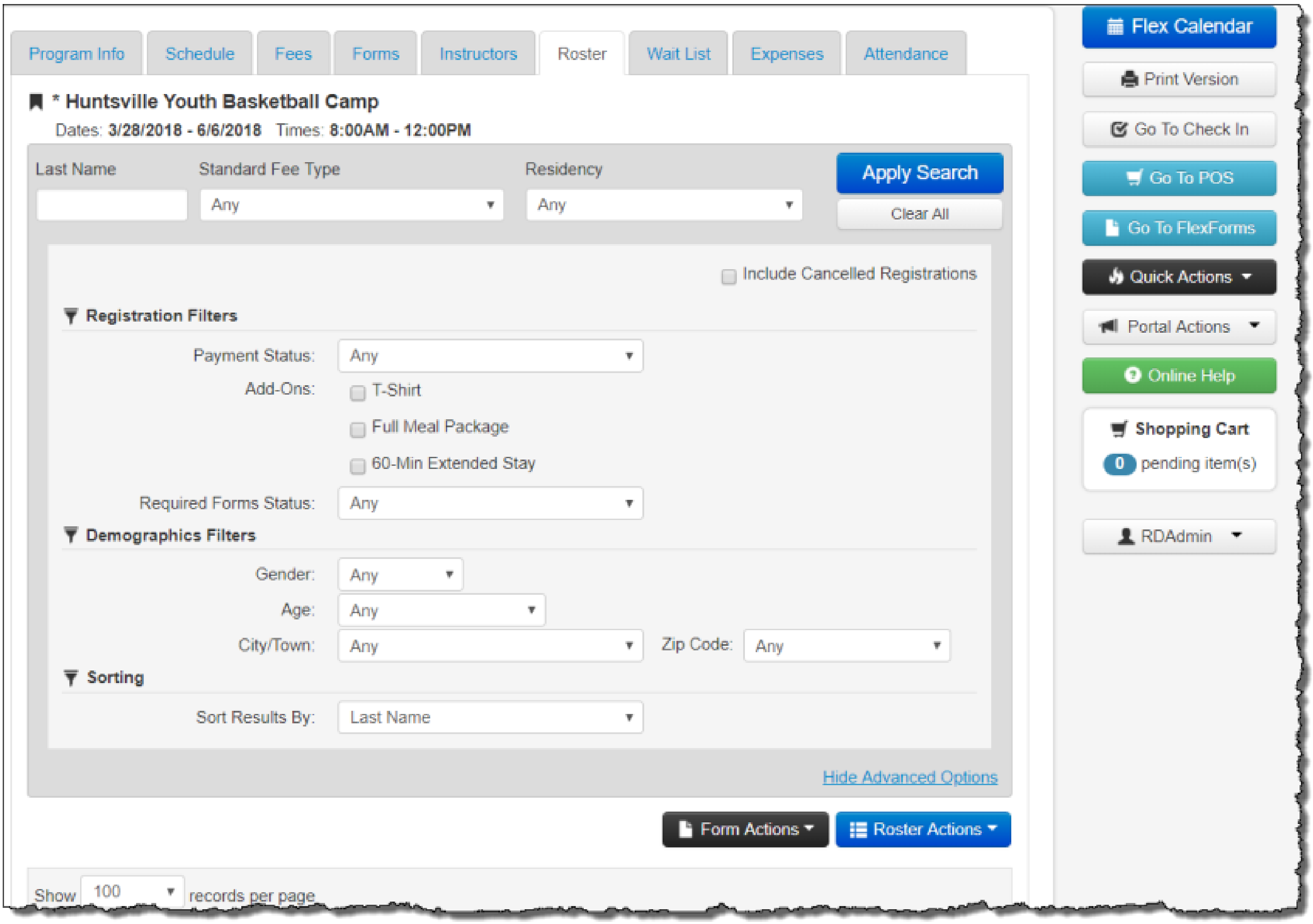
The Roster List (Advanced Search)

To Search for registrants of a Program, click on the **Program Name** and then the **Roste**r tab. The default page will list all current registrants of the Program.

Basic Search options include: *Last Name, Standard Fee Type and Residency.*

For more advanced search options, click **Show Advanced Options**. You then have the option to *Include Cancelled Registrations,* and you can filter by the *Registration Filters* and/or *Demographic Filters* listed in the screenshot below. After choosing filters, click **Apply Search.**

Important Note: Once the roster list is filtered, you can do any of these [Roster Action Items](#) on the [***Filtered List***](#) by clicking on the **Actions** button.



Roster Action Items

Once your Roster list is ***filtered***, any of these Actions can be taken for the ***Filtered Roster List***:

Printing Attendance Sheets of *Filtered* List of Participants

- Click on the **Actions** button
- Select *Print Consolidated Attendance Sheet* (includes all dates on the schedule) or *Print Daily Attendance Sheet* (includes lines for signing in and out)
- The report will appear and can then be printed or exported to a PDF, Word or Excel

Printing Rosters of *Filtered* List of Participants

- Click on the **Actions** button
- Select *Print simple Roster* or *Print Detailed Roster (*Detailed Roster contains answers to Custom Form Questions)
- The report will appear and can then be printed or exported to a PDF, Word or Excel

Emailing *Filtered* List of Participants

- Click on the **Actions** button
    - Option 1: **Email All Participants (as To)** or **(as Bcc)**
        - 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 *filtered* participants as well as all household members that are designated as Head of Household
        - Type email and send as you normally would
    - Option 2: **Display/Copy Email Addresses**
        - This will open a pop-up with the email addresses of all *filtered* participants as well as all household members that are designated as Head of Household. You can then copy/paste this list as required

SMS/Texting *Filtered* List of Participants

- Click on the **Actions** button

  - Option 1: **Text (SMS) All Participants**
    - This will open up your *default email client* (i.e. Outlook, Outlook Express) and pre-fill the To: list with the Text/SMS addresses of all *filtered* participants as well as all household members that are designated as Head of Household who have opted-in to Receive Text Messages (see Member Fields)
    - Type text message and send as you normally would send an email

  - Option 2: **Display/Copy Text/SMS Addresses**
    - This will open a pop-up with the Text/SMS addresses of all *filtered* participants as well as all household members that are designated as Head of Household who have opted-in to Receive Text Messages. You can then copy/paste this list as required

Exporting Roster Information to Excel

- **Basic** Roster information export
  - Click on the **Actions** button
  - Click on the **Export Basic List to Excel** button

- **Fully Detailed** Roster information** export (includes ALL of a registrant's profile information plus Names, Phone Numbers and Email Addresses of those individuals in their household marked as Head of Household)
  - Click on the **Actions** button
  - Click on the **Export Full Detail to Excel** button

** To *display* the fully detailed roster information, simply click **Actions**, **Show Full Detail**. To close this display, click **Actions**, **Hide Full Detail.**

Form Action Items

Once your Roster list is ***filtered***, any of these **Form Actions** can be taken for the ***Filtered Roster List***:

- **Print Specific Forms** for all registrants in filtered list
- **Print All Forms** for all registrants in the filtered list
- **Export Specific Form Results to Excel** for all registrants in the filtered list

Updating/Cancelling Roster Entries

Updating Roster Entries

Individual Roster entries (including answers to Custom Questions and registered Family Member) can be updated; here's how:

- Click **View/Edit** on the entry you'd like to update
- Click **Edit Registration**
- Update the appropriate fields and click **Save.**

Canceling Registrations

- Click **View/Edit** on the entry you'd like to cancel
- Click **Edit Registration**
- Click **Cancel Registration**, and then click **OK** to confirm**.**

NOTE: Remember to filter your Roster list to ***Include Cancelled Registrations*** and then go to the **Invoice** and then the **Payment to issue a refund**, if appropriate.

Form Actions for Individual Roster Entries

Form Actions

- Click **View/Edit** on the roster entry
- Click on the **Form Actions** drop down to View/Edit Forms for this registrant, or Print a specific Form or All Forms for this registrant

View/Edit Forms

- Click **View/Edit** on the roster entry
- Click on the **Form Actions** drop down
- Click **View/Edit Form**
- Click **Edit Response**
- Make appropriate changes
- Click **Update Response**

Printing Forms for Individual

- Click **View/Edit** on the roster entry
- Click on the **Form Actions** drop down
- **Print** a specific Form or All Forms for this registrant

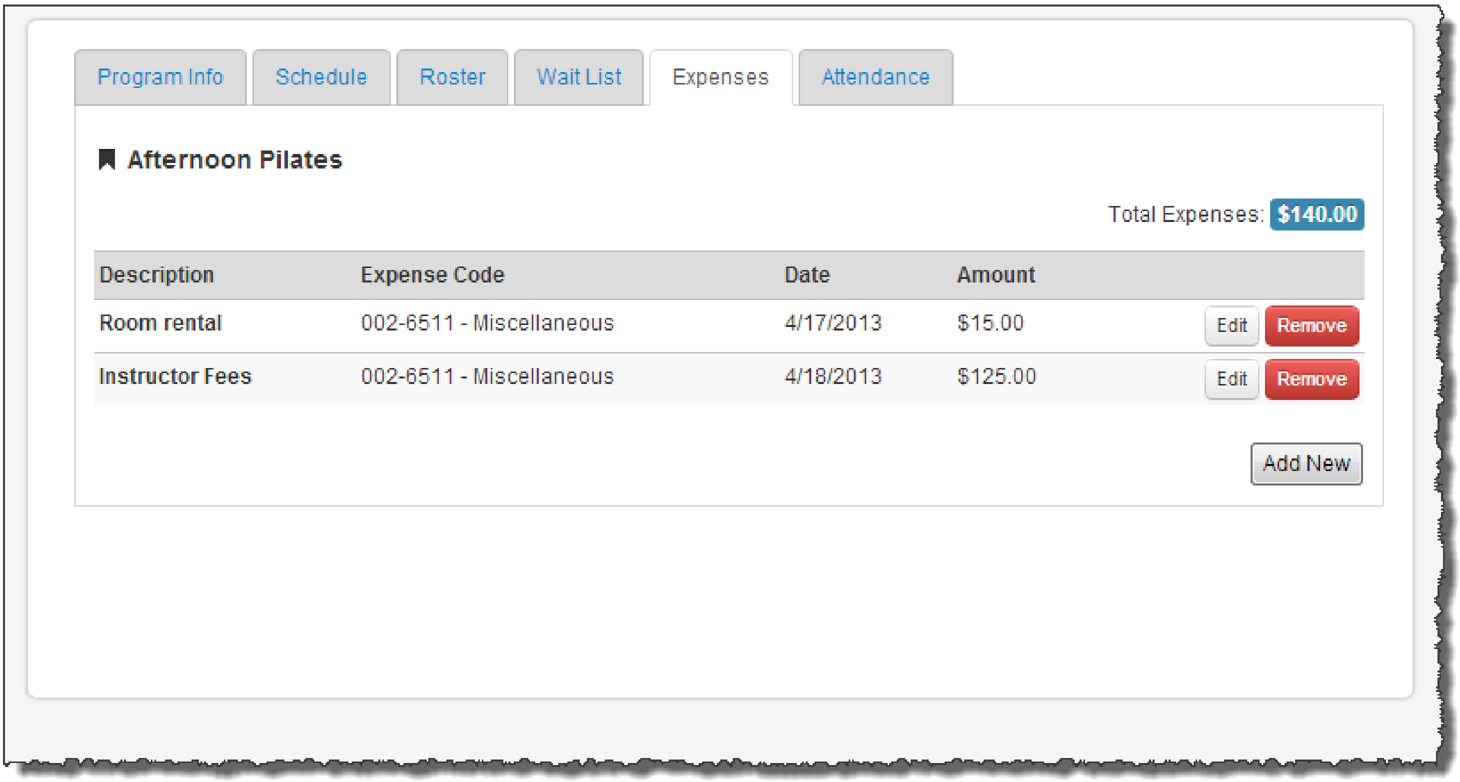
Wait Lists

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.

- **Drop In Support** - Designate this Program as supporting drop ins. See Facility Check Ins for how Drop in Support can be used.

- **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 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.

- **Allow Wait Listing** - Check this box to allow wait listing for this Program once the Enrollment Maximum is reached. Default is checked.

- **Enrollment Begin Date/Time** - The date/time when online registration is opened to the public. If this date is left blank, online registration will be available immediately.

- **Enrollment End Date/Time -** The date/time 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

- **Notes** - Any additional Notes related to the Program

- **Include Notes on Receipt -** Check this box if you wish to include the Notes on the registrant's receipt

Accounting

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

- **Sales Tax** - The Sales Tax associated with this Program. See Managing Custom Lists

Demographics

- **Gender** - Male, Female or Both. Default is Both. 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 if the Allow Wait List box is checked.

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

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

- **Age Minimum** - Target minimum age.
  - **Enforce - Age as of Date** - The cutoff date for *Age Minimum*. When this is set (in conjunction with *Age Minimum*), the *Minimum Age* restriction will be **enforced** on the RecDesk Community portal for online registrants - and they will not be able to register unless eligible.

- **Age Maximum** - Target minimum age.
  - **Enforce - Age as of Date** - The cutoff date for *Age Maximum*. When this is set (in conjunction with *Age Maximum*), the *Maximum Age* restriction will be **enforced** on the RecDesk Community portal for online registrants - and they will not be able to register unless eligible.

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

<u>**Checkbox**</u> - A simple Yes/No answer

- **Label** - The question being asked
- **Checked** - Select checked to default response to *checked*.
- **Required** - Check this to require a response

Fee Fields

Fee Fields

- **Fee Type -** The Standard Fee Type assigned to this fee (see *Manage Fee Type*s under Managing Custom Lists).

- **Add-On Type** - The Add-On Fee Type assigned to this fee (see *Manage Add-On Fee Types* under 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*)

- Click ***Show Advanced Options*** to set optional restrictions:

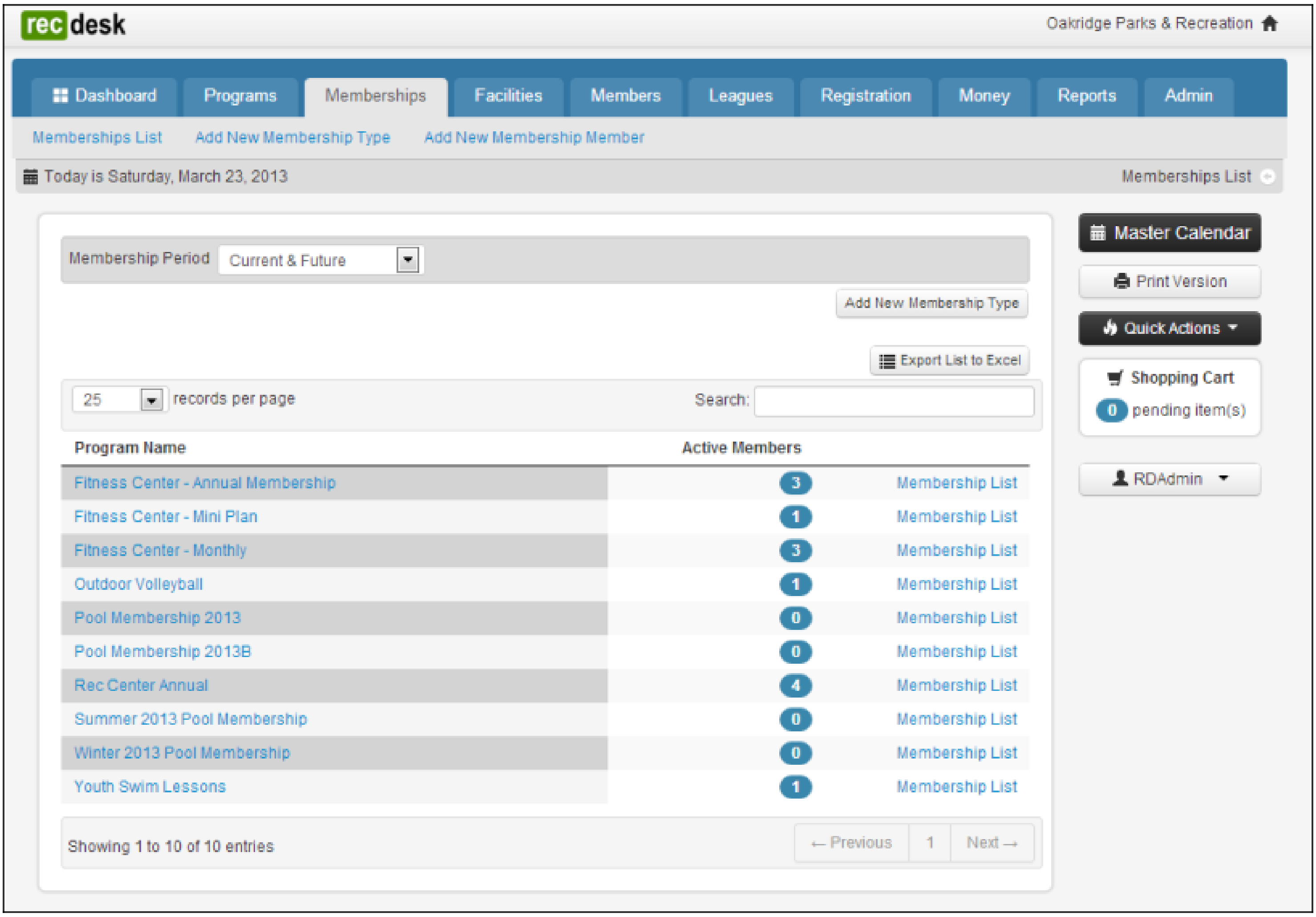
    - To have this Fee start and/or end at a specific date/time, enter a ***Fee Effective Date*** and/or ***Fee End Date***. You can also ***Set Specific Time(s)*** for one or both dates. These dates/times only impact Online Registration. The Fee Dates will appear next to the Program Name when registering in-house (via RecDesk Director).

    - To ***restrict this Fee to Members of certain Memberships***, simply check off the Membership(s) in which the Member must be currently active in to select this fee (registrants must be current active Members of at least one Membership checked off in order to choose this Fee Type).

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 to send Automatic Emails when Memberships are due to expire, check off ***Automatically Send Expiration Email*** and then select the number of days before expiration you'd like the email sent from the ***Days before expiration*** drop down.

- 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.

- Enter additional **Notes** (optional) for this Membership. The public will see the **Notes** on the RecDesk Community portal.

- If you wish to include Notes on the enrolee's receipt, check **Include Notes on Receipt**.

- **Accounting**
    - You may optionally assign a **GL Account** code to this Membership
    - You may optionally assign a **Sales Tax** rate 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.
    - You can optionally limit the number of visits by entering a number of **Punches/Swipes Allowed**. See Creating Punch Passes.
    - Fees can be set to be applicable to ***Only Residents*** or ***Only Nonresidents***. See Setting Up Residency Requirements.

- Click **Save**

Creating Punch Passes

Punch Passes provide the option of restricting Enrolled Members to a certain number of visits to a Facility rather than unlimited visits for a period of time as with conventional Monthly, Annual or Definitive time-period Memberships. This is done by defining the number of Punches/Swipes Allowed for a fee-type.

Basic Workflow

- Follow the Basic Workflow for Creating and Modifying Membership Definitions up to the **Fees** section. If your Membership is Open (Ongoing), you may want to have a longer Default Membership Duration to allow Members to use their punches for a longer period of time.

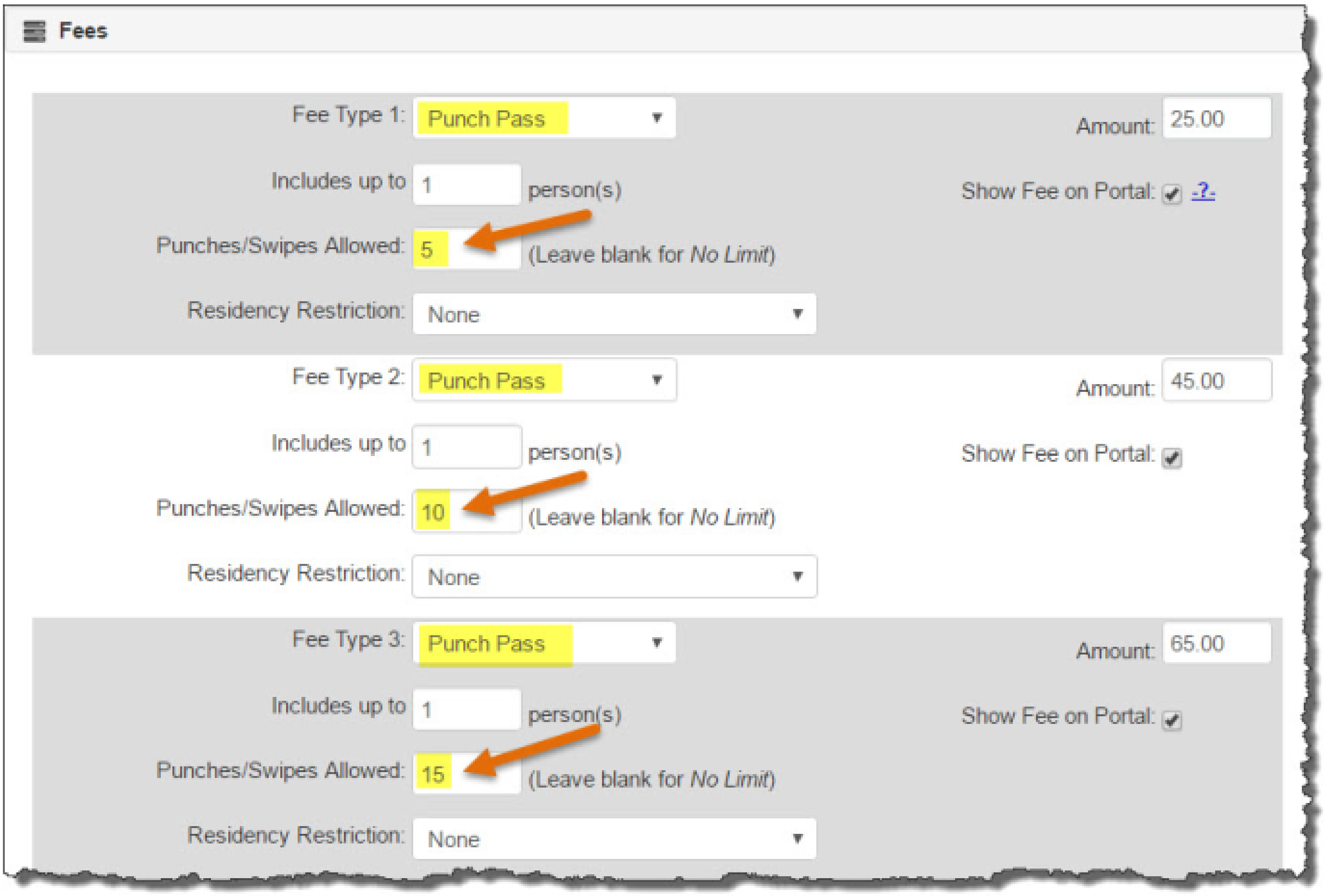
- Choose a **Fee-Type** from the drop down. You may want to name a Fee-Type called *Punch Pass* for this purpose.

- Enter the **Amount**.

- Enter the maximum number of Members in the **Includes up to ___ person(s)** box. Note: Each time *any member* enrolled in a group Membership checks into a Membership with a number of Punches/ Swipes Allowed, the number of punches remaining will be decremented.

- You can choose whether or not the Fee appears on the RecDesk Community portal by checking or unchecking the **Show Fee on Portal** checkbox.

- Enter the number of **Punches/Swipes Allowed**. When a person enrolls and chooses a fee with a number of **Punches/Swipes Allowed**, each time the person checks into a *Facility*, the remaining number of Punches/Swipes gets decremented. If the person checks into a *Membership,* once there are no punches remaining on their Punch Pass Membership, they will no longer be able to check-in to that *Membership.*



- Choose **Residency Restriction** for the fee from the drop down, if applicable.

- Click **Save**.

Assigning Forms to Memberships

FlexForms built via the FlexForms Builder can be assigned to Programs for completion at the time of in-house or online registration (see The FlexForms Builder). This is done by clicking on the **Forms** submenu for a Program, then clicking the **Edit** button.

Prerequisites - Forms must be built using the The FlexForms Builder prior to assigning them to Programs.

Basic Workflow

- Check off the **Form(s)** that are required to be completed at the time of registration

- For each Form checked, choose:

  - **Requirement Type:**

    - **New Form Each Time** - Use this Requirement Type if you would like Program Registrants to have to fill out a new instance of this form for each registration - regardless of whether they've filled out the same form for a prior registration.

    - **Shared:** Use this Requirement Type if you would like Program Registrants to only have to fill this form out ONCE. This means that if they have a prior instance of this form that has already been completed, they will not have to fill it out again. They will however have the opportunity to update it. This is common for fairly static information like Health Assessments**.**
    -
    - **Required For:** This is really only applicable if a Membership can have multiple Members associated with it (i.e Family Membership). In this case, if only the primary Member needs to fill out the Form, choose Primary Member otherwise choose All Members

  - Optionally check off **Allow Partial Completion** to allow Online Registrants to proceed through the Check Out process without having to completely fill out all required form elements (less common) **.

- Click **Save**.

** Note: All Forms required for ***In-house Membership Enrollments*** are allowed to be partially completed

Enrolling Members In-house

New *Membership Members* can be created by selecting **Add New Membership Member** submenu option off of the *Memberships tab*. See Membership Enrollment Fields for a full list of fields on this page.

Basic Workflow

- 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 **Add New Member** to add more Members to Membership (other Household Members will be in the drop down)
- If you'd like this Membership to be auto renewed, check **Auto Renew**** and complete the following:
    - Optionally choose **Days in Advance** of the renewal date that you'd like to process the renewal from the drop down
    - Choose a Payment Plan Template from the drop down (see Setting Up Payment Plan Templates)
    - Select a **Payment Plan Method** from the drop down:
        - **Enroll in AutoPay** - Select this option to have installment payments made automatically. Then choose a **Payment Option** from the drop down (*Note: You must have Stored Payment Options for this Household).* For more info. see Household Stored Payment Options.

  - **Send Installment Due Email** - Select this option to send an email to the Customer each time an Installment Payment is due.

  - **Manage Manually (No Email Sent)** - Select this option to manage the Payment Plan manually.

- Click **Save.**

** Each time a Membership gets auto renewed, a new Invoice will be created with a new payment plan.

Online Membership Enrollment

Online Membership Enrollments can be done by the public via the **RecDesk Community** portal.

Prerequisites:

- You will first need your **Memberships** tab activated on your Community portal if it is not already activated. Send an email to support@recdesk.com requesting the activation.

- The **Online Enrollment** and **Show on Portal** options must me checked for the Membership definition in RecDesk Director. Note: If Enrollment Begin Date and/or Enrollment End Date are entered, online membership enrollments will only be available during that time period.

Note on Default Membership Durations - ** IMPORTANT CONSIDERATION **:

- When a customer enrolls in a Membership online, the **duration/time period** of the membership is automatically set to whatever you have designated to be the **Default Membership Duration** for that particular membership - see Creating and Modifying Membership Definitions. This cannot be overriden by the customer as it can be in-house via RecDesk Director. This will need to be taken into consideration as you set up Memberships that will be available for online enrollement.

RecDesk Community Portal Workflow - Customer Perspective

Members of the public can enroll in a membership by following this basic workflow:

- **Login to RecDesk** or **Create Account**

- Click on the **Memberships** tab

- Click the **Enroll** button for the Membership

- Choose a **Fee Type** from the drop down list

- **Membership Start Date** and **Membership End Date**:

- For **Open or Ongoing Memberships**, **Membership Start Date** is the **current date** and **Membership End Date** is calculated based on the **Default Membership Duration**.

- For **Definitive Start and End Date Memberships, Membership Start Date** is the **current date** *or* **the Begin Date** of the Membership, whichever is *later*. The **Membership End Date** is calculated based on the **Default Membership Duration**. However, if the **End Date** of the Membership precedes the date calculated, the **Membership End Date** is the **End Date** of the Membership.

- Optionally add a **Note**

- Click the **Add Household Member to Membership** button

- Choose the family member from the **Select Family Member** drop down list

- Add additional family members by clicking the **Add Household Member to Membership** button and choose each family member if the **Fee Type** allows multiple people

- Click **Save**.

Working with Membership Members

You can **View, Edit, Cancel 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 **View/Edit** for the entry you'd like to view

Editing Membership Details

- Click on **View/Edit** for the entry you'd like to edit
- Click **Edit**
- Make appropriate Changes and then click **Save.**

Canceling a Membership

- Click on **View/Edit** for the entry you'd like to cancel
- Click **Edit**
- Click **Cancel Membership** and then click **Save.**

** Be sure to click through to the Invoice link after removing a member from a membership to issue a refund.

Renewing Membership Members

Once a Member is enrolled in a Membership, renewing their Membership is easy. Follow these simple steps:

1. Click on the **Memberships** tab to pull up the Memberships List

2. Click on the name of the Membership

3. Click on the **Members** sub-tab

4. Locate the Member to renew and click the **Renew** button *(note: you may need to change the Membership Status in the drop down to find the Member)*

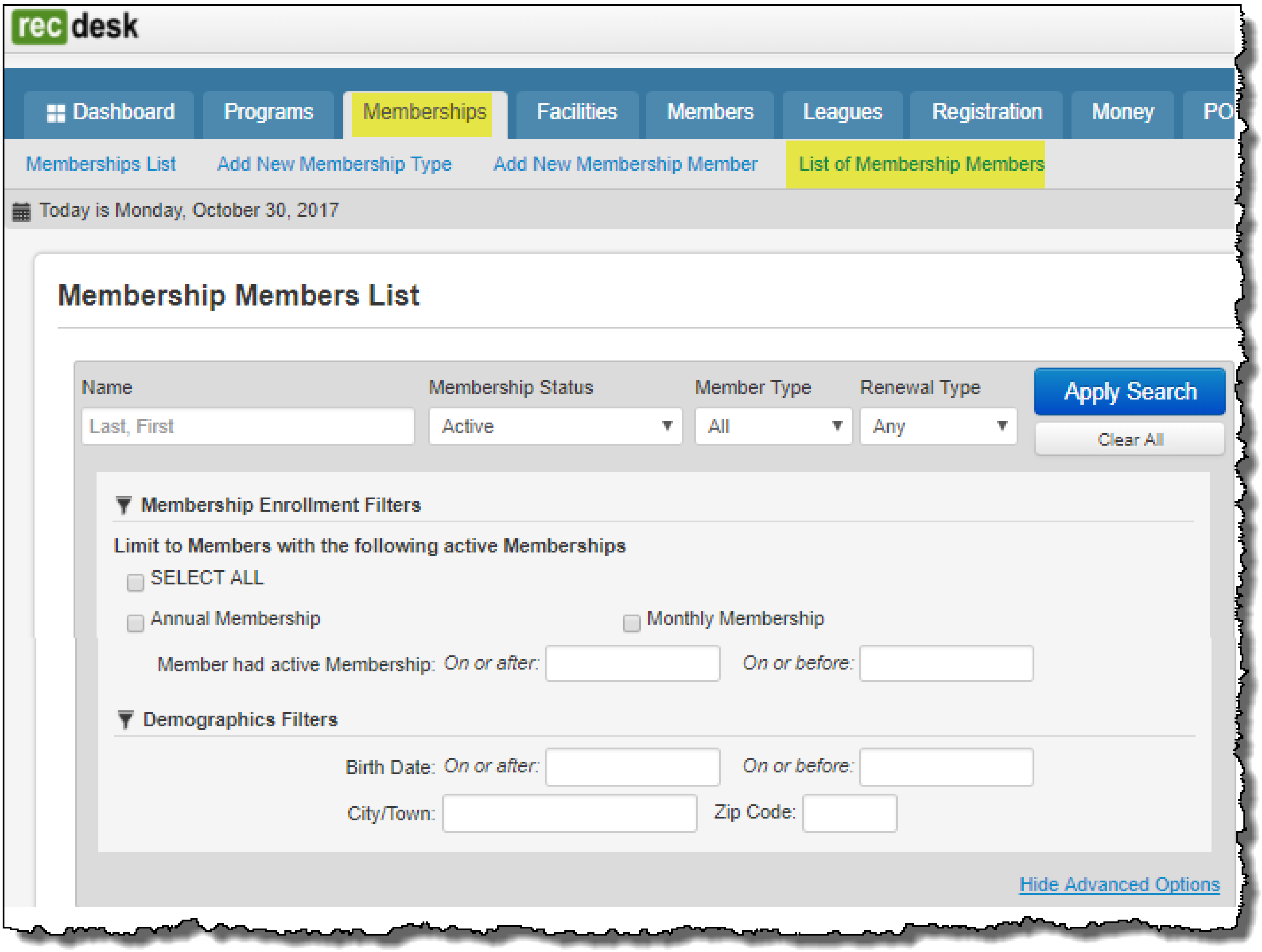
5. The Start Date and End Date will automatically reflect the new Membership Period

6. Click **Save**

7. Go through the normal checkout process to complete the renewal.

List of Membership Members

To see a **List of Membership Members**, navigate to the Memberships tab and click on the **List of Membership Members** tab. Click on Show Advanced Options to filter by Membership(s), Active Date(s), and/or Demographic Filters.



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.

- **Automatically Send Expiration Email** - If you would like to send Automatic Emails when Memberships are due to expire, check off **Automatically Send Expiration Email** and then select the number of days before expiration you'd like the email sent from the **Days before expiration** drop down.

- **Online Enrollment** - Check this box to make Membership available for online enrollment. 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

- **Notes** - Any additional Notes related to this Membership

- **Include Notes on Receipt** - Check this box if you wish to include the Notes on the enrollee's receipt

Accounting

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

- **Sales Tax** - The Sales Tax associated with this Membership. 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.

- **Punches/Swipes Allowed** - The number of Punches/Swipes allowed in a Punch Pass Membership.

- **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

Membership Renewal Options

- **Auto Renew -** Check this box to auto renew this Membership instance
- **Days in Advance -** Number of days in advance of the renewal date that you'd like to process the renewal
- **Payment Plan Template -** The template you wish to use for this Membership renewal
- **Payment Plan Method -** Options are *Enroll in AutoPay, Send Installment Due Email,* and *Manage Manually (No Email Sent)*
- **Payment Options -** If Payment Plan Method is *Enroll in AutoPay,* Payment Options available for this Household appear in the drop down

Facilities, Reservations and Check Ins

The Facility List (Advanced Search)

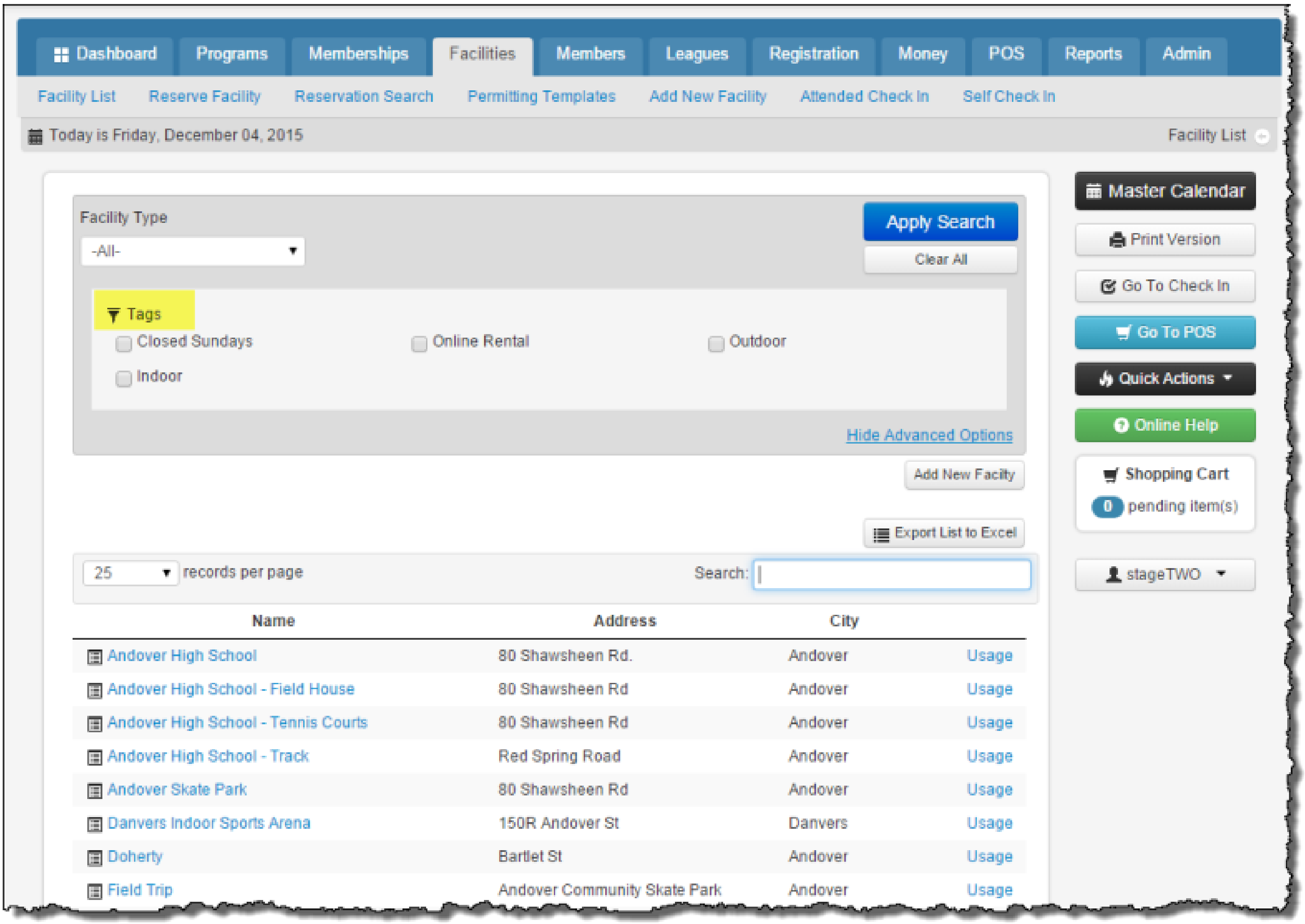
The **Facility List** contains all facilities you've added for your organization. You can view the whole list or filter by *Facility Type*. To go to the Facility List simply click on the **Facilities** tab.

Advanced Search Options:

- Click **Show Advanced Options**

- Check off any or all **Tags** to filter the Facility List to show Facilities that have *any* of the Tags checked.

Facility List (with Advanced Search Options)



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
- If you'd like to charge **Sales Tax** for reservations of this facility, select the appropriate Sales Tax rate from the drop down *(note: Sales Tax only applies to the base fee, not the deposit amount)*
- 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**

Facility Fee Schedules (FlexScheduler Only)

Facility Fee Schedules must be added to make reservations with RecDesk FlexScheduler. The purpose of the fee schedules is to calculate the total fee for the reservation

Prerequisites - Before adding Facility Fee Schedules, you should create *Fee Types (Standard Fee Types) and Add-On Fee Types* that are appropriate for your organization. See Managing Custom Lists.

While viewing a Facility, navigate to the **Fee Schedules** tab and click the **Edit** button.

Adding Standard Fees

- Select the **Fee Type 1** from the drop down (see Managing Custom Lists)

- Enter the **Amount** of the Fee

- Select the Default Rate Calculation for this fee from the drop down:
  - **Per Occurrence -** the fee amount entered will be applied once per occurrence of the reservation

  - **Per Hour** - the total fee for thate reservation for this facility will be calculated by multiplying the number of hours by this hourly fee amount

  - **Per Minute -** the total fee for the reservation for this facility will be calculated by multiplying the number of minutes reserved by this per minute fee amount

- Fee Schedules can be set to be applicable to *Only Residents* or *Only Nonresidents* by choosing **Residency Restriction** from the drop down (see Setting Up Residency Requirements)

- Repeat for all Standard Fees (up to 12)

Adding Add-On Fees

- Select the **Add-OnType 1** from the drop down (see Managing Custom Lists)

- Enter the **Amount** of the Fee

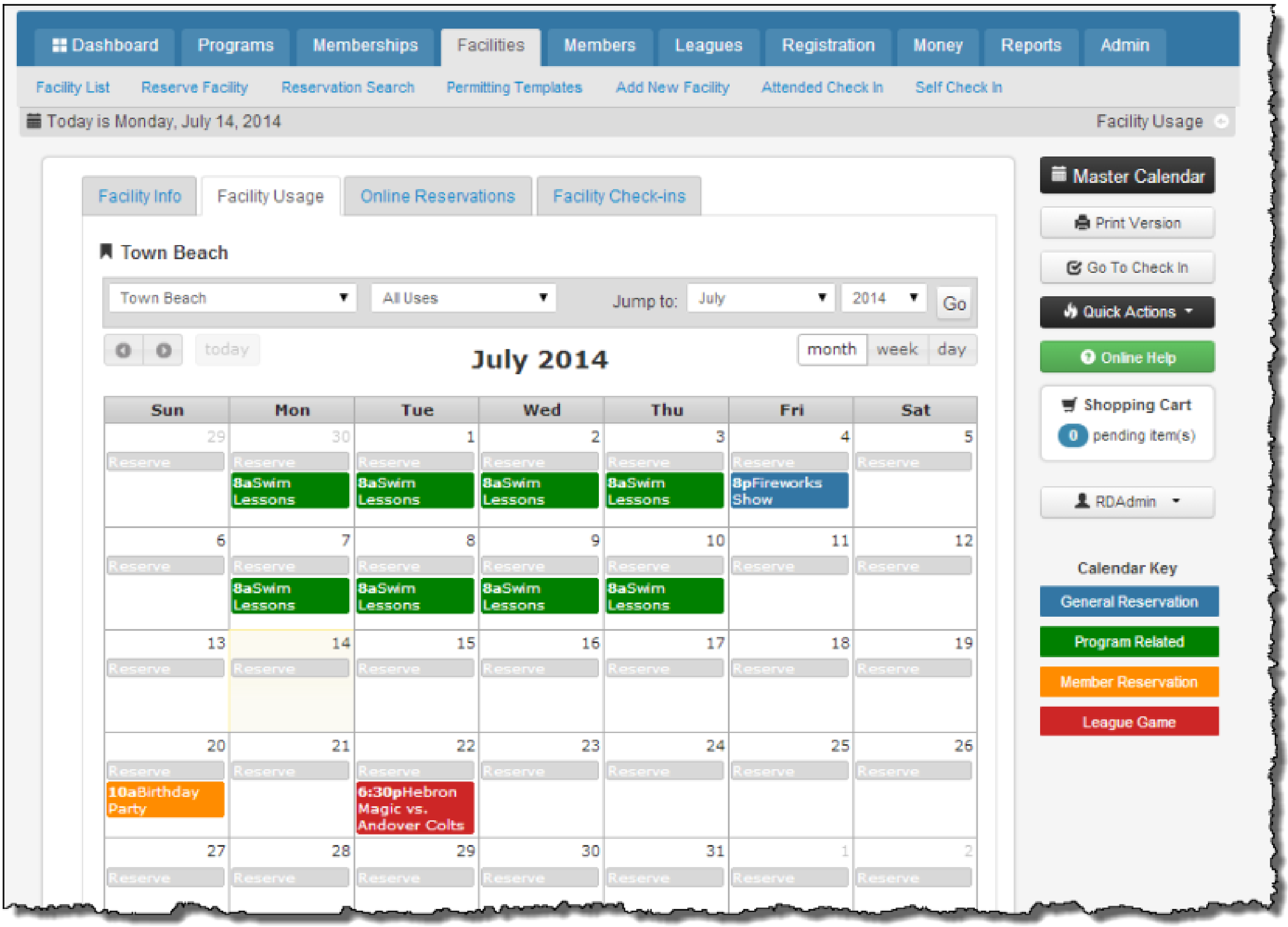
- Select **Residency Restriction** from the drop down (see Setting Up Residency Requirements)

- Repeat for all Add-On Fees.(up to 12)

Facility Usage Calendar

The **Facility Usage** calendar shows all activity (Programs, Reservations etc) happening at a particular Facility. This is in contrast to the Flex Calendar which shows activity for **all** Programs and Facilities in the first view. 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



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Assigning Forms to Facilities

FlexForms built via the FlexForms Builder can be assigned to Facilities for completion at the time of in-house or online reservations (see The FlexForms Builder). This is done by clicking on the **Forms** submenu for a Facility, then clicking the **Edit** button.

Prerequisites - Forms must be built using the The FlexForms Builder prior to assigning them to Facilities.

Basic Workflow

- Check off the **Form(s)** that are required to be completed at the time of a reservation
- For each Form checked, choose:
    - **Requirement Type:**
        - **New Form Each Time** - Use this Requirement Type if you would like Reservees to have to fill out a new instance of this form for each reservation - regardless of whether they've filled out the same form for a prior registration and/or reservation.
        - **Shared:** Use this Requirement Type if you would like Reservees to only have to fill this form out ONCE. This means that if they have a prior instance of this form that has already been completed, they will not have to fill it out again. They will however have the opportunity to update it. This is common for fairly static information like Health Assessments.
    - Optionally check off **Allow Partial Completion** to allow Online Reservees to proceed through the Check Out process without having to completely fill out all required form elements (less common) **.
- Click **Save**.

** Note: All Forms required for ***In-house Reservations*** are allowed to be partially completed

Adding Tags to Facilities

RecDesk allows you to add Tags to Facilities and then easily search for all Facilities labeled with that Tag. Facility Tags also allow filtered views of the Master Calendar. (see also Using Tags Effectively)

Basic Workflow

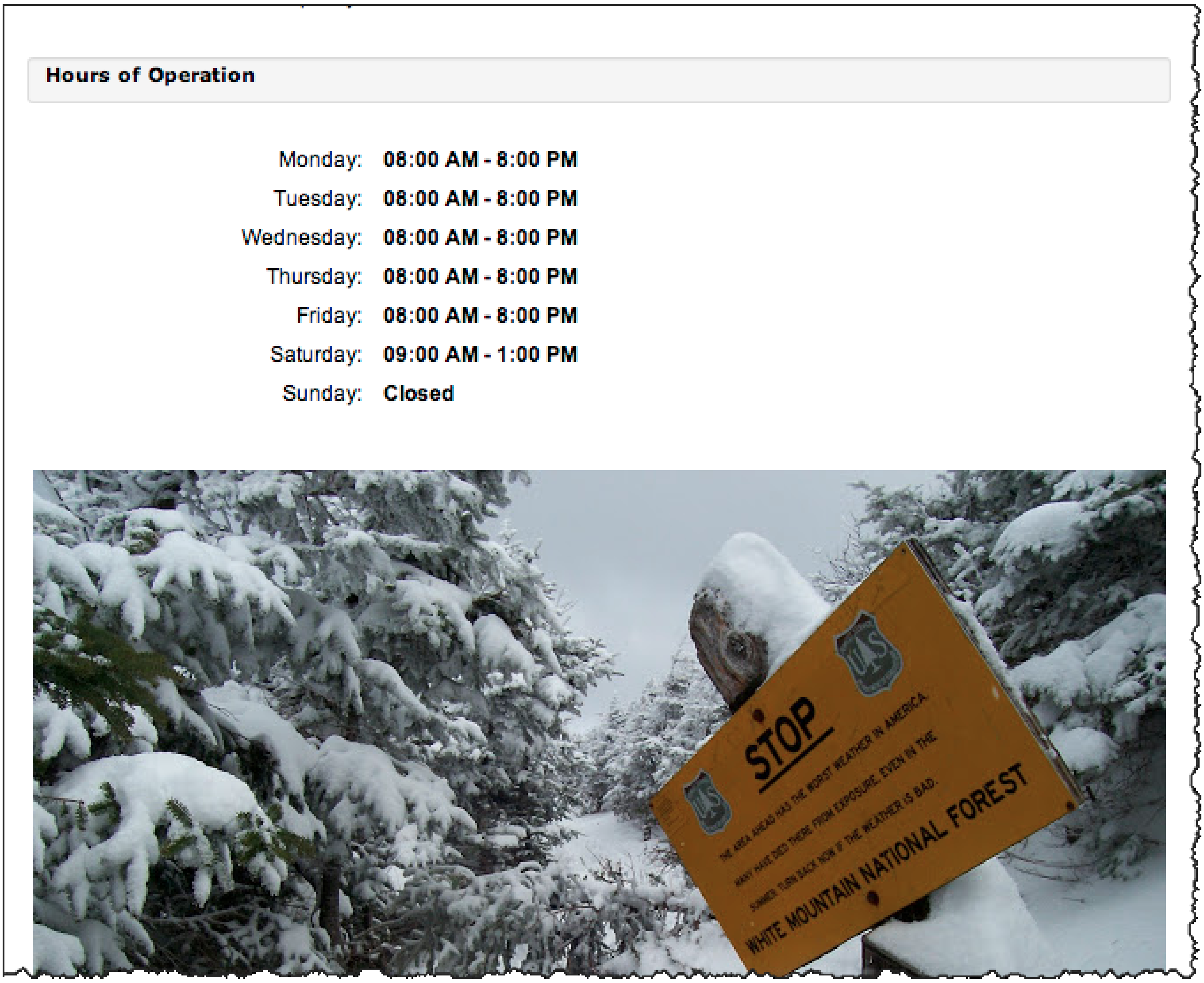
- Before tagging Facilities, be sure to add any/all Tags you'd like to place on Facilities. See Managing Custom Lists.
- Click on a Facility name from The Facility List.
- Click **Add Tag(s)**.
- Check off all Tags that apply to this Facility.
- Now you can perform an Advanced Facility Search by any or all Tags! You can also view the Flex Calendar by filtering by Facility Tags.

Facility Photos, Slideshows and Video

RecDesk allows you to display an individual photo, a slideshow or video of your facilities in the RecDesk Community portal by allowing you to include "***embed code***" from popular photo/video sharing sites such as DropShots, Google Photos or YouTube and more (see full list at [Wikipedia- List of photo sharing sites]). These sites are dedicated to organizing and sharing photos (or in the case of YouTube - video) and can provide a much better user experience than simply uploading a photo to RecDesk. In most instances, these services are free. These sites provide detailed instructions for working with and creating embedded content from their services.

The embedded content will appear on the **RecDesk Community** portal when you drill down into a Facility. It will be located just below the *Hours of Operation*. See example below:

RecDesk Community



Associating Embedded Content with a Facility

As you upload and create albums and/or video on these various sites, you will given the option to share them either individually, or in the case of an album, as a slideshow. All you need to do is copy the ***embed code*** that the service provides and paste it into the *Image Gallery Embed Code* field for the given Facility. This is done in **RecDesk Director** and is shown below:

RecDesk Director

Go ahead and experiment a bit..... that's the best way to see how things will look on your Community portal! See Embedding Third Party Content

Creating Facility Reservations

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 date. 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**

- Set the **Privacy** setting
  - PRIVATE – Details NOT viewable on Community Calendar
  - PUBLIC – Details Viewable on Community Calendar

  - *The default value is PRIVATE. As an example, if a Reservation is made with a Use description of "Fred's Big 50th Birthday Bash", and the Reservation is marked Private, the description on the Community Calendar will read "** Reserved **". If it is marked public, it will read "Fred's Big 50th Birthday Bash".*

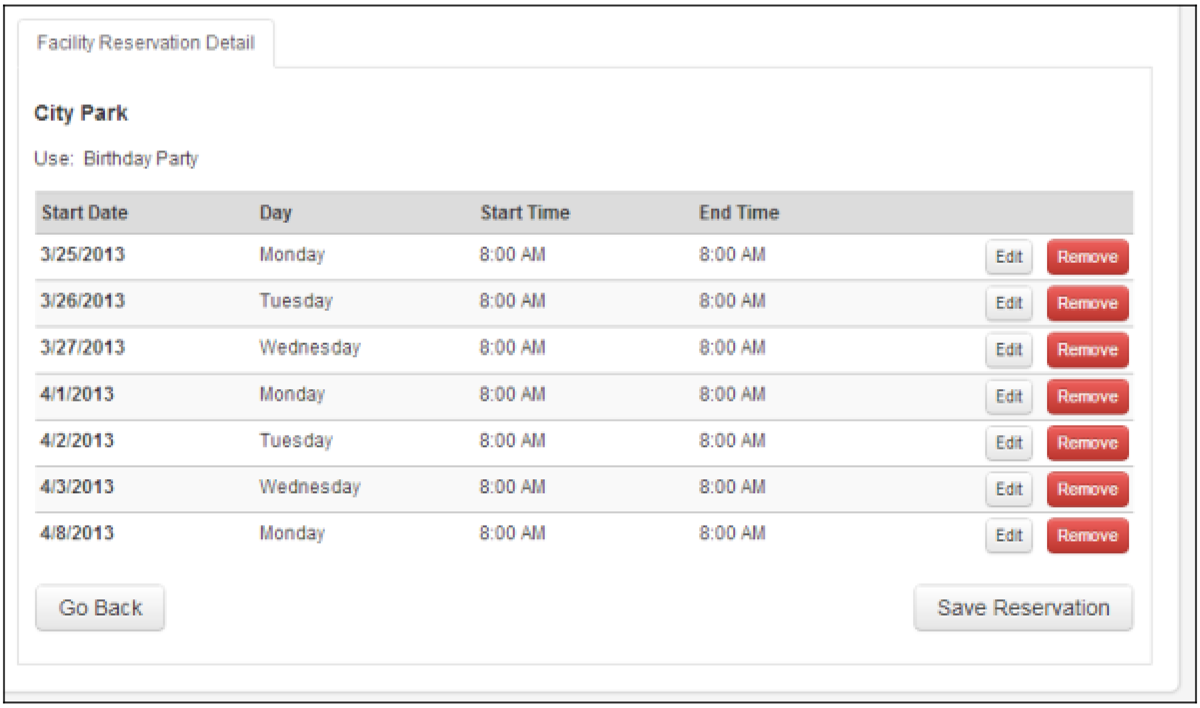
- If this reservation is being made by/for a Member, select them (optional) now
    - If they're already in RecDesk click **Search** and then choose them from the list by clicking the **Select** button
    - or, click Add New to add member profile

- If a **Fee** is being collected for the Reservation, check the Fee Required checkbox, set Fee Type and enter 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 dates at this point to account for holidays or other exceptions in a **repeating schedule**. Click **Remove** to delete a particular date and **Edit** to update the time details of a specific date.

Facility Reservation Review



- Click **Save** reservation

FlexScheduler Reservations

RecDesk FlexScheduler has been developed to meet the needs of increasingly more sophisticated scheduling scenarios voiced to us by our existing customers as well as future clients. This enhancement will initially be released to a few early access customers in February, 2018 and will be released to all customers in March of 2018. If you'd like to be an early access customer, please contact your RecDesk Customer Success Representative. FlexScheduler will have the following capabilities:

- **Predefined Fee Schedules** with rates and rate calculation measure (per occurrence, per hour, per minute);
- **Auto-Rate calculation** on line items with ability to override as necessary;
- Support for **Add-Ons** on a per-timeslot basis (each with or withour associated fees);
- Ability to select and include **multiple facilities** when generating a reservation;
- Ability to easily **append single or recurring timeslots to an existing reservation** with different recurring date parameter and/or facility selections (ie T,Th from 8AM - 10PM and then M,W,Fri from 11AM - 1PM);
- Ability to specify **Set-Up and Teardown times** on timeslots to allow for facility prep and cleanup;
- Specify a ***Custom Color*** for a particular reservation or series of reservations.

Facilities can be reserved with the FlexScheduler 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 date. The advantage of the latter way is that the Facility and Date will be preselected.

Prerequisites - Facility Fee Schedules.must be set up ahead of time, if applicable (see Facility Fee Schedules (FlexScheduler Only))

Basic Workflow

- Enter a Reservation **Title** (required)
- Optionally add a **Customer**
- Set the **Privacy** setting

  - PRIVATE – Details NOT viewable on Community Calendar
  - PUBLIC – Details Viewable on Community Calendar

- Select a **Status** from the drop down (note: currently only Approved is available)

- If you'd like to change the Calendar **Color** for this reservation from the default color, click on the Color box drop down, select a new color, and click *choose.* To clear a color and make it black, click on the X in the upper right of the color selection box.

- Optionally add a **Note** and/or a **Private Note** (click + *Add Private Note* and enter the private note for internal use only)

- **Choose Facilities**:

  - Choose a **Facilit**y from the drop down (required)

  - Choose a **Group Size** (required)

  - Optionally add a **Line Description**

  - If you'd like to add another Facility to this reservation, click on **+ Add Another Facility** and repeat

  - Click **Continue**

- **Select Dates & Times:**:

  - Select **Single Date** OR **Recurring**

  - **Enter Start date and Start Time** and **End Date and End Time (required)**

  - Optionally add **Set Up Minutes** and/or **Teardown Minutes**

  - For <u>Recurring Reservations</u>:

- Choose repeat pattern by selecting **Repeats** from the drop down

- If **Daily** selected
  - Choose the ***Repeats every*** interval
  - Set the **Ends After** occurrences or **Ends On** date
- If **Weekly** selected
  - Choose the ***Repeats every n weeks*** interval
  - Select the **days** that it repeats
  - Set the **Ends aAfter** occurrences or **Ends On** date
- If **Monthly** selected
  - Choose the ***Repeats every n months*** interval
  - Select the **Repeat by** option
  - Set the **Ends After** occurrences or **Ends On** date

- Click **Continue**

- **Set Fees (optional)**

  - If you'd like to set a fee for a Facility on this reservation, click on the **Require fee** switch for that Facility
    - Choose a **Fee Type** from the drop down (Note: Facility Fee Schedules must be set up ahead of time for facilities requiring fees by clicking the Fee Schedules tab in the facility detail page).

    - The default **Fee Amount** for that fee schedule will appear in the fee amount and can be overridden if your role allows it. **Rate Type** will be prefilled by the fee type chosen (Note: The auto-rate calculation will be done if Rate Type is Per Hour or Per Minute)

    - Optionally add a **Security Deposit** (Note: If the reservation is a recurring reservation, once you enter the Security Deposit, you have the option to **Apply Security Deposit to all dates**)

    - You can also optionally check off **Include Setup/Teardown in Fee Calculation** and the same fee chosen will be charged for the Setup and Teardown times (Note: this option is *not available for per occurrence fee types*)

  - If this Facility has optional Add On Fees, check off the **Add On Fee Type**, enter **Quantity**, and optionally override the default **Fee Amount** for that add on fee if your role allows it

  - Repeat for all Facilities requiring Fees

- Click **Continue**

- **Review Reservation -** you may do any of the following**:**

  - **Edit Details**

  - **+ Add New Time Slots**

  - **Select Reservation Occurrence(s) and click Delete selected (n)**

  - **Edit Individual Reservation Occurrences by clicking on the pencil icon**

- Click **Save Reservation**

- *If **Conflicts** are found, the occurrence(s) will be highlighted and the conflict will be listed below the occurrence. You can select individual occurrences and and click Delete selected (n). Then click **Save Reservation with conflicts**.*

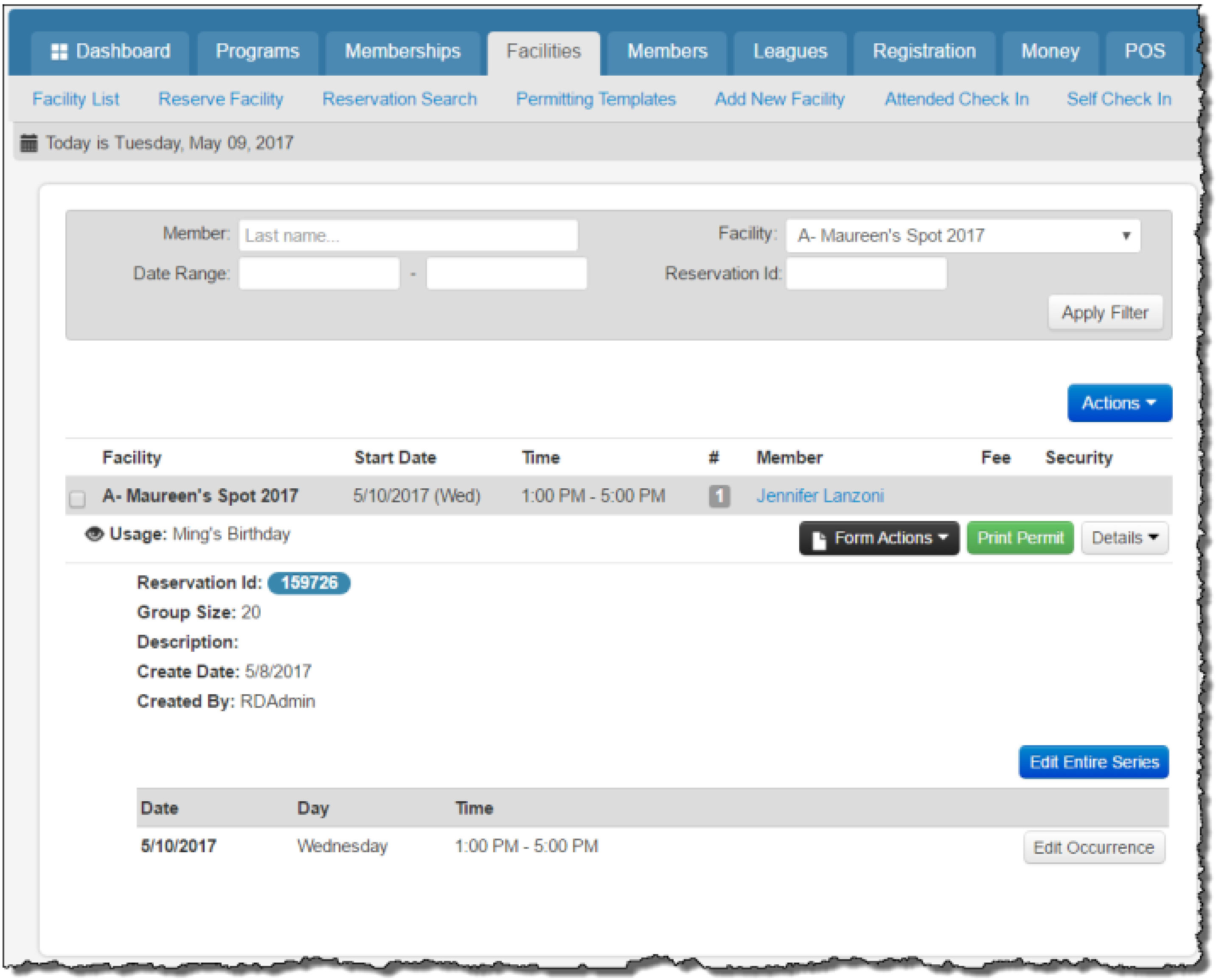
- If fees were added to this reservation, be sure to complete the checkout process and create the invoice.

Searching, Viewing and Editing Facility Reservations

You can work with an existing Facility Reservation by selecting it from the Master Calendar, the Facility Usage Calendar or by finding it via the ***Reservation Search*** page (Facilities => Reservation Search). The Reservation Search page allows you to filter search results by **member name**, **date (or date range) of reservation**, **facility name** or **reservation ID**. The Reservation Search page shows details of the reservation as well as offering the following options:

- Form Actions - View/Edit Forms and Print one or all Forms for Reservation
- Print a Permit
- Print Multiple Permits
- Select check boxes to left of reservations and then choose Print Multiple Permits from the Actions drop down
- Edit Entire Series (for reservations with multiple dates)
- Edit Occurrence (a single date)

Reservation Search (Facilities Menu)



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 **Enable Online Reservations** button. You may also optionally set a required ***Lead time*** for the public to make online reservations by setting the **Required Lead Time** drop down.

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

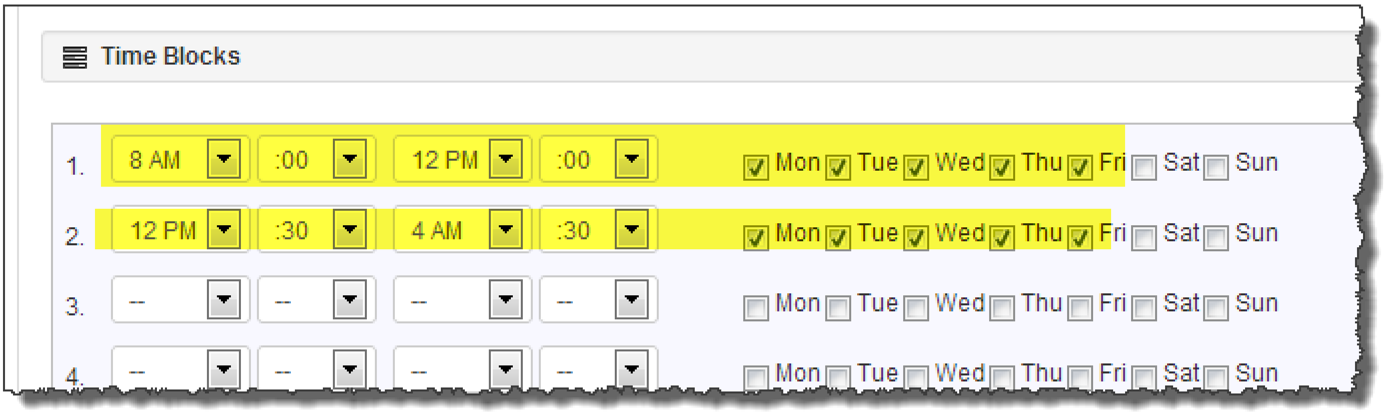
- Enter a **Name** for the Availability Calendar - it is recommended that naming schemes similar to those outlined above are used

- 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.

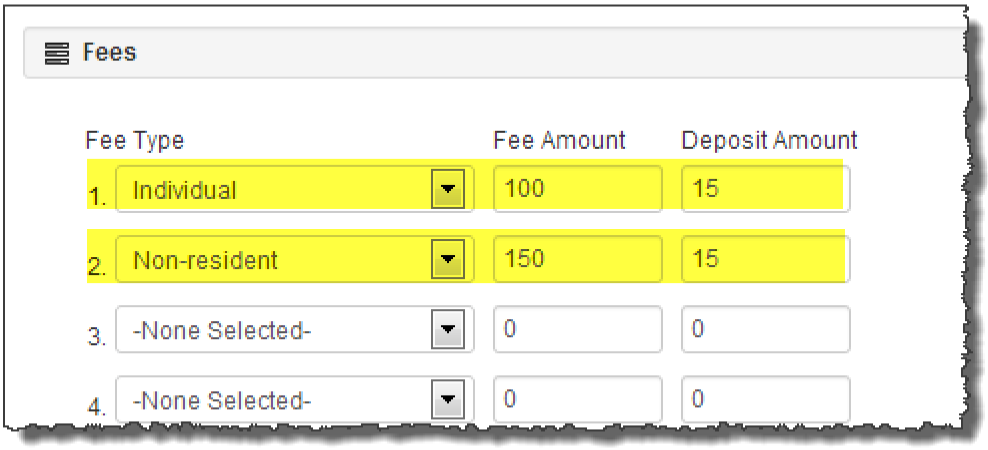
- Optionally enter a **Passcode** that will be required online to reserve a time block in this availability schedule. This passcode can then be given to coaches or other authorized personnel who are allowed to reserve one or more of these time blocks.

- 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
    - **12:30PM - 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 that you 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** and a **Header** for the Permit.

- Enter the verbiage of your template as you would like it to display in the **Body** field
  - HTML tags are accepted
  - Avoid using the characters &, <, and >

- 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]*
  - *[MemberHomePhone]*
  - *[MemberMobilePhone]*
  - *[PrintDate]*
  - *[PrintTime]*

- Click **Save**

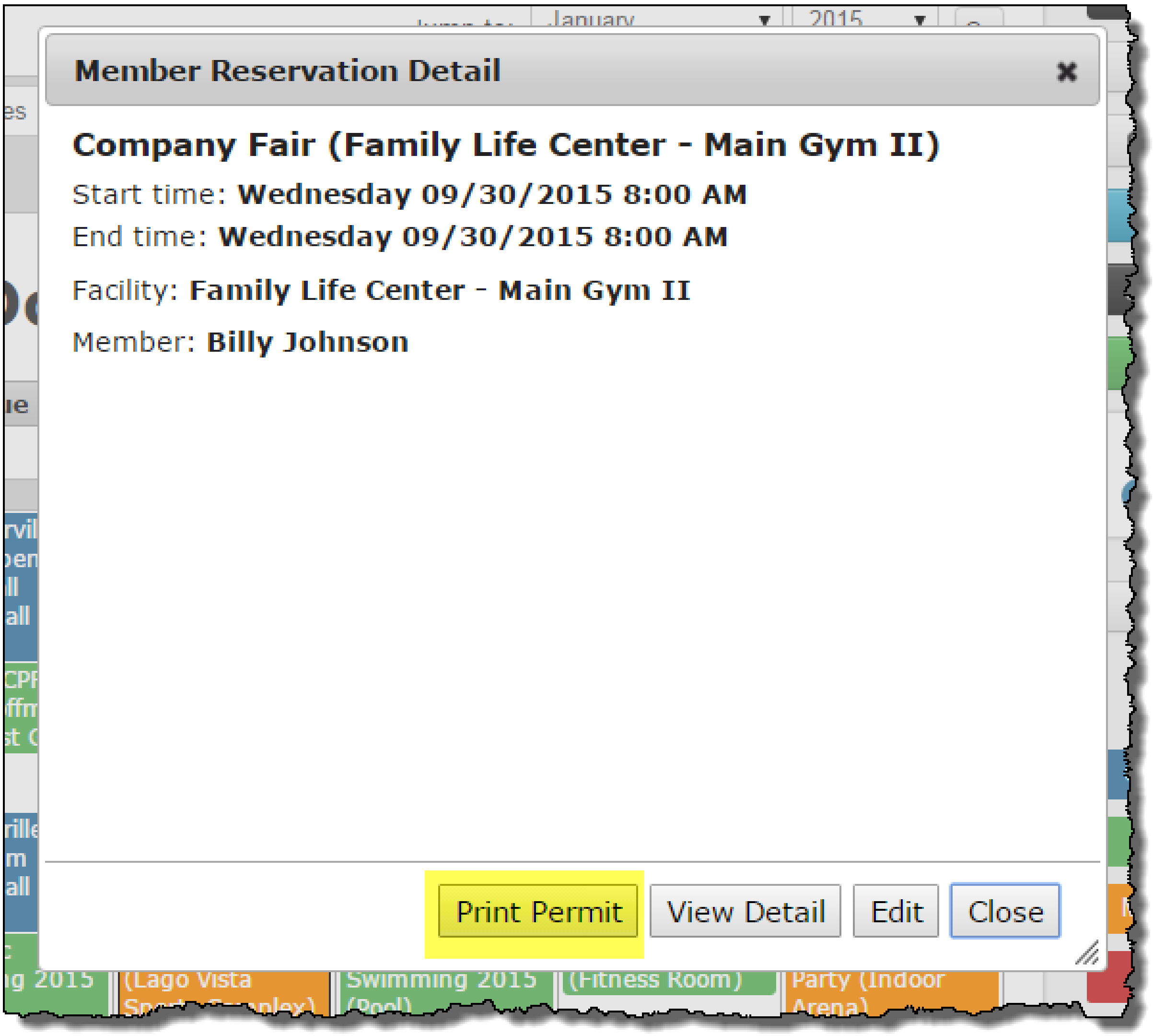
Assigning Permitting Templates to individual Facilities - see Creating and Modifying Facilities

Printing Permits

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

OR

- Perform a Reservation Search and click **Print Permit** (See Searching, Viewing and Editing Facility Reservations)



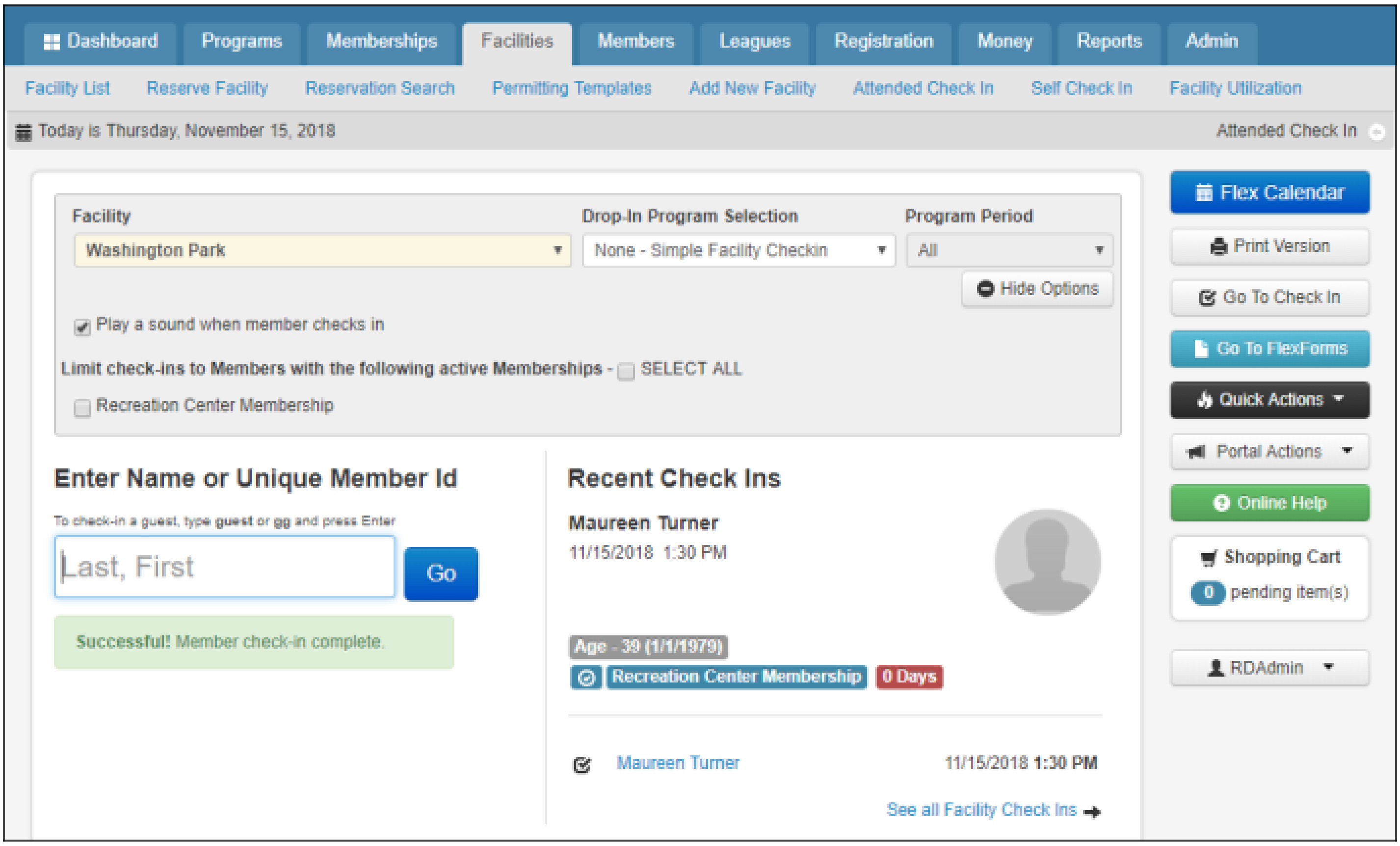
Facility Check-ins

Attended Check-In (w/ Drop In Support)

One option for Facility check-ins is the **Attended Check-In (with Drop In Program Support)**. 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*.

CHECK-IN ATTENDANT Role: *For seasonal help or users who you would like to simply limit access too, they can be assigned the **Check-In Attendant** Role (as specified on User Role). This effectively limits the logged in user to ONLY ATTENDED CHECK-IN functionality. When a User is assigned this Role, they are taken directly to the Attended Check-In page.*

** **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

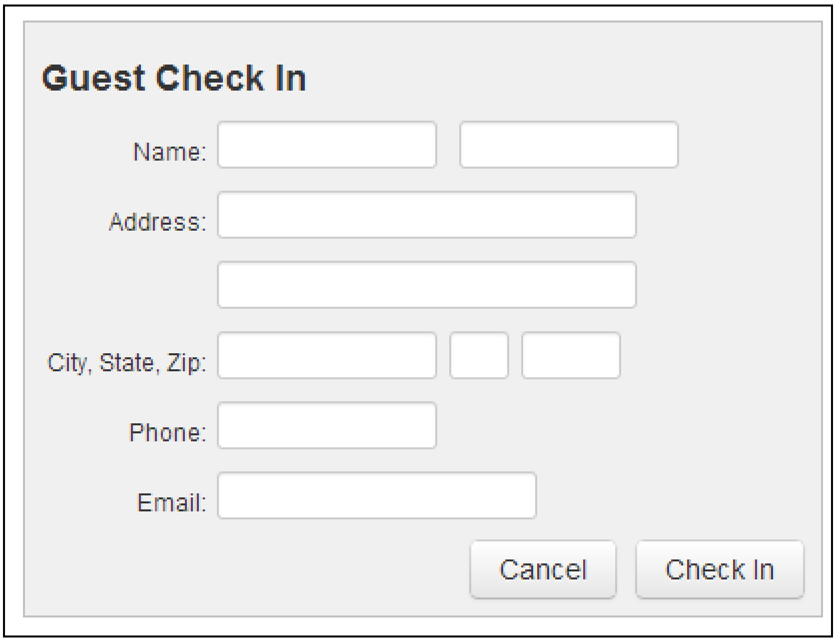
- Select a **Facility** from the drop down

- If you would like to enable selection of **Drop In Programs** at the time of Check In, select ***Enable Program/Event Selection*** from the *Drop-In Program Selection* drop down and optionally change the ***Program Period*** (see Drop In Program Selection below)

- If would like to **limit check-ins** to Members with specific *active* Membership(s), select the checkboxes for those Memberships. See Check-Ins for 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**



Drop In Program Selection

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

- Select ***Enable Program/Event Selection*** from the *Drop-In Program Selection* drop down

- Optionally change the ***Program Period*** drop down from ***All*** programs to programs running ***Today***, ***Today and Tomorrow***, or ***Next 7 Days***

- Optionally limit check-ins to active Members of Memberships

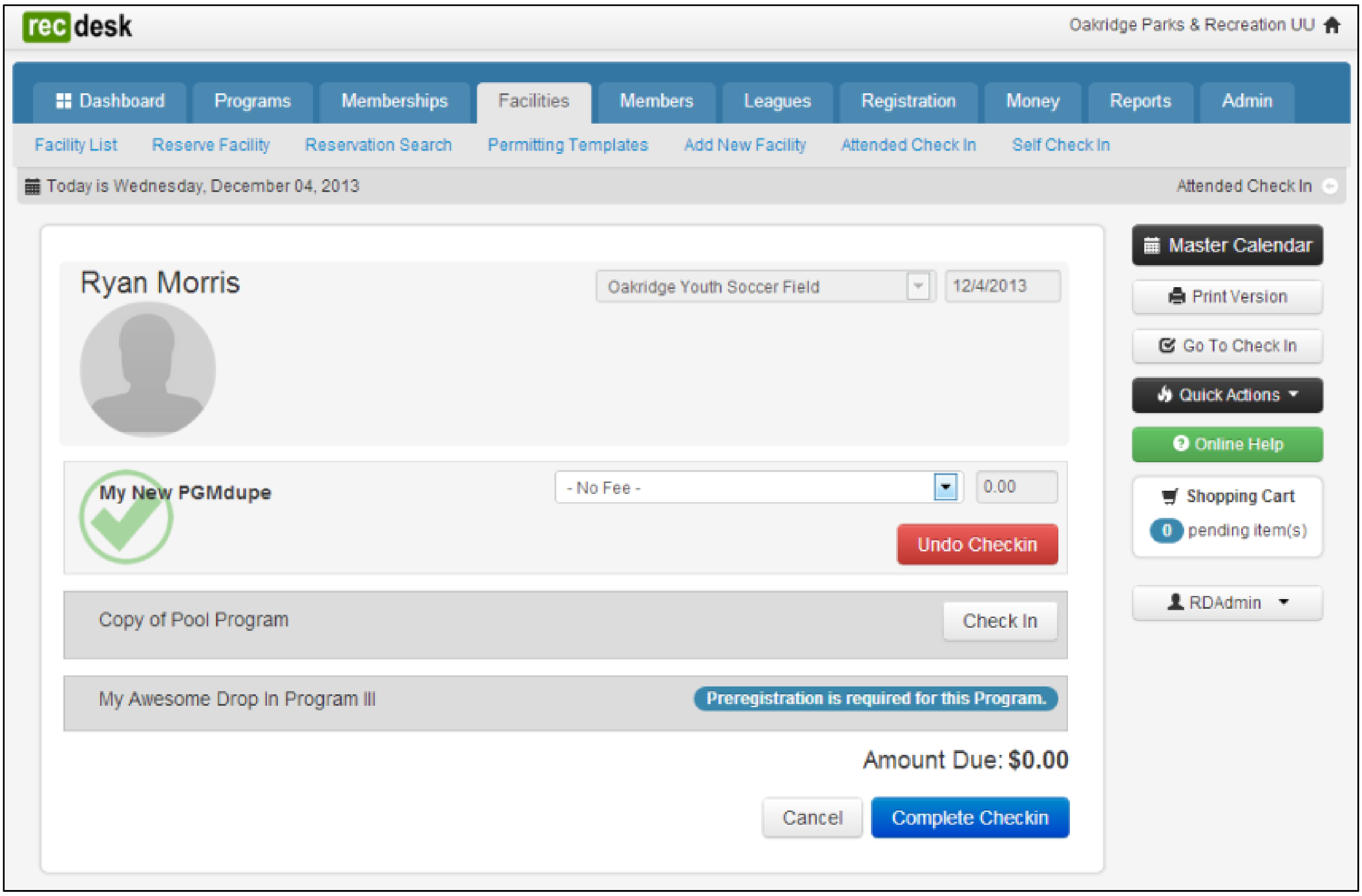
- Check-In Member (shown in workflow above)

- Once you select a Member for check in, you will be presented with a page to select individual Programs designated as supporting *Drop Ins.* See [Creating and Modifying Programs]() for details on how to enable Drop In Support for a Program.

- Click the **Check In** button to check individual into that Program

- If they will be charged a Fee, select the appropriate Fee from the drop down

- If no Fee is due, click **Complete Checkin** to record check in. If payment is due, click **Proceed to Payment** or **Proceed to Invoice** (see [Invoice Payments]()) to process payment

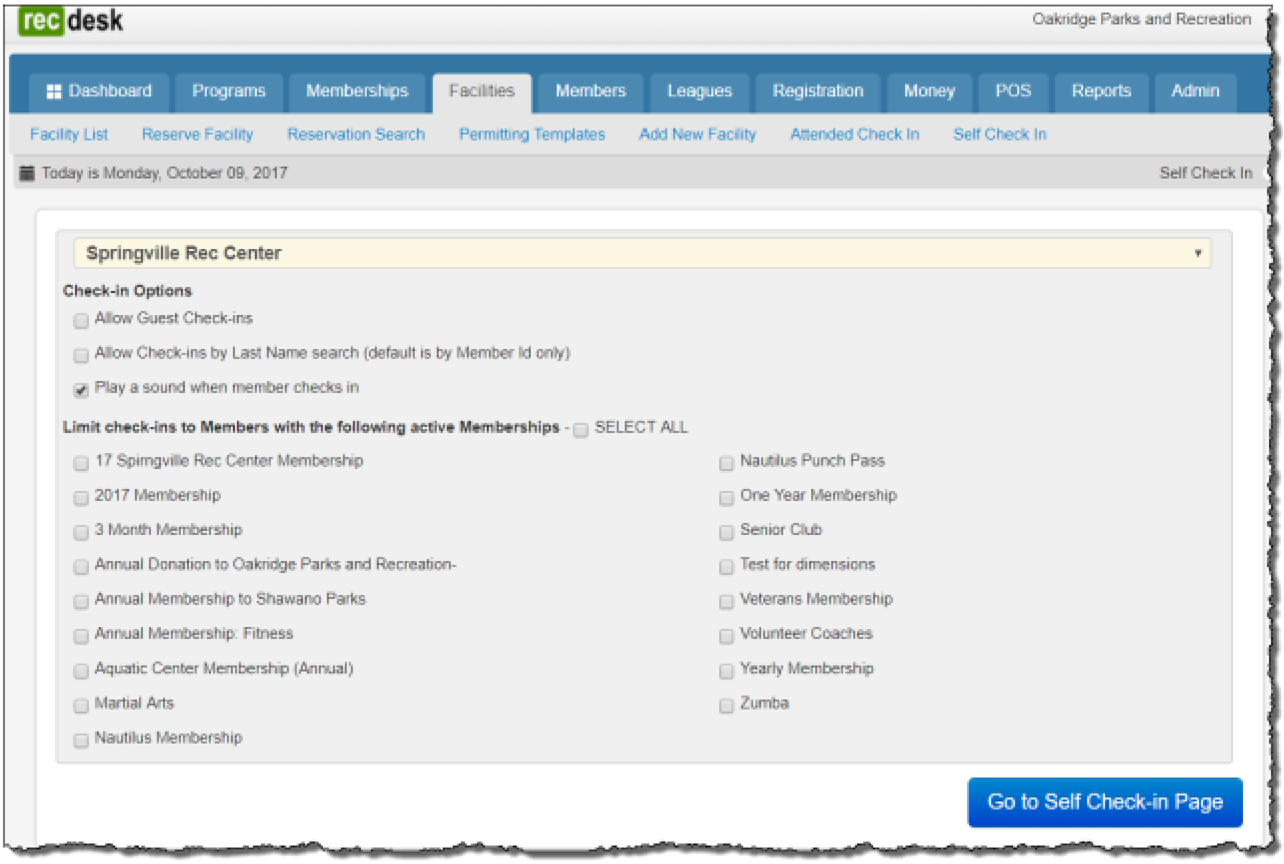


Self Check-In

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 via a *barcode reader/scanner.* You can also optionally allow people to check themselves in using their **last name** or as **guests**.

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

Self Check-In Set Up

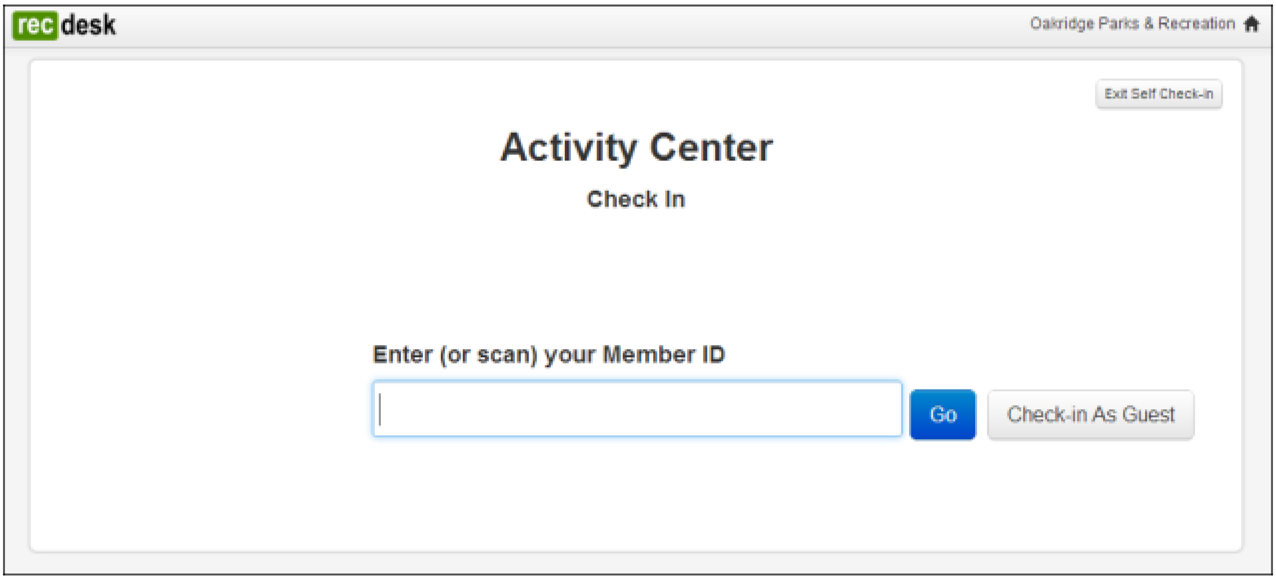


Basic Workflow

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

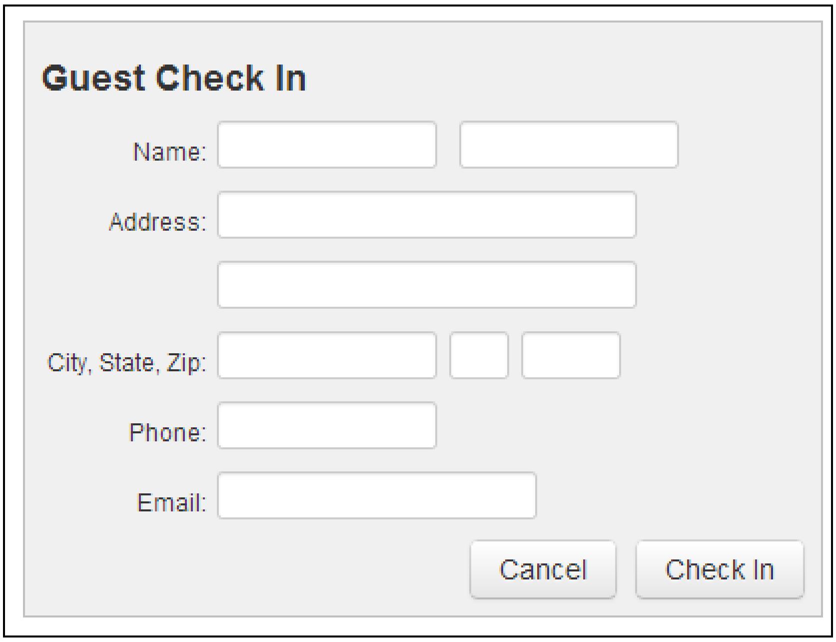
- If you would like to **limit check-ins** to Members with specific *active* Memberships, select the checkboxes for those Memberships. See [Check-Ins for Memberships](#).

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


Guest Check In
Name:
Address:
City, State, Zip:
Phone:
Email:
Cancel
Check In

Check-Ins for Memberships

If you would like to **limit check-ins** to Members with specific *active* Membership(s), select the checkboxes for those Memberships.

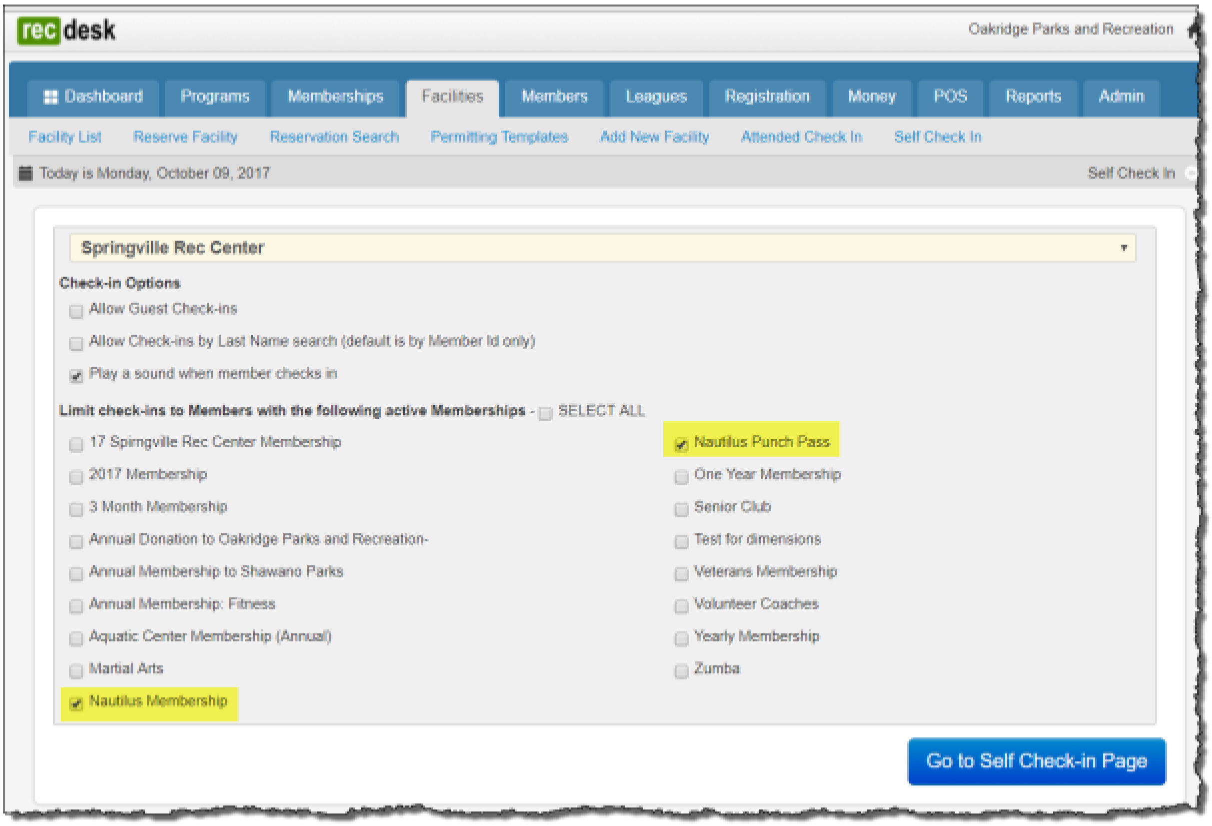
Attended Check-In

If Member being checked-in has multiple memberships, the attendant will be notified that Member has multiple Active Memberships and all the Active Memberships will be checked off. You can then select the *appropriate* Membership the Member is checking into before clicking Complete Check-In. *Note: all Memberships active for that Member will be checked by default.*

Self Check-In

Check-In will be successful if Member is in at least one of the Memberships checked in the set up screen, so be as specific as possible when selecting Memberships in the set up screen. After check-in in is complete, check-ins will be recorded for only Memberships checked-off in the set up screen.

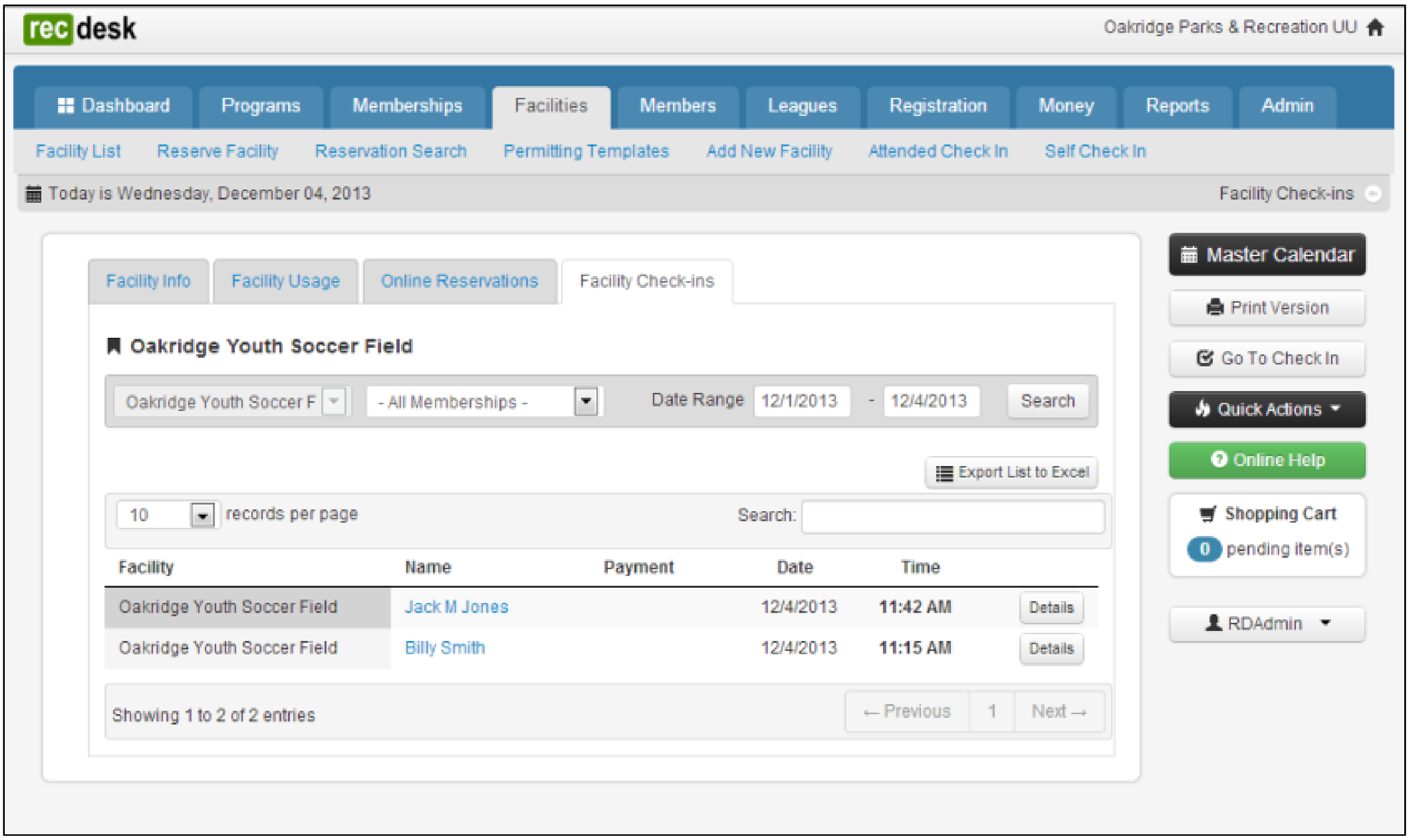
Self Check-In Set Up


rec desk
Oakridge Parks and Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
POS
Reports
Admin
Facility List
Reserve Facility
Reservation Search
Permitting Templates
Add New Facility
Attended Check In
Self Check In
Today is Monday, October 09, 2017
Self Check In
Springville Rec Center
Check-in Options
Allow Guest Check-ins
Allow Check-ins by Last Name search (default is by Member Id only)
Play a sound when member checks in
Limit check-ins to Members with the following active Memberships - SELECT ALL
17 Spirngville Rec Center Membership
2017 Membership
3 Month Membership
Annual Donation to Oakridge Parks and Recreation-
Annual Membership to Shawano Parks
Annual Membership: Fitness
Aquatic Center Membership (Annual)
Martial Arts
Nautilus Membership
Nautilus Punch Pass
One Year Membership
Senior Club
Test for dimensions
Veterans Membership
Volunteer Coaches
Yearly Membership
Zumba
Go to Self Check-in Page

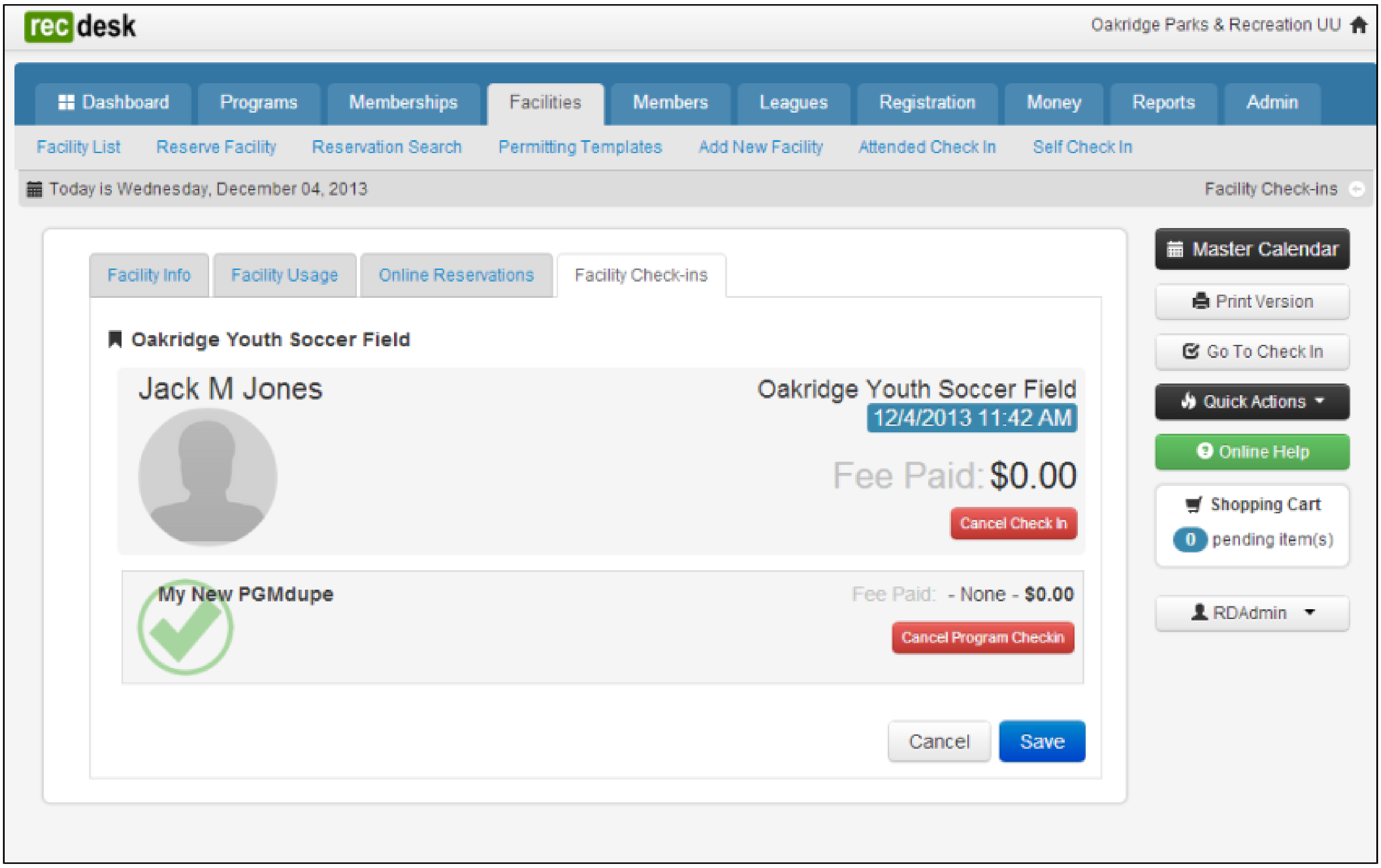
Viewing and Editing Check Ins

Facility and Drop In Program Check In details can be ***viewed*** or ***edited*** by going to the **Check In tab** for a *Facility*, *Member* or *Membership* and clicking on the **Details** button. The *Facility Check In tab* is shown below. Once you click on the Details button you will be brought to the check in detail and can edit it by clicking on the Edit button. See *Check In Edit* below.

Check In List via Facility Detail

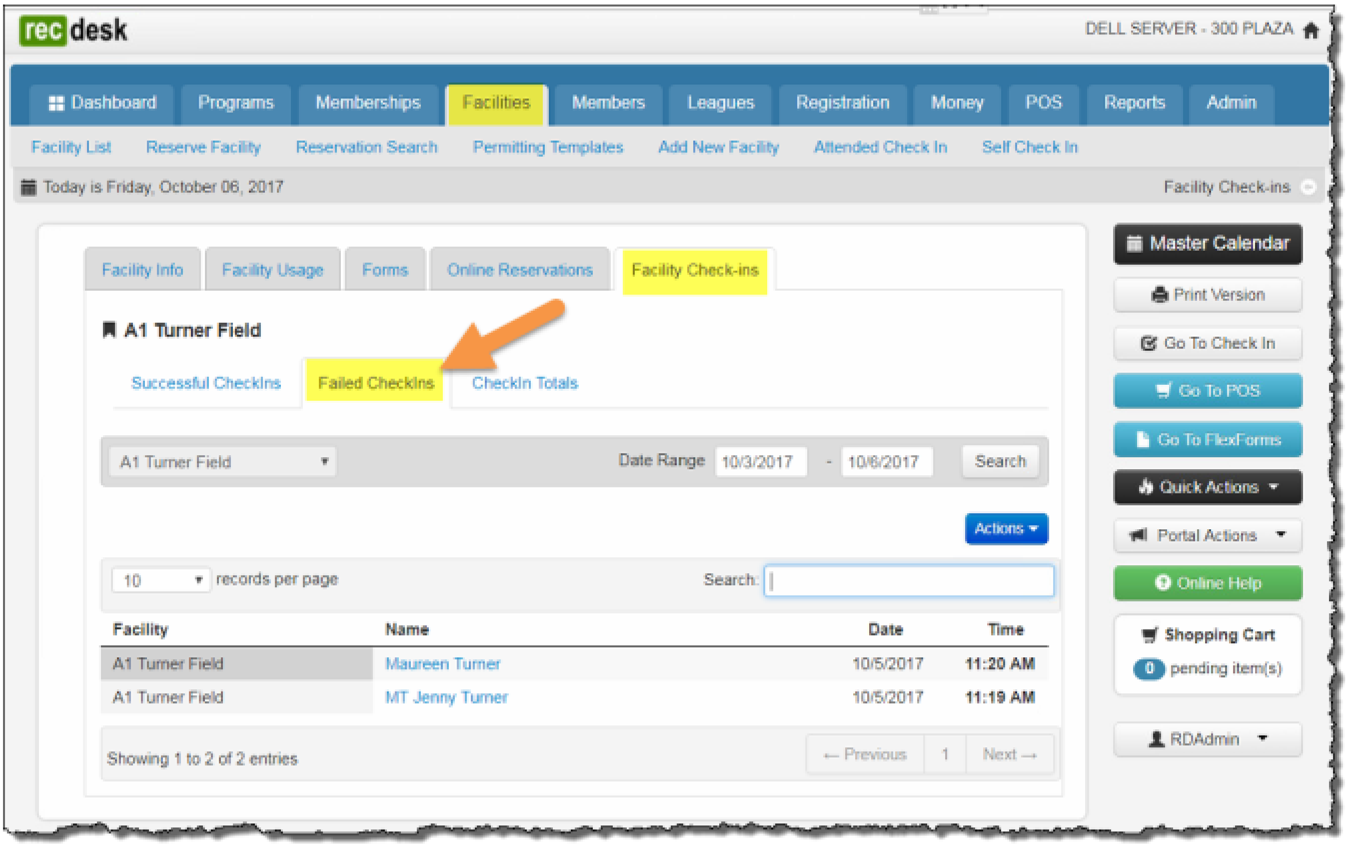


Check In Edit


rec desk
Oakridge Parks & Recreation UU
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Facility List
Reserve Facility
Reservation Search
Permitting Templates
Add New Facility
Attended Check In
Self Check In
Today is Wednesday, December 04, 2013
Facility Check-ins
Facility Info
Facility Usage
Online Reservations
Facility Check-ins
Oakridge Youth Soccer Field
Jack M Jones
Oakridge Youth Soccer Field
12/4/2013 11:42 AM
Fee Paid: $0.00
Cancel Check In
My New PGMdupe
Fee Paid: - None - $0.00
Cancel Program Checkin
Cancel
Save
Master Calendar
Print Version
Go To Check In
Quick Actions
Online Help
Shopping Cart
0 pending item(s)
RDAdmin

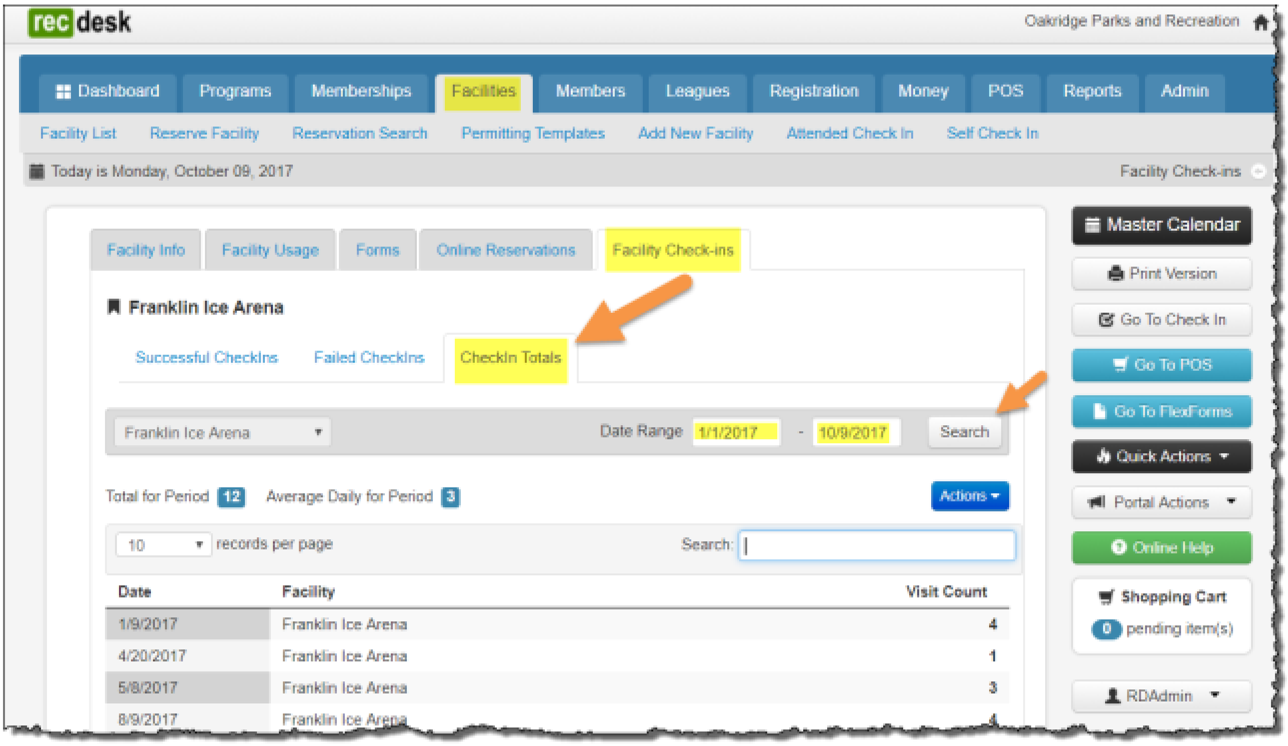
Unsuccessful Check-Ins

Unsuccessful Check-Ins can be seen by navigating to the **Facility Check-Ins** page and clicking on the **Failed Check-Ins** sub-tab. (Note: Unsuccessful Check-Ins will only be listed if Member checked-in by using a unique Member Id or barcode).



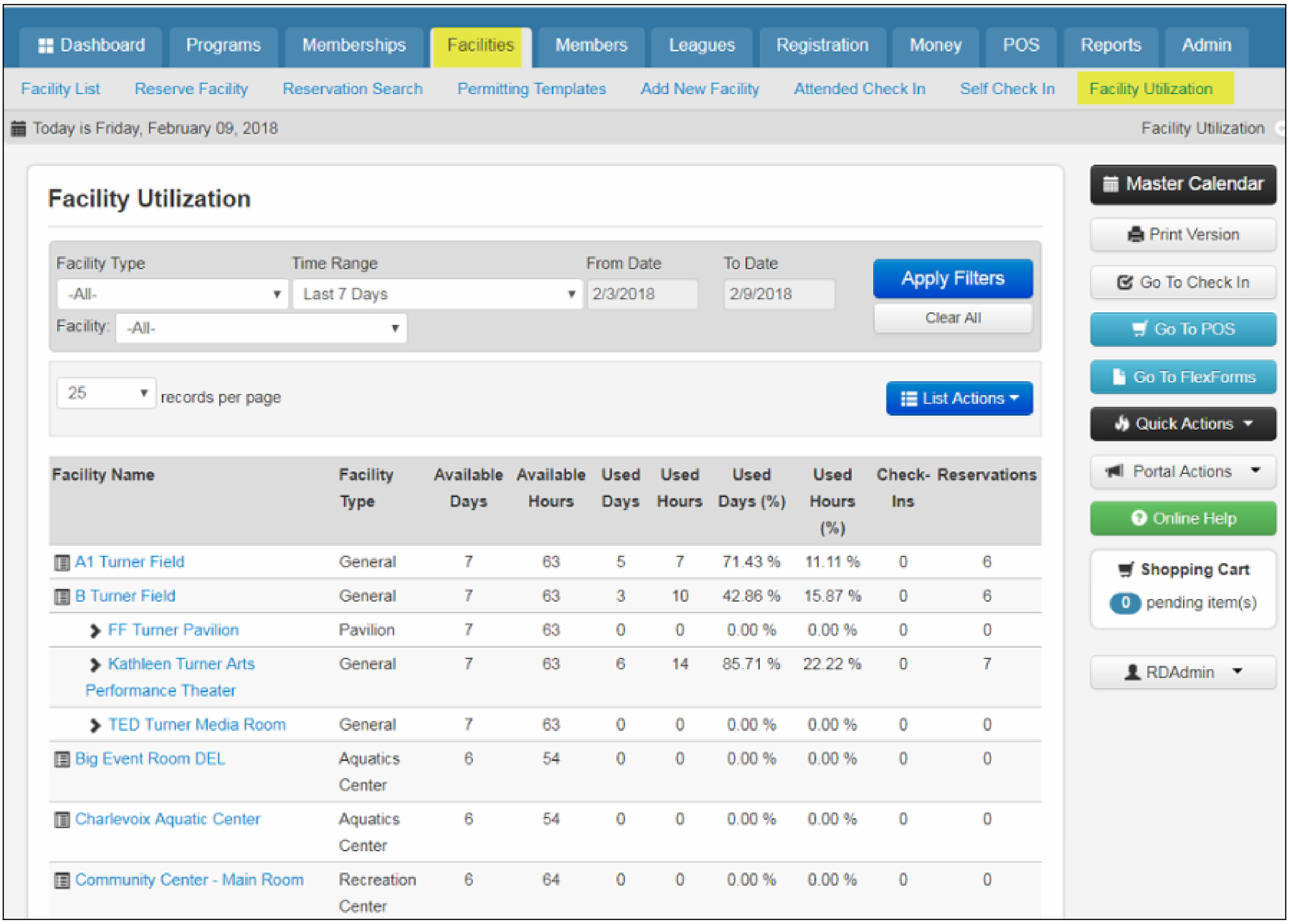
Check-In Totals

Check-In Totals can be seen by navigating to the **Facility Check-Ins** page and clicking on the **Check-In Totals** sub-tab. Enter the *Date Range* and click *Search.*



Facility Utilization Report

To see a list of your **Organization's Facility Usage**, navigate to the **Facilities** tab, then click on the **Facility Utilization** submenu. Select the *Facility Type* and *Time Range* from the drop down. Custom Range option allows you to enter Custom Start and End Dates. To see a specific Facility's Utilization, *Facility* from the drop down. Then click *Apply Filters.* You also have the option to *Export Utilization Report to Excel* under *List Actions.*



Appendix

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

Facility Fields

Facility Fields

General

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

- **Name** - Facility name

- **Facility 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

- **Sales Tax** - The Sales Tax associated with reservations of this Facility *(note: Sales Tax only applies to the base fee, not the deposit amount).* 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.

Image/Photo Gallery

This can be used to display individual pictures, slide shows or videos of facilities on the RecDesk Community portal. "Embed Code" provided by various photo sharing sites such as DropShots, PhotoBucket. For more information, see Facility Photos, Slideshows and Video

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

    - **Privacy** - Options are *PRIVATE – Details NOT viewable on Community Calendar or PUBLIC – Details Viewable on Community Calendar*

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

FlexScheduler Fields

Facility Reservation Fields

- **Title (required)** - Brief description of purpose of reservation
- **Customer (optional)** - Member making reservation
- **Privacy** - Options are *PRIVATE – Details NOT viewable on Community Calendar or PUBLIC – Details Viewable on Community Calendar*
- **Status - Status of the reservation** (note: currently only Approved is available)
- **Color** - The color of this reservation in calendars
- **Note (optional)** - Additional note about this reservation that will appear on the calendar if Privacy is Public
- **Private Note (optional)** - Additional note that is only visible internally
- **Facility** -Facility to reserve
- **Group Size (optional)**- Size of group
- **Line Description (optional)** - Line Description for that facility's part of the reservation
- **Single Date or Recurring** - The kind of reservation you are making
- **Start Time** - Start date and time of reservation
- **Set Up (mins)** - The number of minutes you'd like to add *prior to this reservation* to set up the Facility. For example, if the reservation starts at 8 AM and you need to start setting up at 7:30 AM, enter 30 Set Up (mins).

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

- **Teardown (mins)** - The number of minutes you'd like to add *after this reservation* to clean up or teardown the Facility. For example, if the reservation ends at 10 AM and you need to clean up or teardown until up at 10:45 AM, enter 45 Set Up (mins).

- **Require Fee** - When set to "On", this will allow a fee to be selected from the Fee Schedule for this Facility

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

- **Fee Amount** - the rate for that fee type (will be multiplied by hours or minutes if Rate Type is Per Hour or Per Minute)

- **Security Deposit (optional)** - security deposit amount for that Facility (Note: If the reservation is a recurring reservation, once you enter the Security Deposit, you have the option to **Apply Security Deposit to all dates**)

- **Add On Fees** - Can be set up under Fee Schedules and optionally added on with a quantity and Fee Amount per Add On

Members

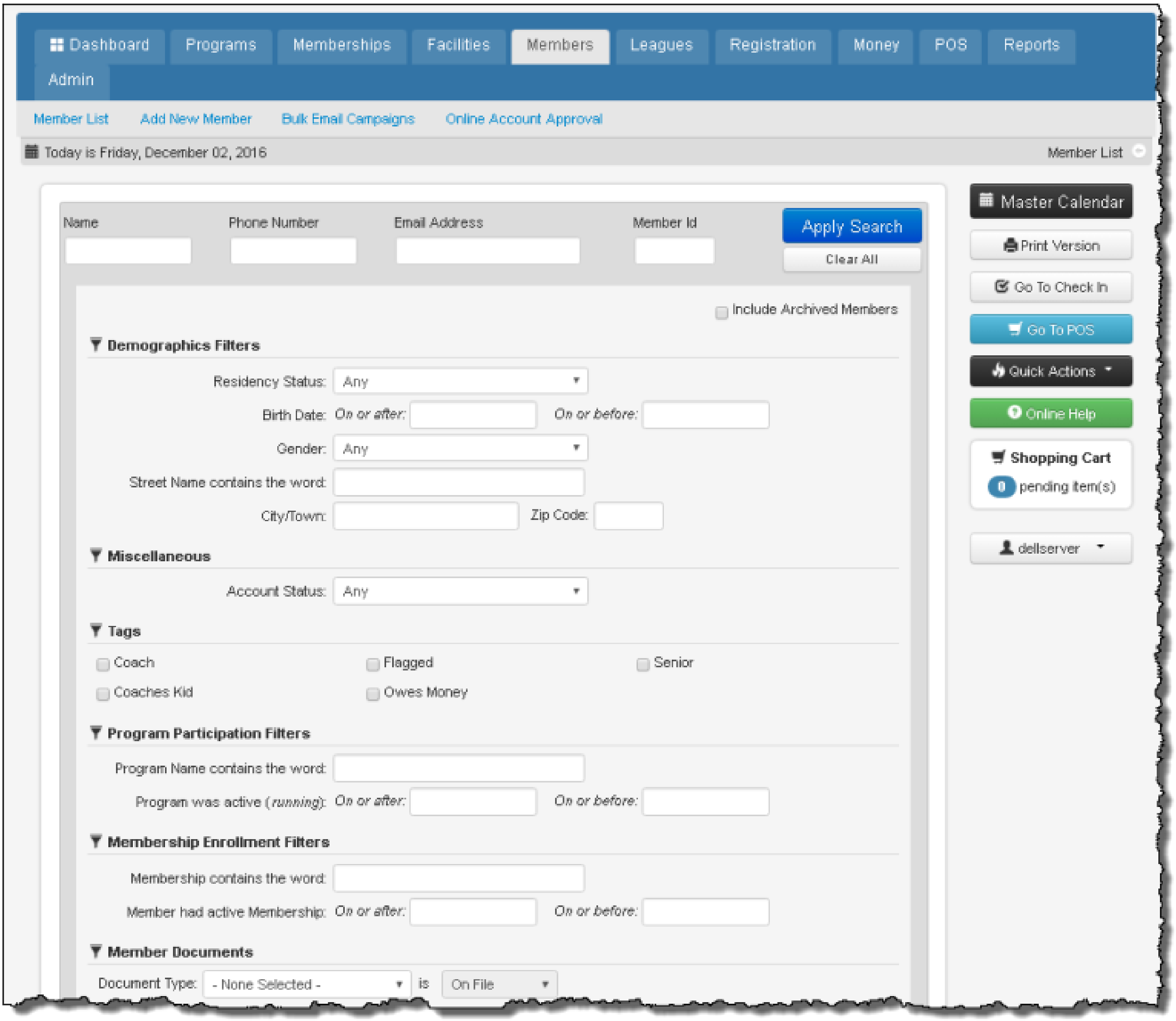
The Member List (Advanced Search)

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. Search results can be easily ***exported to Excel***.

Basic Search options include: *Last Name, Phone Number, Email Address and Member ID.* If you want to search for all Members of a particular **Organization**, enter the Organization Name under *Name (*Note: Household must have a Type of Organization (see Organizing as Household/Organization Groups).

Advanced Search Options: *See screen shot below*

Member List (with Advanced Search Options)



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 Household Member to an existing Household or Organization, see Organizing as Household/Organization 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 entry errors*)

- Enter **First Name**, **Middle Initial** and **Last Name**

- Optionally check member as **Head of Household**

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

- Select **Gender**

- If you would like to override the Member's Residency Status when adding new Member, simply choose the appropriate override selection. Once a Member has been added, their Residency Status can be overridden by clicking the ***Override Residency Status*** button when viewing profile.

- Enter **Address Line One, Address Line Two, City, State/Province** and **Zip/Postal Code**

- Enter **Email Addresses:**

    - Enter Member's **Email Address** and **Confirm Email Address**

    - Optionally, enter **Alt Email Address #1** and **Alt Email Address #2**

    - By default, the Member will receive bulk emails. Uncheck **Opt-in Bulk Emails** to change this

- Enter **Phone Numbers and Mobile Notifications**
    - Enter Member's **Home Phone**
    - Optionally, enter Member's **Work Phone** and **Extension** (if applicable)
    - Optionally, enter Member's **Mobile Phone** (Note: **Mobile Phone** is required if opting in to receive Text Alerts)
    - If the Member would like to receive SMS Text Alerts, check **Opt-in Text Alerts**, and choose carrier from the **Select Carrier** drop down (Note: **Mobile Phone** is required if opting in to receive Text Alerts)
- Optionally, enter **Emergency Contact** information
- Optionally enter a **Member Note**
- Optionally enter a **Private Note** for internal use only; will appear with Member Badges but not visible on RecDesk Community
- Click **Save**

Organizing as Household/Organization Groups

Members can be organized into **Household Groups** or **Organizations** for convenience.

The **Household Name** defaults to the Member's Last Name. Click **Edit Name** to change the name or the type. The **Type** defaults to Household. For Organizations, change **Type** to Organization. (Note: if this is an Organization, all Members acting on behalf of this Organization should be added as New Group/Family Members here)

To Add a new Household or Organization 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 into a **Household** or **Organization** are:

- After working with one Household Member, other Household 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
- When specifying a Household as an Organization, all Members of the Organization can be found by performing a Member Search on the Organization Name (see The Member List (Advanced Search)

Member Profile with Family Group

Assigning Member IDs

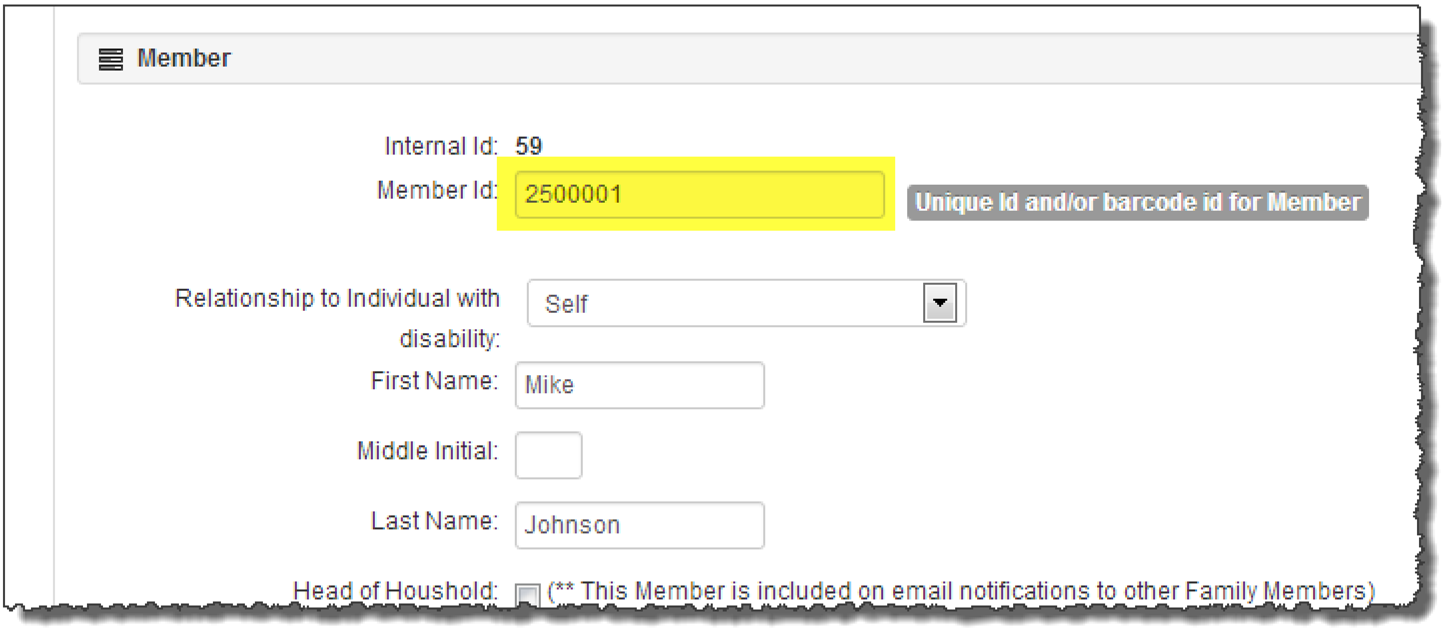
Members can be assigned a Member ID for purposes if uniquely identifying them to process things such as Facility Check-ins. Most often this **unique Member ID** is encoded on *keyfob or ID card* in the form of a **barcode**. This makes it easy for them to scan or swipe a barcode as the enter a facility. 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



Adding Tags to Members

RecDesk allows you to add Tags to Member profiles and then easily search for all Members labeled with that Tag. (see also Using Tags Effectively)

Basic Workflow

- Before tagging Members, be sure to add any/all Tags you'd like to place on Members. See Managing Custom Lists.
- Click on a Member's name from The Member List.
- Click **Add Tags** below the Member Photo.
- Check off any and all Tags that apply to this Member.
- That's it! Now you can perform an Advanced Member Search by any or all Tags!

Attaching Documents to Members

RecDesk allows you to attach documents to Member profiles and then easily search for all Members with certain Document Types On file or NOT on File (see The Member List (Advanced Search) and Attached Documents FAQ).

Basic Workflow

- Before attaching Documents to Members, be sure to add any/all Document Types you'd like to attach to their profiles. See Managing Custom Lists.

- Click on a Member's name from The Member List.

- Click **Attach New Doc** just above the Member Info.

- Choose a **Document Type** from the drop down. If the Document Type has an Expiration Type, the default **Expiration Date** will appear, which can be overridden.

- Check off **Mark Document as on File** if you have a hard copy of the document OR click **Choose File** and follow the prompts if you'd like to Upload a Document to attach to this Member.

- The **Document Title** will be autofilled with the Document Type, but can be overridden.

- You can optionally add a **Note**.

- Click **Save**! You can now perform an Advanced Member Search by Document Type!

Member Photos

Getting Started

- Log into RecDesk and select a Member from your Member List. Click **Change Photo**.
- To **Take a photo** using your webcam:
    - Click **Activate Camera**
    - Click **Take Picture**
    - Click **Save Photo**.
- To **Upload an image** from your computer:
    - Click **Upload Picture**
    - Find / select image file and click Open
    - Optionally use your cursor to center the photo, and/or click Rotate Left / Rotate Right
    - Click **Crop**.

**** Note to Internet Explorer Users (IE11 and below) ****

RecDesk uses HTML5 to access your computer's web cam and snap the photo. Internet Explorer does not support HTML5 access to your camera but we have an alternate photo capture method for IE that utilizes a plug-in called Microsoft Silverlight. If you receive an error or are prompted to update Silverlight, you will need to update or install Silverlight with the latest version (5.1.20913.0). Follow the prompts on this page or see updating or installing Silverlight.

Updating or Installing Silverlight

1. Go to Microsoft's Silverlight installation page

2. The resulting page will be the *Installation Instructions* page. There will be a blue hyperlink up top to the right of Current Version. Click that.

3. Your browser will prompt you to either run or save the file (Silverlight.exe). Click Run to start the download. When the download is finished, you will get another prompt to run the installer. Click Run to start the installation.

4. If your computer uses Windows Vista or Windows 7, you may be prompted for security permission. Follow the prompts to allow the installation to continue.

5. Click Install Now after reading the license agreement and privacy statement.

6. After installation is finished, completely close the browser and reopen it. Silverlight should now be installed and you should be able to proceed with taking member photos.

Web Camera Setup Plus Requirements

RecDesk will work with most USB web cameras or your laptop/computer's integrated camera. In the case of an external USB camera, you should simply have to plug the camera into an available USB port and your computer will recognize it. For external USB cameras, we recommend the Microsoft LifeCam Cinema Webcam. This provides the appropriate resolution for taking member photos and can be positioned in a variety of ways either on top of a monitor or on another flat surface.

Household Credits

RecDesk supports the crediting of a Household Account rather than refunding via check, cash or credit card. This allows the balance to be applied to a future purchase/registration by any Member of that household. Each Household/Organization is automatically set up with a Household Credit Account with a zero balance.

Note: If you are using General Ledger Accounts and plan on using the Household Credit Account, we recommend that you set up a GL Code for this purpose (see Setting Up Household Credit GL Code).

Household Credit Account Additions(Credits):

There are 2 ways to increase a Household Credit Account balance:

- By issuing Refunds (see Refunds);

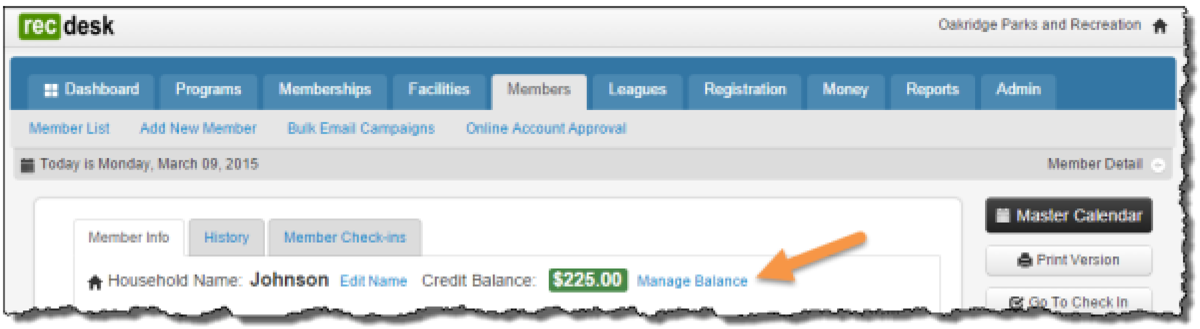
- By Manually Crediting the Household Credit Account. This is done by navigating to the Member profile of any Member in the Household and clicking **Manage Balance** (see screenshot below). Click **Manually Credit Account,** enter the Amount of the addition to the account and optionally a Note, and click **Save**.

Household Credit Account Reductions(Debits):

There are 2 ways to reduce a Household Credit Account balance:

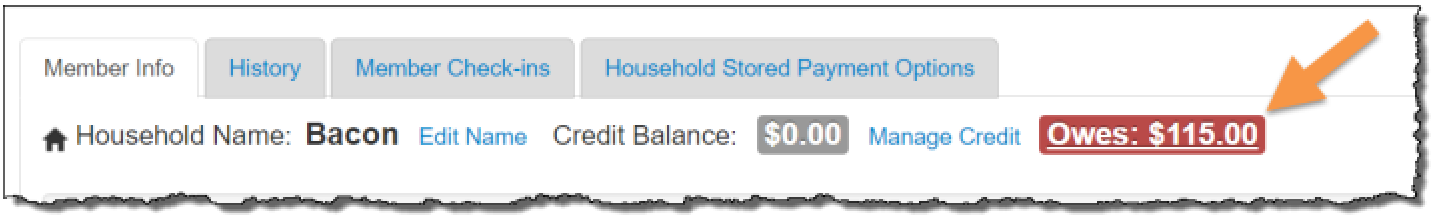
- By making payments on Invoices from the Household Credit Account (Invoice Payments);

- By Manually Debiting the Household Credit Account. This is done by going to the Member profile of any Member in the Household and clicking **Manage Balance.** Click **Manually Debit Account,** enter the Amount of the reduction to the account and optionally a Note, and click **Save**.



Amount Owed Balance

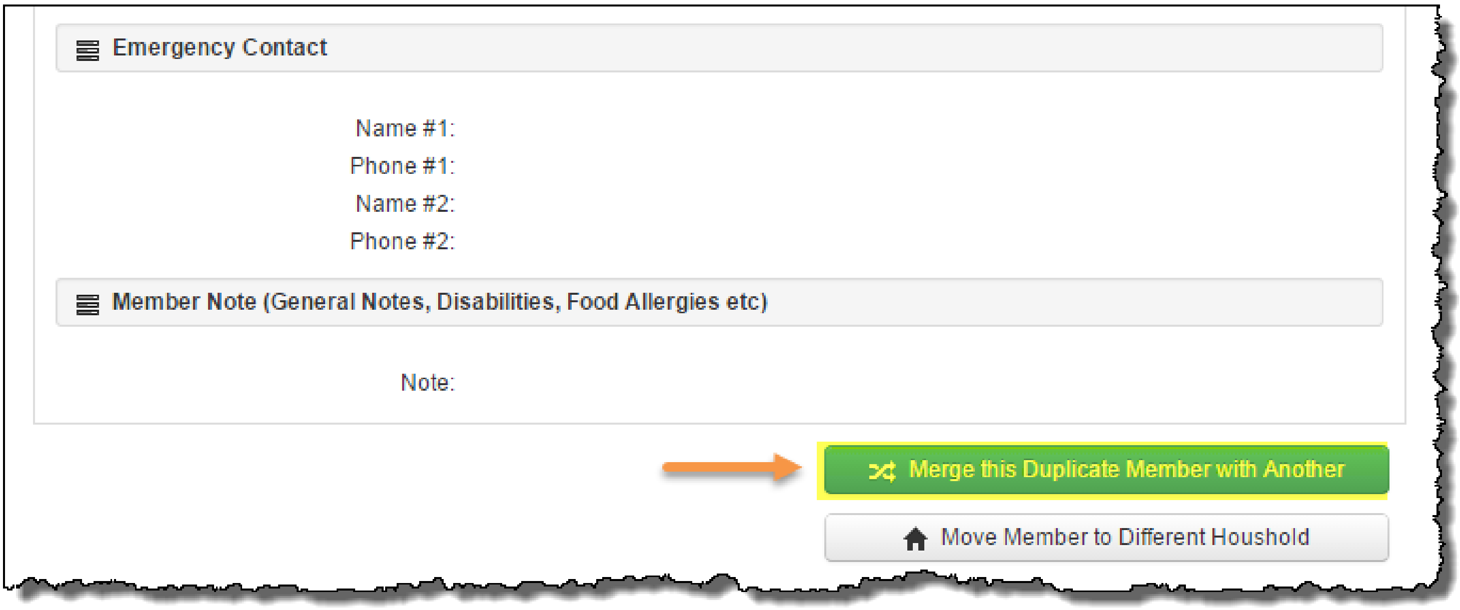
RecDesk shows the **Amount Owed Balance** for Households with an outstanding Balance. Click on the red **Owes: $** link to see a list of all Open and Overdue Invoices that make up that balance.



Merging Members

To Merge a Member into another member:

1. Go to the Member tab and search by Last Name for the Member you would like to merge into another
2. Click on the Member Name and scroll down to the bottom of their Member profile
3. Click on the **Merge this Duplicate Member With Another** button at the bottom-right:



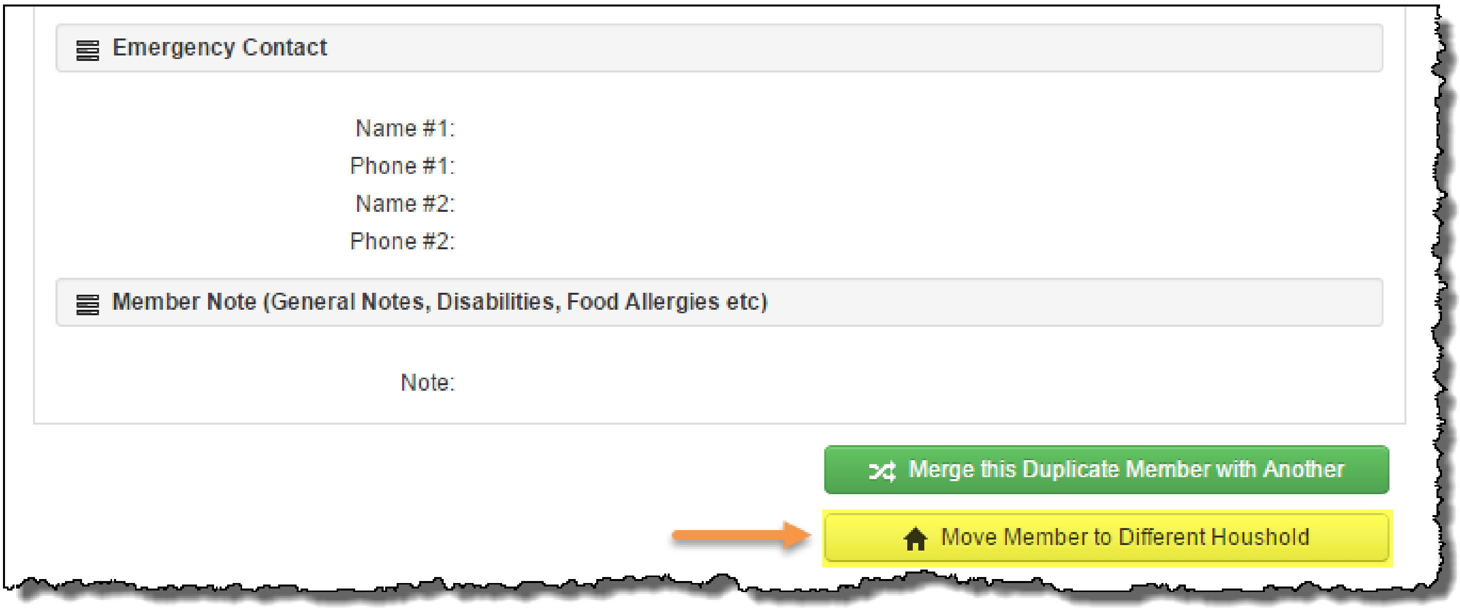
4. Enter the first few characters of the last name of the Member being merged to and select it from the list. Click on the **Merge Now** button. That's it. Please note that this action cannot be reversed so please pay careful attention to the profiles being merged from/to!

Note: Household Credit balances transfer on Member Merges if from Member is the only person in the Household

Moving Member to Different Household

To Move a Member from one Household/Organization to another:

1. Go to the Member tab and search by Last Name for the Member you would like to move to another Household or Organization
2. Select that Member and scroll down to the bottom of their Member profile
3. Click on the **Move Member to Different Household** 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 **Move Now** button. That's it.

Note: Household Credit balances transfer if from Member is the only person in the Household

Suspending Members

Member profiles can be **suspended** in RecDesk Director. This will prevent that Member from registering, reserving or enrolling online via RecDesk Community. Members can be unsuspended at any time.

When a Member has been suspended, they:

- will not be allowed to Register for Programs online via RecDesk Community
- will not be allowed to Reserve Facilities online via RecDesk Community
- will not be allowed to Enroll in Memberships online via RecDesk Community

In **Recdesk Director**:

- a Suspended Member will display a red Suspended badge on his/her Member profile
- the Suspended badge will display whenever that Member is selected to register for programs in-house, but *will not prevent* a RecDesk Director user from registering the Suspended Member
- a red "S" will appear in the Member List next to a Suspended Member

How do I Suspend a Member?

- Select the Member from the Advanced Member Search page to view their profile
- Click the **Edit** button
- Click the **Suspend Member** button in the lower-left and confirm by clicking OK
- The Member is now suspended

How do I Unsuspend a Member?

- Simply click on the red **Unsuspend Member** button next to the Edit button on the Member profile

Archiving Members

Member profiles which are no longer actively used can be **archived**. This does *NOT* delete the profile per se, but does hide it from many of the normal day-to-day RecDesk operations. Full history is maintained and an archived member can be **un-archived** at any time. The primary purpose of the archive feature is to help organizations maintain a clean member's database that is relevant and can be easily worked with.

When a Member has been archived, they:

- will no longer show up in Member Search queries by default (there is an *Include Archived Members* checkbox on the Advanced Member Search page if you would like to include them)
- will no longer be available for Registrations and Reservations as part of a family group
- will not be included on bulk emails
- will no longer be able to log in to the RecDesk Community portal

How do I archive a Member Profile?

- Select the Member from the Advanced Member Search page to view their profile
- Click the **Edit** button
- Click the **Archive Member** button in the lower-left and confirm by clicking OK
- The Member is now archived

Online Account Approval

RecDesk can be configured so that all new accounts created online via the RecDesk Community portal must go through an approval process prior to allowing new account members to register for programs and reserve facilities. This works great if you have very specialized residency requirements or just want more control over who can/cannot register for programs and make online reservations.

Basic Work Flow

- Community Member sets up a new account on RecDesk Community
- An email alert is sent to department staff members who have subscribed to that email alert (see Alerts). Additionally, there is an alert on the Director Dashboard showing that there are accounts pending approval.
- New account profiles can be approved as **Resident** or **Non Resident** (or if Residency requirements are not defined, just a simple Approve). The *Online Account Approval* page is under the Member's tab
- Once approved, an email is sent to that individual informing them their account has been approved and they can now register for Programs

How do I activate Online Account Approval?

- Contact RecDesk and ask us to activate this feature
- If you want to be able to Approve as Resident or Non-Resident, be sure that you have baseline Residency Requirements set up
- Have key staff members subscribe to the **Online Account Created - Approval Required** alert so they receive an email when a new account is created. See Alerts. During times of heavy user registration and program sign-up, you may want to temporarily disable the alert and monitor the approval queue manually throughout the course of the work day.

Advanced Payment and Billing Options

RecDesk's **Advanced Payment and Billing Options** are ONLY supported for clients utilizing the Authorize.net payment processing gateway as RecDesk utilizes their advanced Customer Information Management (CIM) interface to securely store and access card holder information.

Please contact RecDesk Support at support@recdesk.com to learn more about Advanced Payment and Billing Options and how your organization can get started with it.

PLEASE NOTE: RecDesk **DOES NOT** store credit card and bank account details on its own servers. We utilize Authorize.net's **Customer Information Management (CIM)** interface to securely store and access card holder information.

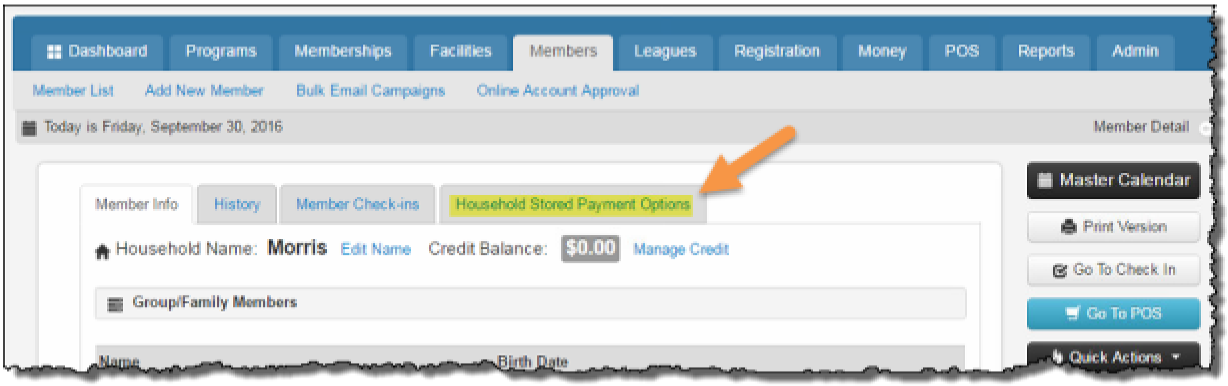
Household Stored Payment Options

When using the Authorize.net gateway, RecDesk allows you to add/edit **Household Stored Payment Options.** This allows access to this payment option for future use. PLEASE NOTE: RecDesk DOES NOT store credit card and bank account details on its own servers. We utilize Authorize.net's Customer Information Management (CIM)** interface to securely store and access card holder information.

*** *You may need to explicitly enable the CIM Module in your Authorize.net account prior to utilizing the Stored Payment Options feature. See Activating Authorize.net's CIM Module for how to do so.*

Basic Workflow

- View a **Member** and click on the **Household Stored Payment Options** tab



- Click **Add New Payment Option**
- Choose the **Family Member** from the drop down
- Select **Source Type** from the drop down:
    - For **<u>Credit Card Source Type</u>**:
        - Enter **Card Type** from the drop down
        - Enter **Card Number**
        - Enter **CVV**
        - Enter **Expiration Month** (MM) and **Year** (YYYY)

        - Enter **Cardholder First Name, Cardholder Last Name**, **Address**, **City**, **State**, and **Zip Code**

    - For **eCheck/ACH Source Type**:

        - Enter **Account Holder** Type of **Individual** or **Business** from the drop down

        - Enter **Routing Number**

        - Enter the same number in **Account Number** and **Repeat Account Number**

        - Enter **Bank Name**

        - Enter **Name on Account**

- Click **Save**.

This option can now be chosen when Making a Payment.

Activating Authorize.net's CIM Module

The CIM Module may not automatically be enabled on your *Authorize.net* account. If you try to store a payment option and receive the message ***Customer Information Manager is not enabled***, you will need to activate CIM on your Authorize.net account. Here is how:

1. Log into your Merchant Interface at https://account.authorize.net.
2. Click **Customer Information Manager** in the main *left side menu*.
3. Click ***Sign up for Customer Information Manager (CIM) Now***.
4. Click the checkbox labeled I have read and understand the Terms of Service.
5. Click **I Agree**.

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

- **Gender -** Member's gender

Address

- **Address Line One** - Address of member

- **Address Line Two** - Address of member

- **City** - City/Town

- **State/Province** - State or Province

- **Zip/Postal Code** - Zip/Postal code

Email Addresses

- **Email Address** and **Confirm Email Address** - Member's email address
- **Alternate Email Address #1** - Member's 2nd email address
- **Alternate Email Address #2** - Member's 3rd email address
- **Opt-in Bulk Emails** - Uncheck this to remove member from bulk email list

Phone Numbers and Mobile Notifications

- **Home Phone** - Member's home phone
- **Work Phone** - Member's work phone and **Extension** (if applicable)
- **Mobile Phone** - Member's mobile phone
- **Opt-in Text Alerts** - Check this to receive SMS Text Alerts to the **Mobile Phone** listed above, and select **Carrier** (required if checked)

Emergency Contact

- **Name #1** - Emergency contact name
- **Phone #1** - Emergency contact phone
- **Name #2** - Emergency contact name
- **Phone #2** - Emergency contact phone

Member Note

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

- **Private Note** - For internal use only. Will appear with Member Badges.

Login

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

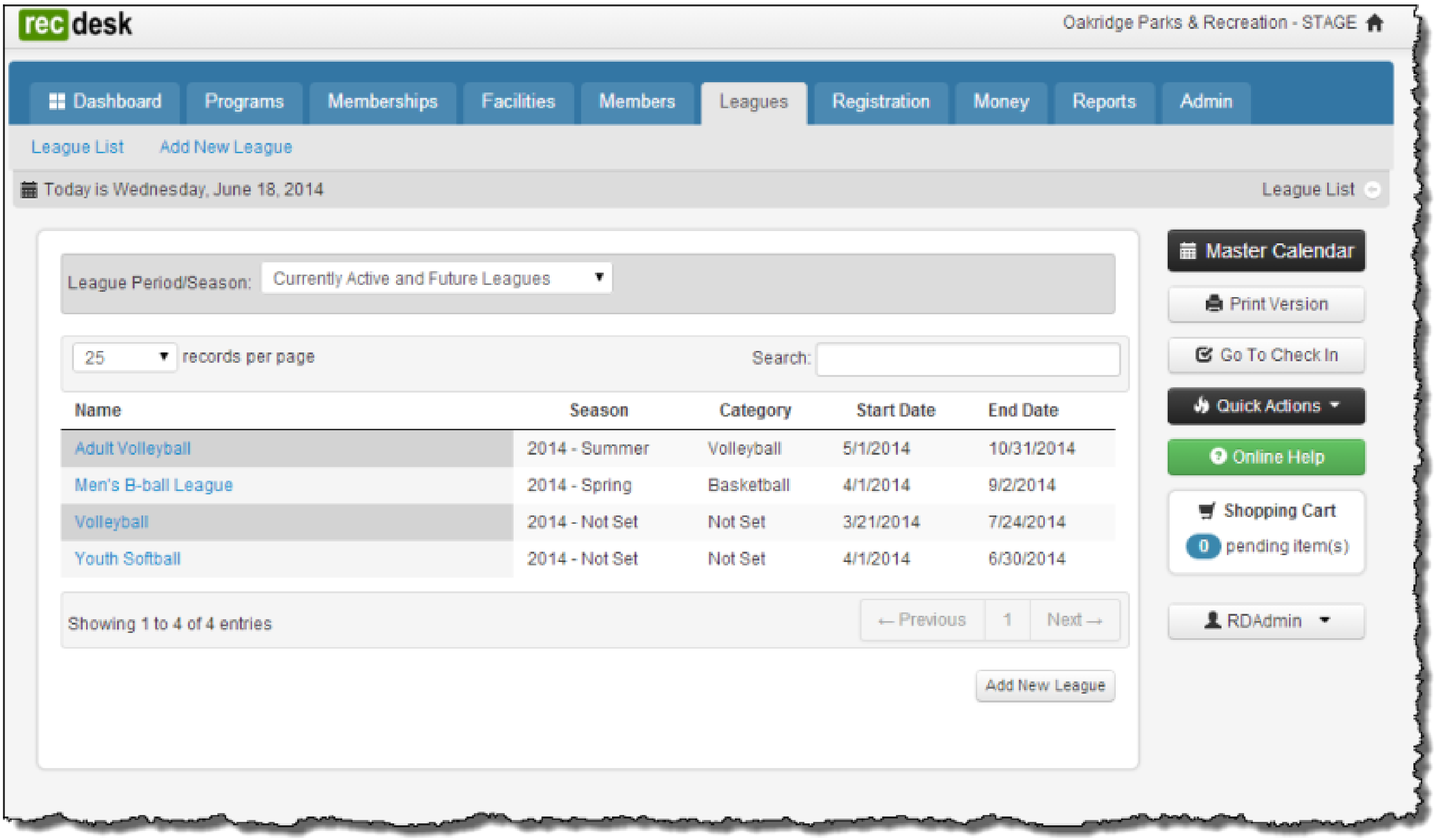
- **Password** - Password assigned to this user for the RecDesk Community portal (online registration)

Leagues

The League List

The League **List** page shows all *Currently Active & Future Leagues* by default. This would be any League that has an End Date that is greater than or equal to today.

Previous Leagues can be viewed by selecting Past Leagues from the League Period/Season drop down. The League List can also be viewed by choosing one of the other seasons listed from the drop down list. For a complete list of fields on the League List page see League Fields



Creating Leagues and Divisions

Adding **new Leagues and Divisions** and modifying existing ones begins on the The League List page. To add a new League, click on *Add New League* from the Leagues submenu.. To **modify an existing League**, simply click on it from the League List page and click the *Edit League* button.

For a complete list of League related attributes see League Fields

Basic Workflow

- Choose the **Season** for the League from the drop down list. You may optionally enter a Season Name ** as well
- Enter the **Category** of the League (i.e. Baseball, Basketball, etc.) **
- Enter the **Name** of the League
- All Leagues are based on an existing program. Choose the **Based on Program** from the drop down list *(note: all active programs appear in this list)*
- Enter the **Start Date** and the **End Date** of the League's Season
- Check the **Show on Portal** box to make this League appear on the Community portal **
- Check the **Show on Internal Calendar** box to make this League's scheduled games appear on the *Director* Flex Calendar
- Check the **Show on Community Calendar** box to make this League's scheduled games appear on the *Community* Calendar
- Specify a **Custom Color** for this League's games on the *Flex Calendar* and *Community* Calendar
- Enter a **Description** for this League (optional)
- Enter additional Notes for this League (optional)
- Click **Save.** This brings you to the **League Info** page.

- From the **League Info** page you may click on the blue **Actions** button to Print All Simple Rosters, Print All Detailed Rosters, or to send Emails to all League players

- Next, **define the Divisions** in the League

Divisions

- All Leagues are assigned a **Default Division**. To Change the name of this Default Division, click **Edit**, change the **Name**, and click **Save** *(note: the first (default) Division cannot be removed and will always be visible on the Community portal if Show on Portal is checked for that League; therefore, be sure to use the first Division and rename it if you'd like).*

- To add another Division, click the **Add Division** button. Give the Division a **Name**, and click **Save**.

- Continue on to Creating Teams

** If *Show on Portal* is checked*,* *Season Name* and *Category* are visible on the Leagues List page of the Community portal

Creating Teams

Once you have set up your League and have defined the Divisions within your League, it is time to Create Teams and place them in Divisions. You create **Teams** for a League by selecting the League from the League List page and then clicking on the Teams tab. To **modify an existing Team**, simply click on it from the Teams List page and click the **Edit Team** button.

Adding a New Team

- Click on the **Add New Team** button

- Enter the **Name** of the Team

- Optionally enter **Coach Notes** *(Note: Coach Assignments from Personnel/Volunteers List can be made on the Coaches tab (see Assigning Coaches to Teams). To enter coach information free form (not from Personnel/Volunteers list) enter coach information in* ***Coach Notes****.)*

- A Team is required to list the **Division** in which it exists. By default, the first League listed on the *League Info* Screen will be listed under Division. You may choose to place this Team in a different division by choosing that Division from the drop down list (see Creating Leagues and Divisions).

- Click **Save**

Once you have added your teams, it is time to start Assigning Players to Teams

Assigning Coaches to Teams

Coaches can be assigned to Teams. This is done by clicking on the **Coaches** submenu for a League, then clicking the **Assign New Coach** button.

Prerequisites - To make a Coach available in the drop down list below, they first need to be added on the Personnel/Volunteers List page with a Role of Coach. See Adding/Editing Personnel/Volunteers.

Basic Workflow

- Choose a **Coach** from the drop down (see Adding/Editing Personnel/Volunteers)
- Choose the **Division** from the drop down (see Creating Leagues and Divisions)
- If the Coach is an Administrator for the League, check **Is League Admin**
- Choose the **Team** to which the Coach is being assigned from the drop down (see Creating Teams)
- Choose the Coach's **Team Role** from the drop down
- The **Team Role Description** will be autofilled with the Team Role, but you can opt to override this if you'd like
- Click **Save.**

Emailing/Texting Coaches

- Click on the **Coaches** tab for a League
- Optionally filter the Coach list by **Division**
- Click on the **Actions** drop down
- Choose **Email Coaches (as To)** OR **Email Coaches (as Bcc)** to send an Email to the Coach List

- Choose **Text (SMS) All Coaches** to send a Text Message to all Coaches on the List who have opted in to receive Text Alerts (see Member Fields)

- You can also **Display/Copy Email Addresses** OR **Display/Copy Text/SMS Addresses**

Assigning Players to Teams

Players can be assigned toTeams and can also be assigned **Player Ratings**. This is done by clicking on the **Players** tab, then clicking the **Assign Players to Teams** button.

Basic Workflow for Assigning Players to Teams

- Once you have clicked on the **Assign Players to Teams** button, this puts you into edit mode.

- To assign players to teams, simply choose a team from the drop down list before the **Assign to Team** button

- Next, check off all the players you'd like to assign to that team

- Then click the **Assign to Team** button. You will now see those players assigned to that team as indicated in the Team column. (*Hint: Before assigning players to the next team, click on **Select None** to deselect the players just assigned)*

Continue assigning Players to Teams in this manner until all Players are assigned.

Basic Workflow for Assigning Player Ratings *(Optional)*

- Click on **Assign Players to Teams** button as you did above

- To assign player **Ratings**, choose a rating from 1 - 5 from the drop down list before the **Set Rating** button

- Check off all the players you'd like to assign that rating

- Then click the **Set Rating** button.

Note: You may change teams assigned and/or ratings for one specific team by clicking on the **Assign Players to Teams** button from the **Team Detail** page of that Team.

Now you are ready to **Schedule** games for your League (see Schedules and Standings).

Schedules and Standings

Auto-Scheduling

Recdesk gives you the ability to **Automatically Schedule** games at facilities/fields defined in your system, **round robin** style. When scheduling games at *your organizations's facilities*, RecDesk takes care of notifying you of any conflicts with other reservations at those facilities. If a Facility is *outside of your organization*, you can simply **deselect** the **Show Facility on Portal** Field on that facility's Facility Info Page so it won't appear on your Community portal for the public to view (see Creating and Modifying Facilities). To Start, click on the **Leagues** tab.

Automatic Scheduling

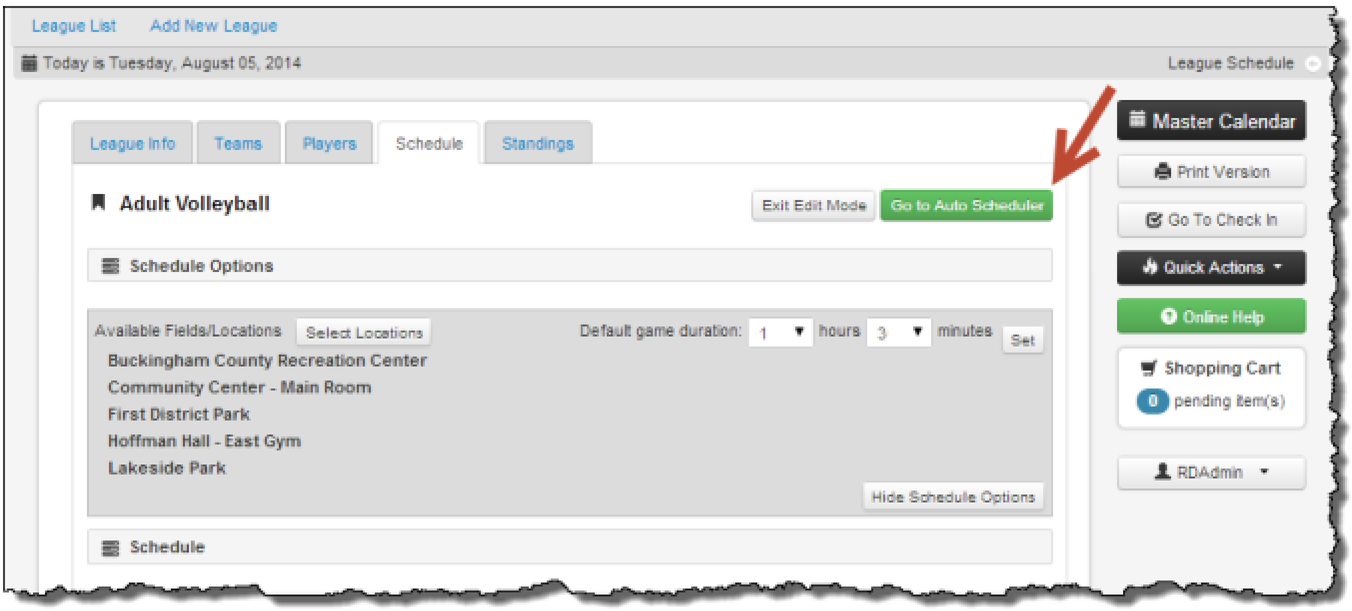
- Select the League for which you'd like to **Schedule**

- Click on the **Schedule** tab

- Click on the **Edit Schedule** button to add or change your schedule. The first time you edit the schedule, be sure to complete your Schedule Options

- Choose the **Division** from the drop down list

- Click on the **Go to Auto Scheduler** button



Step 1: Set General Game Options:

Game Count Options **- Choose either:

- **Number of times teams play each other** (traditional round robin style). Enter the **number** of games each team will play each other (*this is the most common option*); or

- **Each team plays same number of games** and enter the **number** of games each team will play.

** If the League has an odd number of teams, the "**Each team plays same number of games"** option is unavailable

Games per Day - Choose either:

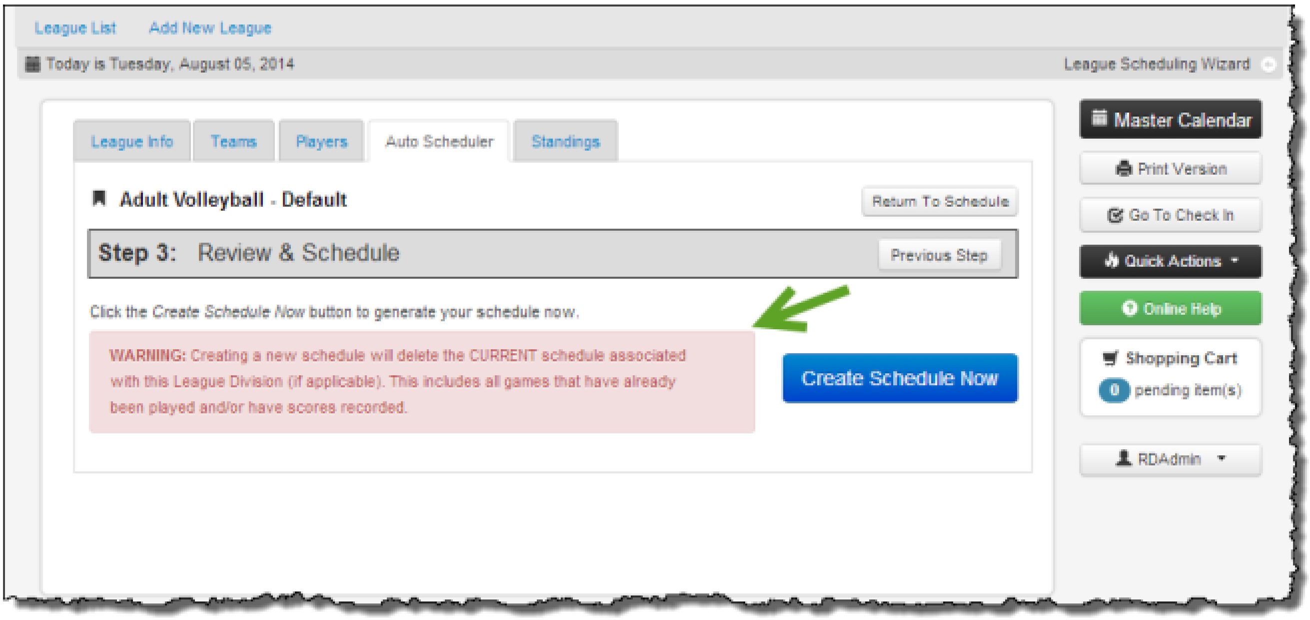
- **Fill all available time slots per day**; or
- **Limit to one (1) game per team per day** (*no double or triple headers - most common option*)
- Click on the **Next Step** button

Step 2: Assign Time Slots Per Field: (Note: all time slots will be *added* to the current time slots listed. If you would like to remove any time slots at any time, simply click on **Day Actions**, **REMOVE All Day's Time Slots**, or click on the **Edit** button next to a single time slot, then the **Delete** button)

- Enter **Initial Date & Time** (Note: the End Time will automatically be completed after entering a Start Time other than the default (based on the Schedule Options you defined); however, the End Time can be overridden)
- Select a Location (the available options were defined in your Scheduling Options)
- If you'd like to **Use Recurring Options** (repeating daily, weekly, or monthly), check off the **Use Recurring Options** check box and choose how often you want it to repeat (**Daily**, **Weekly**, or **Monthly**), **Repeats every value** and the corresponding values that are required for that option, and **Ends After** a **number** of occurrences *or* **On** a certain **Date**
- Click **Add Time Slot(s)**
- **Repeat** these steps until all the time slots games will be played at appear (scroll down to view all)
- Click on the **Next Step** button

Step 3: Review & Reschedule:

- You will now have the option to click on the **Previous Step** button to review and make changes, or **Create Schedule Now** (Note: a warning will appear - see below)



- When you are ready to create your schedule, click on the **Create Schedule Now** button

- Once you create your schedule, you will see the message **Schedule Created.** Then click on **Click here to go there now** to see the schedule that was automatically created based on your criteria. (Note: the first time you view the schedule, the **Show Schedule Conflicts** box will be checked by default. To view conflicts at a later time, manually click on the **Show Schedule Conflicts** check box.)

- You can now click on **Schedule Actions**, and **Print Schedule**

- You can also click on the **Edit Schedule** button and Manually Schedule any changes.

Manual Scheduling

Recdesk gives you the ability to Manually Schedule games at facilities/fields defined in your system. When scheduling games at *your organizations's facilities*, RecDesk takes care of notifying you of any conflicts with other reservations at those facilities. If a Facility is *outside of your organization*, you can simply **deselect** the **Show Facility on Portal** Field on that facility's Facility Info Page so it won't appear on your Community portal for the public to view (see Creating and Modifying Facilities).

Manual Scheduling

- Select the League for which you'd like to **Schedule**

- Click on the **Schedule** tab. To*view* the current schedule, choose a **Division** and optionally a **Team** to filter your view.

- Click on the **Edit Schedule** button to add or change your schedule

- The first time you edit the schedule, be sure to complete your Schedule Options

Adding Games

- First select the **Division** for which you are scheduling, then click **Add Game**

- Select the **Home Team** and the **Away Team** from the list of teams defined for that **Division**

- Enter **Start Date** and **Times** *(Note: the End Time will automatically be completed after entering a Start Time other than the default (based on the Schedule Options you defined); however, the End Time can be overridden)*

- Select a **Location** (the available options were defined in your **Scheduling Options**)

- **Scores** can be completed at a later time by clicking on the Edit button next to the game *(note: you must be in Edit mode for the Schedule in order to Edit individual games)*

- Click **Save**

Deleting Schedules and/or Games

- To **Delete** an **Entire Schedule**, click **Schedule Actions**, ***DELETE* Entire Schedule** (you will be asked to confirm before anything is deleted)

- You may also **Reschedule Games** or **Remove All Day's Games** by clicking on the **Day Actions** button on that day's Schedule and selectiong the option of your choice

- An Individual **Game** can be **Deleted** by clicking on the **Edit** button next to the game and clicking the **Delete** button

Standings

Team **Standings** are calculated based on **Scores** entered for all games played. For accurate **Standings**, **Scores** must be entered for all games played. The Standings appear in order based on Win Percent *(See* Winning Percentage Calculation*).*

Entering Scores

- Navigate to the **Schedule** page for the League, select the **Division**, and click **Edit Schedule**

- Click on the **Edit** button next to a game

- Enter in the **Score** of the **Home Team** and the **Away Team**

- Click **Save**

Standings List

- To view the **Standings** for a **Division** in a League, simply navigate to the **Standings** page for the League, choose the **Division**, and your standings will appear!

Appendix

League Fields

League Fields

- **Season -** Choose season year(s), and optionally a Season Name **

- **Category** - Sports Category of the League **

- **League Name** - Name of the League

- **Based on Program** - All Leagues are based off of an existing program. All *active programs* appear in the drop down list as a basis for this League.

- **Start Date** - Starting Date of the League's Season

- **End Date** - Ending Date of the League's Season (*League List* is based off this date)

- **Show on Portal** - Check this box to make this League appear on Community portal **

- **Show on Internal Calendar** - Check this box to make this League's scheduled games appear on the *Director* Flex Calendar

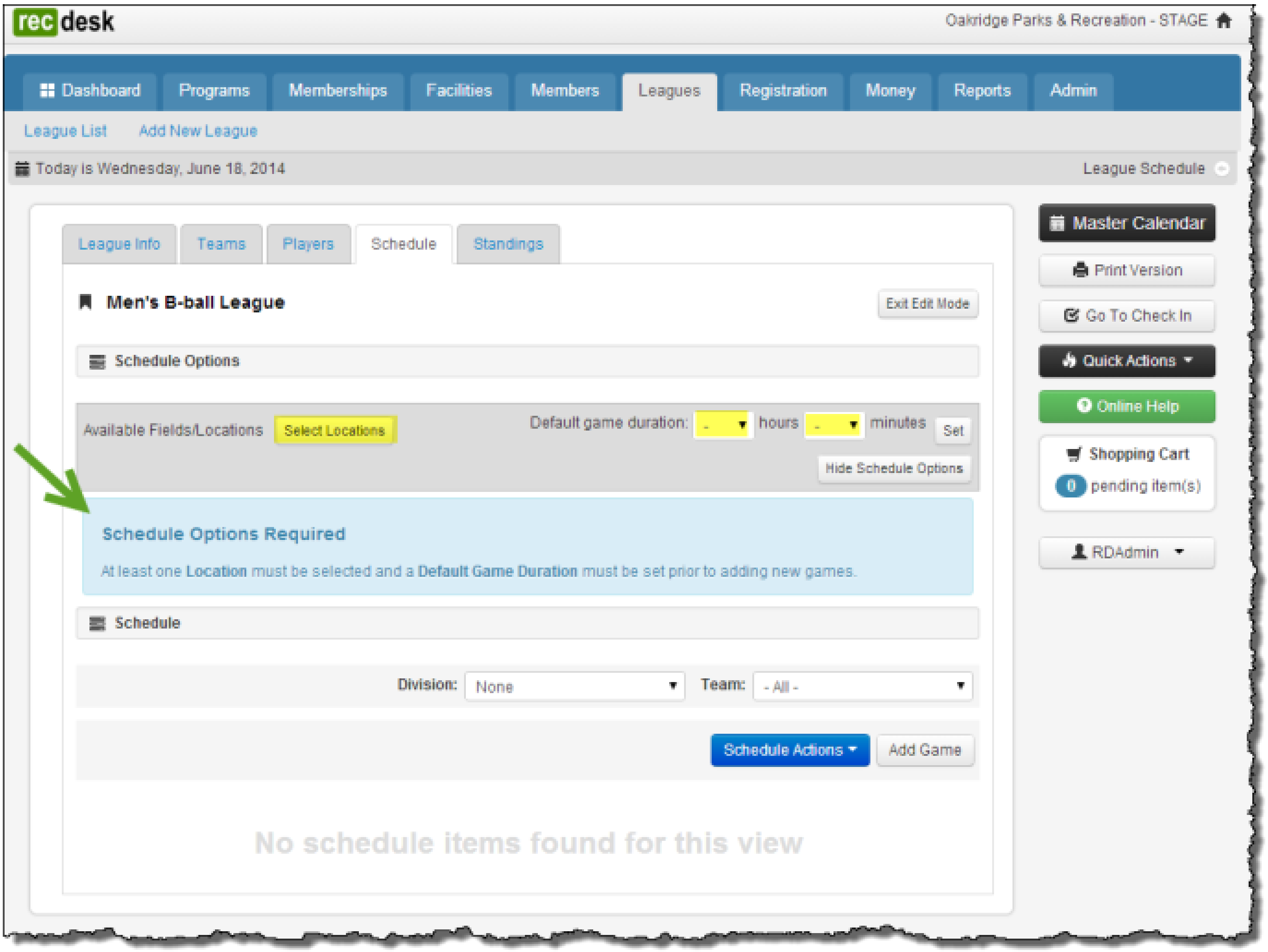
- **Show on Community Calendar** - Check this box to make this League's scheduled games appear on the *Community* Calendar

** If *Show on Portal* is checked, *Season Name* and *Category* are visible on the Leagues List page of the Community portal

Schedule Options

Schedule Options

- The first time you edit the schedule, you will see a **Schedule Options Required** message. **You are required to complete the Schedule Options prior to scheduling any games.**



- Click on the **Select Locations** button and **check off all Facilities** at which you'd like to schedule games and then click **Close** *(Note:all facilities will need to be defined in your system if games are scheduled there, and a facility cannot be deselected from this list if a game is scheduled at that facility.)*

- Next, select the **Default game duration hours** and **minutes**

- Click **Set**. You are now ready to setup your schedule!

Invoices

Invoice List

You can Search for Invoices in RecDesk by going to the Money tab and clicking on the **Invoice List** button. This takes you to the **Search Invoices** page. The Invoice Status search options are:

- **All** - Lists all Invoices
- **Open** - (Default) Lists all unpaid Invoices (includes Open and Overdue)
- **Overdue (30, 60, 90 days)** - Lists all Overdue Invoices
- **Paid** - Lists all Paid Invoices
- **Closed** - Lists all Invoices which have been Closed out

For a complete description of **Invoice Status** see Invoice Fields

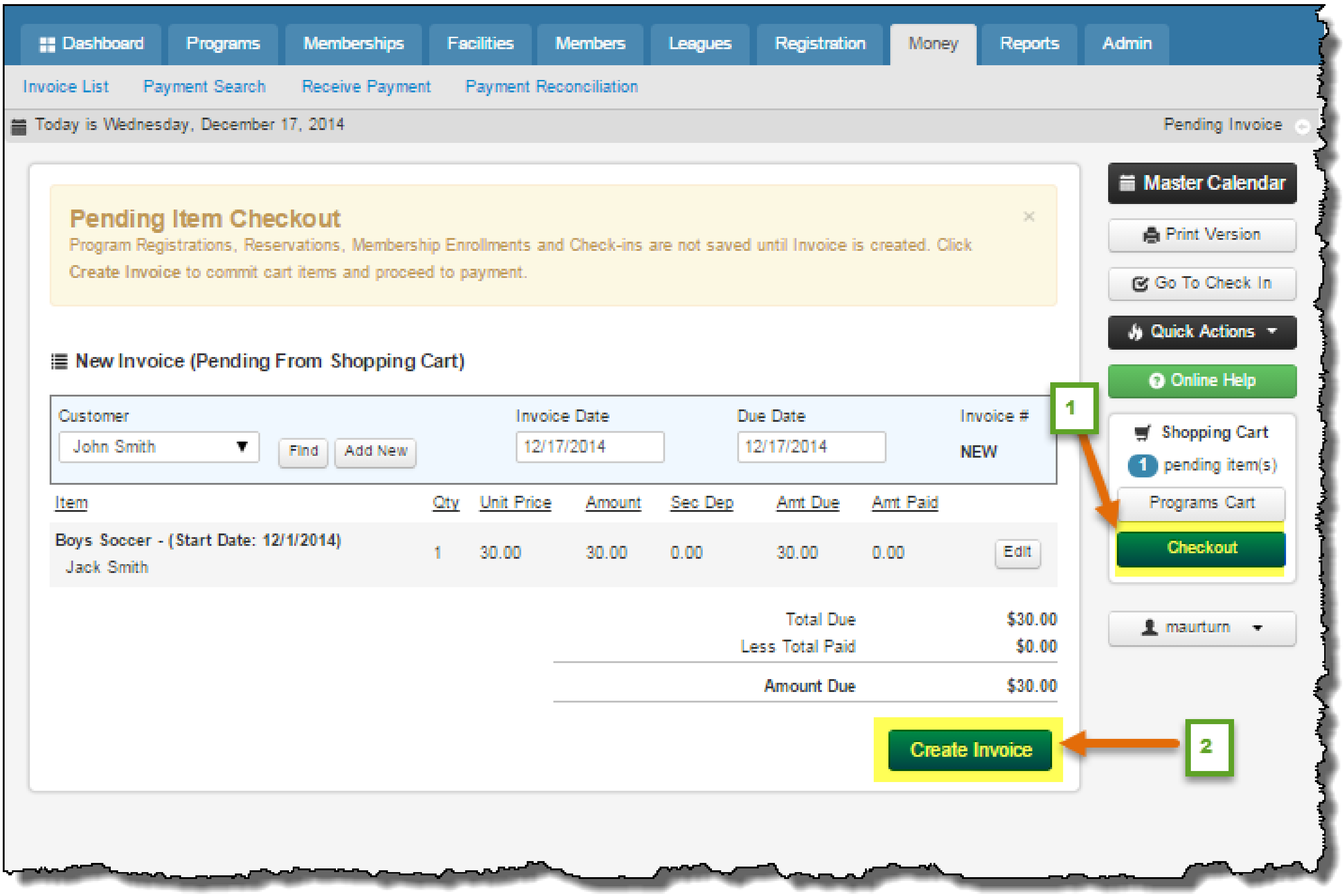
Choose your **Invoice Status** and optionally enter the **Invoice #** and/or **Last Name** and hit **Apply Search.** Click on the Invoice Number to View and/or Edit the Invoice (see Viewing and Editing Invoices).

To Print Multiple Invoices, see Printing Multiple Invoices

To Send Multiple Emails for Payment Online, see Sending Multiple Invoice Emails for Online Payment

Creating Invoices (Registrations, Reservations, Memberships)

Invoices are created as a result of processing **Program Registrations**, **Facility Reservations** (that require payment), **Membership Enrollments** and **Drop-In Program Check-ins** (that require payment). Once you click on the **Checkout** button from the Shopping Cart you will be directed to the Pending Invoice page. Clicking **Create Invoice** will create the invoice and then present you with the various *Payment Options*. See Invoice Payments.



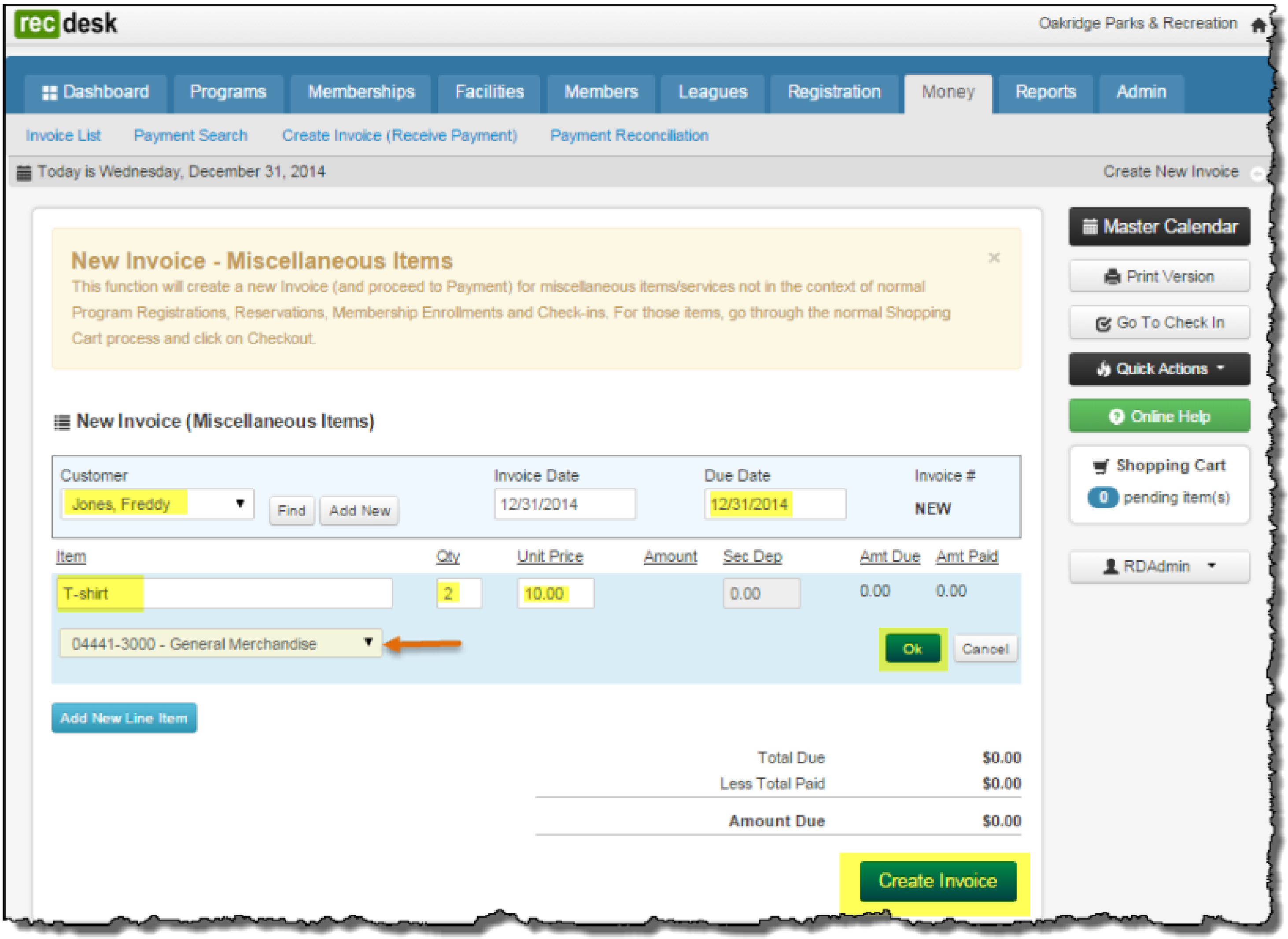
Creating Invoices (Miscellaneous)

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

Basic Workflow

- Enter the **Customer Name** by clicking on the Find or Add New button
- The **Invoice Date** defaults to the date the Invoice was created, but can be changed
- Enter the **Due Date** of the Invoice
- For **Item**, type the item name for this item on the invoice
- Enter the Quantity (**Qty**) and its **Unit Price**
- You may optionally add a Security Deposit in the **Sec Dep** field
- Optionally choose the **Sales Tax** rate from the drop down
- You may also optionally assign a **GL Account** to the Item
- Click **Ok**

Repeat this process by clicking on **Add New Line Item** for each Item in the Invoice and then click **Create Invoice** once all line items are entered. Then choose **Process Payment Later (Send Email Confirmation Now)** or **Process Payment Now** and follow the steps from the **Pay Invoice** page of **Making a Payment** under Invoice Payments


rec desk
Oakridge Parks & Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Invoice List
Payment Search
Create Invoice (Receive Payment)
Payment Reconciliation
Today is Wednesday, December 31, 2014
Create New Invoice
New Invoice - Miscellaneous Items
This function will create a new Invoice (and proceed to Payment) for miscellaneous items/services not in the context of normal Program Registrations, Reservations, Membership Enrollments and Check-ins. For those items, go through the normal Shopping Cart process and click on Checkout.
New Invoice (Miscellaneous Items)
Customer
Jones, Freddy
Find
Add New
Invoice Date
12/31/2014
Due Date
12/31/2014
Invoice #
NEW
Item
Qty
Unit Price
Amount
Sec Dep
Amt Due
Amt Paid
T-shirt
2
10.00
0.00
0.00
0.00
04441-3000 - General Merchandise
Ok
Cancel
Add New Line Item
Total Due $0.00
Less Total Paid $0.00
Amount Due $0.00
Create Invoice
Master Calendar
Print Version
Go To Check In
Quick Actions
Online Help
Shopping Cart
0 pending item(s)
RDAdmin

Viewing and Editing Invoices

Invoices can be ***viewed*** and/or ***edited*** by searching for the Invoice (see Invoice Search) and then clicking on the Invoice Number.

Viewing Invoices

Invoices can be viewed in any of these ways:

- From the Dashboard, in the Invoices - Balance Due section, click on the amount labeled Open or Overdue to view the Invoice List of Invoices with those statuses
- Perform an Invoice Search (see Invoice Search), and click on the **Invoice Number**
- Go to the Roster Page of a program (see Working with Rosters), and click on **Invoice** for the roster member
- Perform a Reservation Search (see Searching, Viewing and Editing Facility Reservations), click **Show Details**, and then click **Go to Invoice**

For a complete list of Invoice related attributes see Invoice Fields**.** Additionally, the Invoice contains 3 tabs at the bottom:

- **Notes -** these can be added by clicking on Add New Note when viewing an Invoice
- **Payments -**this tab shows all payments associated with this Invoice. Click on a payment # to view, edit, or issue refunds for this payment
- **History -** shows a full history of all activity on this Invoice, including the type of Activity, Date, Description of the Activity, and the User who processed the Activity

Editing Invoices: Basic Workflow

- Click on the **Edit** button
- Editing information specific to the *entire Invoice*:
    - **Customer Name** defaults to the person assigned to Head of Household; this can be changed by choosing any other family members from the drop down list

- **Invoice Date** defaults to the date the Invoice was created; this can also be changed

- **Due Date** also defaults to the date the Invoice was created, but can be modified here as well

- Editing *item specific* Invoice information:

  - Click on the **Edit** button for the item to be changed

  - Change (increase) the **Unit Price**, **Security Deposit**, and/or **Sales Tax** amounts/rate

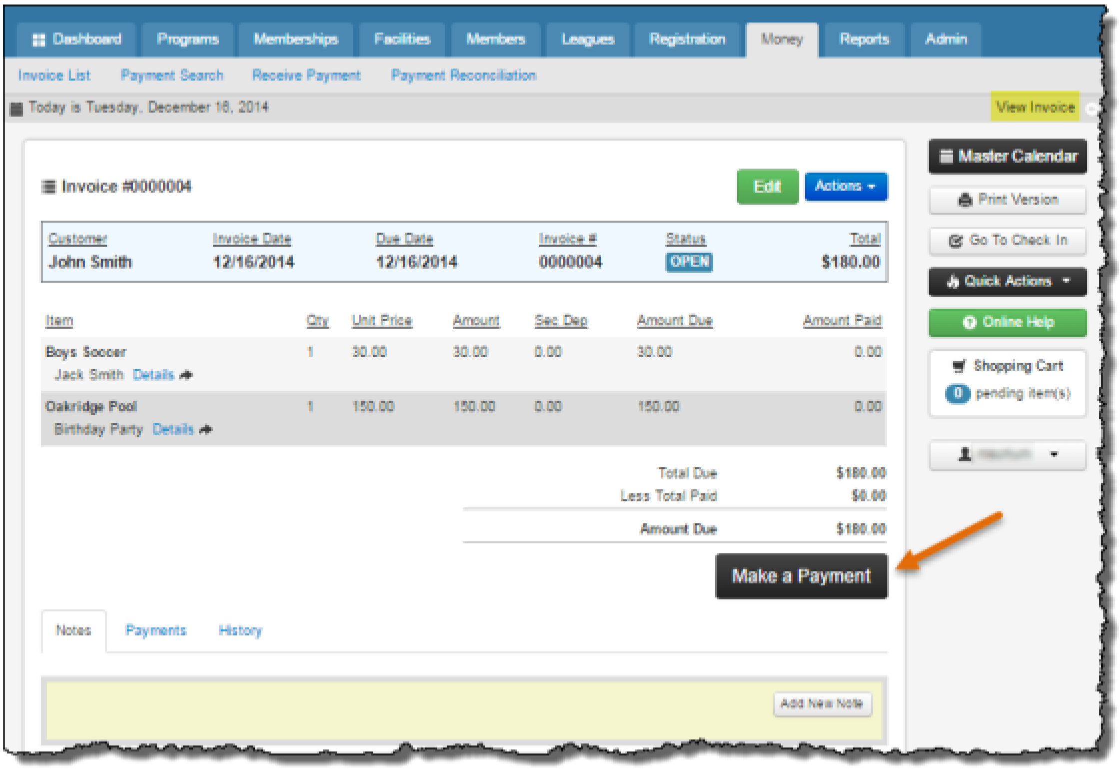
  - Click **OK**

- Click **Save**

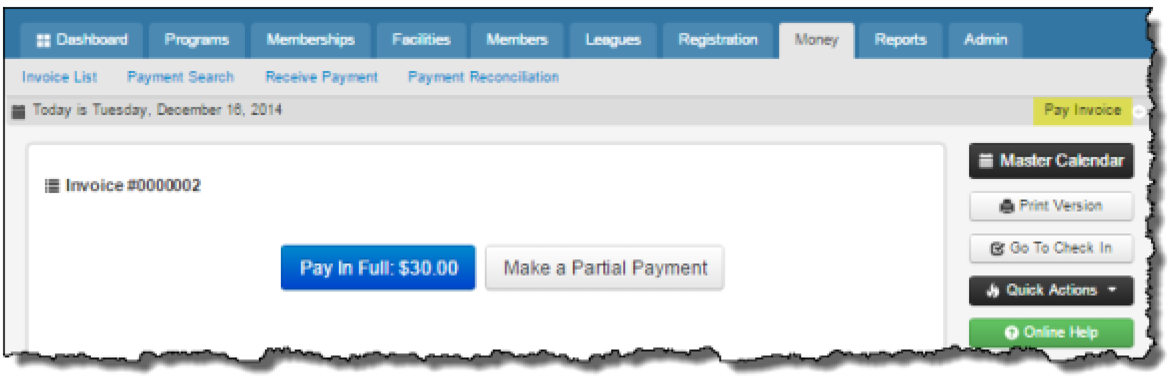
Invoice Payments (Internal)

Making a Payment on an Invoice

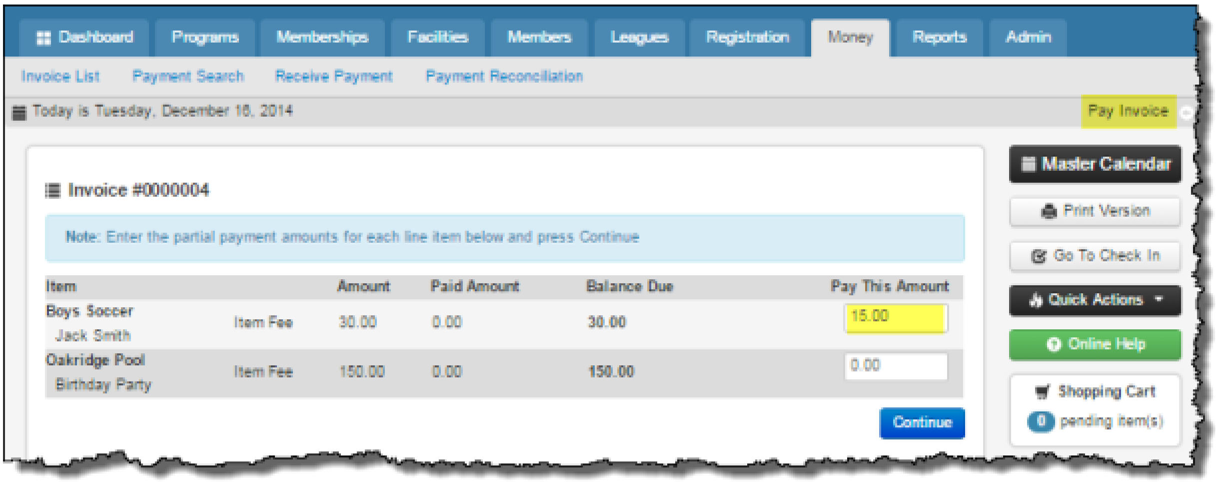
To make a **payment** on an Invoice, View the Invoice (see Viewing and Editing Invoices) and if a balance is due, click **Make a Payment**



You will then be brought to the **Pay Invoice** page, where you will see the options to **Pay In Full** with the amount, or **Make a Partial Payment**:

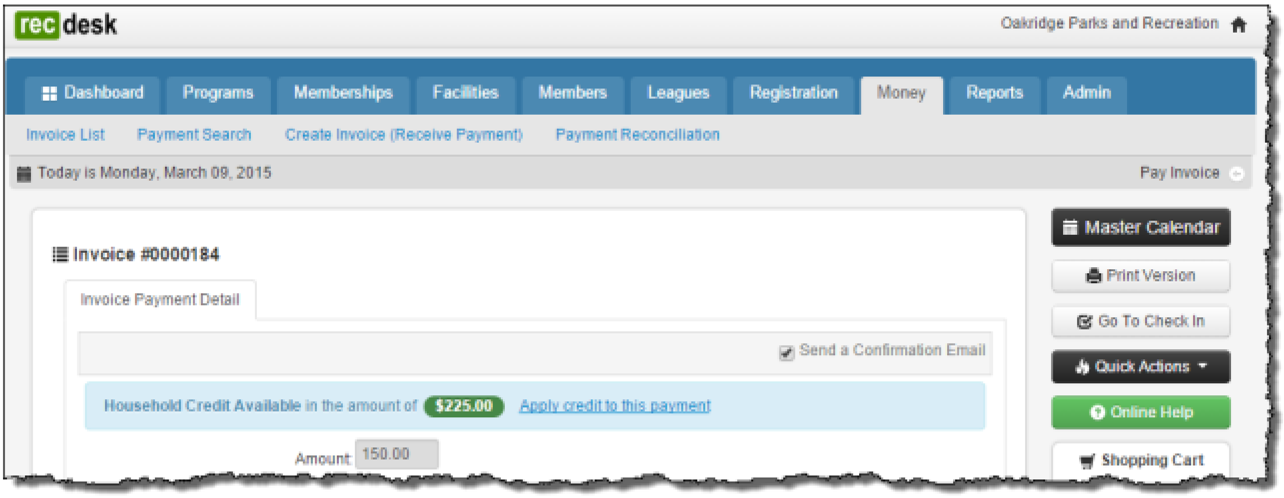


If you opt to **Pay In Full**, you will be brought to the traditional payment page (see Making a Payment). If you choose the **Make a Partial Payment** option, you will be brought to the **Pay Invoice** page, where you can select which items to make partial payments on. Enter the amounts and click **Continue**.



Household Credits

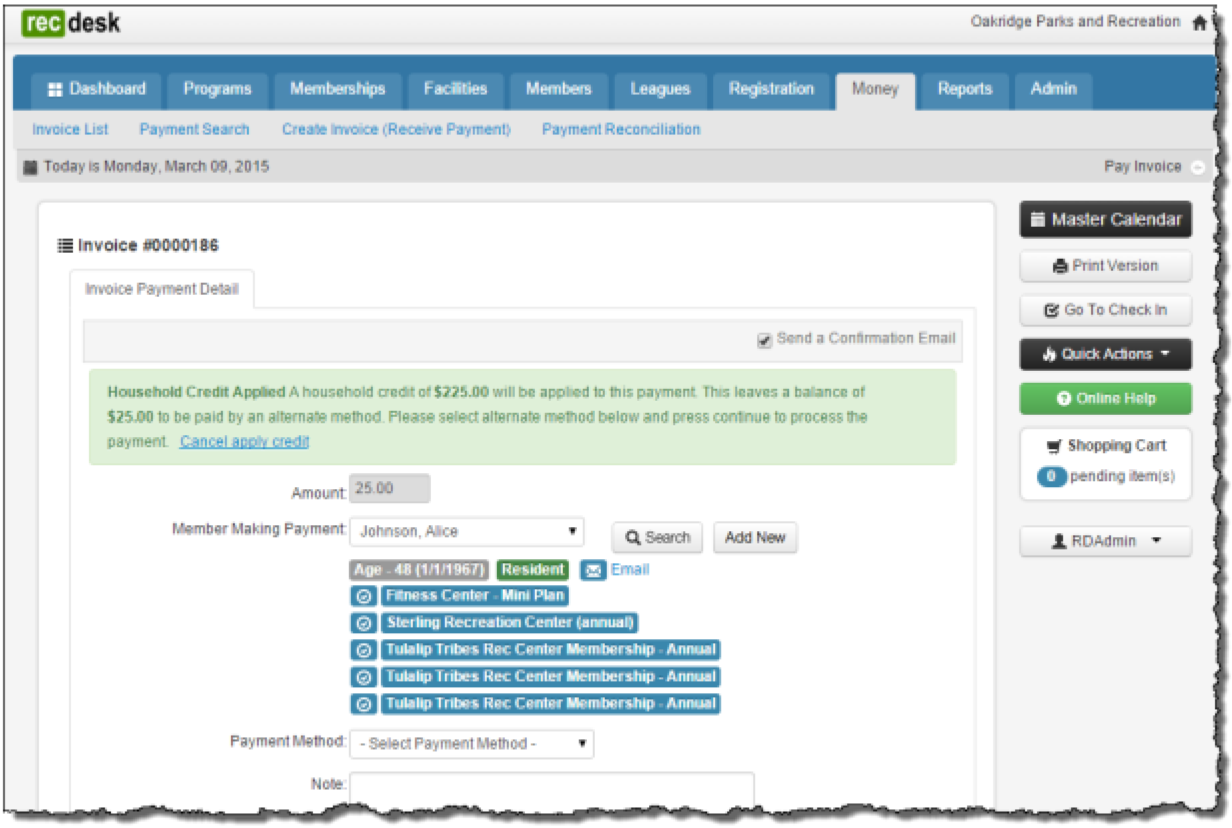
If this customer has a balance in his/her Household Credit Account, the balance in the account will be shown, and he/she will be given the option to Apply credit to this payment.



To apply the credit to this payment, click **Apply credit to this payment**.

- If the payment amount is **less than the balance** in the Household Credit Account, click change the Member Making Payment (if applicable), click Continue, and then click OK. The entire payment will be made from this account, and the balance of the Household Account will be adjusted by this amount.

- If the payment amount is **greater than the balance** in the Household Credit Account, this will result in a split payment. You'll receive a message stating the remaining amount of the Household Credit Account that will be applied, and then you will be asked to select the Payment Method of the remaining balance due. The entire Household Credit Account will then be depleted.


rec desk
Oakridge Parks and Recreation
Dashboard
Programs
Memberships
Facilities
Members
Leagues
Registration
Money
Reports
Admin
Invoice List
Payment Search
Create Invoice (Receive Payment)
Payment Reconciliation
Today is Monday, March 09, 2015
Pay Invoice
Invoice #0000186
Invoice Payment Detail
Send a Confirmation Email
Household Credit Applied A household credit of $225.00 will be applied to this payment. This leaves a balance of $25.00 to be paid by an alternate method. Please select alternate method below and press continue to process the payment. Cancel apply credit
Amount: 25.00
Member Making Payment: Johnson, Alice
Search
Add New
Age - 48 (1/1/1967)
Resident
Email
Fitness Center - Mini Plan
Sterling Recreation Center (annual)
Tulalip Tribes Rec Center Membership - Annual
Tulalip Tribes Rec Center Membership - Annual
Tulalip Tribes Rec Center Membership - Annual
Payment Method: - Select Payment Method -
Note:
Master Calendar
Print Version
Go To Check In
Quick Actions
Online Help
Shopping Cart
0 pending item(s)
RDAdmin

Making a Payment

Once the amount is set for your Invoice Payment, you will be ready to make your payment.

Basic Workflow

- The **Member Making Payment** will default to the Head of Household. You can change this to another Member of the same Household (by choosing him/her from the drop down), by clicking Search to choose another Member outside of that Household, or by clicking Add New.

- Choose a **Payment Method** from the drop down:
  - **Check** - you will be prompted to enter a **Check Number**.

  - **Cash** - you will be prompted to enter **Amount Tendered**.

  - **RecDesk Credit Card** - the Payment Method that will allow for integrated credit card processing against your merchant account. This is the most commonly used method for credit card payments. See RecDesk Credit Card.

  - **Internal Credit Card** - a method for recording credit card payments that are performed using legacy methods using older equipment and/or readers **not integrated with RecDesk**. Although Internal Credit Card payments are not processed through RecDesk, specifying this payment method allows you to record and track these transactions in RecDesk.

  - **Stored Payment Option** (only available on Authorize.net gateway) - choose one from the drop down. See Household Stored Payment Options to add options to this list.

- Optionally add a **Note** for this Payment

- Click **Continue** and if everything looks good, click **OK** to confirm.

RecDesk Credit Card

RecDesk Credit Card is the payment method that will allow for integrated credit card processing against your merchant account. This is the most commonly used method for credit card payments. You can optionally swipe credit cards instead of manual data entry if using Stripe or Authorize.net.

Basic Workflow

- The **Member Making Payment** will default to the Head of Household. You can change this to another Member of the same Household (by choosing him/her from the drop down), by clicking Search to choose another Member outside of that Household, or by clicking Add New.

- **Payment Method** - Choose **Recdesk Credit Card.**

- **Card Entry Options**:

    - **Manual Data Entry** - Choose a **Card Type** from the drop down, enter the **Card Number** (numbers only, no dashes), **CVV Security Code**, **Expiration date** (choose month and year from the drop down), and optionally enter a **Note** at the bottom.

    - **Credit Card Swiping (for customers who have Stripe or Authorize.Net as payment processor)**** - Click **Swipe Card Data**. Then simply **swipe the credit card** and then click OK to confirm! ***Important Note:*** *If you are entering a **Note**, be sure to type it first and then PLACE THE CURSOR IN THE SCAN CARD BOX PRIOR TO SWIPING CARD. For the remainder of your login session, when selecting RecDesk Credit Card as a Payment Method, your system will automatically remain in the "SWIPE CARD NOW" mode until you click Manually Enter Card Data, where it will remain until Swipe Card Data is chosen again.*

*** The Stripe and Authorize.net platforms are the standard RecDesk payment gateways that support Card Present transactions (i.e. swipe transactions). PayPal and other non-standard gateways either do not support Card Present transactions or are not enabled to do so with RecDesk.*

For supported card readers see [Money Related FAQs]

Sending Invoices for Online Payment

An Invoice can be sent to a Customer to **view** or **pay** the Invoice Online.

Basic Workflow

- View the Invoice (see Viewing and Editing Invoices)
- Click on the **Actions** drop down and choose **Send Invoice to Customer**
- You will then be editing an email that contains the public link to the Invoice which reads, "Go to Invoice now: Invoice #invoice number"
- You can modify the email in any way that you'd like, but be sure to include the public link to the Invoice
- Click Send.

Once the customer clicks on the public link to the Invoice, he/she will be allowed to pay the Invoice by credit card. If a balance exists in the Household Credit Account, the customer can opt to apply the Household Credit to the Invoice payment.

Printing Multiple Selected Invoices

Multiple Invoices of your choice can be ***Printed*** at once.

Basic Workflow

- Navigate to the Invoice List and filter the list if desired (see Invoice List);

- To select **All Invoices** on the list to print, check the box beside the column headers;

- To select **Individual or Multiple** invoices to print, check the box(es) next to the Invoice Number(s);

- Click **Actions**, then choose **Print Selected Invoices**. Each Invoice selected will be on a separate page.

Sending Multiple Selected Invoice Emails for Online Payment

Multiple Invoices of your choice can be ***Emailed*** to the customers at once for **Payment Online**.

Basic Workflow

- Navigate to the Invoice List and filter the list if desired (see Invoice List);
- To select **All Invoices** on the list to send, check the box beside the column headers;
- To select **Individual or Multiple** invoices to send, check the box(es) next to the Invoice Number(s);
- Click **Actions**, then choose **Send Selected Invoices**. An Invoice Template will appear with a list of all the Invoice Numbers and Email Addresses of the recipients;
- To Preview how an email willl display, click the **Preview** button next to it.

Customizing the Emails (Optional)

You can customize the message in all the emails sent by typing a combination of ***Text and Email Tokens*** into the subject and the body of the email. The ***Email Tokens*** will automatically insert data values for the individual invoices. *Note: This process works similar to a mail merge.*

Available tokens are listed below (click **Show Template Help** for this information). Simply insert these tokens (including Begin and End brackets) into your template as desired. Note: *DO NOT FORMAT TEXT ON ANY OF THESE TOKENS*

The following tokens may be inserted in the ***Subject and/or Email Body***:

[Organization] - Inserts the Organization name

[InvoiceNumber] - Inserts the individual Invoice Number

[MemberFirstName] - Inserts the first name of the Member associated with the Invoice

The following tokens are **only valid in the *Email Body***:

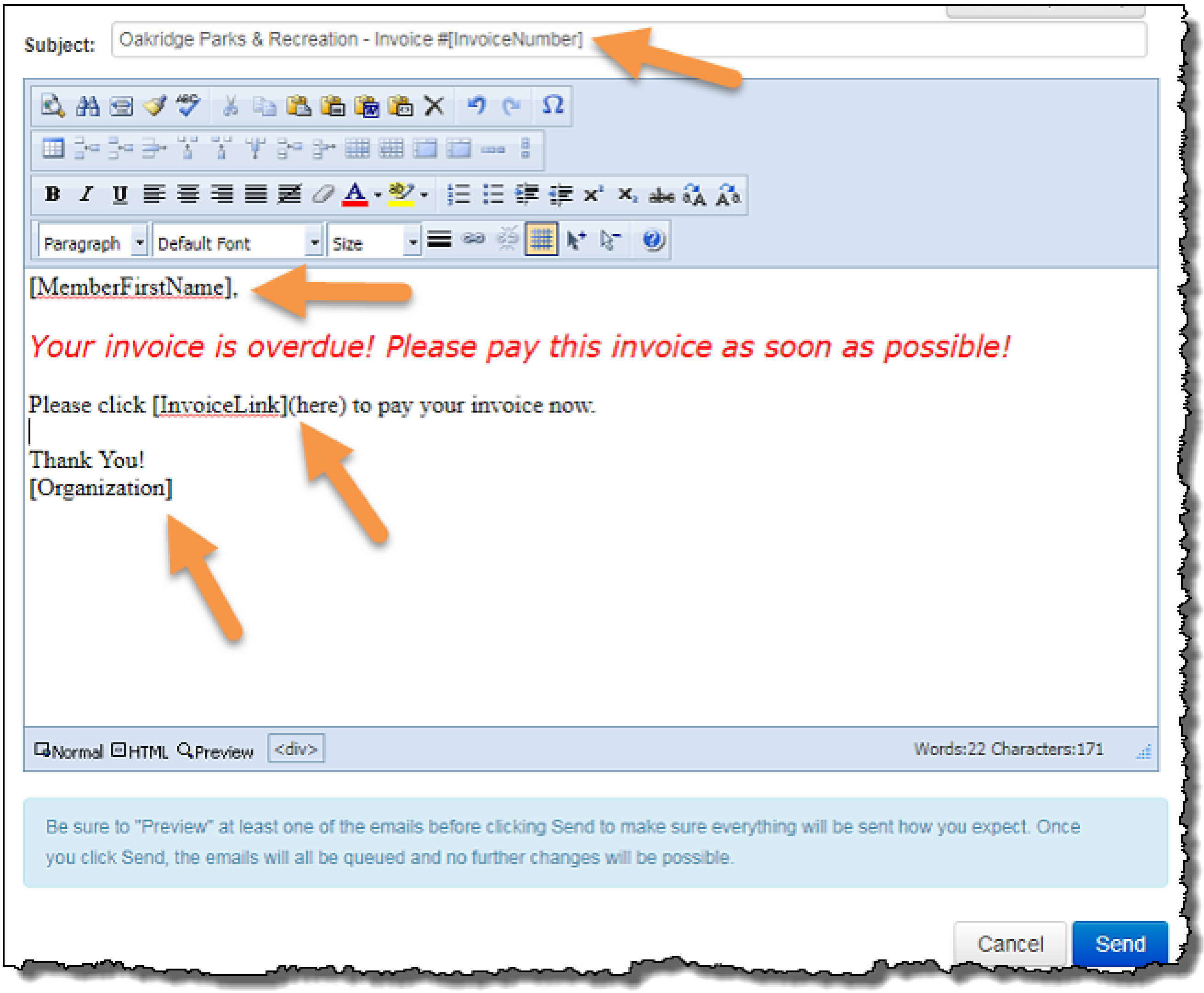
[InvoiceLink] - Inserts a link to the public Invoice and will appear as: “Invoice # xxxxxxx"

[InvoiceLink](Custom Link Text) - Inserts a link to the public Invoice with custom text instead of the invoice number. Type the custom text for the link inside the parentheses.

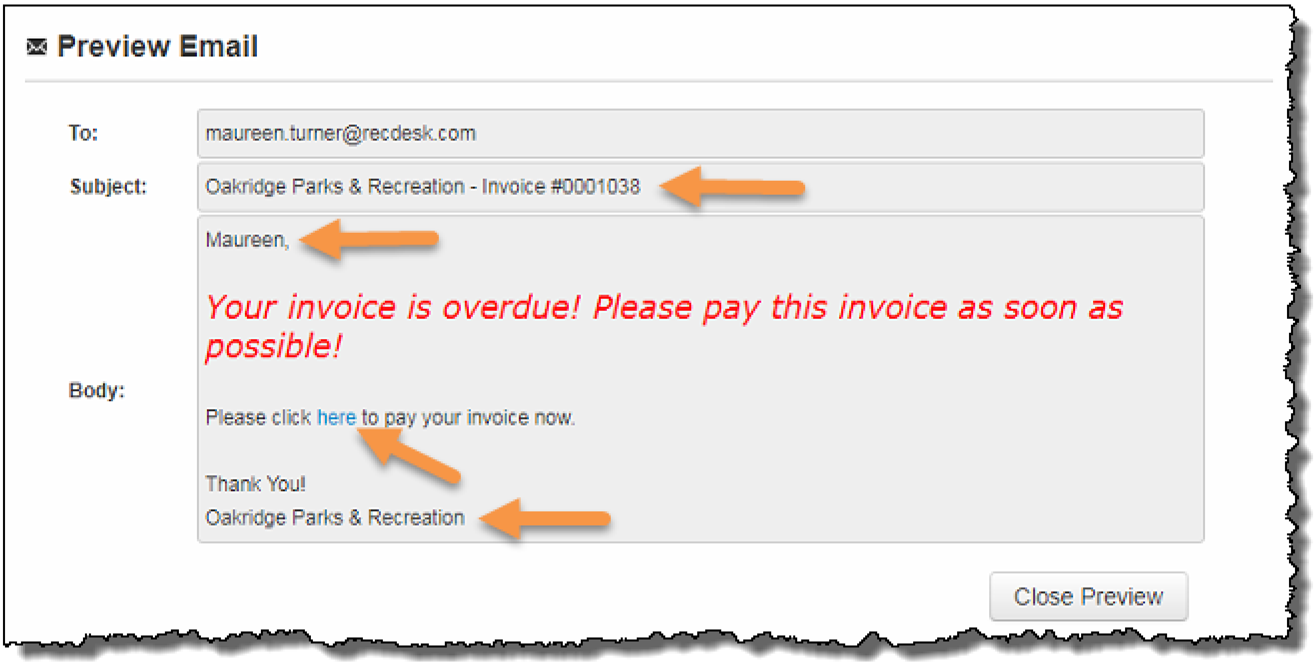
After customizing the email, be sure to click **Preview** to see how it will look once it's sent.

Example:

Customized Email:



Preview of Email:

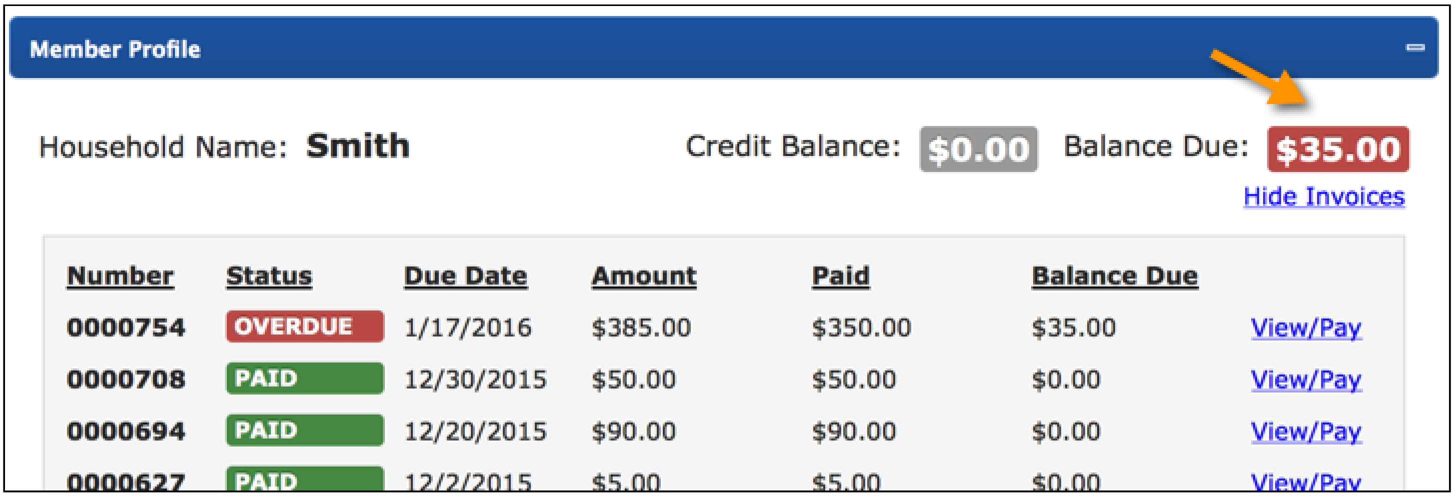

Preview Email
To:
maureen.turner@recdesk.com
Subject:
Oakridge Parks & Recreation - Invoice #0001038
Body:
Maureen,
Your invoice is overdue! Please pay this invoice as soon as possible!
Please click here to pay your invoice now.
Thank You!
Oakridge Parks & Recreation
Close Preview

Online Invoice Payments (RecDesk Community)

RecDesk Community members (customers) have the ability to **View and Pay** invoices from their **Profile Page** within the RecDesk Community portal. See below:

Portal View

Once the user navigates to their Profile, there will be a Balance Due badge along with appropriate links to View and/or Pay Invoices



Invoice View/Pay Page

Once the user has clicked on the View/Pay link, they are redirected to an external page to View details of the Invoice and proceed with Payment if applicable.

recdesk Oakridge Parks and Recreation

Balance Due of **$35.00** Pay Now

Invoice

Invoice #0000754

Customer	Invoice Date	Due Date	Invoice #	Status	Total
Michael Morris	**1/17/2016**	**1/17/2016**	**0000754**	OPEN	**$385.00**

Item	Qty	Unit Price	Amount	Sec Dep	Sales Tax	Amount Due	Amount Paid
Fall Camp Michael Morris Details	1	385.00	385.00	0.00		385.00	350.00

Sub Total	**$385.00**
Sales Tax	**$0.00**
Total	**$385.00**
Less Amount Paid	**($350.00)**
Amount Due	**$35.00**

Invoice Me (Pay Later) Option for RecDesk Community

RecDesk offers an **Invoice Me (Pay Later)** option for those customers who would like to allow their Community Members to register for Programs, enroll in Memberships and make Reservations online but Pay Later. See Invoice Me (Pay Later) Option for RecDesk Community

Merging Invoices

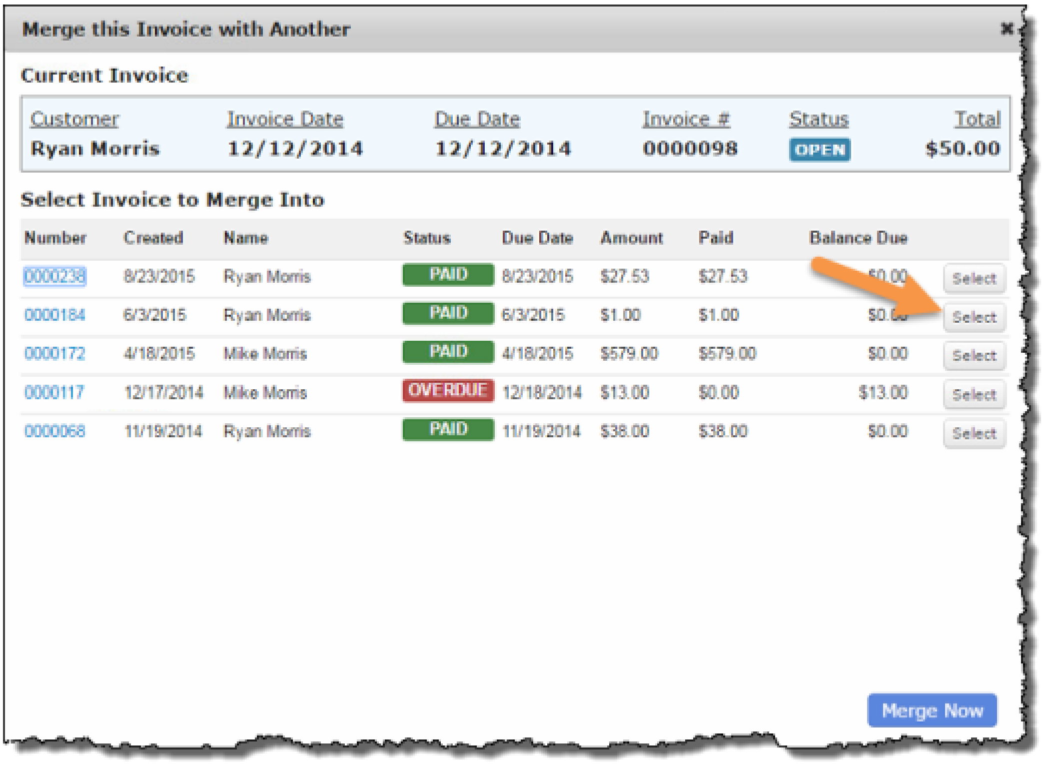
RecDesk allows you to **Merge Invoices**. You are allowed to Merge any **Open**, **Overdue** or **Paid** Invoice with any other Open, Overdue or Paid Invoice ***within a Household***.

Basic Workflow

- View the Invoice that you'd like to **Merge** *into* another Invoice (see Viewing and Editing Invoices)

- Click on the **Actions** drop down and choose **Merge this Invoice with Another**

- You will then see a list of all **Open**, **Overdue** and **Paid Invoices** in reverse chronological order by Invoice Number for the Household in which the original Invoice exists



- You may optionally click on the Invoice Number to view that Invoice (will open in another tab/window of browser)

- Click the **Select** button beside the Invoice you wish to **Merge** *into* and click ***Merge Now***

- A message will appear stating **"This action is irreversable. Are you sure you want to merge these Invoices?"**

- Click **OK** to confirm

- The Invoice you selected to Merge *into* will now be displayed with all **line Items, Notes, Payments and History combined** on that one Invoice. *Note*: The original Invoice will now be marked as "Closed" with a link to the Invoice into which it was merged. To see all Closed Invoices, see the Invoice List.

Working With Payment Plans

RecDesk allows you to create a **Payment Plan** for an Invoice to create multiple installments on the unpaid balance of an Invoice. Installment payments can be 1) **Auto-Scheduled for Payment** (requires Household Stored Payment Options and Authorize.net) 2) **Emailed to Customer** for Online Payment or 3) **Managed Manually** in RecDesk Director.

Creating a Payment Plan for an Invoice

To create a Payment Plan for an Invoice, navigate to an *Open* or *Overdue Invoic*e and click on ***Actions***, ***Create Payment Plan***. Then select the type of payment plan you want to create for the Unpaid Balance of the Invoice by either selecting a predefined Payment Plan Template from the drop down, *OR* clicking ***Create Custom Payment Plan***. Both options will allow you to edit the Payment Plan, but choosing a template will prefill some of the options.

Basic Workflow

- **Payment Plan Name** will default to *Payment Plan (Invoice #)*; you can rename this if you'd like
- Enter the **Plan Start Date** (defaults to *current date*)
- Select a **Payment Plan Method** from the drop down:
    - **Enroll in AutoPay** - Select this option to have installment payments made automatically. Then choose a Payment Option from the drop down (*Note: You must have Stored Payment Options for this Household).* For more info. see Household Stored Payment Options.
    - **Send Installment Due Email** - Select this option to send an email to the Customer each time an Installment Payment is due.
    - **Manage Manually (No Email Sent)** - Select this option to manage the Payment Plan manually
- Select the **Payment Frequency** from the drop down
    - For ***Daily*** Payment Frequency, select how often to create Daily Payments by choosing a number in the **Every # days** drop down
    - For ***Weekly*** Payment Frequency, select how often to create Weekly Payments by choosing a number in the **Every # weeks** drop down and select which **Day(s) of Week**
    - For ***Monthly*** Payment Frequency, select how often to create Monthly Payments by choosing a number in the **Every # month** drop down and select either **On Day of Month** and enter the calendar day from the drop down *OR* choose a more specific pattern by selecting the **On the** option and choosing from the drop downs (for example, *On the Last Friday)*

- Optionally enter an **Initial Payment/Deposit** as a **Percent (%)** *OR* in **Dollars ($)**

- Enter **Number of Payments** (*Note*: this number does <u>not include</u> **Initial Payment/Deposit**)

- Click **Continue** to preview the payment plan. You can click **Remove Installment**, **Add Installment**, or change any Installment Amounts, but they must add up to the Outstanding Balance in order to Create the Payment Plan. Clicking **Recalculate** will split all installments into equal amounts.

Making a Payment on a Payment Plan

Payment Plan Installments can be made manually by navigating to an Invoice that has a Payment Plan and by clicking on ***View Payment Plan*** or ***Make a Payment***.

Basic Workflow

- Click **Pay Installment** (*Note:* Sales tax will be calculated at the time of the payment)

- You will be brought to the traditional payment page (see Making a Payment)

Once the payment is complete, the Outstanding Balance Due on the Invoice will be adjusted accordingly and the *Invoice Due Date* will be be changed to the date the next installment is due. Once the last Installment Payment is made, the Invoice Status will be set to Paid.

Appendix

Invoice Fields

Invoice Fields

Relating to the Entire Invoice:

- **Customer Name -** the person making the payment (defaults to the person assigned to Head of Household)

- **Invoice Date -** the date the Invoice was created

- **Due Date -** the date the Invoice is due (defaults to the date the Invoice was created, but can be modified)

- **Invoice # -** an Internal RecDesk Id assigned to the Invoice

- **Status** - the current status of the Invoice. Invoice Searches can be performed based on Status:
  - **Open -** the Invoice is not yet paid in full
  - **Overdue -** the Invoice is not yet paid in full, and its Due Date is in the past
  - **Paid** - payment has been made in full
  - **Closed -** the Invoice has been manually closed out (as a bad debt, for example)

- **Total** and **Total Due** - the total **Amounts Due** for all items

- **Total Paid** - the total **Amounts Paid** for all items

- **Amount Due** - the **Total Due** less the **Total Paid**

Relating to a Specific Invoice Item:

- **Item** - a registration, reservation or membership on the Invoice

- **Qty** - the quantity of that item on the Invoice

- **Unit Price -** the unit price or cost for the item

- **Amount** - Qty times Unit Price

- **Sec Dep** - the security deposit (for reservations)
- **Sales Tax** - the sales tax rate for the item
- **Amount Due** - Amount plus Security Deposit
- **Amount Paid** - Amount paid (to-date) on the item

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

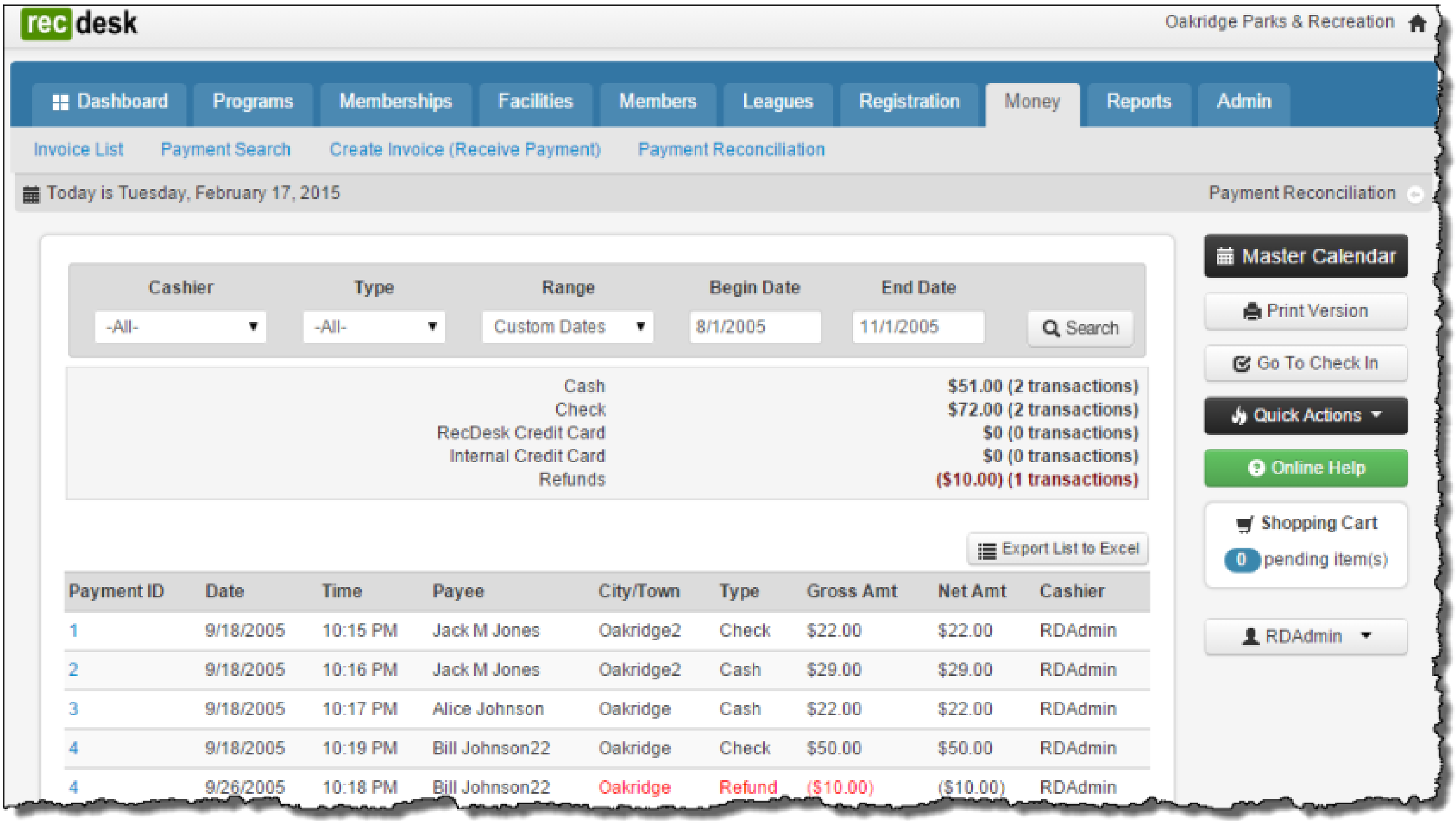
- **Payment ID** - the internal RecDesk ID of the payment

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

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/Household Credit)

Payment Reconciliation Page



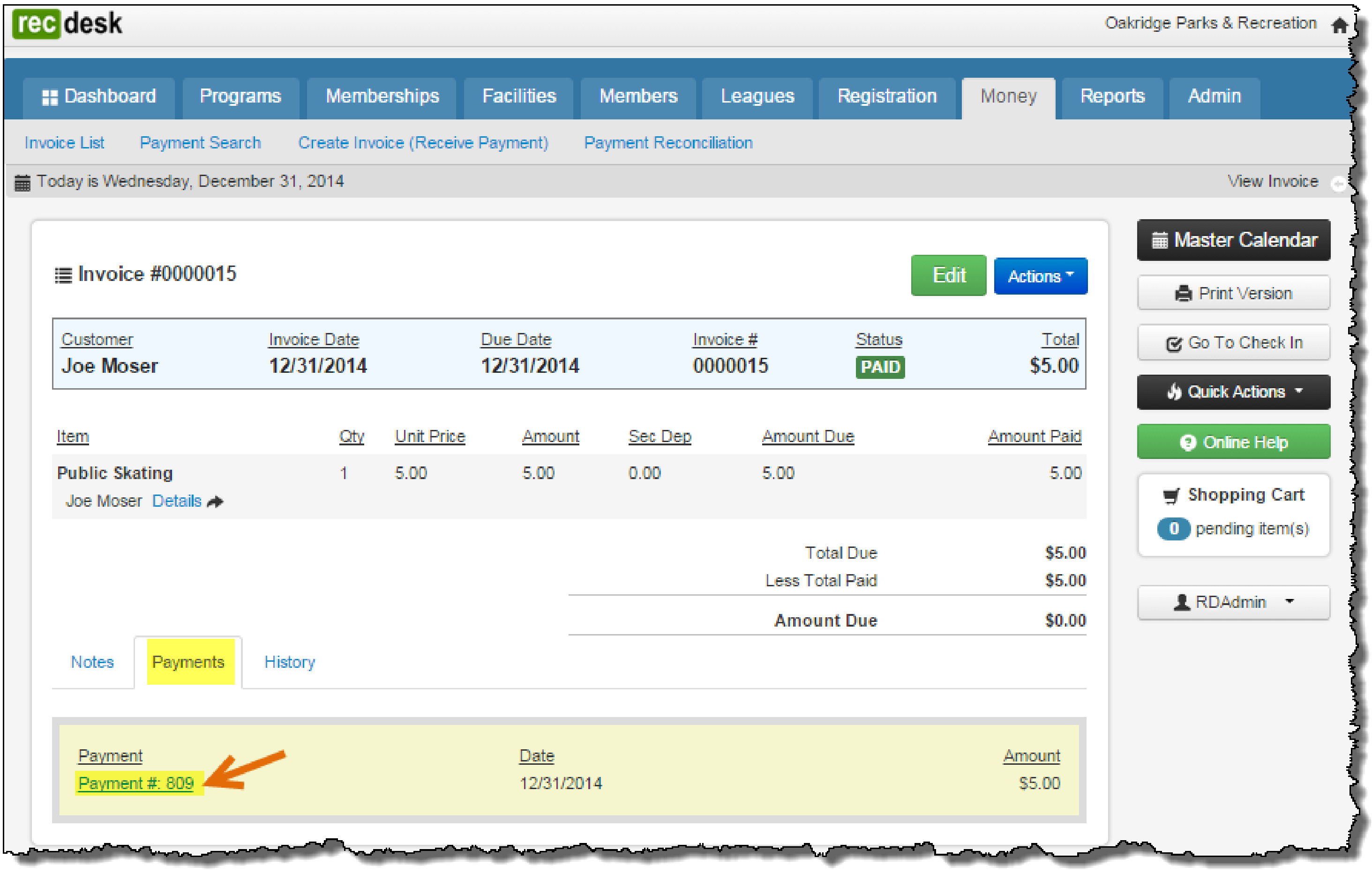
Refunds

Refunds can be issued by navigating to the ***Payment*** to be refunded via the Payment Search page or the View Invoice links associated with *Program Registrations, Memberships* or *Facility Reservations.*

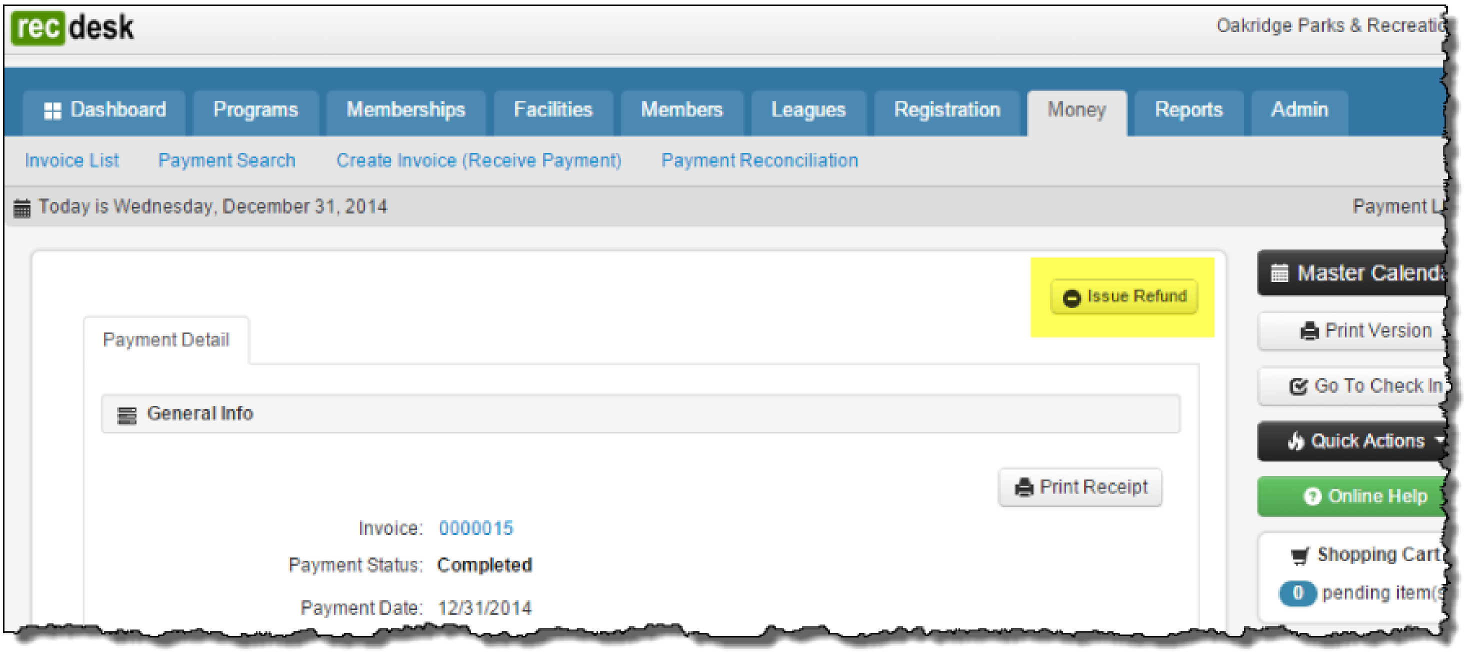
Please Note: *This records the Refund in RecDesk for reporting and reconciliation purposes but* ***does not*** *refund the actual credit card. This must be done through your Authorize.net, Stripe or PayPal administrative interface.*

From the View Invoice page:

- Click on the **Payments** tab, and click on the **Payment #** for which the refund is being processed



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.



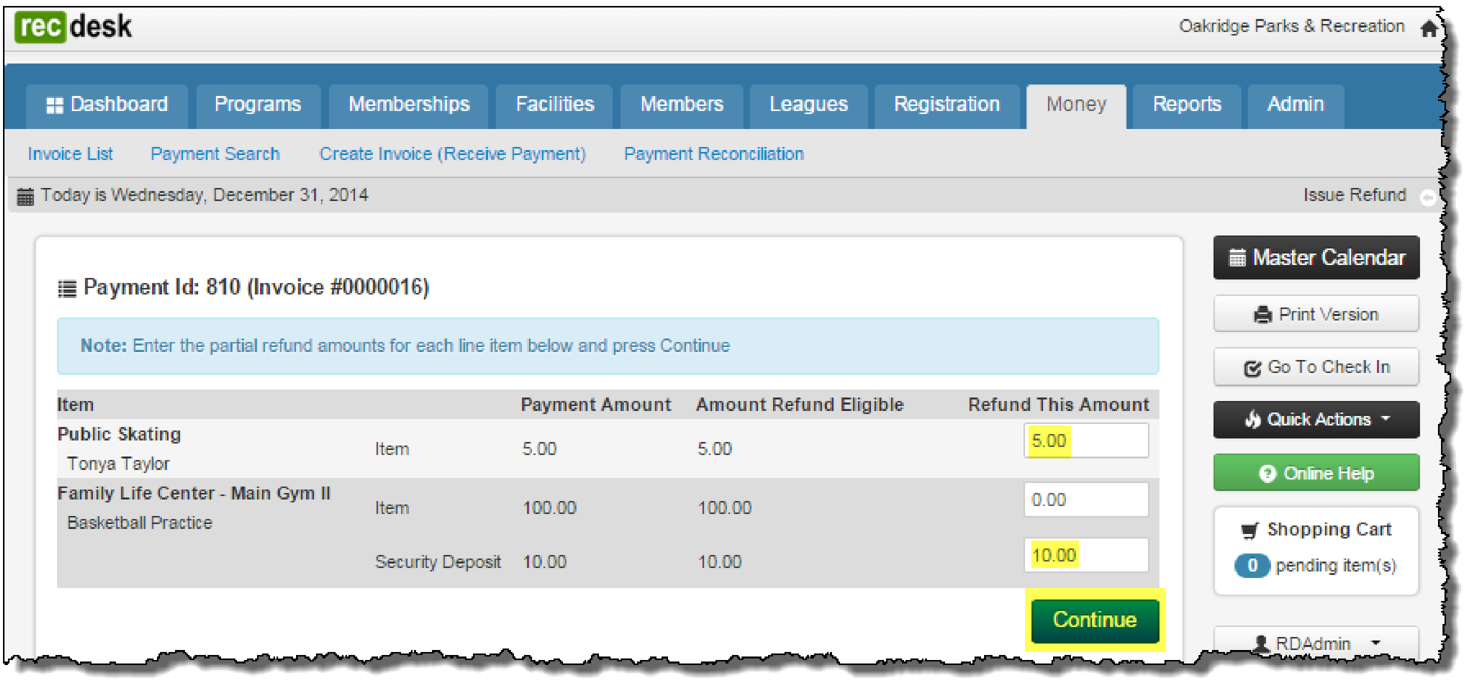
Next, choose the **Refund Method** and optionally a **Reference**, and **Refund Note**. If you chose the **Household Credit** method, you'll receive the message: "Note: This will auto-credit this customer's household account in the amount of the refund". Then you have the option to **Refund Full Amount** or **Refund Partial Amount**.

Full Refunds:

If you choose **Refund Full Amount**, continue by clicking **Process Now** and your refund is complete.

Partial Refunds:

If you choose **Refund Partial Amount**, you can issue specific refund amounts for each line item in the Invoice, then click **Continue** and then **Process Now** and your refund is complete.



Voids

Payments and **Refunds** can be voided in RecDesk. This process is irreversible and will permanently delete these transactions. These activities will be listed under the History tab of the Invoice.

Voiding a Payment

Basic Workflow

- First navigate to the Payment via the Payment Search page, or by Viewing and Editing Invoices, clicking on the **Payments** tab, and clicking on the **Payment #** of the payment to void.
- Click on the **Edit Payment** button
- Click on the **Void Payment** button
- Type the word "**VOID**" in the space provided and the **Reason for void**
- Click on the **Void Now** button

Note: If a Payment has Refunds associated with it, Voiding the Payment voids all Refunds associated with that payment as well.

Voiding a Refund

Basic Workflow

- First navigate to the Payment via the Payment Search page, or by Viewing and Editing Invoices, clicking on the **Payments** tab, and clicking on the **Payment #** for which the Refund was issued
- Click on the **Refunds** tab
- Click on the **Refund #**
- Click on the **Edit** button
- Click **Void Refund**

- Type the word "**VOID**" in the space provided and the **Reason for void**

- Click on the **Void** button

Online Invoice Payments (RecDesk Community)

See Online Invoice Payments (RecDesk Community)

Invoice Me (Pay Later) Option for RecDesk Community

RecDesk offers an **Invoice Me (Pay Later)** option for those customers who would like to allow their Community Members to register for Programs, enroll in Memberships and make Reservations online but Pay Later. See Invoice Me (Pay Later) Option for RecDesk Community

Setting Up Payment Plan Templates

Payment Plan Templates can be created and then used when building a Payment Plan for an Invoice (see Working With Payment Plans). To create a new Payment Plan Template, go to the ***Money*** tab and click on ***New Payment Plan Template***.

Basic Workflow

- Assign a **Template Name**

- Select a **Payment Frequency** from the drop down

    - For ***Daily*** Payment Frequency, select how often to create Daily Payments by choosing a number in the **Every # days** drop down

    - For ***Weekly*** Payment Frequency, select how often to create Weekly Payments by choosing a number in the **Every # weeks** drop down. Then select from **ONE** of these options:

        - **Based on Invoice/renewal date** - select this option to have payments start on the current date or **Membership Renewal Start Date** (this is the best option for Membership Auto-Renewals)
        - **On specific day(s) of week** - select which day(s) of the week payments will be made

    - For ***Monthly*** Payment Frequency, select how often to create Monthly Payments by choosing a number in the **Every # month** drop down. Then select from **ONE** of these options:

        - **Based on invoice/renewal date** - select this option to have payments start on the current date or **Membership Renewal Start Date** (this is the best option for Membership Auto-Renewals)
        - **On Day of Month** - enter the calendar day from the drop down
        - choose a more specific pattern by selecting the **On the** option and choosing from the drop downs (for example, *On the Last Friday)*

- Optionally enter an **Initial Payment/Deposit** as a **Percent (%)** *OR* in **Dollars ($)**

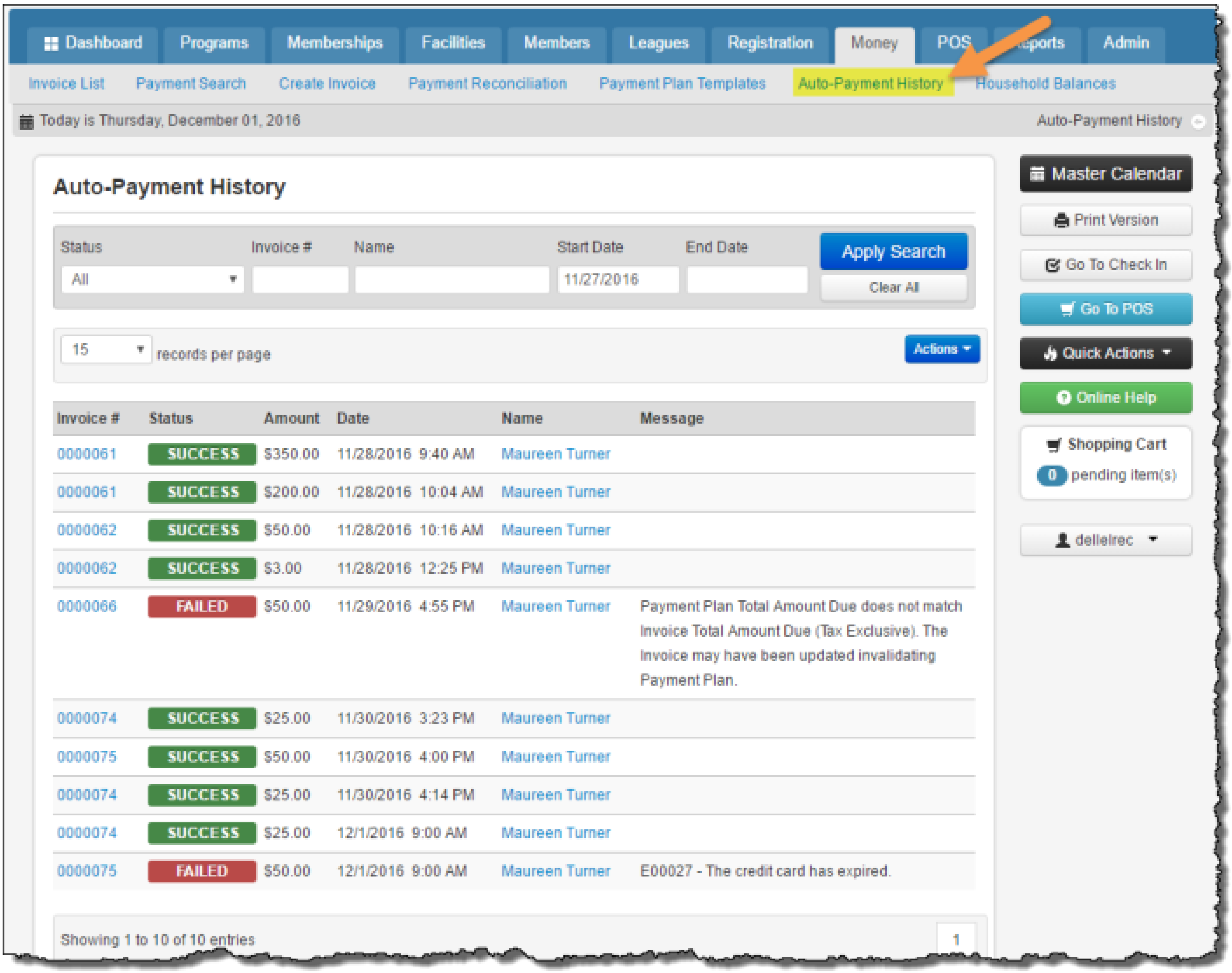
- Enter **Number of Payments** (*Note*: this number does not include **Initial Payment/Deposit**)

- To preview what the plan will look like, optionally click **Show Plan Preview** and enter a **Total Amount to Pay** and a **Plan Start Date** and then click **Preview Plan**

- Click **Save.**

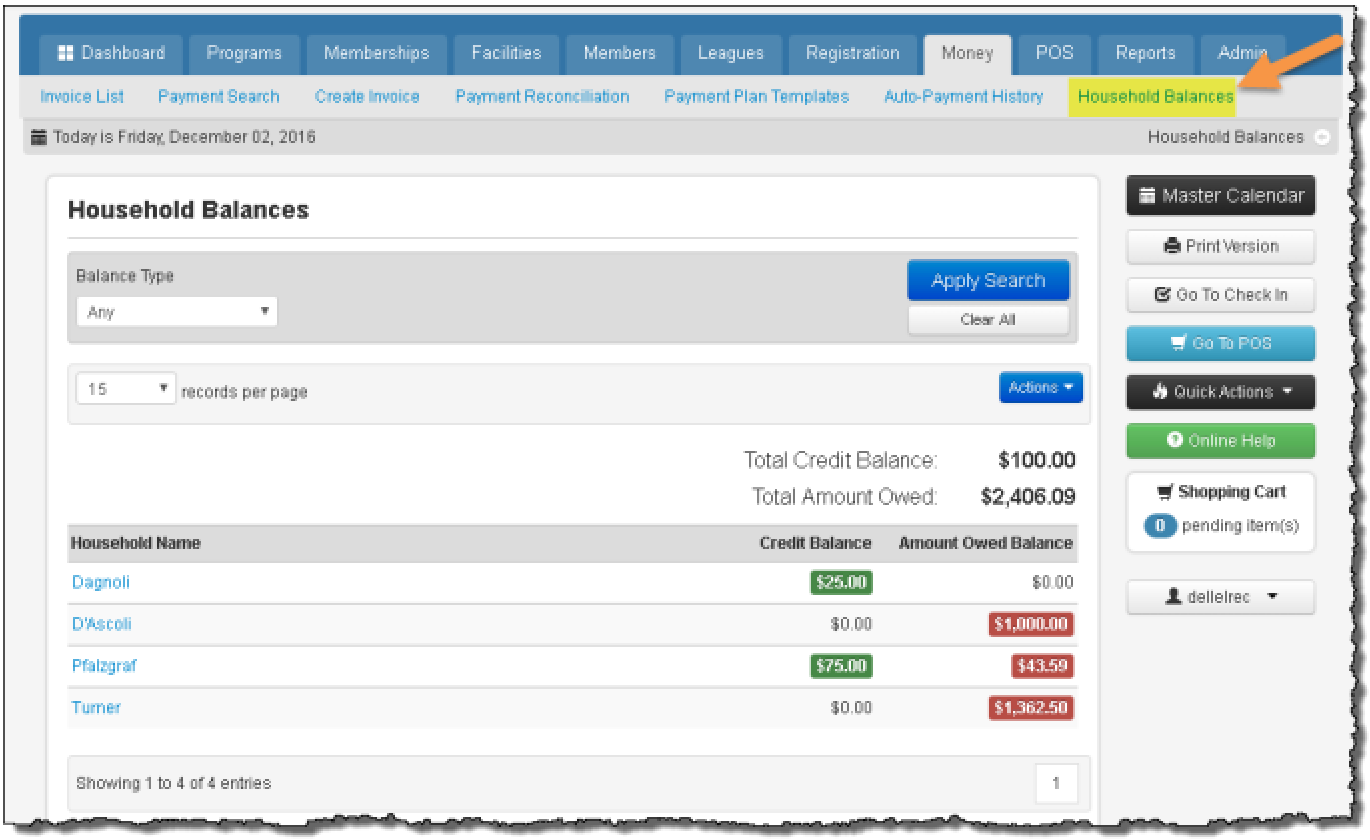
Auto-Payment History

The **Auto-Payment History** page shows all Invoices for which Auto-Payments have been attempted. For each Invoice marked as FAILED, please see Message to help you correct the issue for future Auto-Payments. You must click on the Invoice link and View Payment Plan and manually pay any installment which has a Staged for RecDesk Batch Icon that is still Pending.



Household Balances

The **Household Balances** page shows a summary of the *Total Household Credit Account Balances* and the *Total Amount Owed by all Households*. It also lists all Households that currently have a *Credit Balance* in their Household Credit Account and/or have an Amount Owed Balance on Open/Overdue Invoices.



POS

RecDesk's **Point-of-Sale** (**POS**) System allows you to sell Items at various Locations like concession stands, or any other Facilities, and have separate Terminals (Cash Registers) for each of those Locations. You simply set up everything under the **POS** tab and then sell your Items on a **POS Terminal**. RecDesk Director will then keep track of the financial details of these sales and optionally manage inventory.

Getting Started with Point-of-Sale

Here's how to get started with **POS**:

1. Create **Item Categories**, which are groups of Items that are similar. Examples are Beverages, Fruit, etc. See Item Categories

2. Define **Sale Items** that exist within those Categories. See Creating and Modifying Sale Items

3. Set up **Locations** where you will have Point-of-Sale Terminals. See Locations

4. Choose the **Items that will be available at each Location.** See Managing Available Items

5. Optionally **Manage Inventory** for an Item. See Inventory Management

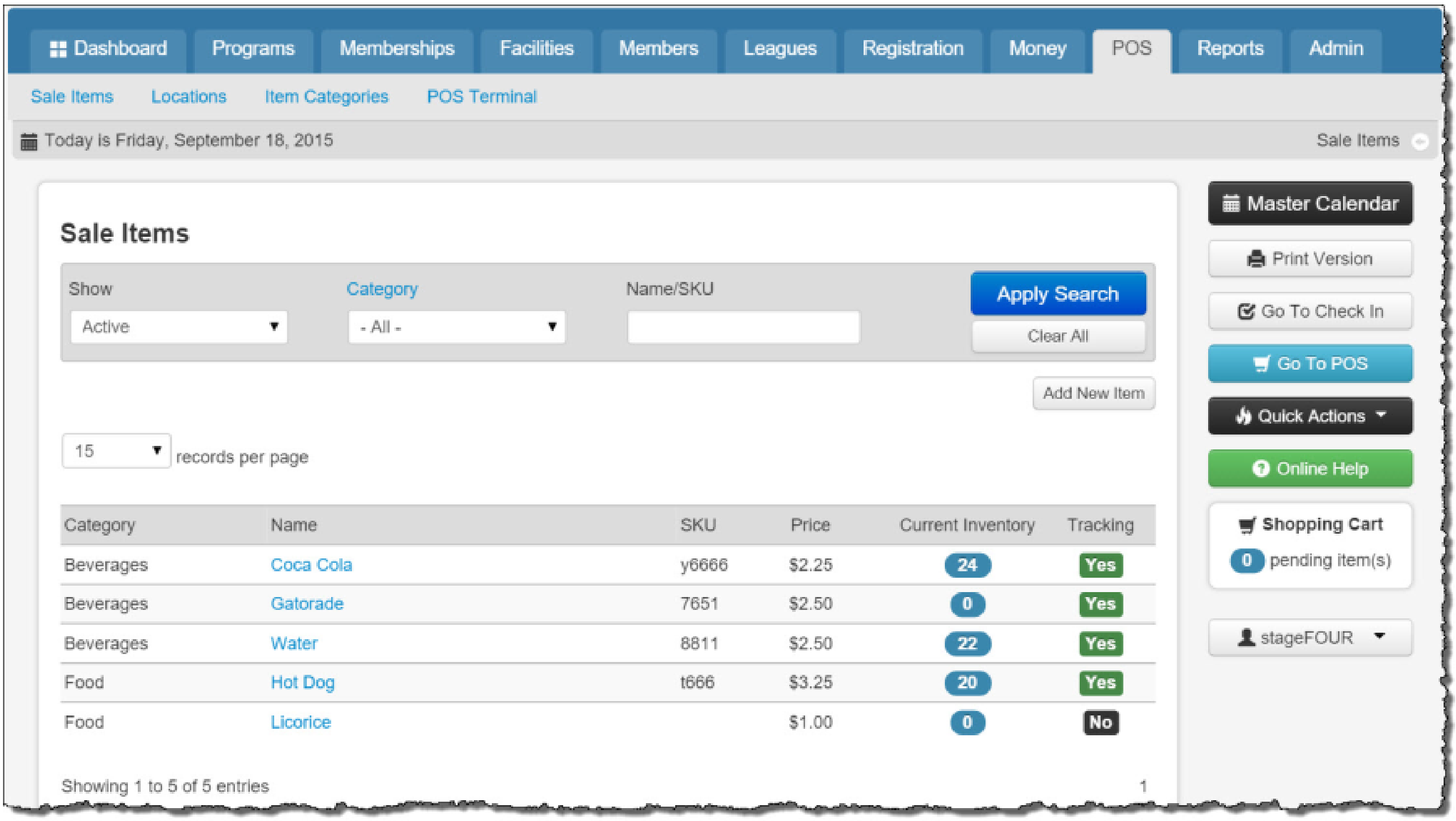
7. Optionally **Create POS Cashier(s) -** a RecDesk User having a Role of POS Cashier, which only has access to POS Terminals. See Adding RecDesk Users

8. Go to the POS Terminal and have fun selling your Items! See POS Terminal.

Sale Items

The **Sale Items** page shows all *Active Items* by default. This would be any Items currently available for sale.

Inactive Items can be viewed by selecting Inactive from the "Show" drop down. These are Items which have been deleted from the Active Sale Items list. For a complete list of fields related to Sale Items page see Sale Item Fields



Filtering Sale Items

Sale Items can be filtered in one of three ways (or in combination):

- **Show** - Select Active, Inactive or All Sales Items from the "Show" drop down
- **Category** - Select a specific Item Category from the Category drop down
- **Name/SKU** - Enter any part of a Sale Item name or SKU

Simply click **Apply Search** to filter the list.

Creating and Modifying Sale Items

Adding **new Sale Items** and modifying existing ones begins on the Sale Items page. To add a new Sale Item, click on the **Add New Item** button. To **modify an existing Sale Item**, simply click on it from the Sale Items page and click the **Edit Item** button.

Prerequisites - Before adding a Sale Item, you need to create *Item Categories. S*ee Item Categories.

For a complete list of **Sale Item** related attributes see Sale Item Fields.

Basic Workflow

- Add the **Name** of the Item for sale
- If you would like assign the Item a **SKU**, enter or scan the **SKU**
- If you wish to describe the Item, enter a **Description** for the Item
- Select the **Category** the Item belongs to from the drop down (see Item Categories).
- After selecting the Category, the **Sales Tax** and **GL Code** will be pre-filled with the default values for that Category. If you wish to change either of those values, choose from the appropriate drop down. The default **Color** for the Category will also pre-fill but can be modified (see below)
- Enter the **Unit Price** for the Item
- If you would like to **Track Inventory** for this Item, be sure to check ***Track Inventory***.
- If you'd like to select a **Color** for this Item or change it from the default Category Color, click on the Color box. First select the **Color Hue**, then the **Color** and click **choose**.
- Click **Save.**

Locations

To sell Items via the RecDesk Point of Sale system, you need to identify which Location(s) will have POS Termina(s).

Adding a Location

- Click on the **Add Location** Button

- Choose a Facility to be included as a POS Location from the **Location to add** drop down

- Click **Save**
-
- If your system is configured to have multiple registers per Location, Click **View Registers** and click **Add Register** to to add a register, and click on the register name to manage registers (see

- Continue on to Managing Available Items.

Managing Available Items

To select which Items will be available for sale at each Location, navigate to the **Locations** subpage of POS, and click on **Manage Available Items** for a Location. Items currently available for sale at that Location will be indicated by a checkmark, and will list the Current Inventory available at the Location.

Adding an Item to a Location

- Optionally filter the list of Items by clicking on a **Category**

- Click **Add Item to Location** (Note: This button is only available for Items not currently available at the Location).

Removing an Item from a Location

- Optionally filter the list of Items by clicking on a **Category**

- Simply click on the **Remove Item** button (Note: This button is only available for Items with a Current Inventory level of 0 at the Location).

To Modify Sale Items, Inventory Management (Optional), or to see **History for an Item**, simply click on the Item name from the **Available Items** page or from the Sale Items page.

Managing Multiple Registers at One Location (Optional)

RecDesk can be configured to allow multiple registers at one location in order to "cash out" different registers at a single location. If you'd like this capability and don't already have it, please contact support@recdesk.com.

Navigate to the **Locations** subpage of POS, and click on **View Registers** for a Location. Directors and Assistant Directors are authorized to Manage Registers. Each Location is equipped with a Main Register which can be renamed by clicking on the name of the register and then clicking the **Edit Register** button. Rename your Register and click **Save**.

Adding a Register to a Location

- Click the **Add Register** button
- Enter a Register Name
- Click **Save.**

Opening a Register

- Click on the name of the Register
- Click on the **Open Register** button
- Enter the **Opening Cash Balance** for the Register
- Optionally enter a **Note**
- Click the **Open Register** button.

That Register is now Open to sell items and process returns until it is time to close the Register at the end of the shift.

Closing an Open Register

- Click on the name of the Open Register

- Click on the **Close Register** button

- The Expected Cash Balance will be shown which is calculated as follows: Opening Balance + Sales - Returns

- Enter the **Counted Cash Balance** from the Register

- Optionally add a **Note**

- Click the **Close Register** button.

The Shift Detail for that Register will display.

Viewing Shift Detail

- Click on the name of the Register

- Click on **See detail** for the shift you'd like to view.

Sale Item History

You can view a **Sale Item's History** at a specific Location by navigating to the *Location* and clicking on the *Item History* tab. Choose your date range for a summary of all items with activity during the specified time.

Item Categories

The first step to getting started with RecDesk Point-of-Sale is to create **Item Categories**, which are groups of Items that are similar. Navigate to the **Item Categories** subpage of the POS page.

Adding an Item Category

- Click on the **Add New Item Category button**

- Enter the **Name** of the Item Category

- Optionally choose the **Default Sales Tax** rate for Items in this Category from the drop down (See Managing Custom Lists)

- Optionally choose the **Default GL Code** for Items in this Category from the drop down (See Managing Custom Lists)

- If you'd like to select a **Default Color** for this Item Category, click on the Color box. First select the **Color Hue**, then the **Color** and click **choose**.

- Click **Save**.

To **Delete** or **Edit** an Item Category, simply click on the appropriate button for that Category.

Inventory Management (Optional)

You can choose to **Manage Inventory** of an Item by first checking the **Track Inventory** field for the Sale Item (see Creating and Modifying Sale Items). To **Manage Inventory** of an Item, view the Item by clicking on it from either the Sale Items list, or while Managing Available Items for a Location. See Managing Available Items.

Basic Workflow

- Click on the **Manage Inventory** button
- Click **Manually Adjust** for a Location to Add, Subtract, or Transfer Inventory of that Item
- To **Add Inventory**, choose the **Add Inventory** option from the **Actions** drop down
- To **Subtract Inventory**, choose the **Subtract Inventory** option from the **Actions** drop down
- To **Transfer Inventory** to another Location, choose the **Transfer Inventory** option from the **Actions** drop down , and choose the **Transfer To** Location from the drop down
- Enter the **Quantity** of the Inventory Adjustment
- Optionally add a **Note** to the Inventory Adjustment
- Click **Save.**

POS Terminal

The **Point-of-Sale Terminal** is the "Cash Register" from which you process POS transactions (ie Sales, Returns) at a Location. Your POS system can be configured to allow multiple registers at one location in order to "cash out" different registers at a single location. If you'd like this capability and don't already have it, please contact support@recdesk.com.

Opening the POS Terminal

Basic Workflow

- **POS Cashiers**: Log into RecDesk Director

- **Non-POS Cashiers**: Click on the **Go To POS** button on the right-hand side of the screen or click on the **POS Terminal** from the POS submenu

- Choose the **Location** from drop down

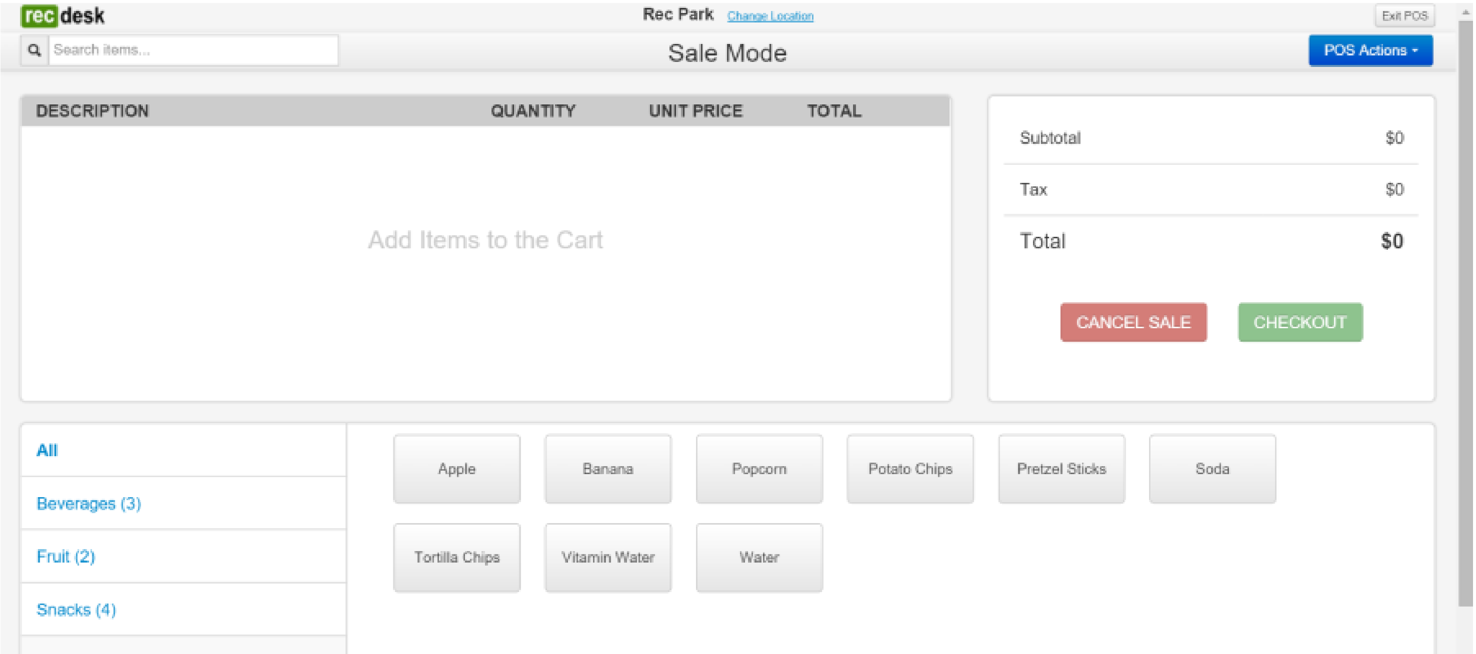
- If your system is configured with multiple Registers per Location, select a Register from the drop down (see Managing Multiple Registers at One Location). If the Register is not yet open, enter the Opening Cash Balance and optionally a Note to open the register if it is not yet open. (Note: If you do not have a role of Director or Assistant Director, you must get a manager's approval by having a Director or Assistant Director type his/her User Name and Password under "Manager Approval Required")

- If using a Thermal Printer, check off **Enable Receipt Printer and Cash Drawer** (see POS Thermal Printing/Cash Drawer Support);

- Click **Next****

- The **POS Terminal** will appear with all *Items Available at that Location.* See Managing Available Items to include or exclude Items on the Terminal.

** Note: You will only be prompted to select a Location/Register the first time you go to the POS Terminal during your login session. After that, when reopening the POS Terminal, you can change Locations/Registers by clicking on the **Change Location** link beside the name of the Location/Register.

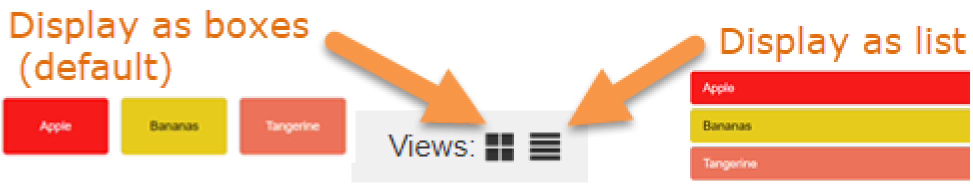

recdesk
Rec Park
Change Location
Exit POS
Search items...
Sale Mode
POS Actions
DESCRIPTION
QUANTITY
UNIT PRICE
TOTAL
Add Items to the Cart
Subtotal
$0
Tax
$0
Total
$0
CANCEL SALE
CHECKOUT
All
Beverages (3)
Fruit (2)
Snacks (4)
Apple
Banana
Popcorn
Potato Chips
Pretzel Sticks
Soda
Tortilla Chips
Vitamin Water
Water

Selling Items

Selling Items is easy with the RecDesk POS Terminal. When selling Items, be sure that the Terminal is in **Sale Mode**, which is the default mode you are in when first opening the Terminal. To change the Sale Item buttons to a list, click on the **Display as list** option next to **Views**. To show only Items in a certain Item Category, click on the **category name**. To **search** for a certain Item, type any part of the Item name in the Search box under the RecDesk logo.

Basic Workflow

- **Views**: Change the View above the Item Categories:



- Click on or touch an **Item** to Add it to the Cart. You can also **Search** for an Item by entering any part of the name of the Item in the box labeled Search items..., and clicking on the Item name from the drop down

- To **Increase or Decrease Quantity** of an Item, click on or touch the **"+" or the "-"** button, OR click on or press the **Item again**. You can also **Increase Quantity** by entering any part of the name of the Item in the box labeled Search items...
- To **Remove** an Item from the Cart, click on or touch the (Note: This will remove the entire Quantity of this Item)

- To see a filtered list of Items by Category, click on the Category name on the lower left of the Terminal

- If you'd like to apply a **POS Discount/Coupon Code**, click on **Apply Discount/Coupon** and select the **Discount Scheme** from the drop down. Then click **Apply**. See Managing Custom Lists to add/remove Discounts/Coupons and to Enable/Disable this feature.

- Once all Items have been added to the Cart, click or touch the **CHECKOUT** button

- Select a Payment Method: **Cash**, **Check**, or **Credit Card**

- Make the Payment**

- Click or touch **Continue**

- Click or touch **OK**

- Optionally click or touch **Print** drop down and choose a print option and/or **Return to Register.**

** Note: You may click Search or Add New to have this POS transaction placed under a specific Member(as opposed to a General Patron). When *manually entering* **RecDesk Credit Card** payments, Search for a Member to autofill name and address information on file.

Returning Items

The RecDesk Point-of-Sale Terminal allows you to process **Returns** in order to keep track of inventory and revenue.

Basic Workflow

- Click on or touch the **POS Actions** drop down and choose **Process Return** to enter **Return Mode**
- Click on or touch the **Item** being returned to Add it to the Returns Cart. You can also **Search** for an Item by entering any part of the name of the Item in the box labeled Search items..., and clicking on the Item name from the drop down.
- To **Increase or Decrease Quantity** of an Item being returned, click on or touch the **"+" or the "-"** button, OR click on or press the **Item again**. You can also **Increase Quantity** by entering any part of the name of the Item in the box labeled Search items...
- To **Remove** an Item from the Returns Cart, click on or touch the (Note: This will remove the entire Quantity of this Item)
- To see a filtered list of Items by Category, click on the Category name on the lower left of the Terminal
- If you'd you'd like to apply a **POS Discount/Coupon Code**, click on **Apply Discount/Coupon** and select the **Discount Scheme** from the drop down. Then click **Apply**. See Managing Custom Lists to add/remove Discounts/Coupons and to Enable/Disable this feature.
- Once all Items being returned have been added to the Returns Cart, click or touch the **CONTINUE** button
- Optionally **Find** or **Add New** Member to Process the Return to a specific **Customer** (Note: Customer other than General Patron is *required for **Refunds Issued to Household Credit Accounts***. We recommend leaving General Patron as the Customer on Cash Returns)
- Next, choose the Refund Method and optionally a Reference, and Reason for Return. If you chose the Household Credit method, you'll receive the message: "Note: This will auto-credit this customer's household account in the amount of the refund".
- Click or touch **Continue**

- Click or touch **Process Now**

- Click or touch **Return to Register**.

Recent POS Transactions and Voids

Recent POS Transactions can be viewed or voided by clicking or touching the **POS Actions** drop down, and choosing **View Recent Transactions**.

Viewing Recent Sales

- The **Period Start** and **Period End** Dates will default to the current date. You can optionally change these dates if you'd like

- Choose the **Location** from which to view **Recent Transactions** from the **Location** drop down

- Click or touch **Apply**.

Viewing Recent Returns

- View Recent Sales for a period and Location

- Click on or touch the **Returns** tab.

Viewing Details

- Click or touch the **Details** button for the transaction to view Details

- Sales transactions can optionally be printed by clicking or touching **Print Receipt**

- Click or touch **Return to List** to return to Recent Transactions**, or Return to Register** to continue selling**.**

Voiding Transactions

- Click or touch the **Void** button for the Sale or Return transaction to be voided. (Note: Only Directors and Assistant Directors have the authority to void transactions. Associates and POS Cashiers will need a Director or Assistant Director to log in to authorize the void)

- Type the word "VOID" in the space provided and the Reason for void

- Click on the **Void Now** button.

POS Thermal Printing/Cash Drawer Support

RecDesk supports the following hardware for its Point-of-Sale module:

Thermal Printer - Star Micronics TSP 143IIU

Cash Drawer - EOM-POS

This document explains how to install the Star TSP100 ECO Printer to print receipts from POS Terminal on RecDesk Director on **Windows**.

Setting Up the Thermal Printer

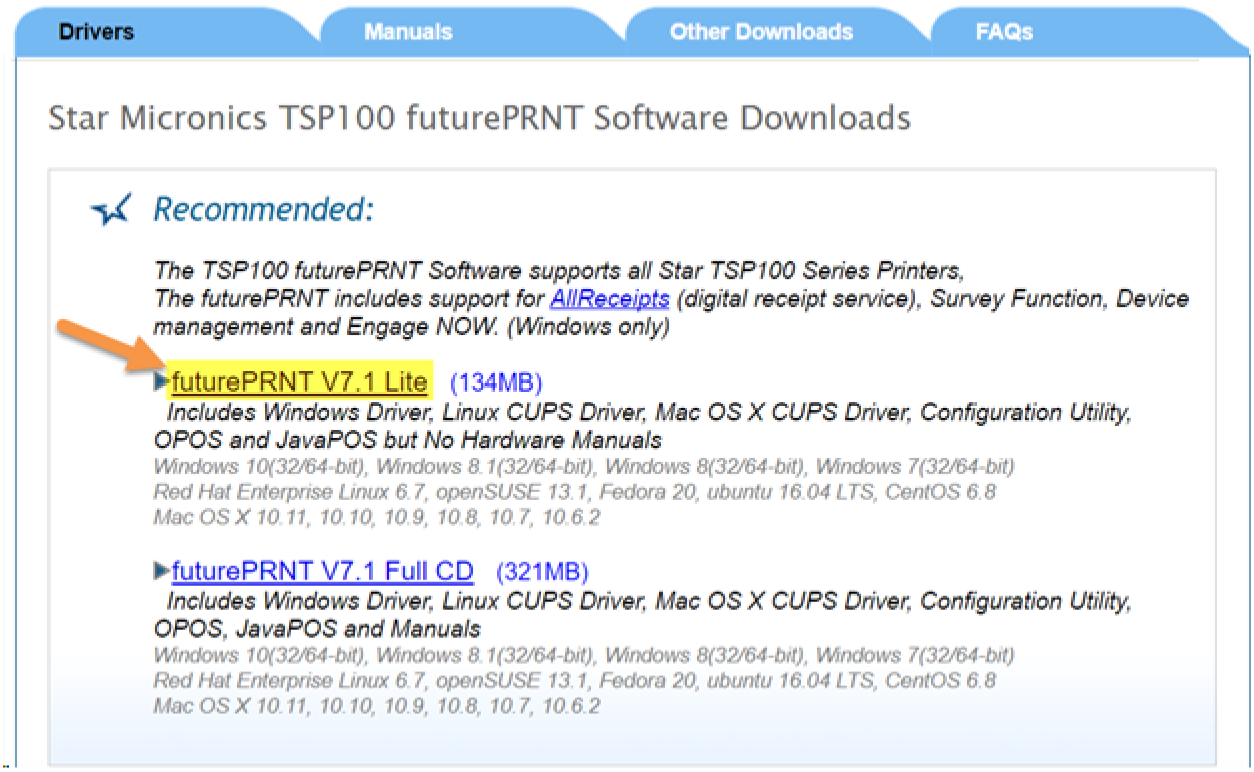
Printer Drivers

NOTE: You don't necessarily need to have your printer connected to your computer at this point

1. If your printer came with a CD-ROM then insert it on your CD-ROM Drive and go to the next step, otherwise you can download the drivers directly from StarsMicronics official web site.

[Star Micronics TSP100 futurePRNT Software Downloads](http://www.starmicronics.com/support/default.aspx?printerCode=futurePRNT)
(http://www.starmicronics.com/support/default.aspx?printerCode=futurePRNT)

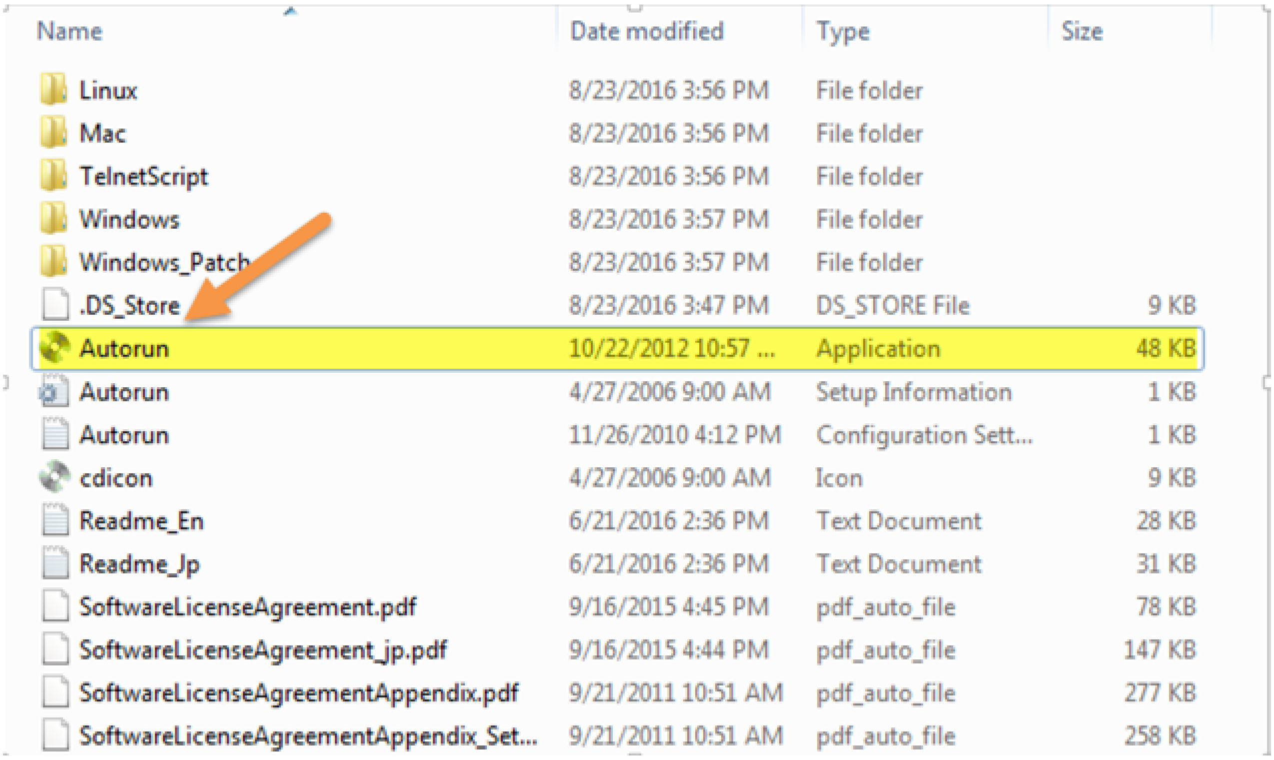
Download the Recommended "Lite" version of the driver.



Once the download is finished then go to your Downloads folder and **unzip** the file "tsp100_v710_lite" (**right-click** on the file, click **Extract All…**, then click **Extract**).

Note: file name might be slightly different depending on the version of the driver you downloaded.

Go to the folder that was created and click on the **Autorun** **Application****.

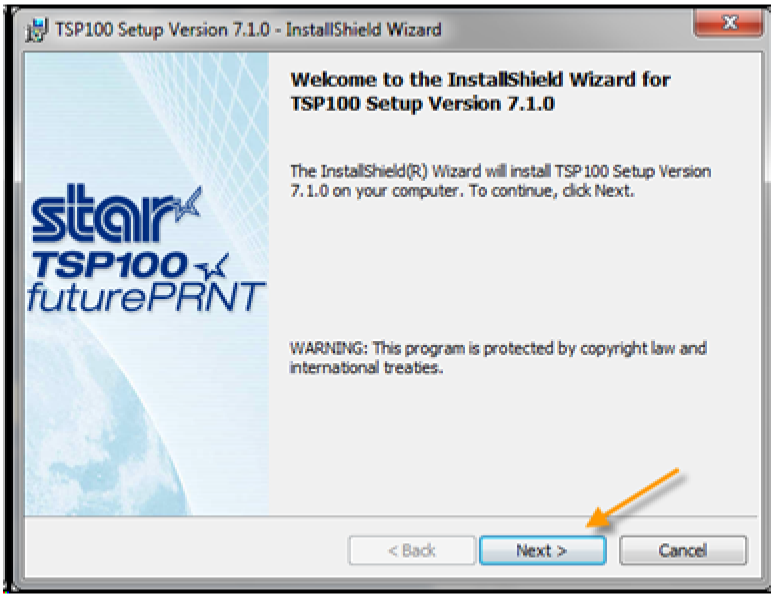


** If the installation window doesn't open, you may need to install the Direct Play Windows feature. If that is the case, the Windows Feature task will appear at the bottom of the screen. Click on it, then click **Install this feature**. After this installation is complete, click **Close** and click on the **Autorun Application** again.

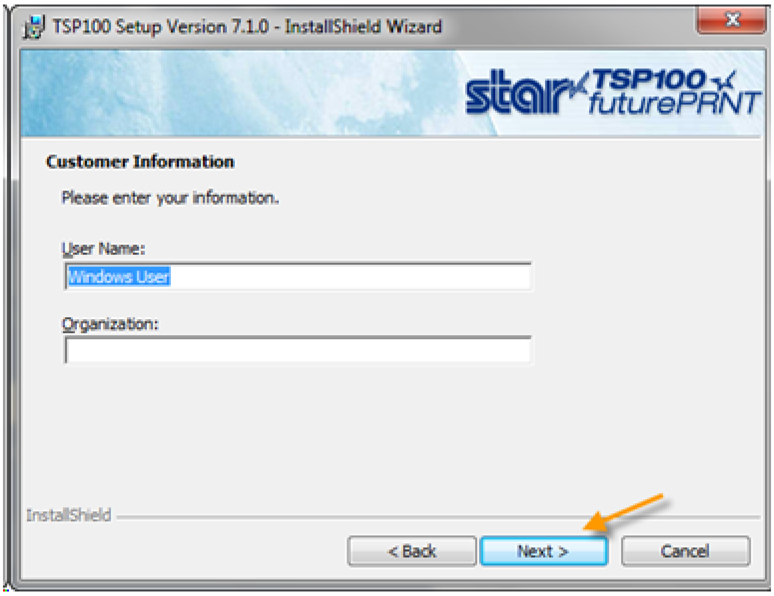
2. You will see the installation window. Click on **Installation**

3. Then click on **I Accept** to Accept the License Agreements and allow to run.

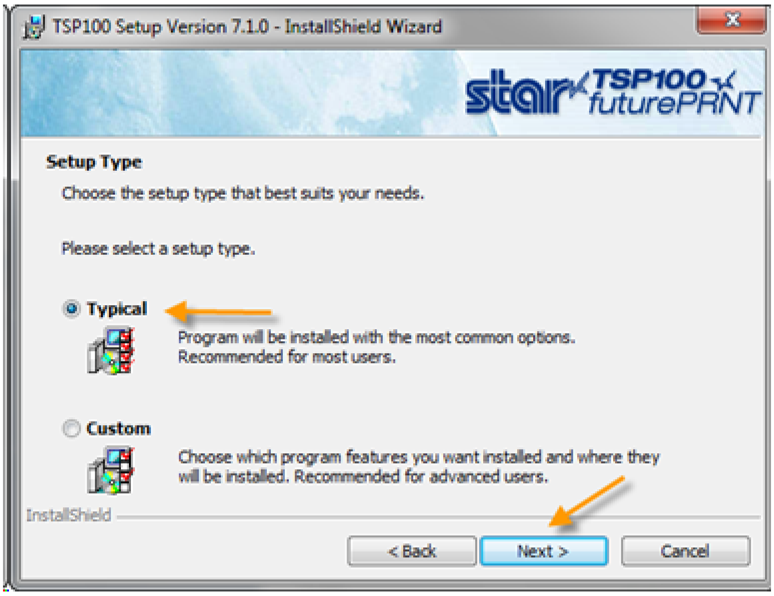
4. The installation wizard will appear. Click **Next**

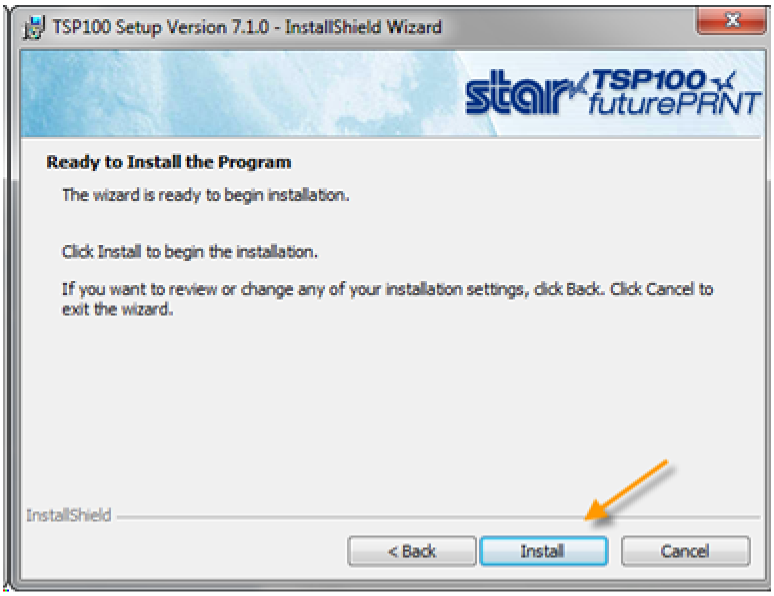


5. You can leave User Name and Organization the way they appear. Click **Next**

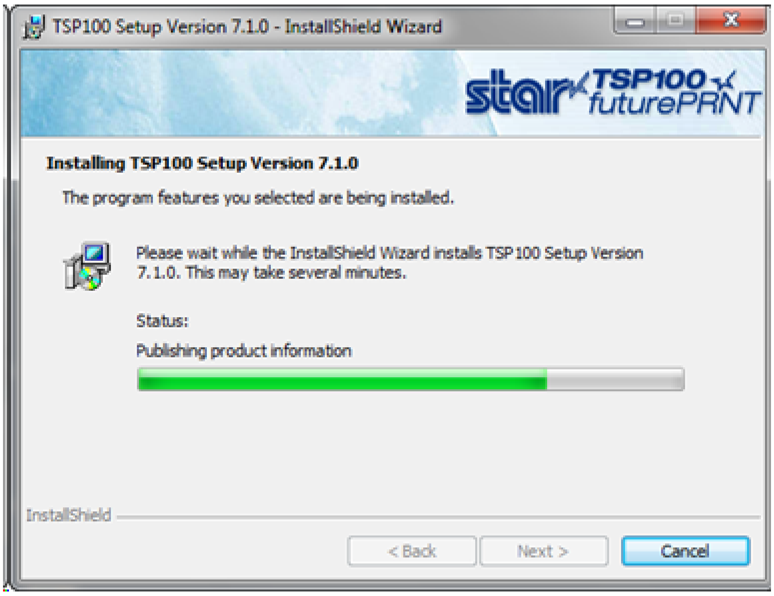


6. In this screen make sure you select **Typical** Installation then click **Next** and on the next screen click **Install**

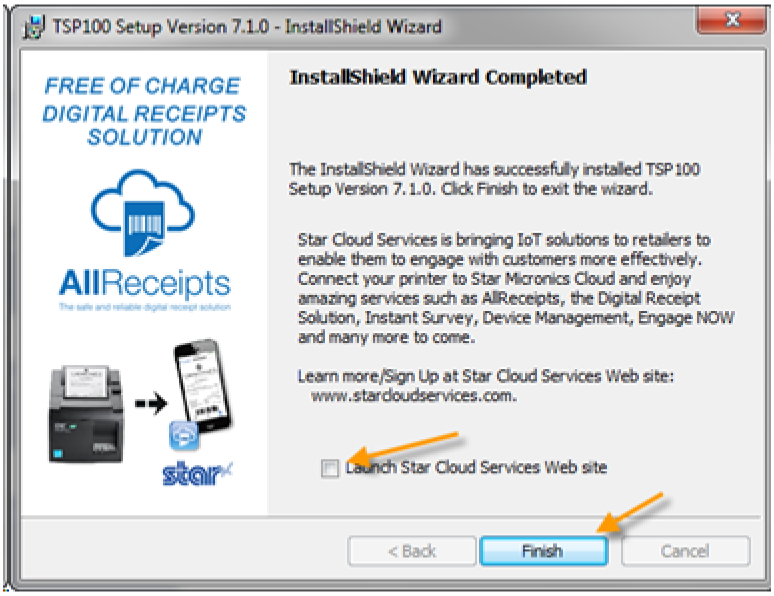




7. Wait for the installation to finish; this might take a couple minutes



8. Once the Installation is finished uncheck the Launch Star Cloud Services Web site checkbox then click Finish and the windows will close



Note: you can disregard the Star Cloud Services welcome page or complete it if you’d like.

Next Step: [Connecting Thermal Printer and EOM-POS Cash Drawer]

Connecting Thermal Printer and EOM-POS Cash Drawer

Follow the instructions that come with the printer or download them here:

http://www.starmicronics.com/support/mannualfolder/tsp100iiu_hm_en.pdf

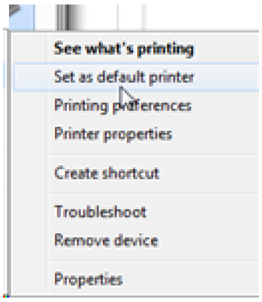
Once you have the TSP100 ECO futurePRNT printer connected to your computer, connect the EOM-POS Cash Drawer. The cash drawer needs a standard 6-pin RJ12 plug for direct connection to the printer.

Next Step: Allowing Auto Receipt Cut and Open Cash Drawer

Allowing Auto Receipt Cut and Open Cash Drawer

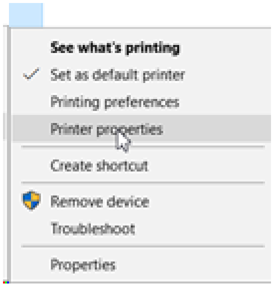
Now that the cash drawer (optional) is connected to your printer and the printer is connected to your computer, we can configure the printer to cut the paper automatically after printing a receipt and the cash drawer to open after a printing job finishes.

Go to **Control Panel** > **Devices and Printers**. Right-click on the **Star TSP100 Cutter (TSP143)** printer and select the option **Set as default printer**.

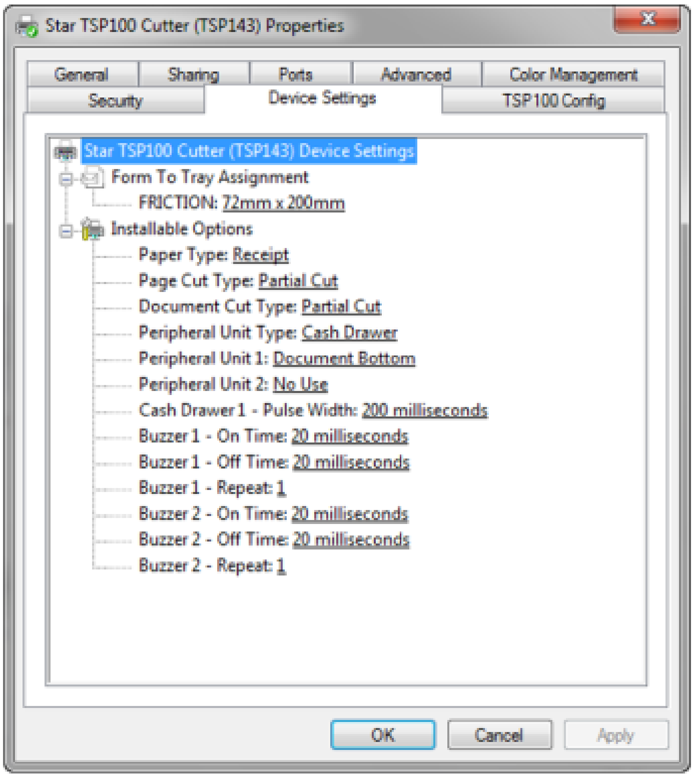


If you see the message “Setting this printer as default means Windows will stop managing your default printer”, click **OK**.

Right-click again and select **Printer properties**.



Then click on the **Device Settings** tab at the top. Change settings to the following, then click **OK**.



Friction	72mm x 200mm
Paper Type	Receipt
Page Cut Type	Partial Cut
Document Cut Type	Partial Cut
Peripheral Unit Type	Cash Drawer
Peripheral Unit 1	Document Bottom

Next Step: [Enabling Auto Printing]

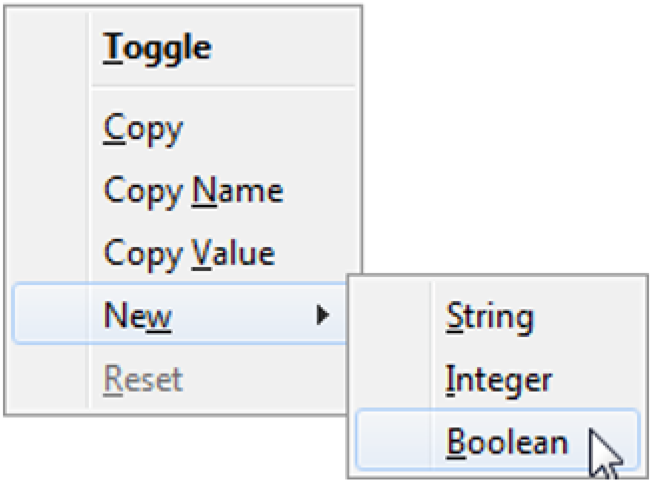
Enabling Auto Printing

The last step is to allow your web browser to print receipts after each transaction **without showing the print preview window**. Depending on your browser do the following:

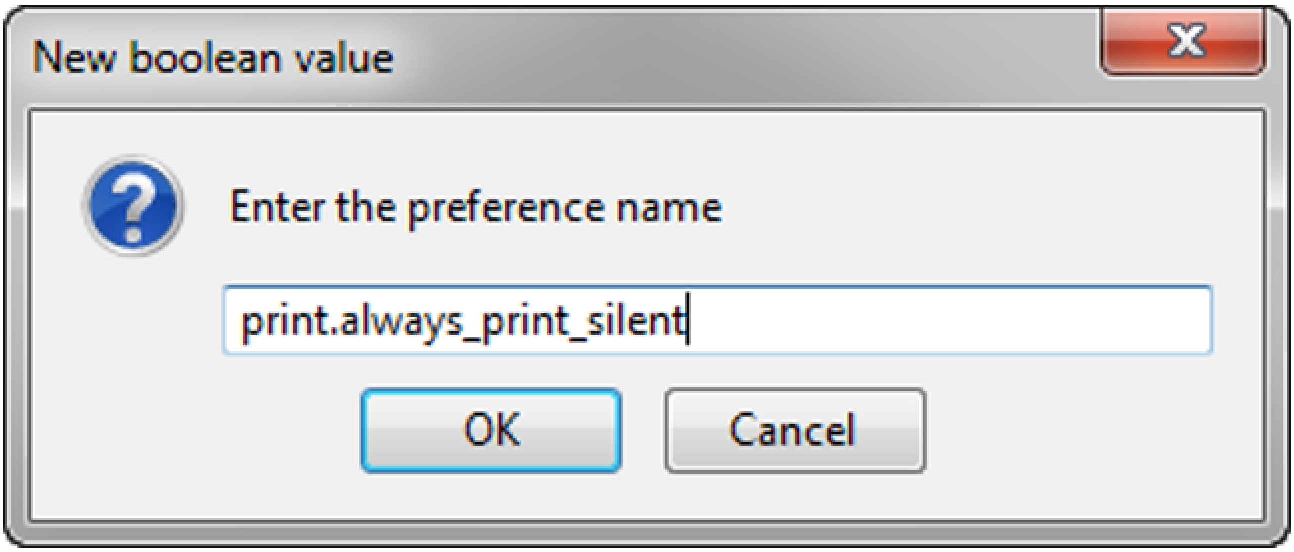
Firefox (Recommended for the Best User Experience)

1. Open Firefox and type **about:config** in the address bar and press enter. Click to confirm that you will be careful.

2. Right-click anywhere on the page. Go to **New** then select **Boolean**.



3. Type **print.always_print_silent** as the preference. Click **OK**.



4. Select **True** on the next screen then click **OK**.

Chrome (Not Recommended - More Technical Expertise Required)

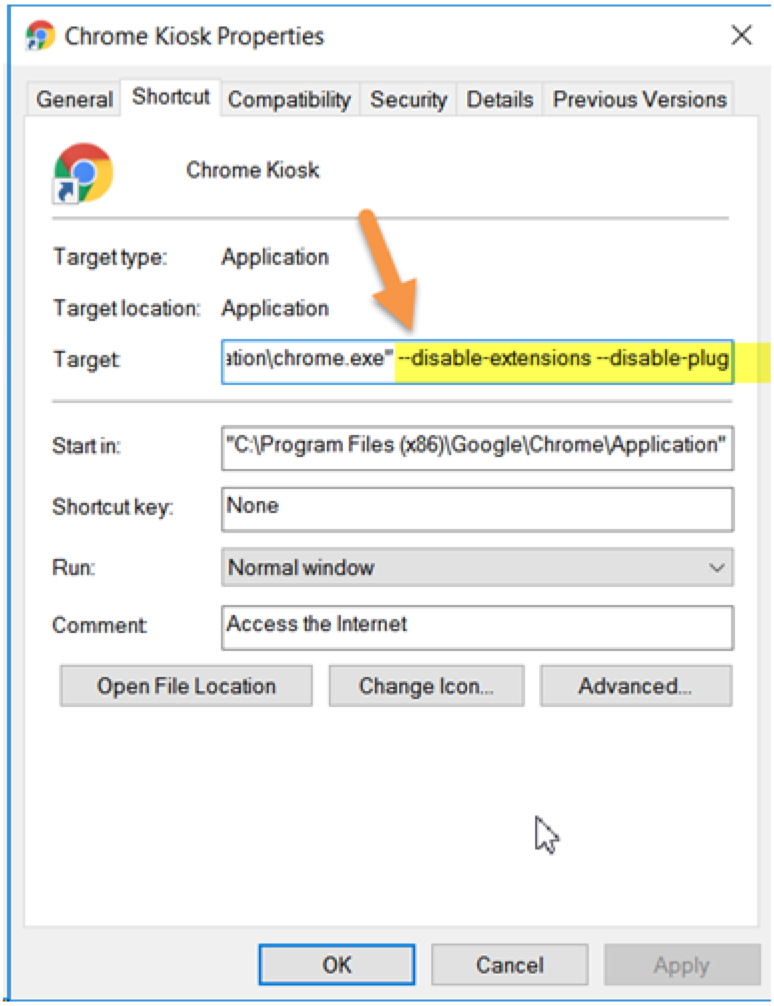
If using Chrome, we recommend disconnecting all other printers from the PC, and disabling all Chrome extensions when printing POS receipts using the Thermal Printer.

1. Create a Chrome shortcut in your desktop (find the Chrome icon in your Windows Start menu and drag it to your desktop). Note: make sure your desktop is visible first.

2. Right-click on the new shortcut icon and click **Properties**.

3. Type:
--disable-extensions --disable-plugins --kiosk --kiosk-printing http://[OrganizationShortName].recdesk.com/Director/POS/POSInit.aspx
at the end of the Target field, where [OrganizationShortName] is the same name that you see on your RecDesk Director url.

Example:
”C:\Program Files (x86)\Google\Chrome\Application\chrome.exe" **--disable-extensions --disable-plugins --kiosk --kiosk-printing http://oakridge.recdesk.com/Director/POS/POSInit.aspx**



4. Click **OK** and **restart Chrome** (or close all the windows you have open).

Note: you must ALWAYS use this shortcut when printing POS receipts with the Thermal Printer. Therefore, we recommend that you rename this shortcut to POS Kiosk, or similar. To exit fullscreen mode, press the Windows key + the Tab key and close out the window.

Internet Explorer and Edge (Not Recommended/Supported)

Auto Printing is not recommended/supported by these browsers. You can still use your Thermal Printer, but the receipts won't print automatically. Therefore, you will see a Print Preview screen and you must hit the Enter key to print after each transaction.

Next Step: Testing the Thermal Printer

Testing the Thermal Printer

Firefox (Recommended)

1. Log in to RecDesk Director and click **Go To POS;**

2. Choose a **Location**;

3. If your system is configured with multiple Registers per Location, select a Register from the drop down (see Managing Multiple Registers at One Location);

4. Check off **Enable Receipt Printer and Cash Drawer**;

5. Click **Next**;

6. On the POS terminal, click **Actions**, then click **Test Receipt Printer**;

7. Click **Print Test Receipt**.

Chrome (Not Recommended)

1. Double click on the Chrome Desktop Shortcut created in Enabling Auto Printing.

2. Follow Firefox steps listed above.

Note: see Troubleshooting for help if printing is not successful.

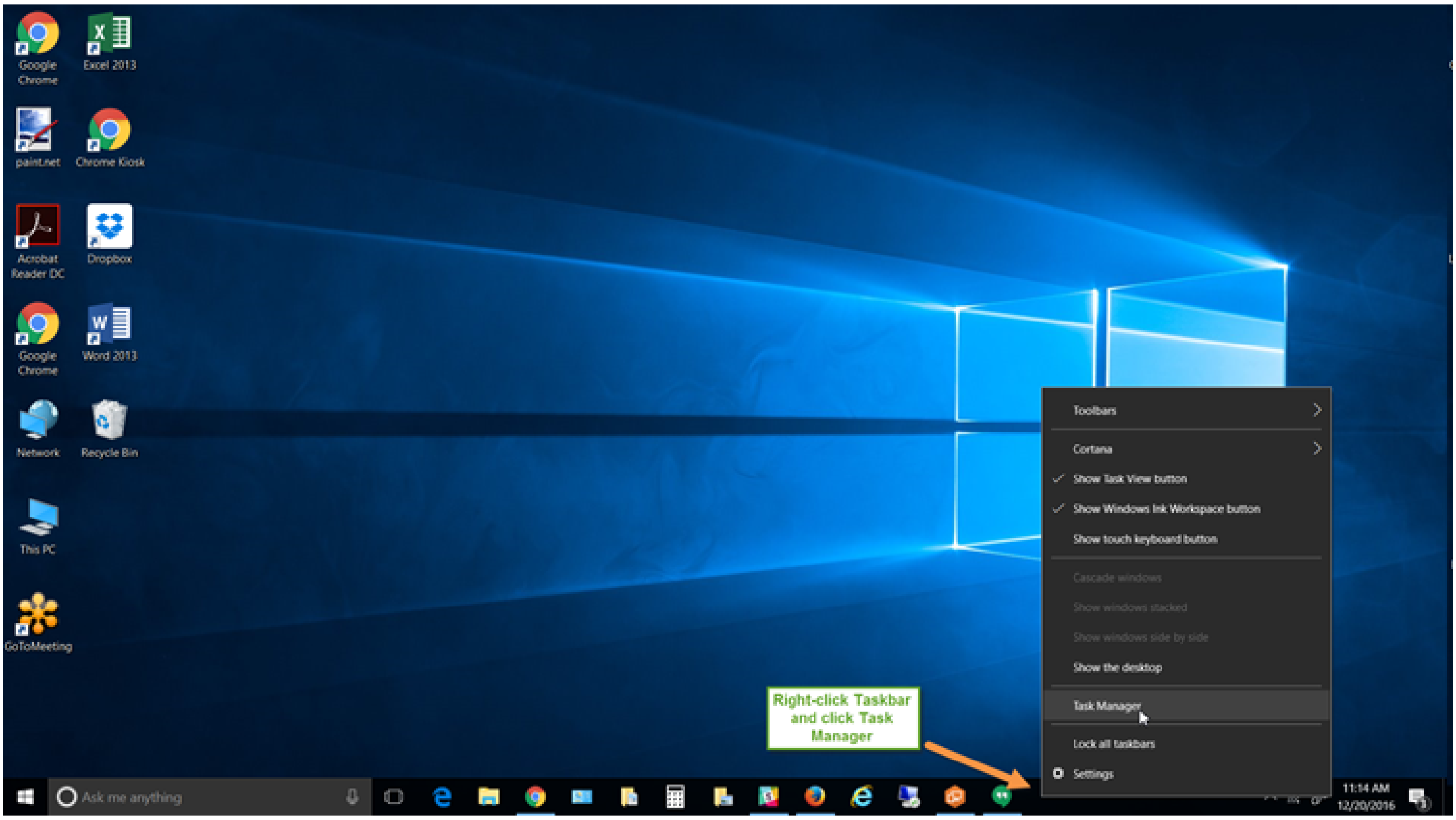
The **Actions** button from the POS terminal will allow you to **Open Cash Drawer**, **Test Receipt Printer**, and **Deactivate/Activate Receipt Printer and Cash Drawer**.

Troubleshooting

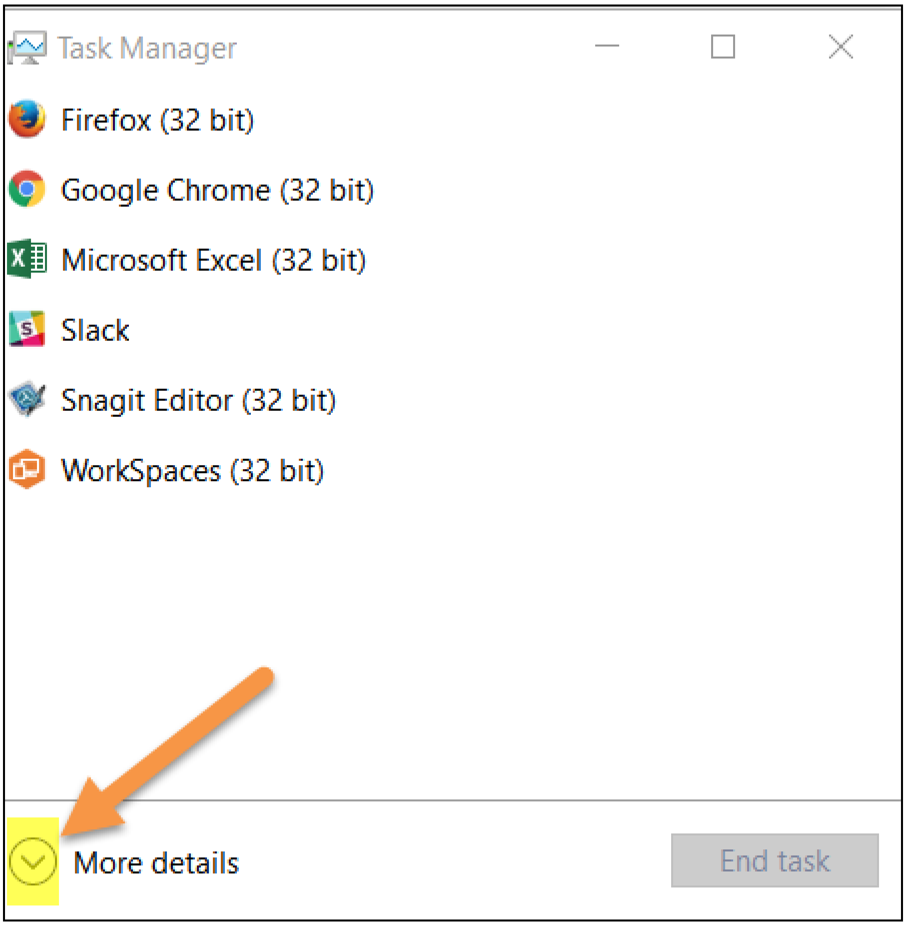
Receipts is not printing on the Thermal Printer when using Chrome

If you've followed the steps under Enabling Auto Printing for Chrome and your test page doesn't print, follow these steps:

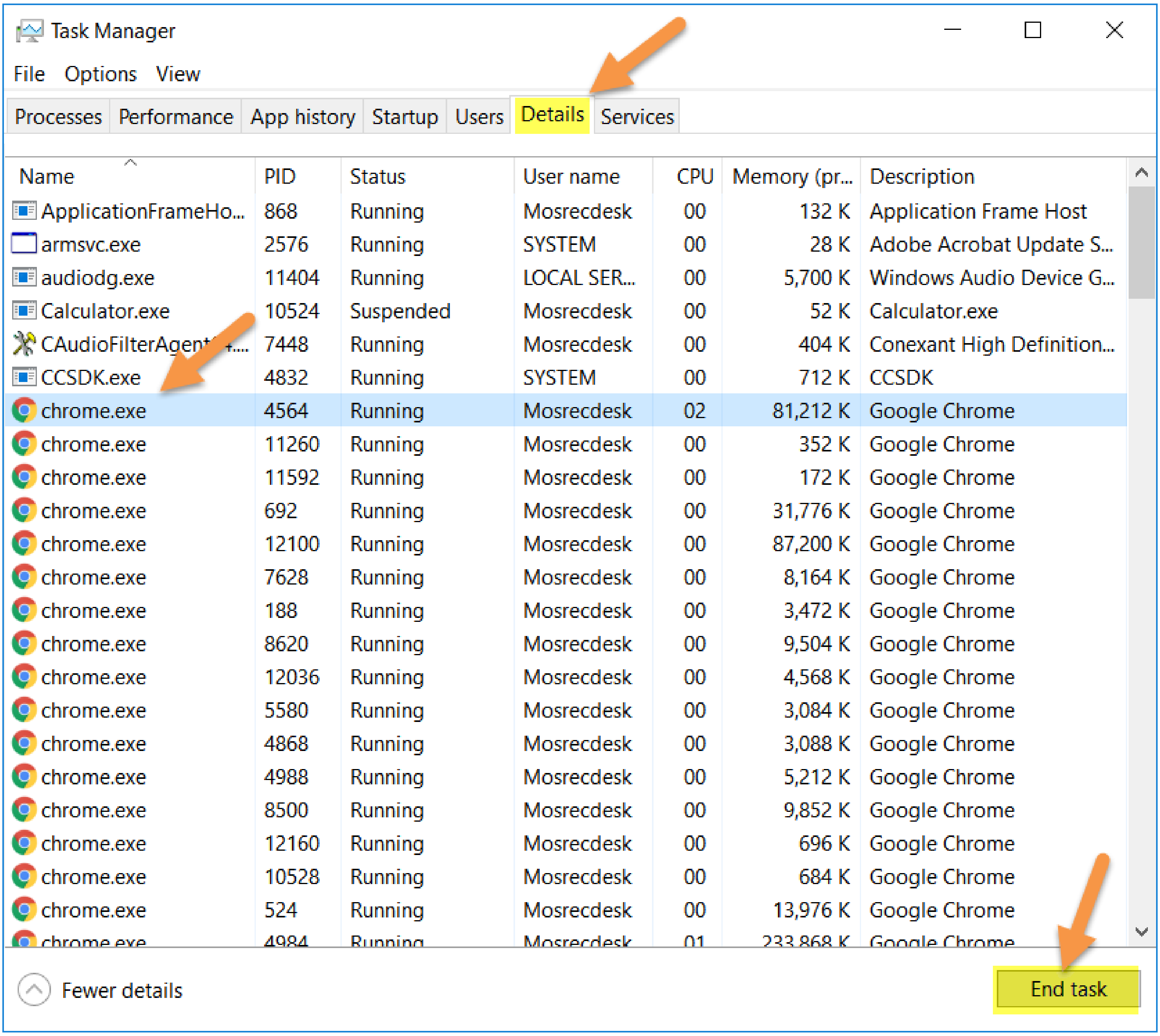
1. Go to the Task Manager by **right-clicking** on the Taskbar and clicking **Task Manager;**



2. Click the **More details drop down;**



3. Click the **Details tab**, then click on the **first Chrome process** listed, and then click **End Task**;



4. Try Testing the Thermal Printer again.

Appendix

Sale Item Fields

- **Name** - Name of the Item for sale.
- **SKU** (optional) - A unique alphanumeric code assigned to this stock keeping unit.
- **Description** (optional) - A brief description of the Item.
- **Category** - The group to which the Item belongs (see Item Categories).
- **Sales Tax** (optional) - The Sales Tax associated with this Item. See Managing Custom Lists.
- **GL Code** (optional) - The General Ledger Account Code associated with this Item. See Managing Custom Lists.
- **Unit Price** - The price per unit of the Item.
- **Track Inventory** (optional) - If checked, the system will keep track of Inventory for this Item.
- **Color** (optional) - The color of the Item on the terminal.

Marketing & Communications

Sending Bulk Emails (Email Blasts)

RecDesk allows you to create Email Campaigns and send them to select Members in your database.... or all of them. There is real power in being able to easily segment your lists and send targeted informational or marketing emails to your members. Some examples of where this targeted segmentation might be useful is:

I want to send an email to...

- "...*all boys between the ages of 8-13 who have participated in a Program in the last two years"*
- *"... all nonresidents under the age of 12"*
- *".... all residents who are older than 18 and have participated in a Program within the last six months"*
- ....many more scenarios. The filtering capabilities are the same ones as outlined in Advanced Member Search

RecDesk leverages **two cloud based email service options** to ensure the highest performance and deliverability of your emails. Even the best crafted email campaigns will have little impact if they do not end up in your intended recipient's email box. This is where Sendgrid and Mandrill excel as they know how to get email right - from deliverability to reputation management. These two options are outlined below; you only need to choose 1 of the two options:

1. Sendgrid - Sign up for a **Sendgrid Essentials** account.
2. Mandrill - If you have a *paid monthly* Mailchimp account and you'd like to use Mandrill as an add-on, see Mandrill's Pricing Calculator.

So, once you choose which option works best for your organization, getting started with RecDesk Bulk Emails (Email Campaigns) is as easy as 1, 2:

1. **Contact Your RecDesk Customer Success Representative for assistance with setting up your account and configuring it into RecDesk.**

2. Creating and Sending Email Campaigns

Creating and Sending Email Campaigns

** You must have a **Sendgrid or Mandrill** account properly set up and configured in RecDesk to send bulk emails. Contact your RecDesk Customer Success Representative for help with creating your account and configuring it into RecDesk.

.

1. Click on the ***Members*** tab

2. Click ***Bulk Email Campaigns*** from the submenu

3. Click *Create New Campaign*

4. Type in Campaign Name of your choice and choose a Schedule Time (default is Send Immediately)

5. Click ***Select Recipients***

6. This brings you to the Advanced Member Search screen

7. Enter search parameters and click Apply Search **(to select ALL members** in database, leave everything **blank** and click *Apply Search*)

8. Once your search results contain the desired recipients, click on the ***Recipient List Actions*** dropdown button on the *bottom right* of the screen

9. Choose Primary Email Addresses Only or Primary and Alternate (Cancel will cancel the search and bring you back to the New Email Campaign screen)

10. Once you return to the New Email Campaign screen, Recipients will indicate the number of unique email addresses receiving the email

11. Select the Recipient Placement (Bcc, To or Cc) from the dropdown list. Default is Bcc.

12. Type in any Additional email addresses separated by semicolons (;), and the Subject of the email

13. Use the Rich Text Editor to compose your email. We don't support attachments on emails, and images need to be inserted using embed code (see Embedding Third Party Content). Do not copy and paste from any other software.

14. When you have finished composing, you have 4 choices:

    1. **Send Test Email**: Type in a Send To email address just to test. Once you click send, click OK and it returns to the email screen
    2. **Save**: this option will stage the email to be sent at the chosen time
    3. **Cancel**
    4. **Save as a Draft:** will allow you to edit the email again before officially saving it to send it.

Sending SMS Text Messages from Programs/Memberships/Leagues

RecDesk allows you to send SMS Text messages from Program Rosters, Membership Lists, and Leagues and their Teams. You have 2 options for sending SMS Text Messages from RecDesk:

1. **Email (default)** - this option opens an email with each recipient's email algorithm for their mobile phone number. Once you send the email, the text message will be delivered by each member's phone carrier (note: this option is free but can vary greatly from one carrier to another).
2. **Plivo or Twilio** - Cloud-based API platforms for SMS Text Messaging that can speed up the delivery of your text messages. Both of these options will charge a nominal fee per each text message sent.

Plivo

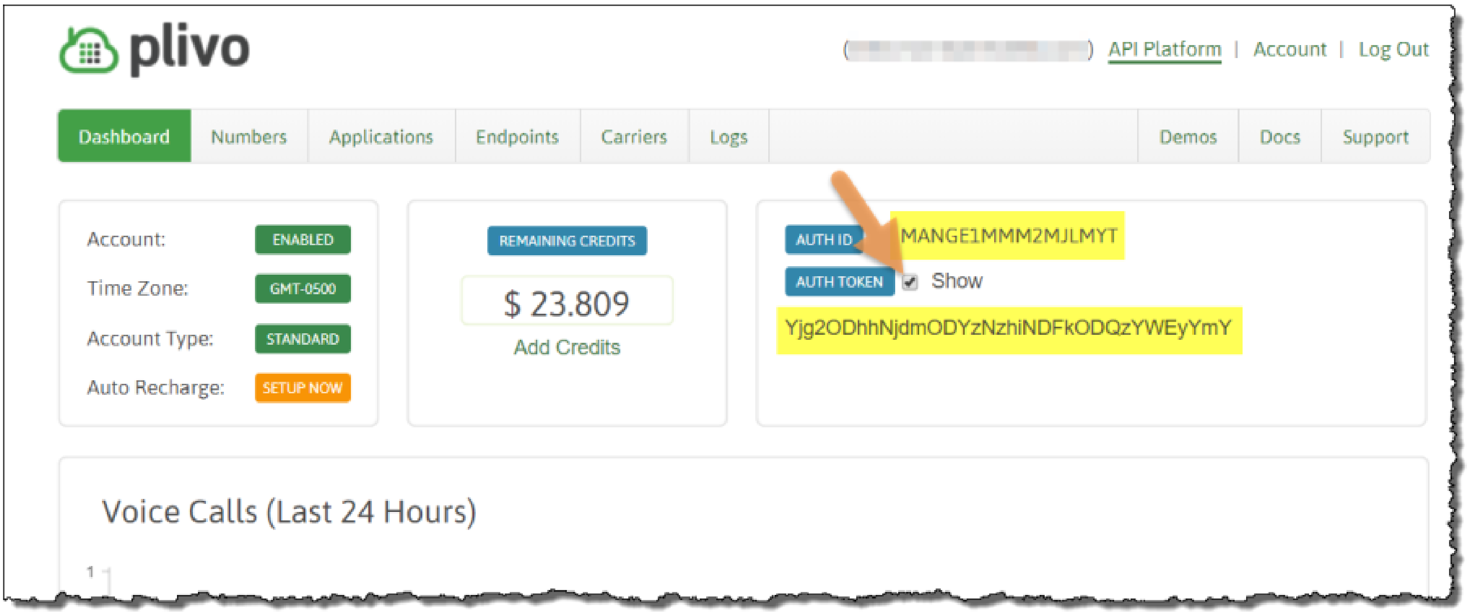
To use Plivo for SMS Text Messaging from RecDesk, follow these steps:

- For Plivo pricing, see here under Regular, Outbound SMS: https://www.plivo.com/pricing/#!sms

- Sign up for free at https://manage.plivo.com/accounts/register/

- Once you have your account, follow these steps to buy a phone number:

  1. Click **Numbers**, then click **Buy Number.**
  2. Choose **Country** and filter by **Location**. Then enter your **State.**
  3. Make sure you check off **only the feature SMS .**
  4. **Choose a number** from the list and click **Buy.**
  5. Then click **Buy This Number (then pay for the number and add money to your account).**



- Once you have your phone number, follow these steps to get it configured into RecDesk:

  1. Log into RecDesk Director and click on the **Admin** Tab

2. Click **Settings**
3. Under SMS Settings, choose **Plivo** from the SMS Provider drop down
4. Enter your **Auth ID** from Plivo (see below)
5. Check off Show next to Token and enter **Token** from Plivo (see below)
6. Enter **Phone Number** that you just bought from Plivo (include country code, but no spaces or hyphens; ie 19596660906)
7. Click **Save**.

Twilio

To use Twilio for SMS Text Messaging from RecDesk, follow these steps:

- For Twilio pricing, see here under Text Messages, To Send: https://www.twilio.com/sms/pricing

- Sign up for free at https://www.twilio.com/try-twilio and skip the questions after password

- Once you have your account, follow these steps to buy a phone number:

1. Click **Buy a Number.**
2. Choose **Country** and choose **Location** from the drop down. Then enter your **State.**
3. Make sure you choose **Capabilities of only SMS** and click **Search.**
4. **Choose a number** from the list and click **Buy.**
5. **Then click Buy This Number (then pay for the number and add money to your account).**

- Once you have your account, follow these steps to get it configured into RecDesk:

1. Log into RecDesk Director and click on the **Admin** Tab
2. Click **Settings**
3. Under SMS Settings, choose **Twilio** from the SMS Provider drop down
4. Enter your **Account SID** from Twilio into the Account Id
5. Click the eyeball icon to view your token and then copy/paste into **Token**
6. Enter **Phone Number** that you just bought from Twilio (include country code, but no spaces or hyphens; ie 19596660906)
7. Click **Save**.

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

Expected Payment Plan Revenue (List)

Payments and Registrations Related

Payment Detail By Period

General Ledger Related

Revenue By Period - Summary

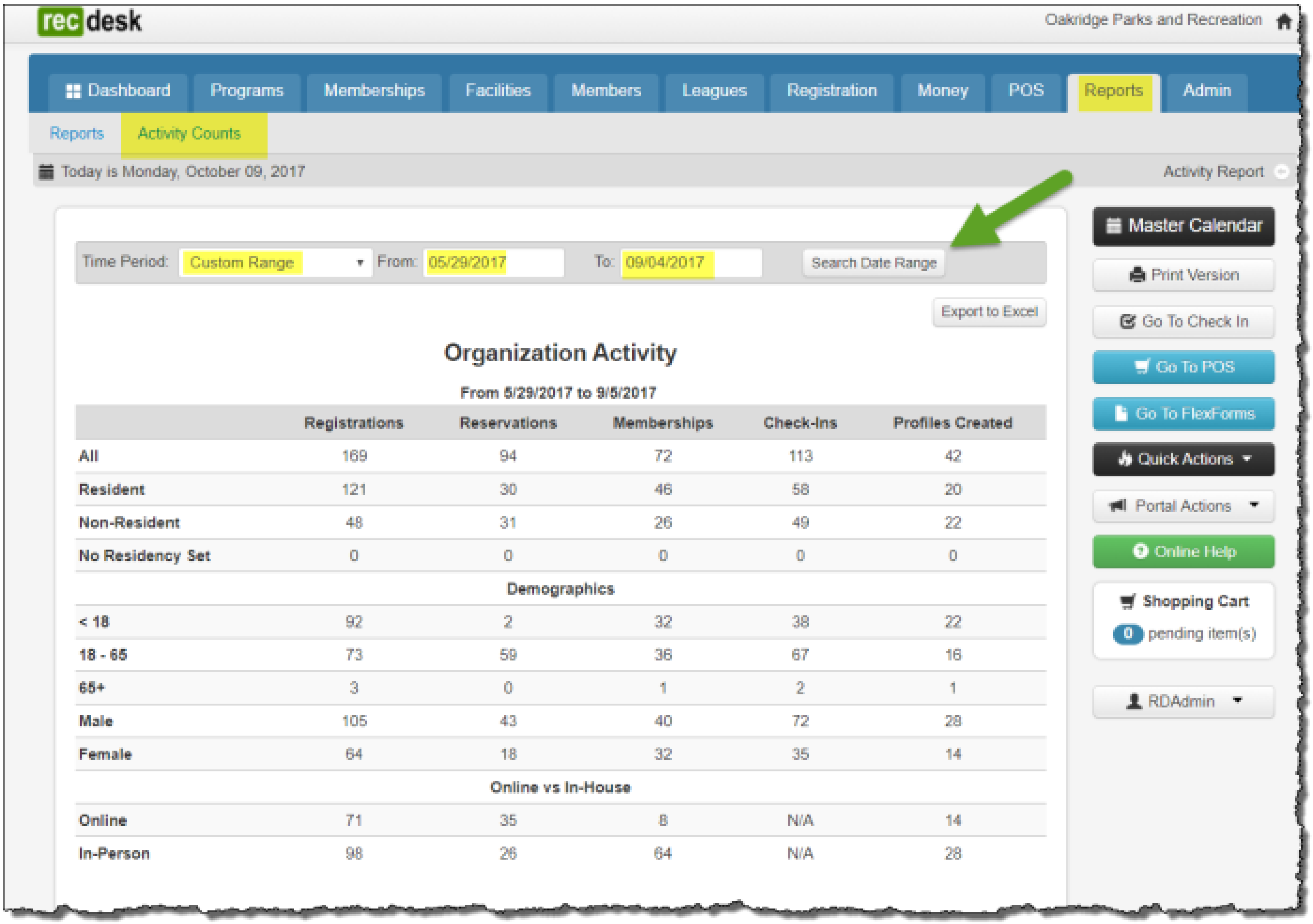
Revenue By Period - Detail

Member Related

Email List

Activity Counts

To see a list of your **Organization's Activity Counts**, Navigate to the **Reports** tab, then click on the **Activity Counts** submenu. Select the *Time Period* from the drop down. Custom Range option allows you to enter Custom Start and End Dates.



	Registrations	Reservations	Memberships	Check-Ins	Profiles Created
All	169	94	72	113	42
Resident	121	30	46	58	20
Non-Resident	48	31	26	49	22
No Residency Set	0	0	0	0	0
Demographics					
< 18	92	2	32	38	22
18 - 65	73	59	36	67	16
65+	3	0	1	2	1
Male	105	43	40	72	28
Female	64	18	32	35	14
Online vs In-House					
Online	71	35	8	N/A	14
In-Person	98	26	64	N/A	28

Credit Card Processing

In order to process credit cards in RecDesk, your organization needs to have or set up an account with one of our supported payment processing partners. Please see more at http://recdesk.com/payment-processing/ .

eCheck/ACH Processing

RecDesk allows you to accept payments via **eCheck/ACH** (requires Authorize.net account)

Authorize.net Prerequisites - the following items must exist in order to accept payments by eCheck/ACH:

- You must be a **US-based merchant** selling to customers in the US

- You must have an **Authorize.net** account configured in RecDesk

- Your account must be **enabled for eCheck processing by Authorize.net** . If you are working with GovtPortal, please contact them directly. If you set up your Authorize.net account on your own, you must submit the eCheck.Net application

- Under the Authorize.net Account Security Settings, enable the **Transaction Details API.** If you are working with GovtPortal, please contact them directly. If you set up your Authorize.net account on your own, go to the **ACCOUNT** tab, and click on **Transaction Details API** under the **Security Settings** section. Then click **Enable Transaction Details API.**

RecDesk Configuration

- After you've completed the above Authorize.net steps, please contact your Customer Success Representative at RecDesk or email us at support@recdesk.com to **activate the eCheck/ACH feature**

- Once the feature has been activated, sign up to get a User Alert if an eCheck/ACH Payment is Returned for any reason, including Insufficient Funds, Account Closed, Invalid Account Number, etc. See User Alerts

Handling eCheck/ACH Returns

Once a check is processed by Authorize.net and handed off to the ACH (Automated Clearing House), it may be returned for a variety of reasons including Insufficient Funds, Account Closed, Invalid Account Number, etc. RecDesk goes out to Authorize.net 3 times after an eCheck/ACH payment is made to check on its status; it checks 7, 10 and 15 days after the original payment is made. On any of those status checks, if the payment is returned for any reason, the Return Code and Description will appear on the email alert (if you signed up for it) and they will also show on the ACH Returns page.

- See Returned eCheck/ACH payments by going to the **Money** tab and then the **ACH Returns** subpage.

- **If an eCheck/ACH payment is Returned****, we recommend you follow these steps:

- **Void the Payment** - see Voids

- **Update the Stored Payment Option** appropriately - see Household Stored Payment Options .

Making Payments with eCheck/ACH

1. Add a **Household Stored Payment Option** with Source Type of eCheck/ACH. See Household Stored Payment Options .

2. Make a payment with an eCheck/ACH Stored Payment Option. See Making a Payment . You can also use the eCheck/ACH option when you create a **Payment Plan** or on **Auto-Renewal of Memberships**. See Working With Payment Plans and Enrolling Members In-house .

-

**

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**

Available Roles are:

- Director
- Assistant Director
- Associate
- Read Only
- POS Cashier (access to POS Terminal ONLY)
- Check-In Attendant (Access to Attended Check-In page ONLY)

User Alerts

RecDesk allows you to receive email alerts when certain triggering events occur.

1. Click on the *Admin* tab
2. Select **RecDesk User List** from the sub menu
3. Select a User from the List and then select the User Alerts tab
4. Check the alerts you would like to subscribe to

Available Alerts

- Program is Full
- Online Reservation Made
- New Online Account Created (only available if Online Account Approval is configured for your organization)
- ACH/eCheck Returned (Failed) (only if eCheck/ACH feature is Activated)

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***.

Facilities:

- **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

Programs:

- **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

Financial:

- **Fee Types -** Fee Types are the general labels used to describe the *name* of a Standard Fee. 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*.

- **Add-On Fee Types -** Add-On Fee Types are the labels used to describe the *name* of an Add-On Fee. These are then assigned to specific Programs (along with a *value*). Some examples would be: *Before Care, After Care, Lunch, T-Shirt.*

- **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. *Note*: If you are using General Ledger Accounts and plan on using the Household Credit Account, we recommend that you set up a GL Code for this purpose. See Setting Up Household Credit GL Code.

- **Sales Tax** - Add Sales Tax Descriptions and Rates. You can designate one rate as the default. Programs, Membership Types and Facilities can then be assigned a Sales Tax Rate.

- **POS Discount/Coupons** - Add POS Discount/Coupon Descriptions and Rates. Click **Enable POS Discounts/Coupons** when you wish to have these available on the POS terminal. Click **Disable POS Discounts/Coupons** when you do not want these available on the POS terminal.

Other:

- **Tags** - Use Tags to label Members, Facilities, or Personnel/Volunteers to easily perform Advanced Searches by them. The following Tag Types can be Added:

    - **Member Tags** - Add all MemberTags to this list, choosing Member from the Applies to Type drop down, and then select from these tags to place on Member profiles. See Adding Tags to Members. See The Member List (Advanced Search) to search by Member Tag(s).

    - **Facility Tags** - Add all Facility Tags to this list, choosing Facility from the Applies to Type drop down, and then select from these tags to place on Facilities. See Adding Tags to Facilities. See The Facility List (Advanced Search) to search by Facility Tag(s). Facility tags can also be used to display different Flex Calendar views.

    - **Personnel/Volunteer Tags** - Add all Personnel/Volunteer Tags to this list, choosing Personnel/Volunteer from the Applies to Type drop down, and then select from these Tags to place on Personnel/Volunteers. See Adding Tags to Personnel/Volunteers. See The Personnel/Volunteer List (Advanced Search) to search by Personnel/Volunteer Tags.

- **Document Types** - Add Document Types to attach those types of Documents to Members or Personnel/Volunteers (see also Attached Documents FAQ).

Basic Workflow

- Click **Manage Document Types**

- Click **Add New Document Type**

- Enter the **Document Type Name** (Birth Certificate, Background Check, etc.)

- Optionally add a **Description** for the Document Type

- Choose the **Applies to Type** (Member or Personnel/Volunteer) from the drop down

- Choose the **Expiration Type** from the drop down:

    - **No Expiration**

    - **Specific Date** - Enter the **Expiration Date**

    - **Choose Pattern** - Enter the **Default Document Expiration** in Day(s), Week(s), Month(s) or Year(s). The Expiration Date will be set using that Pattern from the date of the initial upload

- Click **Save**.

See Attaching Documents to Members, or Attaching Documents to Personnel/Volunteers. See The Member List (Advanced Search), or The Personnel/Volunteer List (Advanced Search) to search by Members or Personnel/Volunteers with certain Document Types.

- **Custom Genders** - To add Custom Genders, click **Add New Gender Option**. Enter the **Gender Description** and **Save** (will be enabled by default). Click **Disable** to remove this Custom Gender from Gender drop down lists. *Note*: *Custom Genders will be marked as "C" on some reports.*

Personnel/Volunteers (Coaches, Instructors, etc)

The Personnel/Volunteer List (Advanced Search)

The **Personnel/Volunteer List** contains all Personnel or Volunteers like Coaches or Instructors you've added for your organization. You can view the whole list, or filter by *Role, Name,* and/or *Email* and click **Apply Search**. To go to the Personnel/Volunteer List, simply click on the **Admin** tab, then click on the **Personnel/Volunteers List** subtab.

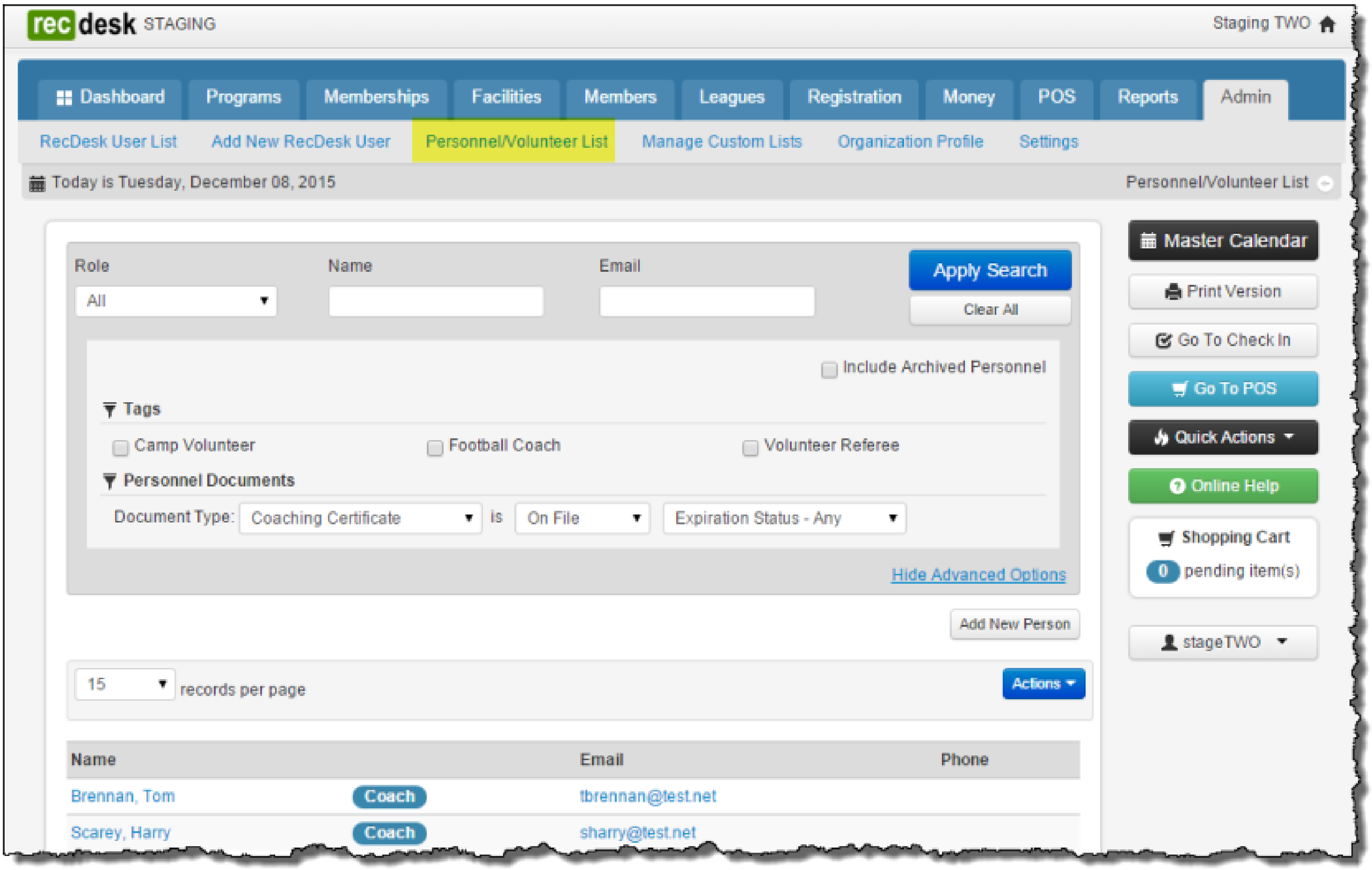
Advanced Search Options:

- Click **Show Advanced Options**

- Check off any or all **Tags** to filter this List to show Personnel or Volunteers that have *any* of the Tags checked.

- You can also filter this List to show Personnel or Volunteers that have a certain **Document** attached to their Personnel/Volunteer profile. Choose a **Document Type** from the drop down, choose whether the Document is **On File** or **NOT on File**, choose an **Expiration Status**, and click **Apply Search**.

Personnel/Volunteer List (with Advanced Search Options)



Adding/Editing Personnel/Volunteers

RecDesk allows you to add **Personnel or Volunteers** like Coaches or Instructors and then choose them where they will be assigned.

Basic Workflow

- Click on the **Admin** tab
- Click on the **Personnel/Volunteer List** submenu to see the current list of Personnel/Volunteers
- To **Add New Personnel/Volunteer**, click on the **Add New Person** button. To **Edit Existing Personnel/Volunteers**, click on the person's **name**, and click on the **Edit Personnel** button.
- Required Fields:
    - **First Name**
    - **Last Name**
    - At least 1 **Role**
    - **State/Province** *(usually autofilled)*
- Optional Fields:
    - **Primary Email Address -** If allowing login by this Personnel/Volunteer, primary email address is *required*, and will be used to log in via your RecDesk Community site. See Online Access for Instructors/Coaches.
    - **Allow Login** and **Password -** If you'd like to allow this Personnel/Volunteer access to login and view their rosters, check ***Allow Login*** and enter a ***Password.*** See Online Access for Instructors/Coaches.
    - All other general Member Fields

- Other Fields *(for use in new features coming soon)*

- Click **Save**.

Note: *Archiving* a person will remove that person from the drop down lists for any future assignments for Roles the person was assigned

Adding Tags to Personnel/Volunteers

RecDesk allows you to add Tags to Personnel/Volunteers to easily search for all Personnel/Volunteers labeled with that Tag. (see also Using Tags Effectively)

Basic Workflow

- Before tagging Personnel/Volunteers, be sure to add any/all Tags you'd like to place on Personnel/ Volunteers. See Managing Custom Lists.

- Click on a name from The Personnel/Volunteer List.

- Click **Add Tag(s)**.

- Check off any and all Tags that apply to this Personnel/Volunteer.

- Now you can perform an Advanced Personnel/Volunteer Search by any or all Tags!

Attaching Documents to Personnel/Volunteers

RecDesk allows you to attach documents to Personnel/Volunteer profiles and then easily search for all Personnel or Volunteers with certain Document Types **On file** or **NOT on File** (see The Personnel/Volunteer List (Advanced Search) and Attached Documents FAQ).

Basic Workflow

- Before attaching Documents to Personnel/Volunteers, be sure to add any/all Document Types you'd like to attach to their profiles. See Managing Custom Lists.
- Click on a Personnel/Volunteer's name from The Personnel/Volunteer List.
- Click **Attach New Doc** just above the Address.
- Choose a **Document Type** from the drop down. If the Document Type has an Expiration Type, the default **Expiration Date** will appear, which can be overridden.
- Check off **Mark Document as on File** if you have a hard copy of the document OR click **Choose File** and follow the prompts if you'd like to Upload a Document to attach to this Member.
- The **Document Title** will be autofilled with the Document Type, but can be overridden.
- You can optionally add a **Note**.
- Click **Save**! You can now perform an Advanced Personnel/Volunteer Search by Document Type!

Coach Assignments

When a person currently has a Personnel/Volunteer Role of Coach or has previously coached, the **Coach Assignments** tab appears for that person. This tab shows all Leagues for which the person currently or previously has coached, including each Division, Team, and Start and End Dates of the each League.

- Click on a **League name** to go to that League Info page

- Cick on a **Team name** to go to that Team Info page

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

Program Assignments

When a person currently has a Personnel/Volunteer Role of Instructor, or has previously been an Instructor for a Program, the **Program Assignments** tab appears for that person. This tab shows all Programs for which the person currently or previously has instructed, including the Start and End Dates of the each Program.

- Click on a **Program name** to go to that Program Info page

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

Online Access for Instructors/Coaches

RecDesk gives you the ability to allow your Instructors and Coaches online access to the current and future programs to which they are assigned. Access is via your **RecDesk Community**** site.

** Please note your RecDesk Community site is at http://**yoursubdomain**.recdesk.com/community

Basic Workflow

- **Allow Log In** - Before allowing access to Personnel/Volunteers, they must be set up under the ***Admin*** tab under ***Personnel/Volunteers*** and ***Allow Login*** must be checked with a ***Password*** assigned. See Adding/Editing Personnel/Volunteers. The person will then be allowed to see current and future *Programs* to which they are assigned as *Instructors* and/or current and future *Leagues* to which they are assigned as *Coaches*.

- **Send the Password to the Instructor/Coach with a link to your RecDesk Community site** - Your RecDesk Community site is http://**orgname**.recdesk.com/community; where ***orgname*** (*also called subdomain in technical terms*) is the first part of your RecDesk Director site. For example, if your RecDesk Director site is https://oakridge.recdesk.com/director, your RecDesk Community site is http://**oakridge**.recdesk.com/community.

Sign In by Instructor/Coach

- Once Instructors/Coaches get to your RecDesk Community site, they click **Sign In** and then click **Log in as Instructor/Coach/Volunteer** and enter their **Email Address** and **Password**. They will then see Programs to which they are assigned as Instructors, and Leagues to which they are assigned as Coaches.

Instructors

- Click on **My Programs**, then click on a **Program Name** to view the Roster and then may click **Actions** and have these options:

    - Email Participants (asTo)
    - Email Participants (asBcc)
    - Display/Copy Email Addresses
    - Text(SMS) All Participants
    - Display/Copy Text/SMS Addresses
    - Export Basic List to Excel
    - Export Full Detail to Excel

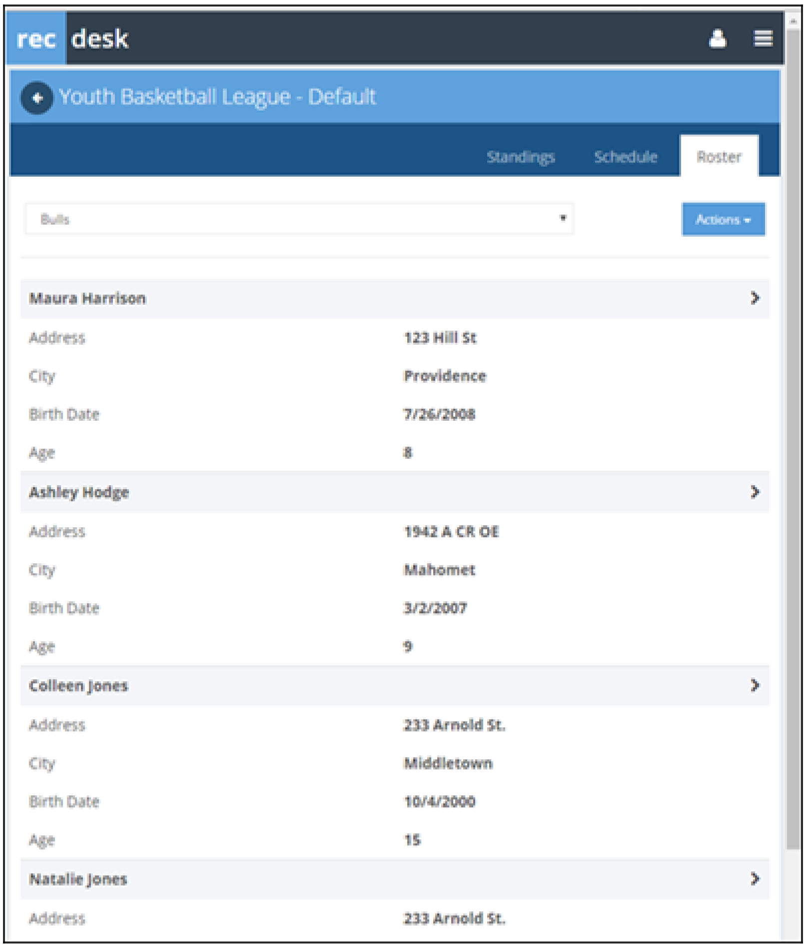
- Instructors can also view **Detail** and **Schedule** tabs for the Program

Coaches

- Click on **My Leagues**, then click on a **League Name** to view the Team Roster(s) for All Teams to which they are assigned as Coaches (***Note:*** Coaches assigned as **League Admin** can see all Teams for that League). Click **Actions** and these options are available for the Roster currently visible:

    - Email Team (asTo)
    - Email Team (asBcc)
    - Display/Copy Email Addresses
    - Text(SMS) All Participants
    - Display/Copy Text/SMS Addresses
    - Export Basic List to Excel
    - Export Full Detail to Excel

- Coaches can also view **Standings** and **Schedule** tabs for the League

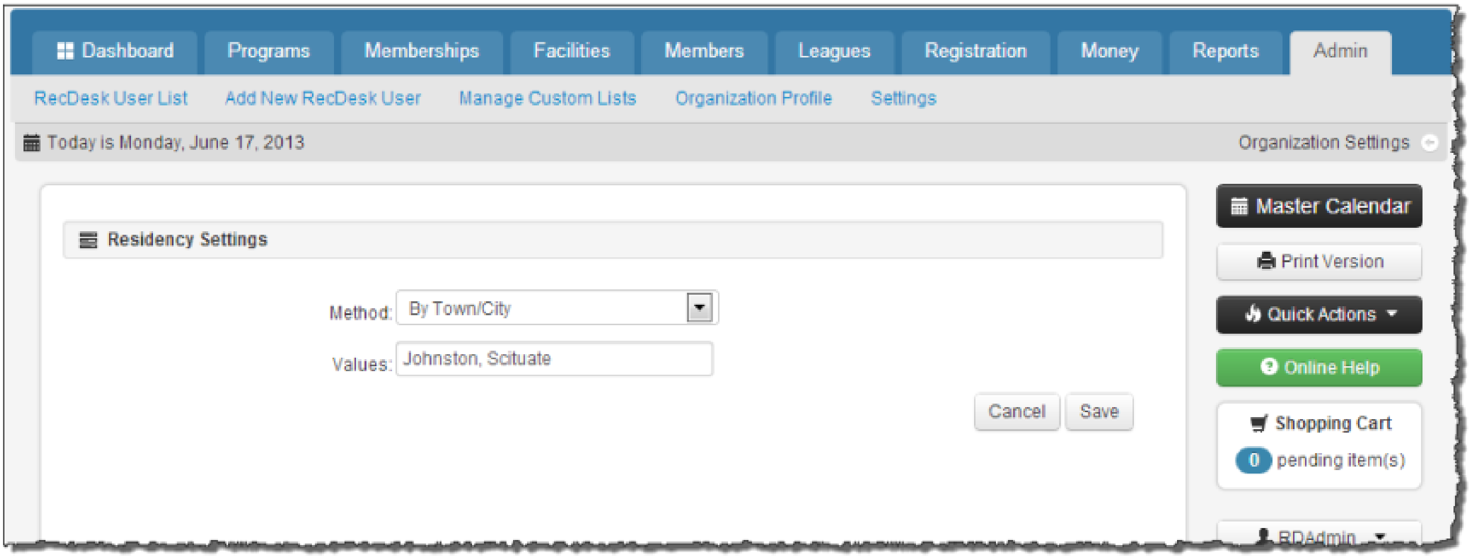


Setting Up Basic Residency Requirements

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.

NOTE: We can also accommodate an **Address/GIS database** as well. See Residency Determination Based on Address/GIS Database

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.



Residency Determination Based on Address/GIS Database

RecDesk also supports the migration of **GIS/Address Data** into RecDesk for purposes of auto-adjudicating Residency Status. It is the responsibility of the recreation organization/municipality to provide RecDesk with a Excel file that conforms to the format detailed in the table below. In most instances the recreation organization/ municipality will have to work with their IT department to provide this extract, but depending on the system being migrated from, there may be a canned report/extract that already serves this purpose. In either case, see Excel File Notes below for specific RecDesk requirements.

*****Please contact RecDesk for more information on implementing this premium functionality***

*** **NOTE**: Once initial import of Address/GIS is complete, RecDesk Director has a maintenance page where ongoing changes to Address data is maintained by the subscribing organization. The organization can also opt to NOT seed this data by doing an import but rather enter Addresses manually up front.*

Setting Up Household Credit GL Code

RecDesk supports the crediting of a Household Account rather than refunding via check, cash or credit card. This allows the balance to be applied to a future purchase/registration by any Member of that household (see Household Credits). If you are using General Ledger Accounts and you will be using the Household Credit feature, you should first set up your **Household Credit GL Code:**

1. Add a General Ledger Code for a Household Credit Account (see Managing Custom Lists).

2. Update your Admin. Settings and save this GL Account as the **Household Credit GL Code:**

- Click the **Admin** Tab, then click **Settings**
- Under Financial Settings, click the **Edit** button for **Household Credit GL Code**
- Choose the **GL Code** you set up in Step 1
- Click **Save**

Invoice Me (Pay Later) Option for RecDesk Community

RecDesk offers an **Invoice Me (Pay Later)** option for those customers who would like to allow their Community Members register for Programs, enroll in Memberships and make Reservations Online but Pay Later. The options are:

1. **Credit Card (Pay Now) Only (default)** - this option *requires* **ALL** RecDesk Community payments to be made by Credit Card at the time the online transaction takes place.
2. **Credit Card (Pay Now) OR Invoice Me (Pay Later)** - this option allows the Community Member to choose between paying now by selecting Pay Now via Credit Card or paying later by selecting Invoice Me (Pay Later).
3. **Invoice Me (Pay Later) Only** - this option will result in **ALL** RecDesk Community transactions creating an invoice to be paid later.

Configuring Invoice Me (Pay Later) Option

- Click the **Admin** Tab, then click **Settings**

- Under Financial Settings, click the **Edit** button for **Invoice Me (Pay Later) Option**

- Choose the option (described above) that you'd like from the drop down ** *Only users with **Director Role** can update*

- Click **Save**

Note: All RecDesk Community transactions will use this configuration. If the Pay Later option is either chosen by the Community Member or the only option offered, the Invoices created will immediately reflect the correct balance due once the transaction is complete. The Community Member will then have the option to pay later by Credit Card from their RecDesk Community account or pay in-house later via Cash, Check or Credit Card.

Bulk Email Settings

RecDesk leverages two cloud based email service options called Sendgrid and Mandrill to ensure the highest performance and deliverability of your emails (see Sending Bulk Emails (Email Blasts).

Show/Hide Director Tabs

The **Show/Hide Director Tabs** settings give you the ability to Show/Not Show some of RecDesk's optional features on your RecDesk Director main menu. The following RecDesk Director tabs can be manually shown or not shown to best meet your organization's needs:

- **Memberships Tab** - default is set to <u>Show</u> this tab

- **Leagues Tab** - default is set to <u>Show</u> this tab

- **POS Tab** - default is set to <u>Show</u> this tab

To change any of these settings, simply click on the **Edit** button, choose **Y** or **N** from the drop down to Show/Not Show that menu tab, and click **Save**.

RecDesk FlexForms

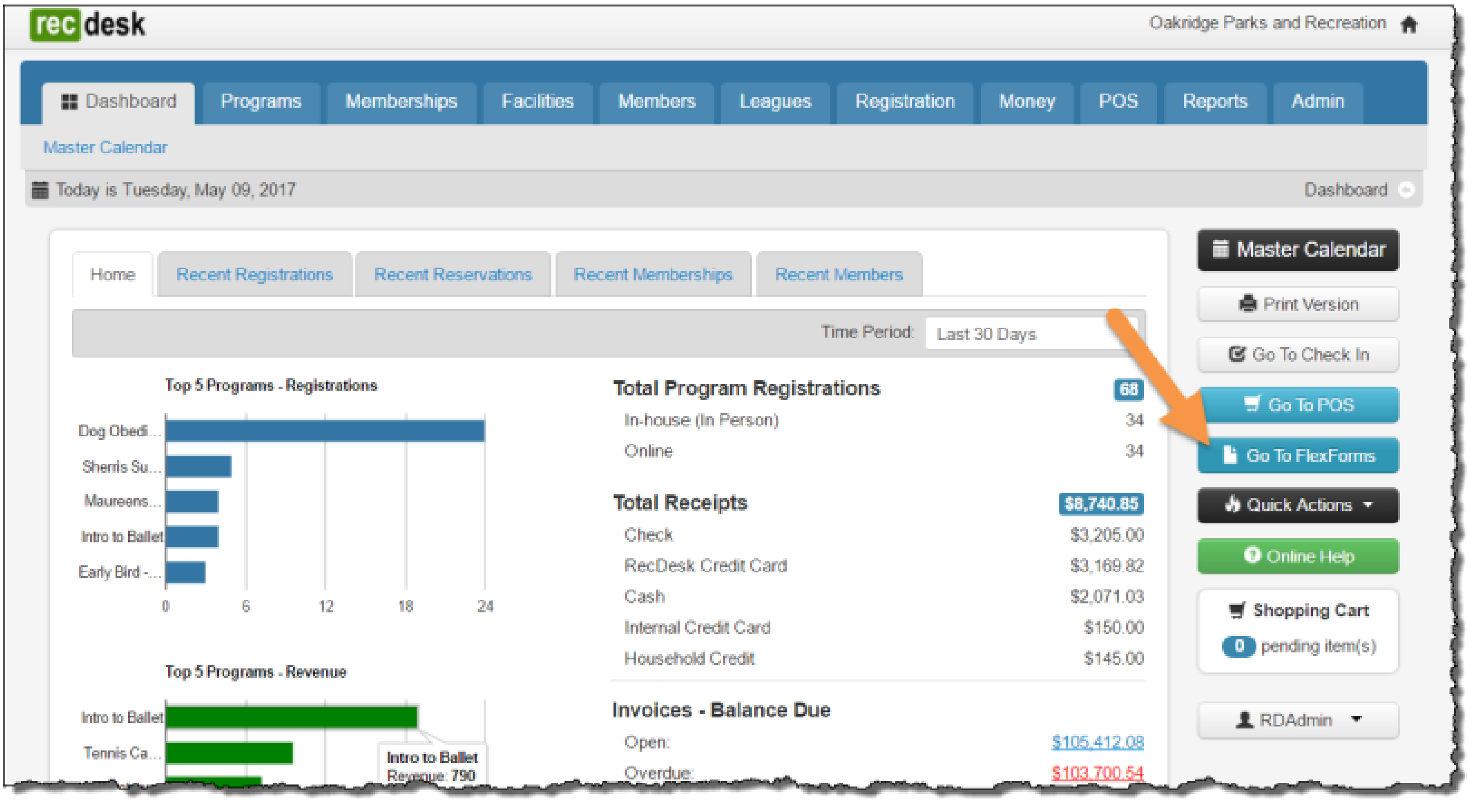
RecDesk FlexForms is the industry's first fully-featured, fully-integrated ***Advanced Custom Forms Engine***. There are three main components.

The FlexForms Builder

The FlexForms Builder allows you to build customized forms to fit your exact needs. The forms designed in the FlexForms Builder are fully integrated with RecDesk Director and Community. The FlexForms Builder can only be accessed from a desktop.

Logging In to the FlexForms Builder

Logging into the **FlexForms Builder** is easy: simply log in to RecDesk Director and click on **Go To FlexForms:**



You can also access your **RecDesk FlexForms** site at **http://orgname.recdesk.com/forms**; where orgname (also called subdomain in technical terms) is the first part of your RecDesk Director site. For example, if your RecDesk Director site is https://oakridge.recdesk.com/director, your RecDesk flexForms site is http://oakridge.recdesk.com/forms.

Use the same log in credentials as you use for RecDesk Director.

Note: You must have a **Director** or **Assistant Director** role to log into the **FlexForms Builder**

FlexForm Settings

Before adding a FlexForm, you should create ***Form Types*** that are appropriate for you organization.

Adding/Editing Form Types

- Click on the **Settings** tab on the far right of the menu. You will see the Form Types List.

- Click **Add new type** or click **Edit** to edit and existing **Form Type.**

- Enter or edit **Type** name and click **Create**.

The Forms List

The **Forms List** page shows all *Active Forms* by default.

Filtering Forms

Forms can be filtered in one of four ways (or in combination).

- **Form name** - Enter any part of a Form name and click **Search**
- **Type** - Choose Form Type from the Type drop down and click **Search**
- **Status** - Choose the Form Status from the drop down and click **Search**
- **Has Response** - If you only want to list Forms that have responses, check off **Has responses** and click **Search**

To reset all filters, click the **Reset Filters** button.

Creating and Modifying FlexForms

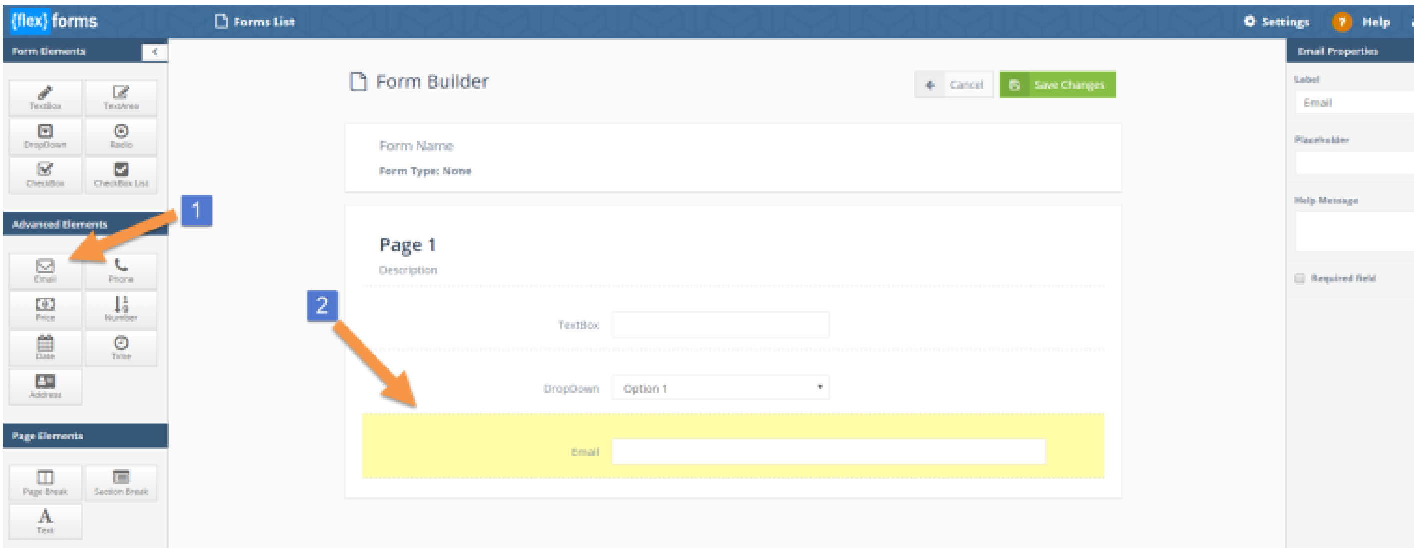
Adding **new FlexForms** and modifying existing ones begins on the The Forms List page. To add a new flexForm, click the *Start New Form* button. To **modify and existing FlexForm**, simply click on it from the Form List page and click the **Form** button.

Prerequisites - Before adding a FlexForm, you should create *Form Types* that are appropriate for you organization. S FlexForm Settings.

Adding FlexForm Elements

- When you first start a new FlexForm, the Form contains a Name and Page 1 with a TextBox and a DropDown list. These are called **Elements**, and all Elements you can add to a Form are in the **left mar** the Form Builder Screen.

- Click on an Element and it will add it to the bottom of your form and highlight it.



For a full list of Element types, see flexForm Elements.

Moving a FlexForm Element on a Form

- Click on the Element in the body of the form to highlight it

- Click the **Move** button within that Element

- Drag the Element to the section of the Form where you'd like it to be.

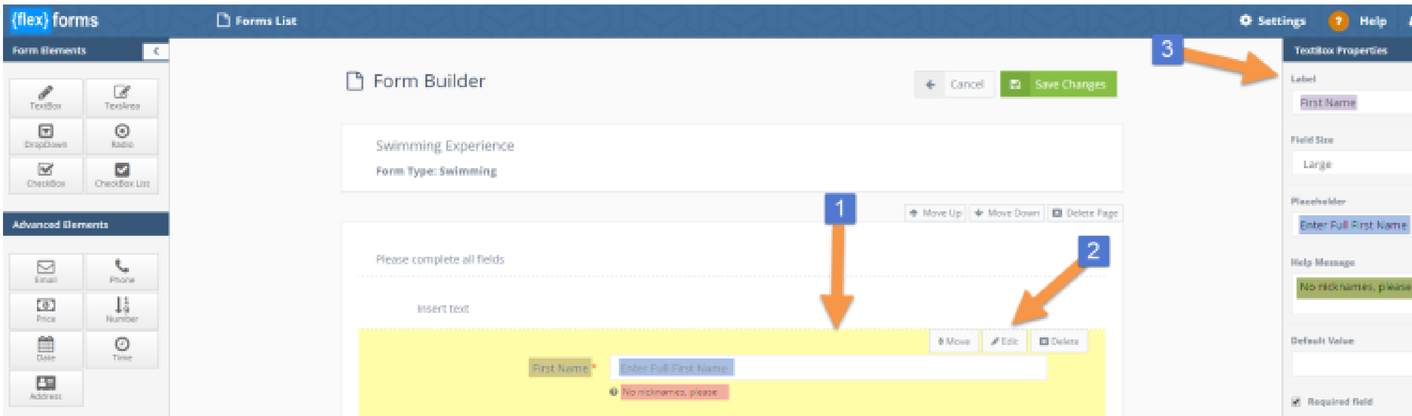
Editing a FlexForm Elements on a Form

Click on the Element in the body of the form to highlight it

- Click the Edit button within that Element

- That Element will appear in the right margin of the screen (Edit Panel). The Edit Panel is where you customize the information for that field including Label, Choices and other Options.

- Once you update the Edit Panel, the changes will then appear on the Element on the Form.



Deleting a FlexForm Element

- Click on the Element in the body of the form to highlight it

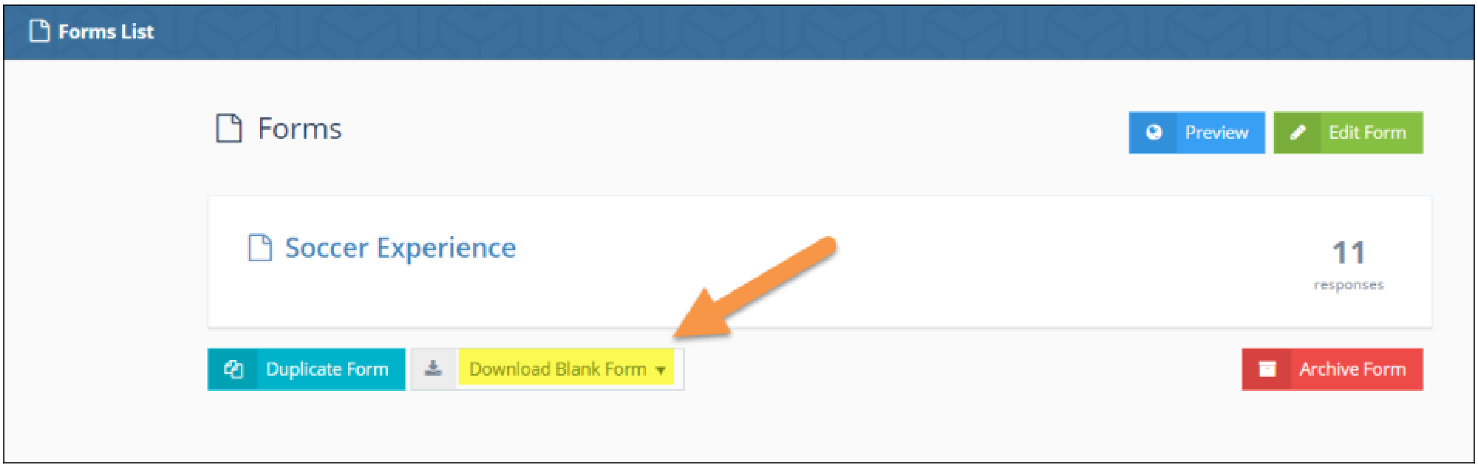
- Click the Delete button within that Element.

Saving a FlexForm

- Once you are finished updating your form, click on the **Save Changes** button at the top of the Form

Downloading Blank FlexForms

Blank FlexForms can be downloaded and printed from the FlexForms Builder. Simply click on the **Forms List**, then click on the FlexForm, and then click on the **Download Blank Form** drop down. You can choose **Download PDF** or **Download Word Document**.



Assigning Forms Programs, Facilities & Memberships

Once you've finished building your FlexForms, the next step is to assign the Forms to Programs and/or Facilities.

- Assigning Forms to Programs - allows you to require Form completion at the time of in-house and online registration (see Adding Forms to Programs)

- Assigning Forms to Facilities - allows you to require Form Completion at the time of in-house or online reservation (see Adding Forms to Facilities)

- Assigning Forms to Memberships - allows you to require Form Completion at the time of in-house or online enrollment (see Adding Forms to Memberships)

Managing Completed Forms

Once FlexForms are completed, here's how to access them:

Managing Program Forms

Form Action Items for Rosters

Form Actions for Individual Roster Entries

Managing Facility Reservation Forms

Searching, Viewing and Editing Facility Reservations

Compatible Signature Pad

RecDesk FlexForms will work with the following USB Signature Pad:

Topaz Model T-L460-HSB-R - see Google Shopping

Installation Instructions (make sure you have administrative access to the PC)

- Download install package from: https://www.topazsystems.com/software/sigweb.exe
- Once downloaded, run the executable to install
- Enter parts of the model number when prompted based on this: T-L460-HSB-R
- Once installed, plug the Signature Pad into an open USB port
- Test installation by visiting: http://www.sigplusweb.com/sigwebtablet_demo.htm
- For more information, see https://www.topazsystems.com/Software/sigweb_install.pdf

Appendix

FlexForm Elements

Form Elements

- **TextBox -** To collect a free-form response in a single line of text.
- **TextArea** - To collect a free-form response in multiple lines of text.
- **DropDown** - To collect a single response from a predefined list.
- **Radio** - Aka Option button - To allow user to choose only one choice from a predefined set of options. Optionally allows Other option for user to specify .
- **CheckBox** - To allow user to check or uncheck an option.
- **CheckBox List -** To allow user the check off one or multiple options from a list.

Advanced Elements

- **Email** - To collect a valid email address.
- **Phone** - To collect a valid phone number.
- **Price** - To collect a response that is in the form of currency.
- **Number** - To collect digits.
- **Date** - To collect a valid date.
- **Time** - To collect a valid time.
- **Address** - To collect a valid US or Canadian address.

- **Document** - To upload a single or multiple documents. File formats supported are:
    - .doc
    - .docx
    - .xls
    - .xlsx
    - .ppt
    - .pptx
    - .pdf
    - .jpg
    - .jpeg
    - .png
    - .bmp
    - .gif

- **Signature** - To collect an electronic signature.

Page Elements

- **Page Break** - Inserts a new page.

- **Section Break** - Inserts a new section with a Title and Description.

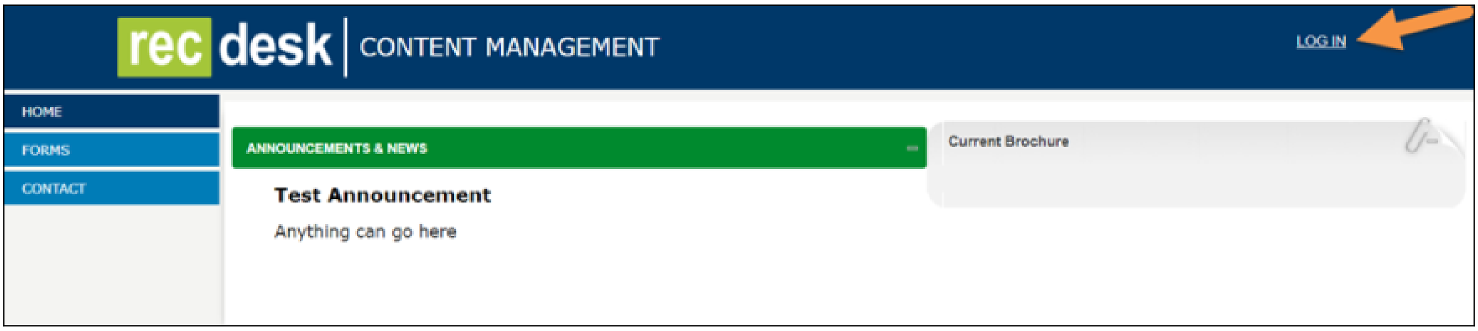
- **Text** - Inserts a text box for entering fixed information on the Form.

RecDesk Content Management

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. From RecDesk Director, click on **Portal Actions**, then choose **Content Management (CMS)**. If you don't see that option and would like it, please contact your RecDesk Customer Success Representative. Sign in by clicking the **Log In** button on the top-right of the screen (see below). Once logged in, you will be able to add and edit content to the pages on the left-hand menu as required.

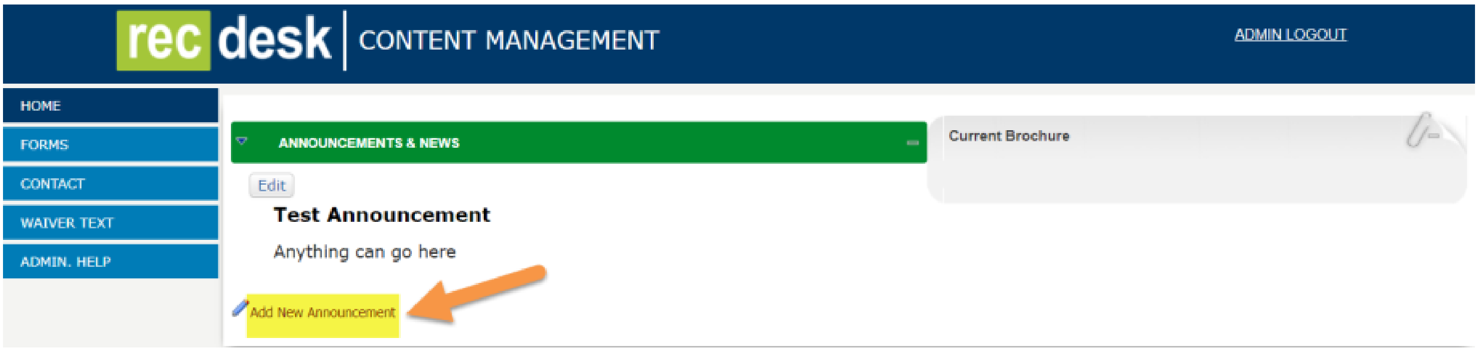


Adding and Updating Content

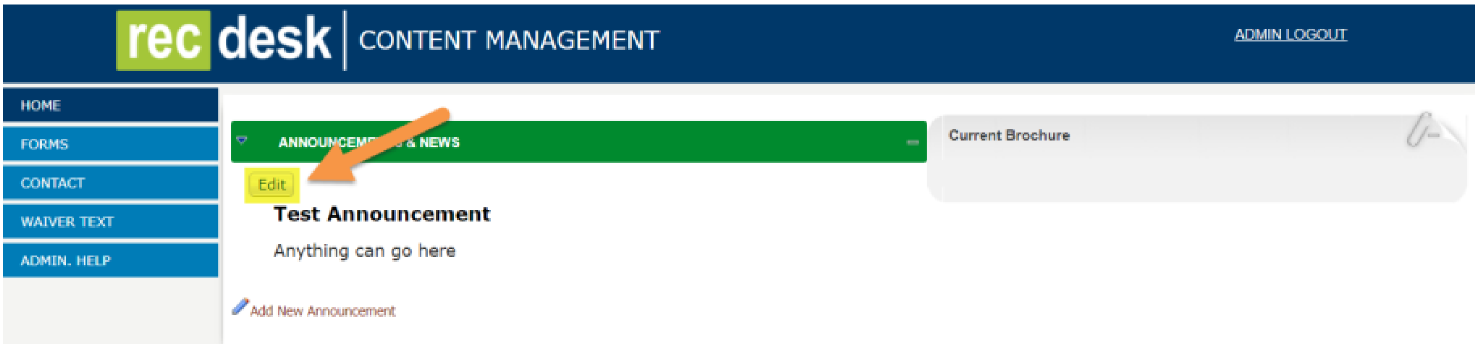
Announcements

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

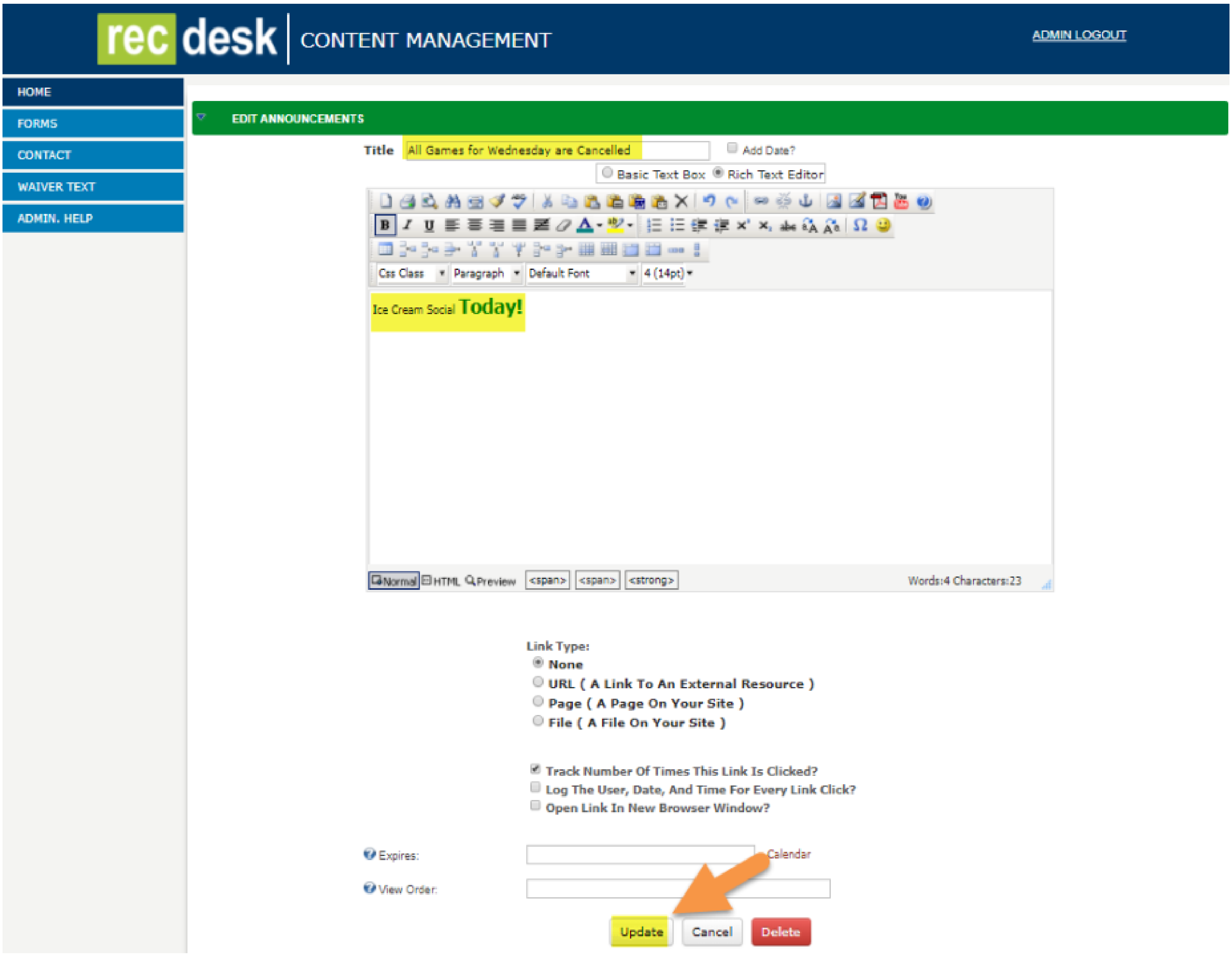
Adding an Announcement - Click **Add New Announcement**



Update an Announcement - Click on **Edit** button above the announcement **to update**

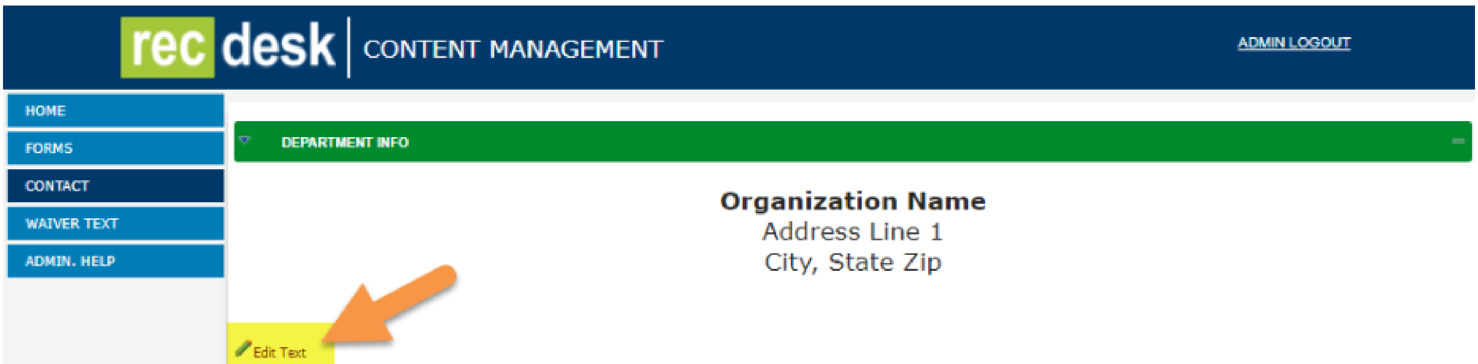


This will bring up the text editor. Add/update the Title, create the content and then click **Update** at the bottom.



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 **Edit Text**. Update the content and Save it the same way as shown above.



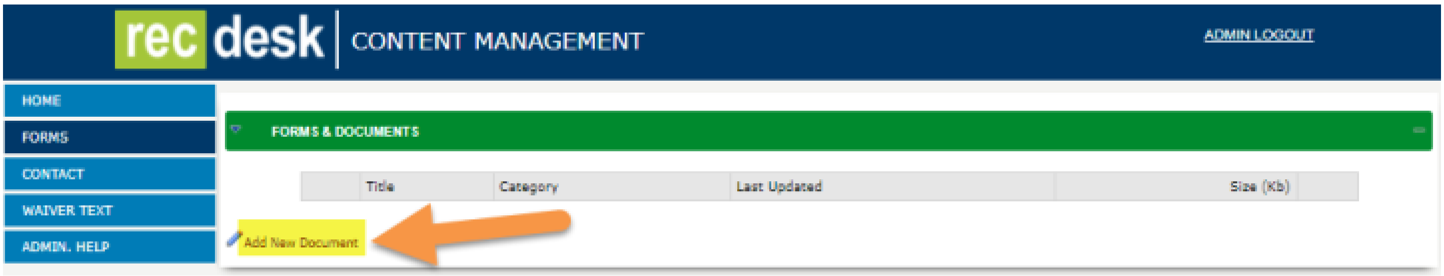
Uploading Documents

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

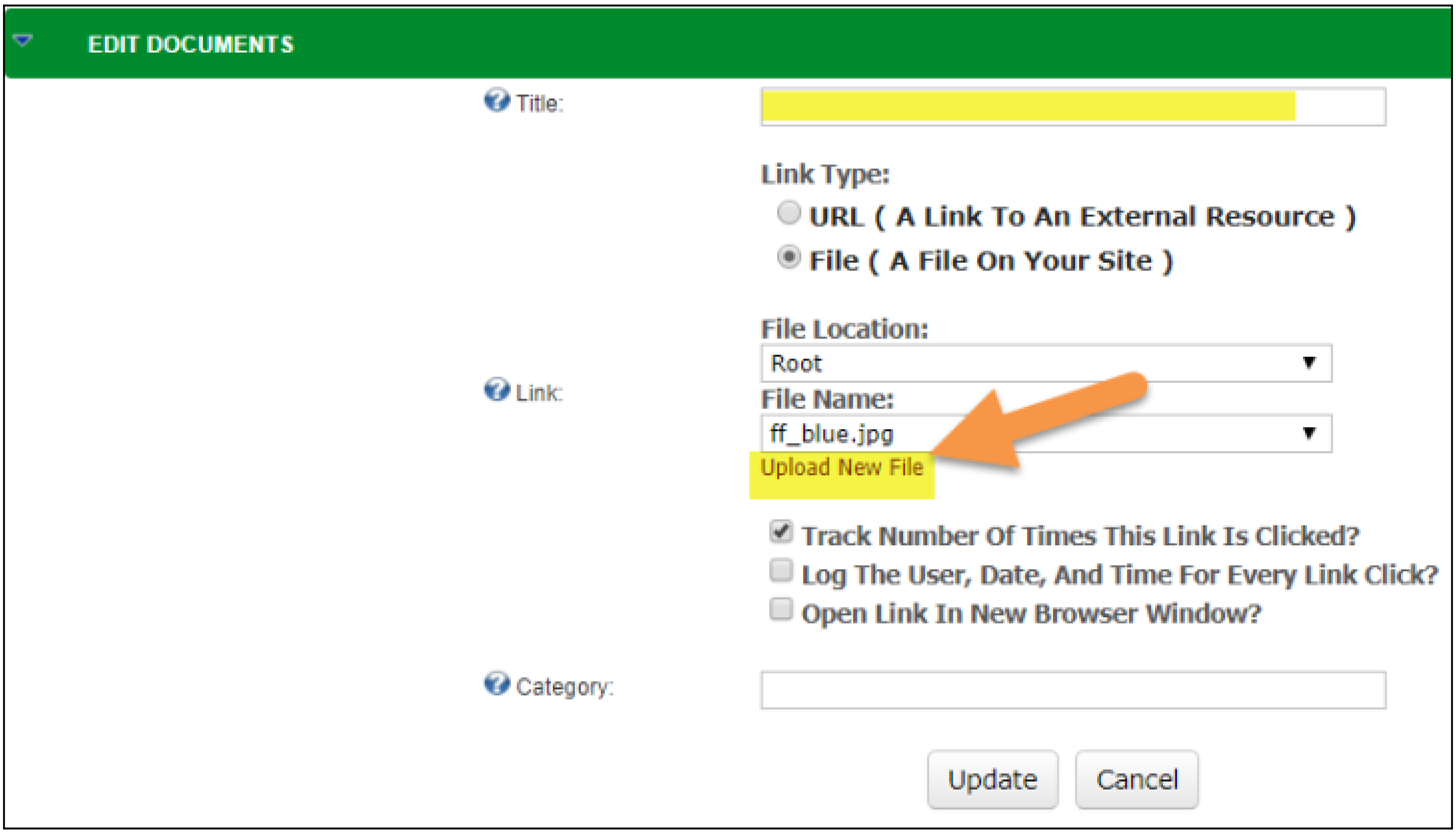
Adding New Documents

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

2. Click **Add New Document**

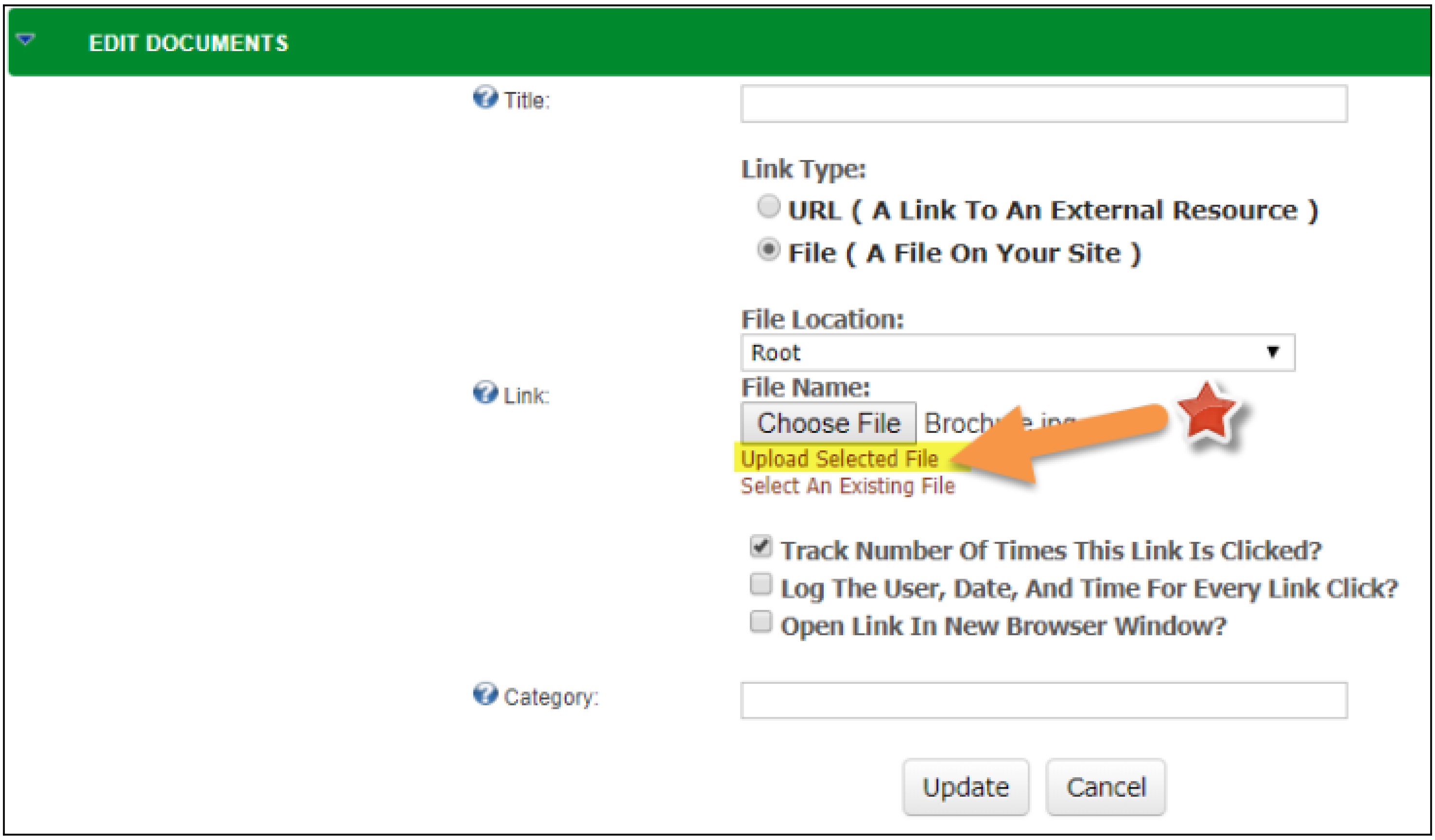


3. Give it a **Title** and click **Upload New File**

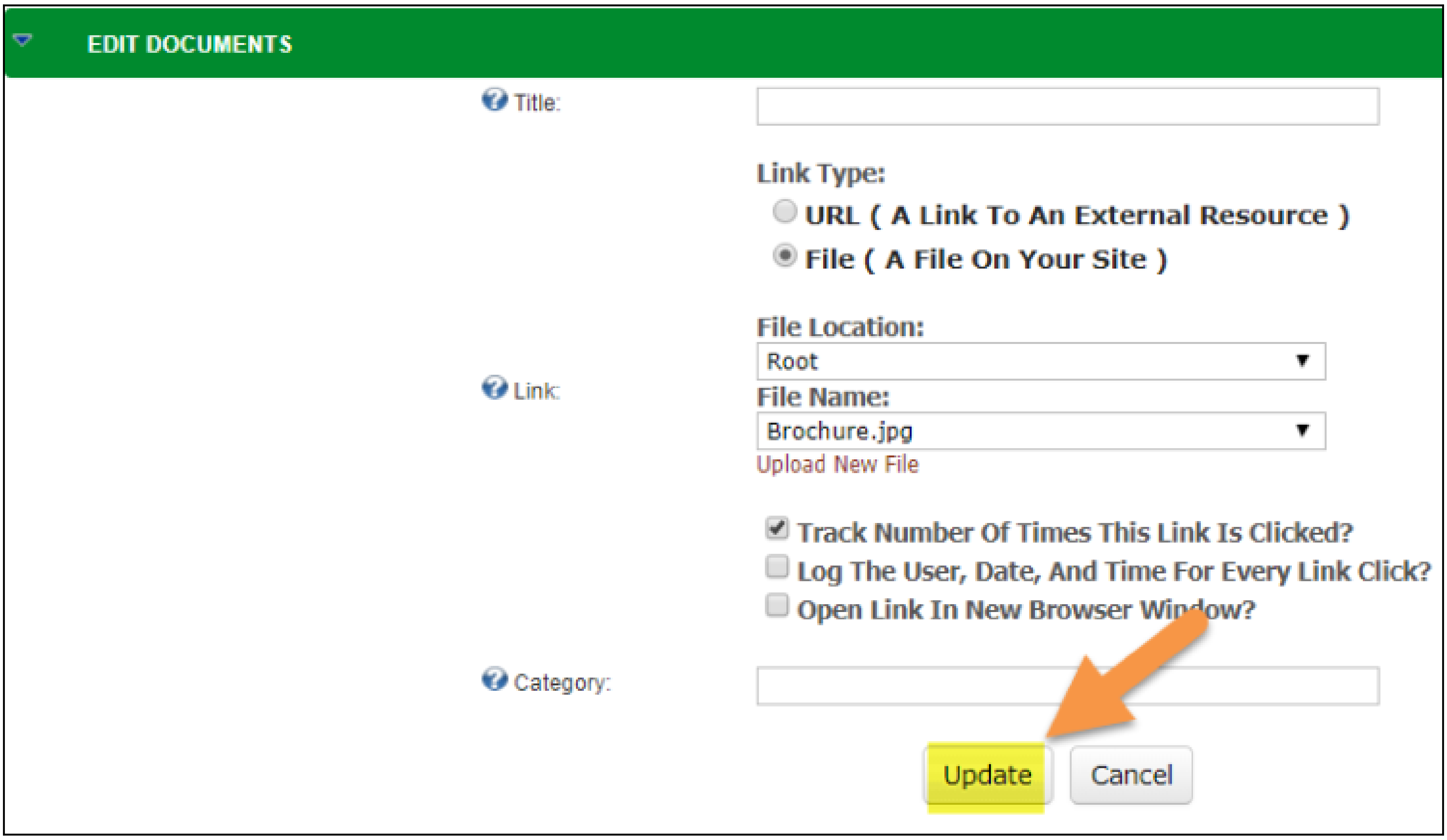


4. Click **Choose File** and select the file from your hard-drive

5. Click **Upload Selected File** and **wait until the file uploads completely**



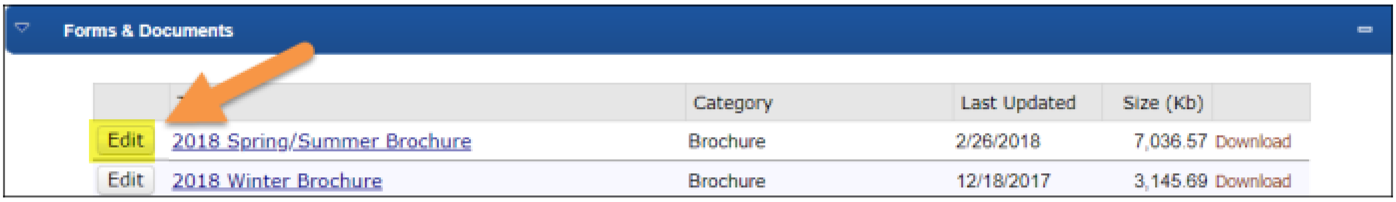
6. Click **Update**...and that's it.



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



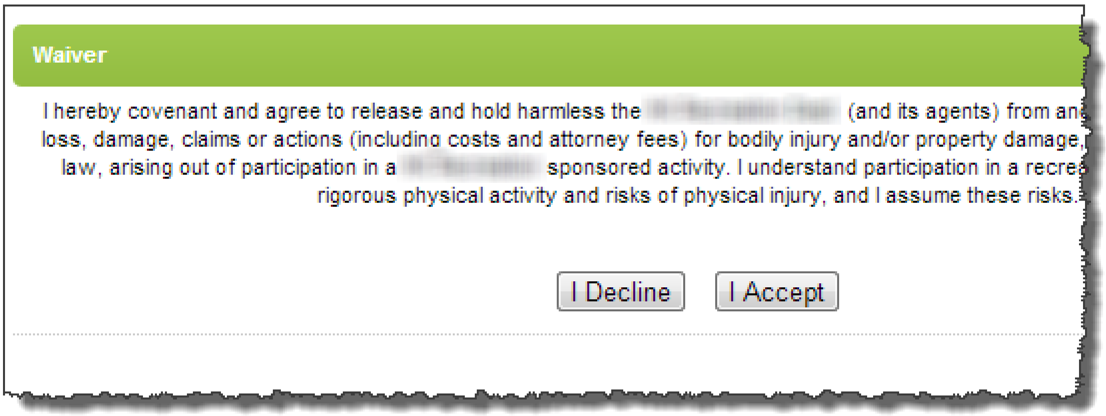
3. Follow the steps starting at #3 above as to how to update and save the document **

**** Please use a different filename on your hard-drive for the updated version of the file. The reason for this is that sometimes the old file is cached and that version of the file will be downloaded to the user's desktop instead of the new version.**

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:

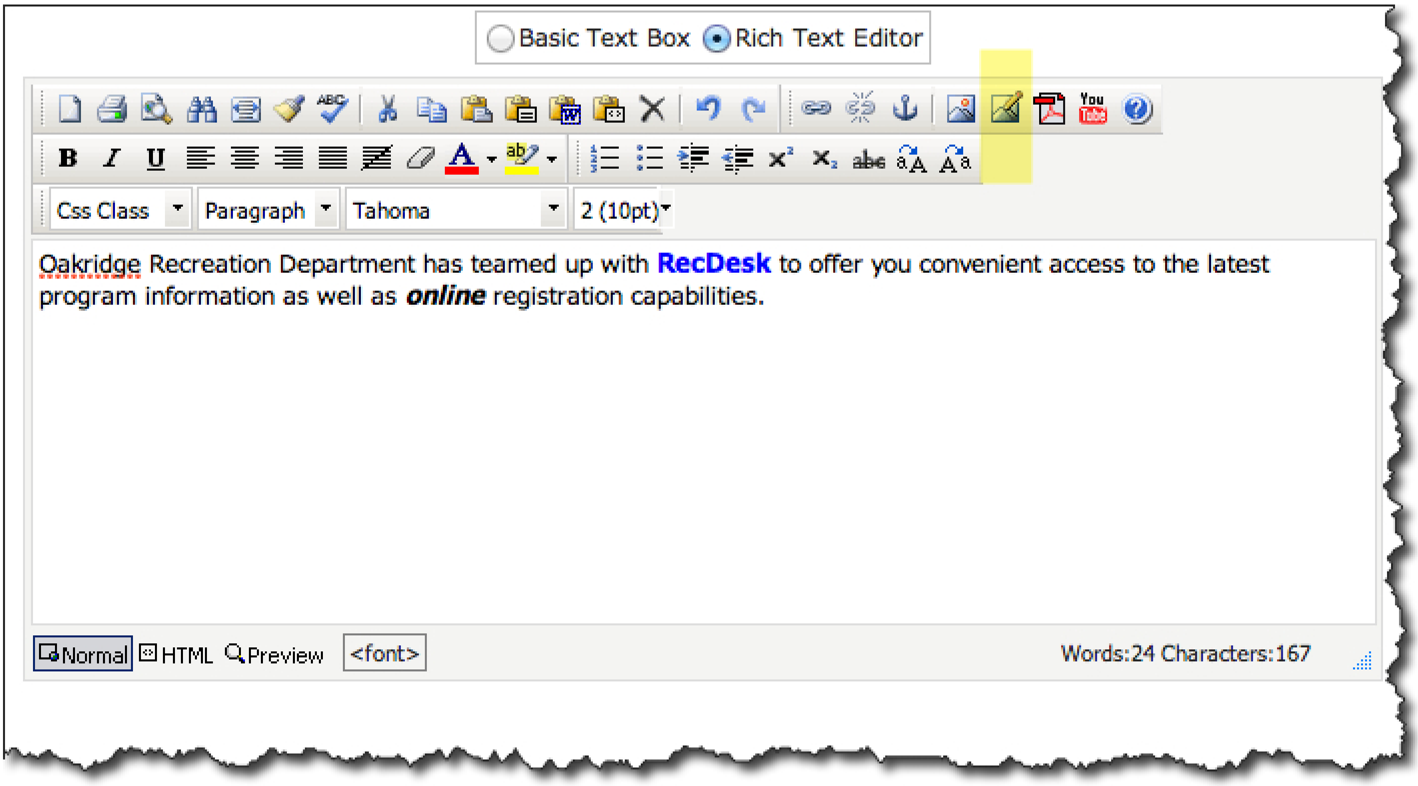
1. User adds registrations to their **shopping cart**
2. They click on the **Check Out** button
3. Your **Waiver** verbiage is displayed (see below)
4. If they **Accept**, they continue on to the Payment page. If they **Decline**, they are redirected back to the shopping cart



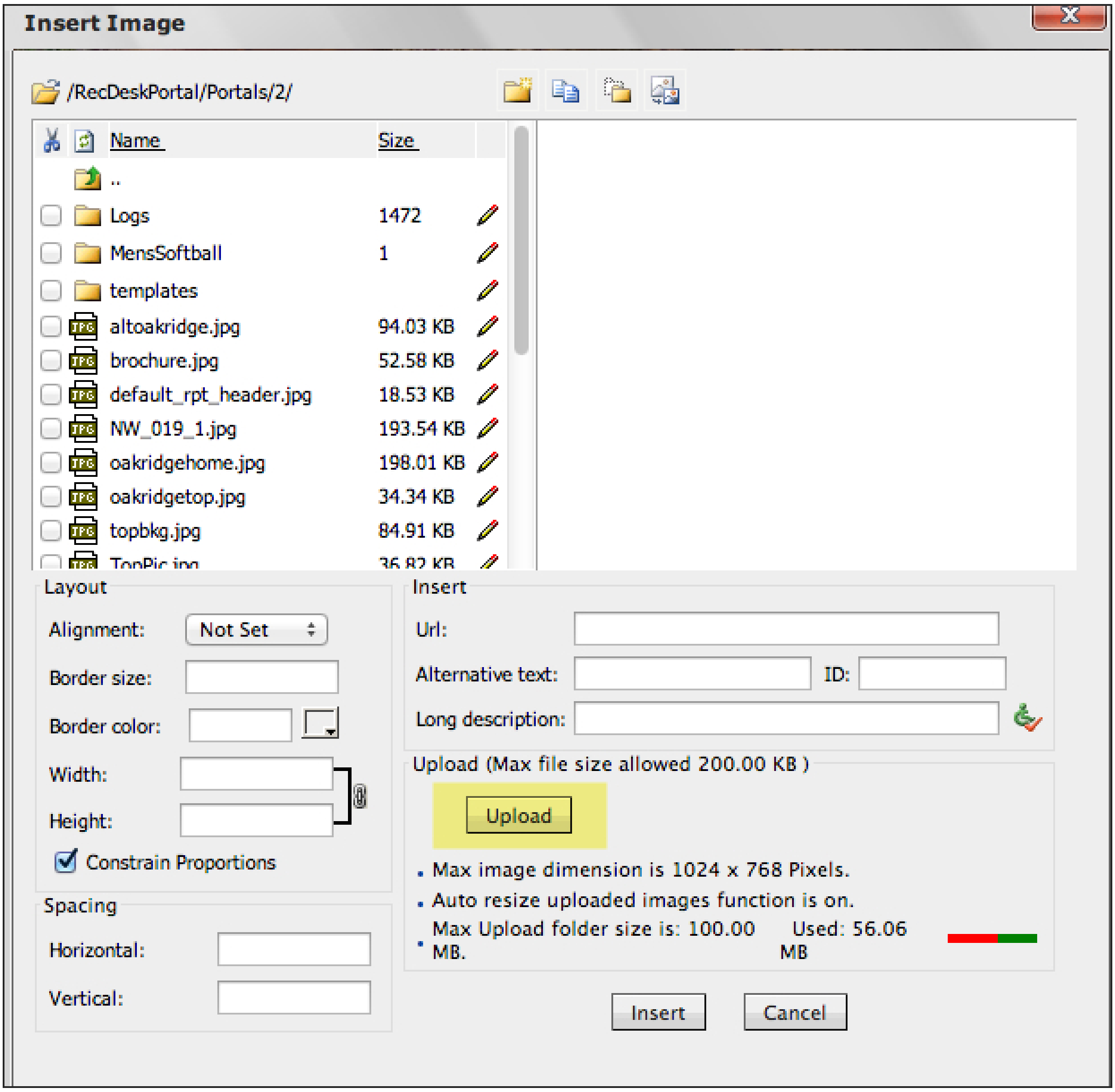
Inserting Pictures into Content

The RecDesk Html Editor allows you to insert images directly into your Announcements or regular Text/Html Content pages.

1. Edit the page content or individual Announcement Post to so that the **HTML Editor** appears as shown below. Make sure the *Rich Text Editor* option button is selected. Click on the highlighted **Insert Image** (highlighted in yellow below).

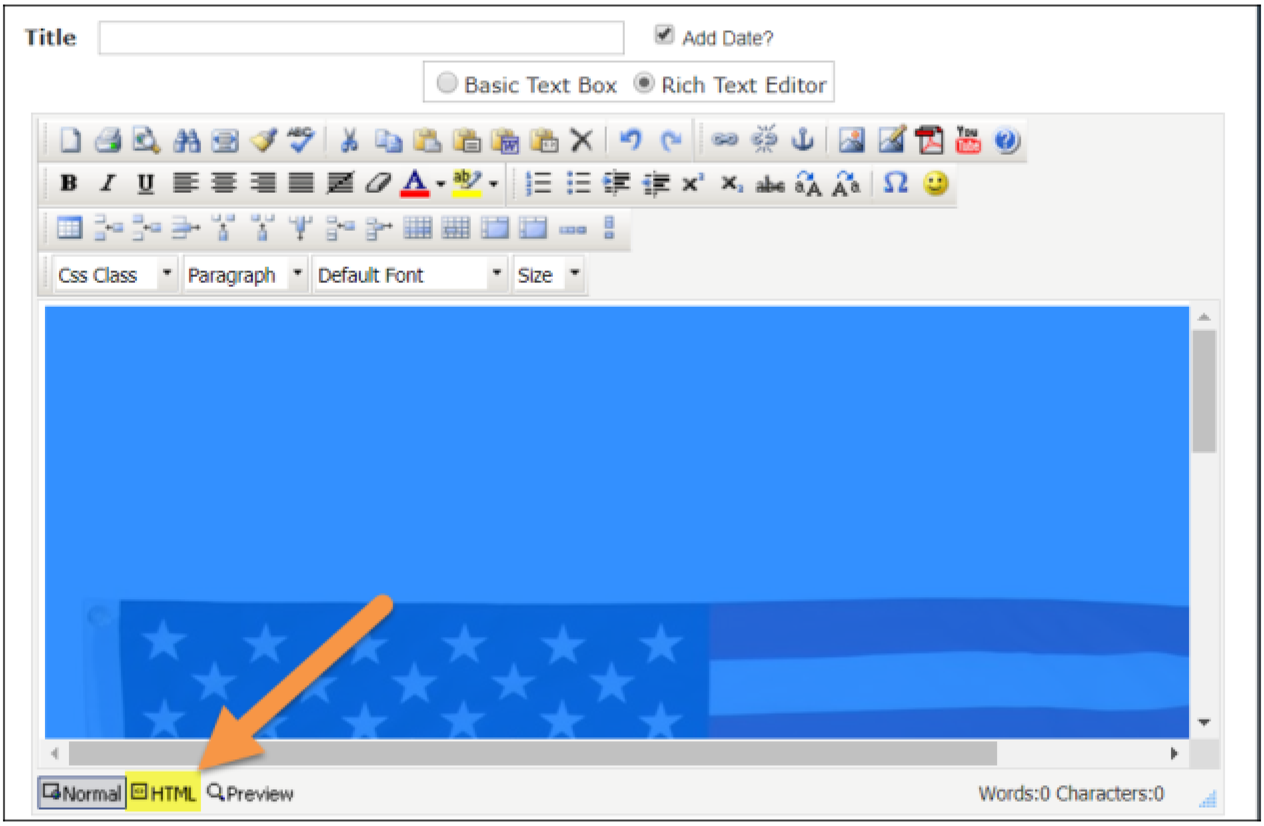


2. This will display the *Insert Image* dialog. To select an image from your local hard drive, click on the **Upload** button (highlighted in yellow below).



3. Once you have selected the appropriate image file, it will be uploaded and displayed in the upper right-hand pane of the dialog. **If the Width is greater than 300px, we recommend that you follow these steps to ensure that your picture renders properly on smaller devices -** Step 1: **Change the width down by 1 digit** (ie change 641 to 640). Step 2: **Uncheck Constrain Proportions**. Step 3: **Remove the Height**. Step 4: Click the **Insert** button (see below).

4. After inserting the image, click on the **HTML** button at the bottom of the editor:



5. Then search for the word "width" and change the width="640" to **width="100%"**. If there's also a style="xxx"clause on the tag, delete that too. For example, it should be changed from:

to:

You can change the width to any percentage of 100% or lower.

Embedding Third Party Content

RecDesk allows you to display an individual photo, a slideshow or video in the RecDesk Community portal by allowing you to include "***embed code***" from popular photo/video sharing sites such as DropShots, Google Photos, YouTube and more (see full list at Wikipedia- List of photo sharing sites). These sites are dedicated to organizing and sharing photos (or in the case of YouTube - video) and can provide a much better user experience than simply uploading a photo to RecDesk. In most instances, these services are free. These sites provide detailed instructions for working with and creating embedded content from their services.

Getting Embed Code from Third Party Software

Yahoo Flickr Photos

RecDesk allows you to display individual photos slideshows in your RecDesk Community portal by allowing you to include "embed code" from Yahoo Flickr**.

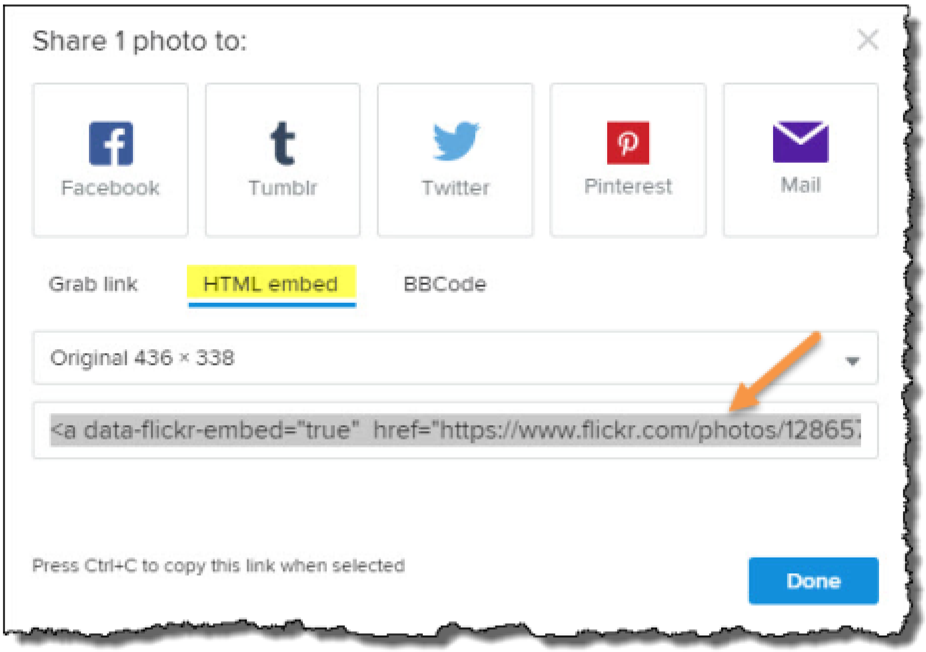
Creating Embed Code for an Individual Photo, Photostream, or Slideshow using Yahoo Flickr:

1. Go to www.flickr.com, sign into your existing Yahoo account or create a free Yahoo acount, and upload your photos. Note: Be sure to "Organize" your Photos and change Permissions (Who can see, comment, tag?) to Anyone (Public).

2. Get the embed code:

- **To Display an Individual Photo:**

    1. Click on the photo
    2. Click on the Share arrow on the bottom right-hand side of the screen
    3. Click **HTML embed**
    4. Click on the drop down arrow and choose the size (width should be 486px or less)
    5. Click on the gray box containing the HTML code; it will turn blue
    6. Right click on the blue highlighted code and copy it to the clipboard



3. Go back to RecDesk Director and paste the embed code in the Image Gallery Embed Code field in the Facility definition, or follow the steps under Inserting Embed Code into Content if pasting into the content of your RecDesk Community portal. See Image/Slideshow/Video Embed Guidelines for important tips.

** Yahoo Flickr is third-party software and is not affiliated in any way with RecDesk. We cannot guarantee the reliability or continued support of third-party software

DropShots - Individual Photos

RecDesk allows you to display individual photos in your RecDesk Community portal by allowing you to include "embed code" from DropShots**.

Creating Embed Code for individual photos using Dropshots:

1. Go to www.dropshots.com, create a free acccount, and upload your photos

2. While logged into your DropShots account, hover over the photo you want to add to your facility definition or Community portal, and click on the little pencil icon

3. Click **View details**

4. Click on the  (Embed code) icon

5. Highlight the code labeled "Html code", and copy it to the clipboard

6. Go back to RecDesk Director and paste the embed code in the Image Gallery Embed Code field in the Facility definition, or follow the steps under Inserting Embed Code into Content if pasting into the content of your RecDesk Community portal. See Image/Slideshow/Video Embed Guidelines for important tips.

** Dropshots is third-party software and is not affiliated in any way with RecDesk. We cannot guarantee the reliability or continued support of third-party software

Google Calendars

RecDesk allows you to display Google Calendar(s) in your RecDesk Community portal by allowing you to include "embed code" from Google Calendar**. This is how it's done:

1. Go to www.google.com/calendar and log in to your Google account

2 Click on the **Settings gear** on the upper right hand side of the screen

3. Click **Settings**

4. Click on **Calendars** tab

5. Under the Calendar section, choose the calendar(s) to embed

6. Under "Embed This Calendar", click **Customize the color, size, and other options**

7. Change the width to 650 pixels and height to 487 pixels, and make any other changes you'd like to see

8. Click **Update HTML** on the upper right

9. Highlight the HTML code in the box below the Update HTML button and copy it to the clipboard

10. Follow the steps under Inserting Embed Code into Content. See Image/Slideshow/Video Embed Guidelines for important tips

** Google Calendar is third-party software and is not affiliated in any way with RecDesk. We cannot guarantee the reliability or continued support of third-party software

Google Forms

RecDesk allows you to collect information via an online form in your RecDesk Community portal by allowing you to include "embed code" from Google Forms**. Here's how it's done:

1. Go to www.google.com/forms, click on the **Go to Google Forms** button, and log in to your Google account

2 Click on the **Change theme** button on the upper left hand side of the screen

3. Scroll through the themes on the right and click on a theme

4. Click on the **Edit Questions** button

5. Enter the Title of the form and optionally, the Form Description

6. Format your question and click **Done**

7. If you wish to add more questions, click **Add item** and repeat step 6 until all questions are added

8. Type your Confirmation Page message and options and click **Send form**

9. Next, click Embed. Click the code under the box labeled "PASTE HTML to embed in website

10. Change the Height (in pixels) to 900

11. Click on the code under the box labeled "PASTE HTML to embed in website" and press Ctrl+C to copy it to the clipboard

12. Follow the steps under Inserting Embed Code into Content. See Image/Slideshow/Video Embed Guidelines for important tips.

The results of the online forms submitted will be in a Google Sheet on your Google Drive, and the file name will be "Title of Form (Responses)". You can then get Email Notifications to your Gmail account by editing the spreadsheet, then doing the following:

1. Click on the **Tools** tab

2. Select **Notifications**

3. Select how often you want to receive the email notification (when and how often)

4. Click **Save**.

Prerequisites: a Google Account

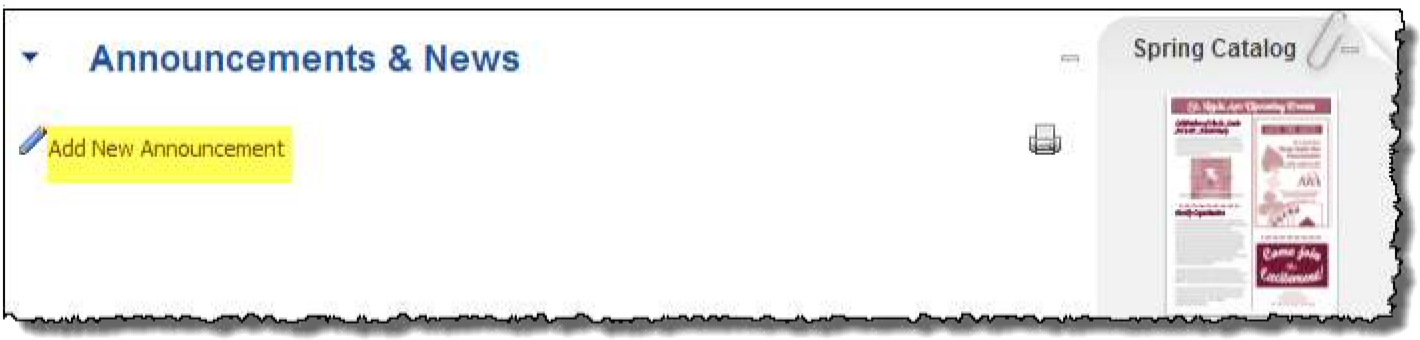
** Google Forms is third-party software and is not affiliated in any way with RecDesk. We cannot guarantee the reliability or continued support of third-party software

Inserting Embed Code into Content

1. Select the embed code created by your chosen photo/calendar sharing site and copy it onto the clipboard

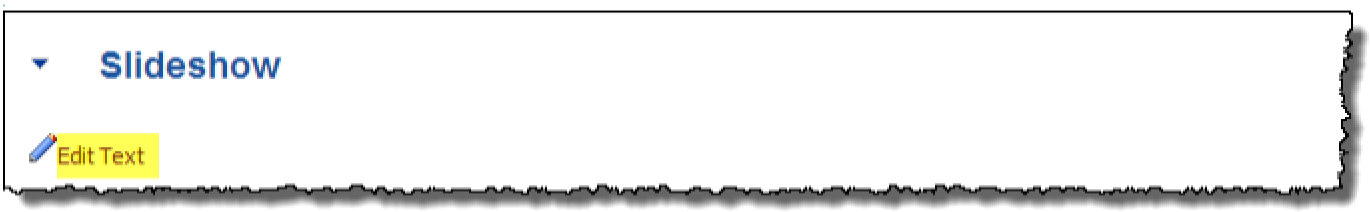
2. Log in to your Community portal and go to the page you'd like the photo, slideshow, video or calendar

3. Click Add New Announcement



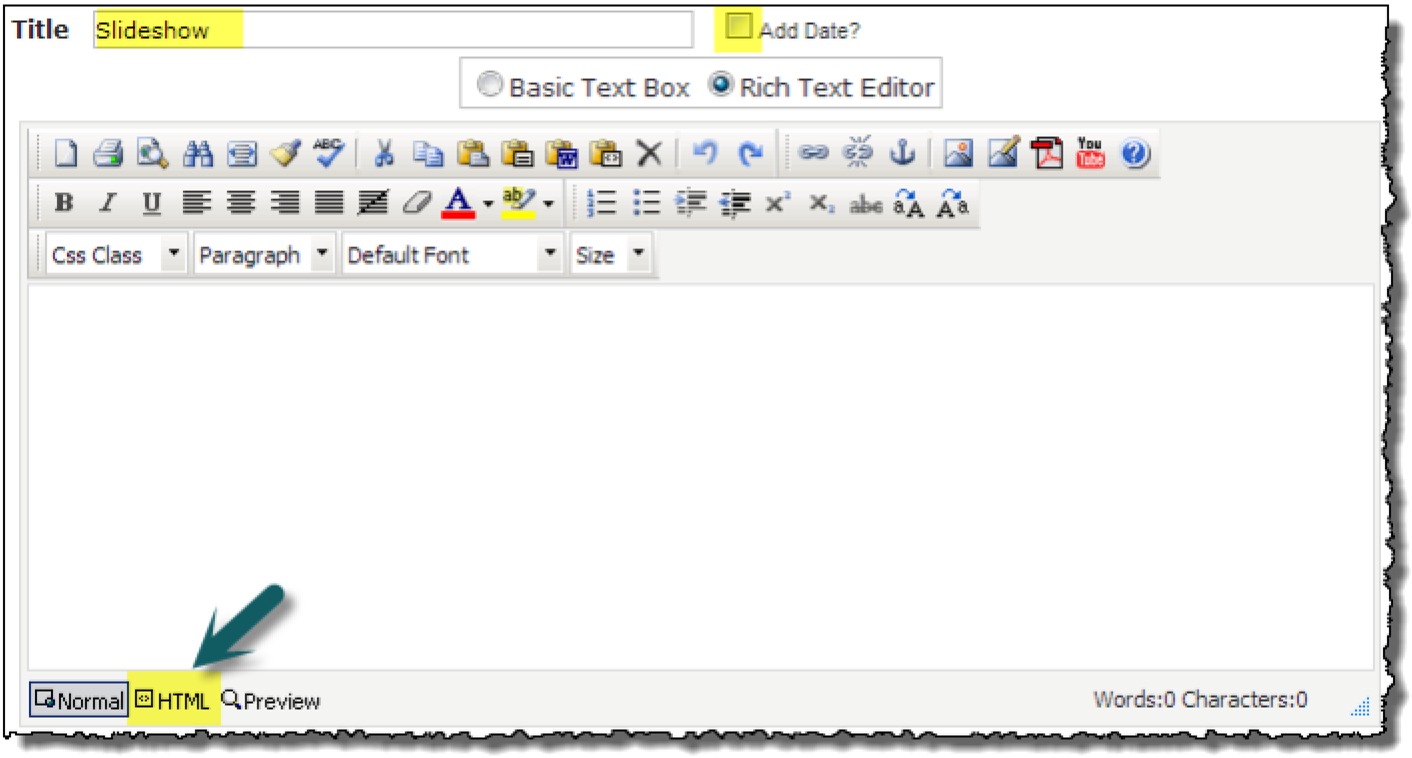
Or

Click Edit Text

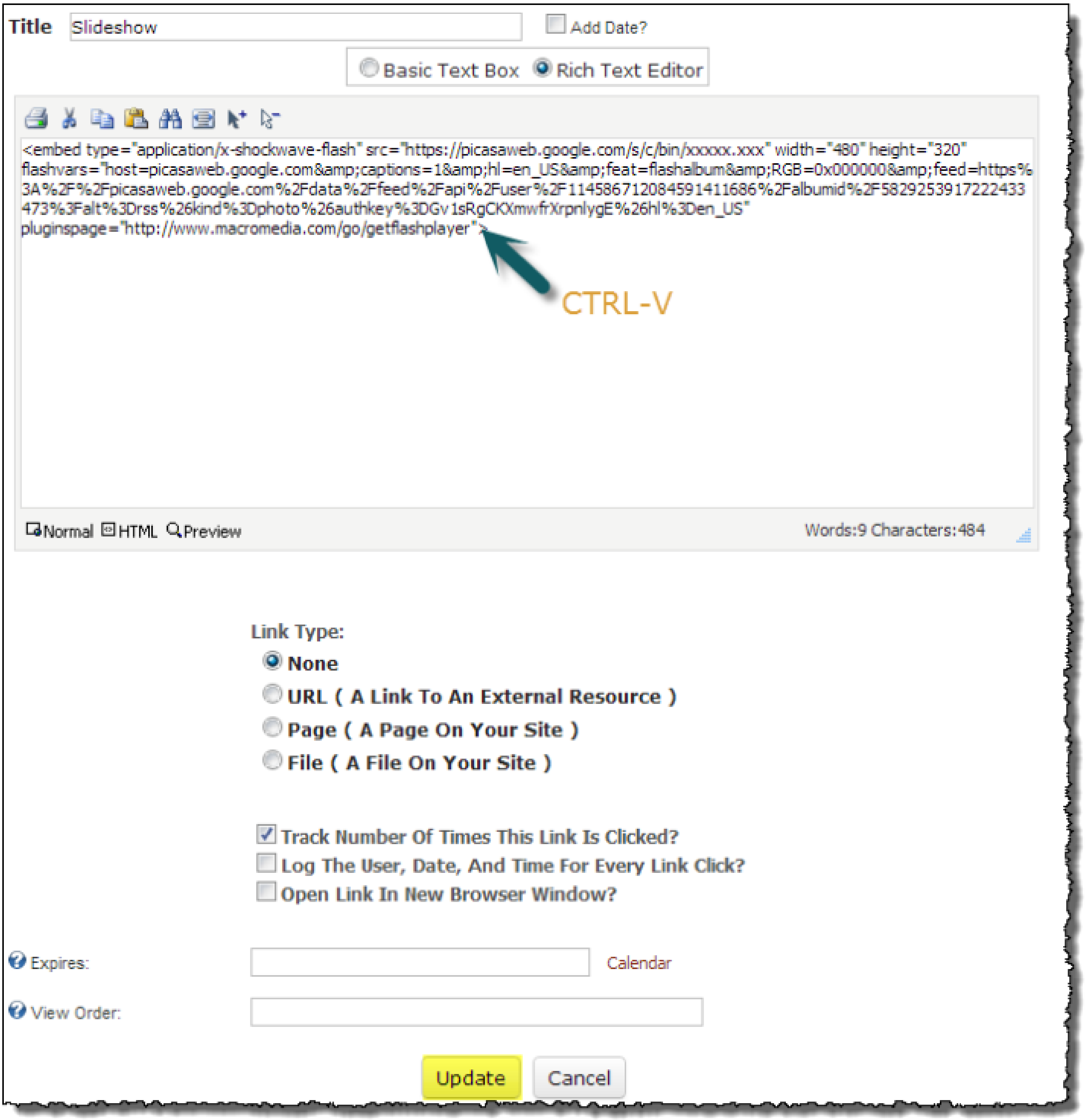


4. If it is an Announcement, type in the Title at the top and you may choose to leave "Add Date?" checked or unchecked

5. Click on the HTML button



6. Type Ctrl-V to paste the embed code from the clipboard, and then click Update at the bottom


Title
Slideshow
Add Date?
Basic Text Box
Rich Text Editor
<embed type="application/x-shockwave-flash" src="https://picasaweb.google.com/s/c/bin/xxxxx.xxx" width="480" height="320" flashvars="host=picasaweb.google.com&captions=1&hl=en_US&feat=flashalbum&RGB=0x000000&feed=https%3A%2F%2Fpicasaweb.google.com%2Fdata%2Ffeed%2Fapi%2Fuser%2F114586712084591411686%2Falbumid%2F5829253917222433473%3Falt%3Drss%26kind%3Dphoto%26authkey%3DGv1sRgCKXmwfrXrpnlygE%26hl%3Den_US" pluginspage="http://www.macromedia.com/go/getflashplayer">
CTRL-V
Normal
HTML
Preview
Words:9 Characters:484
Link Type:
None
URL (A Link To An External Resource)
Page (A Page On Your Site)
File (A File On Your Site)
Track Number Of Times This Link Is Clicked?
Log The User, Date, And Time For Every Link Click?
Open Link In New Browser Window?
Expires:
Calendar
View Order:
Update
Cancel

That's it!

Image/Slideshow/Video Embed Guidelines

1. When given the option to set the **width** of the image/slideshow/video, choose 600px. Then, to make the picture responsive so it displays correctly on all sized devices, search for the word "width" and change the width="600" to **width="100%"**.

2. If possible, update Urls provided in the embed code from http:// to **https://**. This will ensue that in browsers such as Google Chrome, the content can be viewed appropriately whether or not the user is logged into the RecDesk Community portal or not

Brochures, Sponsors and New Tabs

RecDesk takes care of adding these to your Community portal. Click on the item below to request these items.

Brochure/Flyer/Newsletter Postings

RecDesk will assist in the posting of brochures, flyers and/or newsletters to the Home page of your Community portal. You basically upload the document/form and we create the thumbnail image!

1. Upload your pdf file to your Forms & Documents page. See Uploading Documents.

2. Send an email to support@recdesk.com and tell us whether to replace the existing thumbnail, or to add the new thumbnail. Please specify placement order when multiple thumbnails exist.

Sponsor Logos

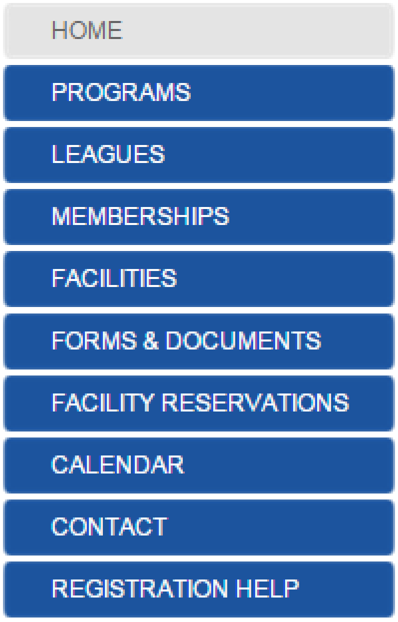
Sponsor logos or images can be placed in the left-hand margin of your Home page under the Shopping Cart or Facebook and/or Twitter thumbnails. You have 2 choices; for each choice, send the information listed to support@recdesk.com. Thanks!

1. Image only - send the **jpg or png image** file to post;

2. Image and link - send the **jpg or png image** file **AND** the **url** to link to (for example: http://xxxxxx.com).

New Tabs

We can add new tabs to your RecDesk Community portal:



For new tabs, send an email to support@recdesk.com listing:

1. The name of the tab

2. Location of the tab

3. Whether you want a **Text/Picture widget**, **Documents widget** (like Forms & Documents), or a multiple **Announcements widget** (like the Home page). You can also have **both** Text/Picture widget and a Documents widget.

Release Notes

1/2/2019 - Sigature Pad Support for FlexForms, Conversion Ability for Online Reservations to FlexReservations, Director/Community Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**FlexForms Now Work with Signature Pads** (see Compatible Signature Pad)
Community/Director	Enhancement	**FlexScheduler Users: New Online Reservations will Automatically Convert to FlexScheduler Reservations. You'll also have the ability to Convert Legacy Reservations to FlexReservations.** For more information on FlexScheduler, see FlexScheduler Reservations (Coming Soon). If you are interested in activating it, contact your RecDesk Customer Success Manager.
Director	Bug Fix	**Corrected Sendgrid 400 Errors**
Community	Improvement	**Multiple Submenus on Community No Longer Display at Once**

11/14/2018 - Auto-Refunds for Authorize.net, Drop-In Program Filtering, Upload Member Photos, Member Directory for Private Portals, and Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Automatic Refunds for Authorize.net Customers**
Director	Enhancement	**Check-In / Drop-In Program Filtering Option Limits Programs Appearing for Drop-Ins to Today, Today and Tomorrow, or Next 7 Days** - see Attended Check-In (w/ Drop In Support)
Director	Enhancement	**Member Photo Images Can Now Be Uploaded** - see Taking Member Photos
Community	Enhancement	**Member Directory Now Available for Private Community Sites**- Please contact your RecDesk Customer Success Manager for more details about this Feature
Director	Enhancement	**Advanced Member Search by Birthday Month Now Available**

8/27/2018 - Print/Email Multiple Selected Invoices, Private Community Portals, and Director/Community Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Ability to Print Multiple Selected Invoices** - see Printing Multiple Selected Invoices
Director	Enhancement	**Ability to Send Multiple Selected Invoice Emails** - see Sending Multiple Selected Invoice Emails for Online Payment

Community	Enhancement	**Private Community Portal Now Available by Request** - this feature requires log in by Community Members before being able to see any pages of the website
Director	Improvement	**POS Thermal Receipts Now Display last 4 Digits of Credit Card Numbers**
Director	Enhancement	**POS Thermal Receipts Now Allow Custom Footers for Signature Lines** - please contact your RecDesk Customer Success Manager for this Feature
Community	Improvement	**Number of Punches Now Display on Community Membership Punch Pass Fees Page**
Community	Improvement	**Wait List Button Now Displays on Program Detail Page (if applicable)**
Community	Enhancement	**Community Stored Payment Options** - this feature is now available by request
Director	Enhancement	**Self Check-In Now Available for Check-In Attendant Role**
Director	Enhancement	**New Personnel Role of "Other"**
Director	Bug Fix	**Corrected Overdue Balance Display on Attended Check-In**
Director	Bug Fix	**Improved DOB Verification**

7/29/2018 - New List View on POS, Facility Check-Ins on Community, and Director/Community Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**New View as list on POS Terminal** - see Selling Items
Community	Enhancement	**Facility Check-Ins Now Show under Community History** - community members can now check their household members' check-ins by navigating to the household members' history page and clicking on the Check-ins sub-menu. The 20 most recent check-ins will show for each household member.
Director	Bug Fix	**Corrected Group Size on FlexScheduler Reservation**
Director	Enhancement	**Session Timeout -** you can now reduce the time your users remain logged into RecDesk Director (default time is 180 mins.). Contact your RecDesk Customer Success Manager for more information or to make changes.
Director	Enhancement	**Whitelist of IP Addresses Allowed to Log In to RecDesk Director** - we can limit the IP Addresses of your RecDesk Director Users. Please contact your RecDesk Customer Success Manager to learn more or to activate.
Director	Improvement	**FlexScheduler Line Item Descriptions Now Show on Reservation Detail, Flex Calendar, and Facility Usage Reports**
Director	Bug Fix	**Corrected Merge issues with FlexForms and Leagues**
Director	Bug Fix	**Corrected "Current" Program Period List View**
Director	Improvement	**Flexforms Allowed to be Partially Completed In-house (Director)**

Community	Improvement	**Flexforms Editing Improvement to Prevent Loss of Data**
Director	Improvement	**Prevent all Facility Types from being Deleted**
Director	Improvement	**Tag Names Limited to 50 Characters**
Director	Improvement	**Home Phone changed to Primary Phone on In-house and Community Member Profiles**
Director	Improvement	**League Auto-Scheduler Now Allows Deletion of All Time Slots**

7/10/2018 - Director/Community Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Enhanced View of Payments Due on Program Rosters** - Unpaid Balance but NOT Overdue now appears grey; Overdue Balances are red
Director/Community	Enhancement	**Description & Notes added to League Information**
Director	Enhancement	**Payment Note added to Payment List and Payment Reconciliation Exports to Excel**

6/18/2018 - New Memberships By Period Report and Director/Community Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**New Memberships By Period Report** lists counts of new, renewed and active membership members for each active membership for date ranges
Community	Enhancement	**Member Notes now visible on Instructor/Coach Access**
Community	Enhancement	**Capability to see past programs/leagues on Instructor/Coach Access now available by request.** Contact Your RecDesk Customer Success Manager for activation.
Director	Improvement	**Hide Options button keeps options hidden on Attended Check In page**
Director	Enhancement	**Registration Dates/Times now on Roster List Page when hover on "I" or "O"**
Director	Enhancement	**Sort Roster by Registration Date** now available under Show Advanced Options (see The Roster List (Advanced Search))
Director	Enhancement	**Verbiage on Send Invoice to Customer Email can be Customized by Organization.** Contact Your RecDesk Customer Success Manager to change the verbiage.
Director	Update	**Period/Season Updated on League List**
Director/Community	Improvements	Various **Performance/Accuracy/Informational Improvements**

5/28/2018 - Flex Calendar Export/Print Option / Flex Calendar and Director Odds & Ends

Application(s)	Type	Description
Flex Calendar	Enhancement	Ability to **Export/Print from the Flex Calendar**

Flex Calendar	Enhancement	**All Facilities checkbox added**, and when parent is chosen, child Facilities also get chosen
Flex Calendar	Bug Fix	**Drag/drop not allowed** on Flex Calendar
Flex Calendar	Bug Fix	**Tag filtering** on Flex Calendar looks at all Facilities on reservation, not just first Facility
Director	Enhancement	**Date/time added to Roster Reports**
Director	Bug Fix	**Corrected Date on Dashboard**
Director	Improvement	**Time period limits on reports** to improve performance

4/9/2018 - Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	Ability to **filter Memberships by Membership (Program) Type**
Director	Improvement	Click **Member Photo** in profile to **enlarge**
Director	Improvement	Printed Invoices and Payment Receipts format payer address to fit in **#10 envelope**
Director	Improvement	**Instructor Names** and **Schedule Dates/TimesDates** added to **roster reports**

3/20/2018 - Introducing the ALL NEW Flex Calendar

Application(s)	Type	Description
Director	Enhancement	Check out the great new replacement for the Master Calendar called **Flex Calendar** (see here)

3/11/2018 - Support for Minimum Deposit Required OR Pay Later on Per-Program Basis / Other Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Minimum Deposit Required OR Pay Later options are now available on a per-Program basis for Community Members Online** (see Program Fees).
Director	Improvement	**Invoice Due Date set to next payment date when payment plans are created/updated.**
Community	Improvement	If **Show Schedule on Portal is unchecked** on a Program, **dates and days no longer show on Household or Personal Calendars**
Director	Bug Fix	**Various bug fixes on Reservation Search and Permits**
Director	Improvement	**Loading and Saving Popups on FlexScheduler**

2/14/2018 - Custom Calendar Colors / Facility Utilization / Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Custom Calendar Colors** now available on Programs, Facilities and Leagues. Add custom colors to Program Types and Facility Types (see Managing Custom Lists). Override them at the Program or Facility Level.

Director	Enhancement	**New Facility Utilization Page** - see Facility Utilization Report
Community	Improvement	**Community History page now shows CANCELLED** next to programs Member was cancelled out of.
Community	Improvement	If **Show Schedule on Portal is unchecked** on a Program, **dates and days no longer show on Program List**
Community	Improvement	**Membership Description and Notes** now show appropriate **line breaks**
Director	Bug Fix	**Membership effective dates are now validated** correctly
Director	Bug Fix	**POS Returns including discounts correctly showing on Revenue by Period reports**
Director	Bug Fix	**Payment Plan Recalculations** after Invoice adjustments corrected
Director	Bug Fix	**Program List Exports** all data on list to Excel

11/19/2017 - Custom Member Genders / Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	**Custom Member Genders** now available (see Managing Custom Lists)
Director	Improvement	**Overdue Balances** are now **Links**

11/5/2017 - Effective Date/Time on Program Enrollment AND Fees / POS Item History by Location / Expected Payment Plan Revenue List / New Membership Member List / New SMS Texting Options / Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	Effective **Times** now available for **Program Enrollment** Begin and End Dates (see Creating and Modifying Programs)
Director	Enhancement	**Effective Dates and Times** now available on **Program Fees** (see Program Fees)
Director	Enhancement	New page showing **POS Item History for a Location** (see Sale Item History)
Director	Enhancement	New **Expected Payment Plan Revenue (List**) under the Money Section of Reports tab
Director	Enhancement	New **List of Membership Members** (see List of Membership Members)
Director	Enhancement	New SMS Texting Options for SMS Texting from Programs, Memberships and Leagues (see Sending SMS Text Messages from Programs/Memberships/Leagues)
Director	Improvement	Revenue by Period GL Reports now allow you to **Include Deleted GL Codes**
Director	Enhancement	Louder unsuccessful Check-In audio/sound
Director	Improvement	**Drop-In Programs now listed alphabetically** on Attended Check-In when Drop-In Support enabled
Director	Enhancement	**Genders of Male/Female enforced on Community** if selected on Program

Director	Enhancement	**Membership List Report** now shows AUTO for **Auto Renewed Members**
Director	Improvement	**Member History now Sorted**

10/8/2017 - Select Specific Membership to Check Into / Director Odds & Ends

Application(s)	Type	Description
Director	Enhancement	Attended Check-Ins enhanced to allow check-in to specific Membership(s). Self Check-In also enhanced to only check into Memberships Listed on set up screen (see Check-Ins for Memberships
Director	Enhancement	Send Automatic emails when Memberships are due to expire (see Creating and Modifying Membership Definitions)
Director	Enhancement	Tracking of "Unsuccessful Check-ins" due to “No active membership.” (Attended AND Unattended Checkins) (see Unsuccessful Check-Ins)
Director	Enhancement	New page showing Facility Check-Ins by Date Range. Navigate to the Facility Check-Ins (see Check-In Totals)
Director	Enhancement	Added link to Member Profile page from Online Account Approval page.
Director	Enhancement	New Portal Actions button to easily navigate to Community site or Content Management site (if applicable)
Director	Enhancement	Number of Players now appears on League Team and Team Details pages
Director	Enhancement	Program Attendance now exportable to Excel
Director	Enhancement	Member Profile page now has Register button
Director	Enhancement	Attended and Self Check-Ins by *LastName, FirstName*
Director	Improvement	Memberships in alphabetical order on Check-Ins page
Director	Bug Fix	Length of Payment Plan Template Name limited to 50 characters
Director	Enhancement	Option to remove *Internal Credit Card* now available. Contact RecDesk Support for this feature.

9/30/2017 - Sub Category Filtering on RecDesk Community

Application(s)	Type	Description
Community	Enhancement	Community Members can now filter by Category AND Sub Category for Programs with Program Type AND Program Sub Types (see Managing Custom Lists)

9/18/2017 - Activity Reporting Page

Application(s)	Type	Description
Director	Enhancement	New Activity Counts Page Under Reports (see Activity Counts)

9/13/2017 - FlexForms for Memberships and Password Policy update

Application(s)	Type	Description
All	Enhancement	Updated password policy in both Director and Community to require at least 8 characters, an upper and lower-case character and a number
All	Enhancement	Added ability to require FlexForms for Memberships
Director	Enhancement	SKUs (if entered), can now be scanned in the POS register for quick entry
Community	Bug Fix	Allow Instructors/Coaches to view Rosters of their Programs even if Show on Portal is unchecked for Program
Community	Enhancement	Ability to Show/Hide Current Enrollment Count on portal

8/29/2017 - Downloading Blank FlexForms

Application	Type	Description
Director	Enhancement	eCheck/ACH Support on Authorize.net platform
FlexForms	Enhancement	Added ability to Download Blank FlexForms (see Downloading Blank FlexForms)

7/30/2017 - Document Uploads and Electronic Signatures for FlexForms / Director Odds & Ends

Application(	Type	Description
FlexForms	Enhancement	Flexforms now allow Uploading of Documents and collection of Electronic Signatures. See FlexForm Elements
Director	Enhancement	Member History now has links to Program Rosters, Facility Reservation Details and Membership Lists
Community	Enhancement	Registration begins/Registration ended/No online registration messages now show on Community Program Lists
Director	Bug Fix	Can use uppercase email addresses on Send Invoice to Customer

5/29/2017 - POS Discounts/Coupons and Director Odds & Ends

Application	Type	Description
Director	Enhancement	POS now allows Percentage Discounts/Coupons on Sales/ Returns. See Managing Custom Lists to set them up and enable them. See Selling Items and Returning Items.
Director	Enhancement	Added ability to print multiple receipts on POS
Director	Enhancement	Added new **Payment Plan Template option - Based on Invoice/renewal date** for Weekly and Monthly Payment Frequencies to streamline Membership Auto-Renewals. See Setting Up Payment Plan Templates.

5/7/2017 - INTRODUCING FLEXFORMS

Application	Type	Description
FlexForms	Enhancement	Introducing RecDesk FlexForms - the industry's first fully-featured, fully-integrated Advanced Custom Forms Engine (see RecDesk FlexForms)

2/9/2017 - Membership List optimizations and Revenue Report Filtering by Payment Type

Application	Type	Description
Director	Enhancement	Membership List optimizations around more efficient paging
Director	Enhancement	Added ability to filter by Payment Method on all **Revenue Over Time Reports**
Director	Bug Fix	Move Member **BarcodeId** to new Member on Member Merge (if merged into one does not have one)
Director	Enhancement	Added **Drop In Date** to Invoices that contain Drop In Programs
RD Batch	Enhancement	Add On Fees are now included in confirmation email that gets sent on all new registrations
Director	Enhancement	When Member Profile Badges are displayed, if they have an Account Balance, the overdue portion is displayed in a separate badge that is Red

1/29/2017 - Program Add-On Fees, Customizable POS Item Colors and Director Odds & Ends

Application	Type	Description
Director	Enhancement	Enhancements to Fees including **Add-On Fees** for Programs (see Program Fees)
Director	Enhancement	Added the ability to customize **POS Item Colors** (see Item Categories, Creating and Modifying Sale Items)
Director	Enhancement	Added the ability to include **First Name** in Member Search
Director	Enhancement	Added **Link to Open and Overdue Invoices** from Member Household Page (see Amount Owed Balance)
Director	Bug Fix	Can no longer Delete a Membership if it has Active or Future Members enrolled
Director	Enhancement	Added the ability to **Export Reservation Search Results to Excel**
Director	Enhancement	Ability to **SMS/Text Members of Membership**
Community	Enhancement	**Custom Profile Fields** can now be designated as Required/ Not Required
Community	Enhancement	Programs/Activities with Membership Dependencies can now be registered for in same Cart Session as the Membership Enrollment they depend on
Director	Bug Fix	Fix issue whereby some Html reserved characters would cause selected reports to not render correctly.

12/22/2016 - POS Thermal Printing/Cash Drawer Support

Application	Type	Description
Director	Enhancement	Added the ability to print POS Receipts using a Thermal Printer and to open a Cash Drawer (see POS Thermal Printing/Cash Drawer Support)

12/4/2016 - Payment Plans, Membership Auto Renewal and Director Odds & Ends

Application	Type	Description

Director	Enhancement	Added the ability to set up **Payment Plans** for Invoices (see Working With Payment Plans)
Director	Enhancement	Added **Auto Renewal** Option for **Membership** Enrollments (see Enrolling Members In-house)
Director	Bug Fix	Member Ids can now be scanned for Members if using older versions of Internet Explorer
Director	Enhancement	**Dashboard Enhancements**: **Recent Memberships** now shows **In-house or Online**, and **Invoice Links** are now included on Recent Registration, Recent Reservations, and Recent Memberships
Director	Enhancement	Added new **Household Balances** page (see Household Balances)
Director	Enhancement	Added phone numbers to Excel Summary and Full Detail Exports
Director	Enhancement	Added Advanced Member Filter for Suspended Members
Director	Enhancement	Added Name link to Invoice List
Director	Bug Fix	Corrected League End Date on printed League Schedules
Director	Enhancement	Phone Numbers easier to enter on RecDesk Director Users
Director	Bug Fix	Corrected Register/Shift Detail and Report
Director	Enhancement	Added **Invoice Opened by Customer** label on Invoice List plus appropriate filter

10/9/2016 - Stored Payment Options

Application	Type	Description
Director	Enhancement	Enhanced ability to use **Stored Payment Options** (see Advanced Payment and Billing Options)

8/31/2016 - Instructor/Coach Access to Rosters

Application(	Type	Description
Director	Enhancement	Added the ability to Allow Login by Personnel/Volunteers
Community Mobile	Enhancement	Instructors and Coaches can now log in and view Rosters for Programs/Leagues to which they are assigned (see Online Access for Instructors/Coaches)
Director	Bug Fix	Fix issue with Program Subtype not saving properly on initial add

8/7/2016 - General Release - Director Odds & Ends

Application(	Type	Description
Director	Enhancement	Added the ability to Suspend a Member's Account in RecDesk Director to prevent them from registering, reserving or enrolling (see Suspending Members)
Director	Enhancement	Added the option to "select" which GL Code(s) you'd like to see listed on the Revenue by Period GL Reports
Director	Enhancement	Passcode access option is now available on Online Reservation Availability Schedules

Director	Enhancement	Merging of Invoices is now allowed on any Invoices within a Household with the exception of Closed Invoices (see Merging Invoices)
Director	Bug Fix	Payment Receipts no longer print on two pages when second page is blank
Community Mobile	Enhancement	Facebook Sharing now available on Community Mobile Checkouts

7/24/2016 - General Release - Director Odds & Ends

Application	Type	Description
Director	Enhancement	Private Note added to Member profile (only visible on Director, not Community)
Director	Bug Fix	Household Credit balances transfer on Member Merges or Household Transfers (if from Member is the only person in the Household)
Director	Bug Fix	Right side of Payment Detail Report being cut off on Print
Director	Bug Fix	Fix issue with Print Date on Reservation Permits not being adjusted for Time Zone
Director	Enhancement	Automatically update End Date to reflect default Membership Duration when Start Date is updated on Add/Edit
Director	Enhancement	Add initial Date of Reservation on Invoice Detail page
Director	Enhancement	Add User Name of person who made a Reservation to Reservation Detail page
Director	Enhancement	Add Outstanding Invoice Balance Badge to Members
Director	Enhancement	Add Address Line 2 and Organization Name next to customer name (if applicable) to Invoice