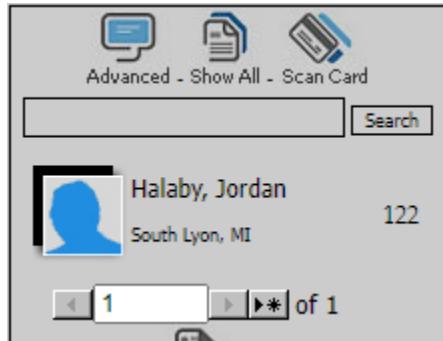


My Senior Centerch

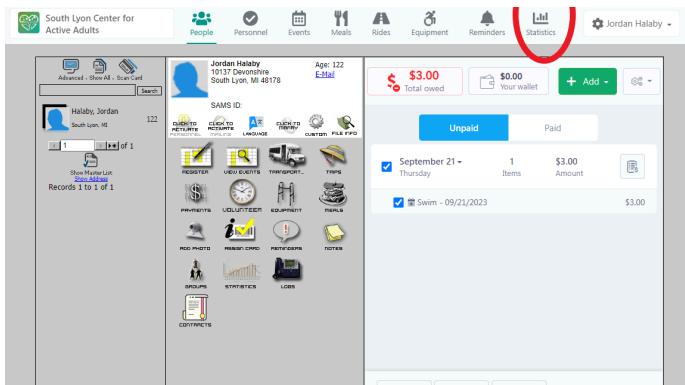
Tips and Tricks

1. Show All Pending Transactions

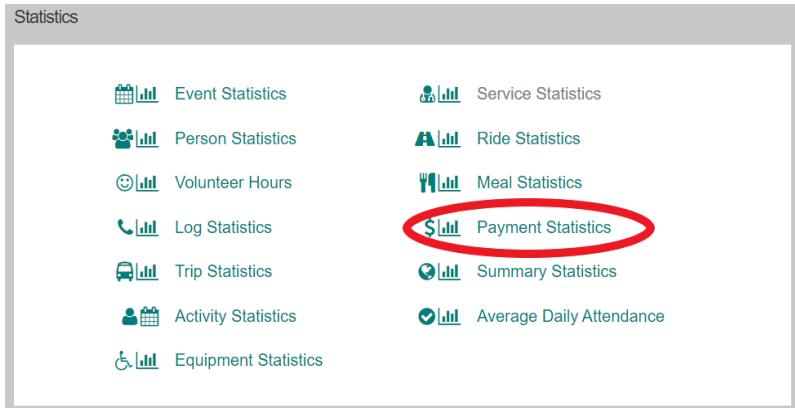
Start by assuming that at least one user has a pending transaction



Click on the statistics button in the top right corner



Click on the payment statistics button



Choose the date range that you want to run on this report (in this case, we will choose today)

By Account

By Type

Today (circled in red)
Yesterday
This Week
Last Week
This Month
Last Month
This Year
Last Year
This Fiscal Year
Last Fiscal Year
Custom Range...

Payments on 09/21/2023

Filters:
Age: >= 0
Site(s): All

Generate Statistics

Press the “Generate Statistics” button

Payments on 09/21/2023

Filters:
Age: >= 0
Site(s): All

Generate Statistics (circled in red)

Click on the text that says "Unknown" - text color is a dark blue/green

Print PDF Export

Payments on 09/21/2023

Filters:

Age: >=0

Site(s): All

Account	Completed Transactions	Total Paid to Account	Pending Transactions	Total Owed to Account	Wallet Transactions	Wallet Transaction Amounts
Unknown	10	\$52.00	4	\$18.00	0	\$0.00
Totals	10	\$52.00	4	\$18.00	0	\$0.00

Scroll down to "Billed Unknown" where it will list the date, person, description, and amount owed. These are the people that have signed up for a class that has not yet paid their amount

Billed: Unknown

Date	Person	Description	Notes	Amount
1. 09/21/2023	Halaby, Jordan	Swim (9/21/2023)		\$3.00
2. 09/21/2023	Martin, Mariann	Kymm--Beginner/Chair Yoga (9/21/2023)		\$5.00
3. 09/21/2023	Dowsett, Linda	Kymm--Beginner/Chair Yoga (9/21/2023)		\$5.00
4. 09/21/2023	Wilson, Diane	Kymm--Beginner/Chair Yoga (9/21/2023)		\$5.00
			Total	\$18.00

2. Blocked Email / Phone on Broadcast

In the case of a failed text message broadcast, there are 2 reasons this may occur.

The first is that the user's phone number is listed as a landline/home number.

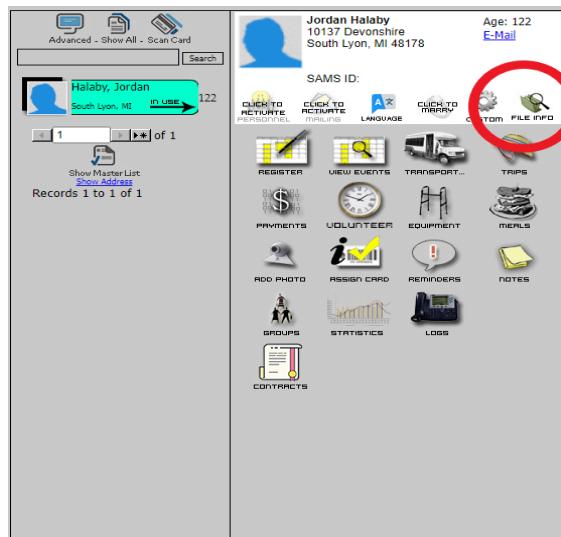
The second is that the user is blocked to receive messages

← Line Dancing Class Cancellation 9/14/23
09/14/2023

Broadcast Message: Hi CAA Line Dancers-- There will be no line dancing class today, see you next Tuesday at 10:30.

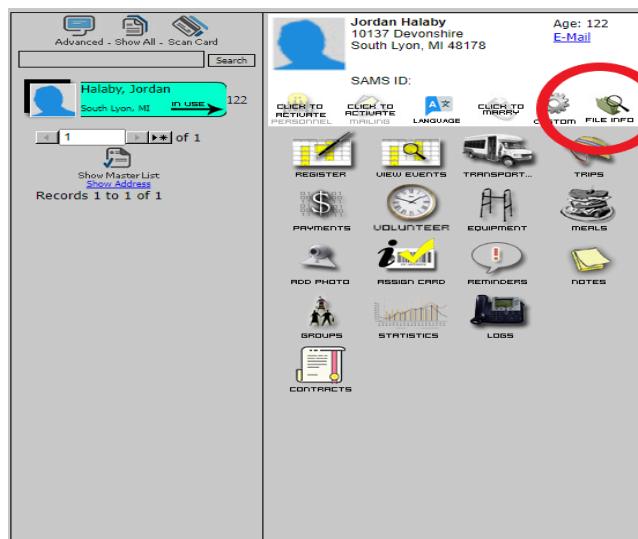
Sending(0)	Failed(3)	Success(27)	Responses(0)
Lori Costantini	(810) 599-9848	<input checked="" type="checkbox"/> Blocked Email/Phone	
Gerri Schumacher	(248) 437-8839	<input checked="" type="checkbox"/> Landline	
Rod Tasker	(248) 486-4034	<input checked="" type="checkbox"/> Landline	

In the case of a landline issue, simply update the record to their actual cell phone number



In the case of a blocked phone number, follow the rest of these steps

Pick the user that has been blocked, and view their file info



Scroll to the bottom of the info and you will see 3 green or red buttons. Click on all of the red icons (if there are any) in order to unblock those contact options

Seniors Lives Alone	<input type="radio"/> Yes <input checked="" type="radio"/> No
Joined Date	9/14/2023
Do Not Contact Settings	<input style="background-color: green; color: white; border: none; padding: 5px; margin-right: 10px;" type="button" value="Text"/> <input style="background-color: green; color: white; border: none; padding: 5px; margin-right: 10px;" type="button" value="Voice"/> <input style="background-color: green; color: white; border: none; padding: 5px;" type="button" value="Email"/>
Last Updated	Jordan Halaby Sep 21 2023 11:10AM EST
<input style="border: none; background-color: #f0f0f0; padding: 5px;" type="button" value="Save"/>	

3. Wallet Transactions Sorted by Member Name

Go to the statistics button in the top right corner

The screenshot shows the software's main dashboard for member Jordan Halaby. At the top, there are navigation links for People, Personnel, Events, Meals, Rides, Equipment, Reminders, and Statistics. The Statistics link is highlighted with a red circle. Below the navigation, there's a summary section for Jordan Halaby, including his name, address, age, and SAMS ID. A large button labeled 'Pay \$3.00' is prominent at the bottom right.

Click on "Payment Statistics"

This screenshot shows the 'Statistics' menu with various reporting options. The 'Payment Statistics' option, which is highlighted with a red circle, is located in the middle column under the heading 'Service Statistics'.

Choose the date range that you want to run on this report (in this case, we will choose today)

This screenshot shows the 'Payment Statistics' report configuration screen. It includes options for filtering by account or type, date ranges (with 'Today' circled in red), and filters for age and site. A 'Generate Statistics' button is at the bottom right.

Click on the button labeled "Payments Received"

Payment Statistics

By Account

By Type

Today

Yesterday

This Week

Last Week

This Month

Last Month

This Year

Last Year

This Fiscal Year

Last Fiscal Year

Custom Range ..

Payments on 09/21/2023

Filters:

Age: >= 0

Site(s): All



Generate Statistics

Payments Received

Donations Export

Select "Wallet Transactions" and choose your date range. For this example, we will use today's date and click "Show Report"

Payments Received

- Payments Received Report by Staff Member
- Payments Received Report by Account
- Individual Payments
- Wallet Transactions
- Refund Report

Select Payment Received Date Range

09/21/2023

09/21/2023

Show Report

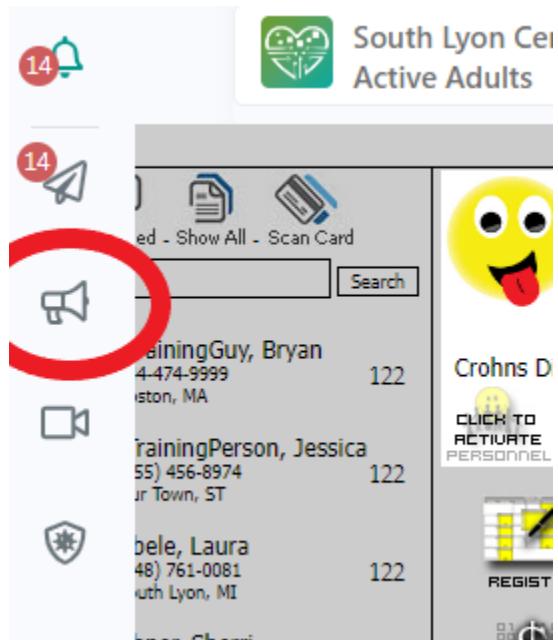
Wallet Balances

This will automatically download an excel spreadsheet that is sorted and grouped by the member's last name

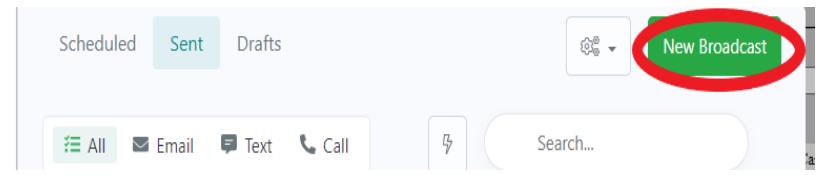
Wallet Transactions on 09/21/2023													
	A	B	C	D	E	F	G	H	I	J	K	L	
1		First Name	Last Name	Date of Birth	Home Phone	Cell Phone	Email	Payment Type	Date	Payment	Notes	Type	Method
2	1 Linda	Dowsett	01/01/1901	(517) 375-517-375-30				Use	09/21/2023	\$ 0.00		Use	Wallet
3	2 Ernie	Hill	01/01/1901	(248) 921-1				Use	09/21/2023	\$ 0.00		Use	Wallet
4	3 Betty	Karsten	01/01/1901	(248) 921-1			i behappy@	09/21/2023	\$ 0.00			Use	Wallet
5	4 Judy	Keeling	01/01/1901	(734) 972-734-972-0	Keelingjud			Use	09/21/2023	\$ 0.00		Use	Wallet
6	5 Mariann	Martin	01/01/1901	(248) 789-248-789-0	mariannm	09/21/2023		Use	09/21/2023	\$ 0.00		Use	Wallet
7	6 Denise	Montfrie	01/01/1901	(248) 486-1		dmmontfrie		Use	09/21/2023	\$ 0.00		Use	Wallet
8	7 Cynthia	Severts	01/01/1901	(248) 378-1		cynseverts	09/21/2023	Use	09/21/2023	\$ 0.00		Use	Wallet
9	8 Mary	Shaner	01/01/1901	(248) 486-1248-345-76	marymsha			Use	09/21/2023	\$ 0.00		Use	Wallet
10	9 Mary Ann	Sikorski	01/01/1901	(248) 982-248-982-1	mafisk@	09/21/2023		Use	09/21/2023	\$ 0.00		Use	Wallet
11	10 Diane	Wilson	01/01/1901	(248) 437-1(248) 303-1	di60ken@	09/21/2023		Use	09/21/2023	\$ 0.00		Use	Wallet
12	11 Diane	Wilson	01/01/1901	(248) 437-1(248) 303-1	di60ken@	09/21/2023		Use	09/21/2023	\$ 0.00		Use	Wallet
13													
14													

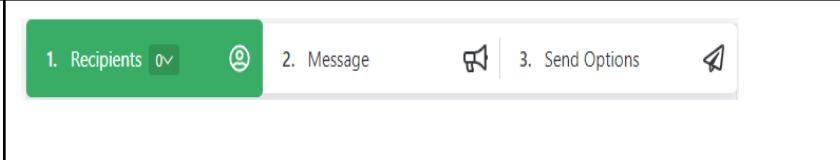
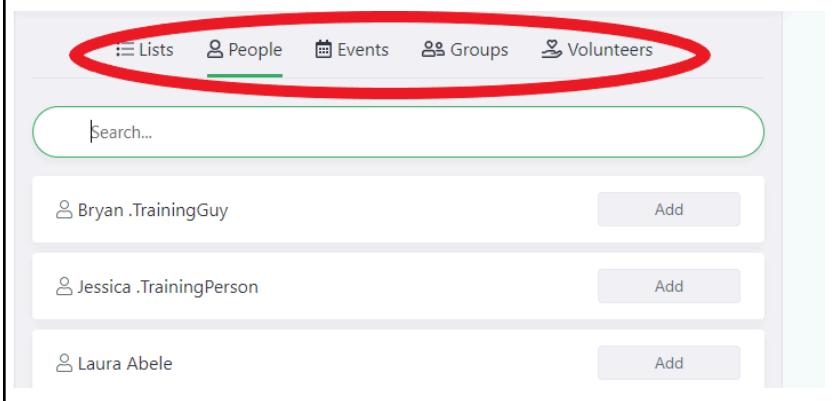
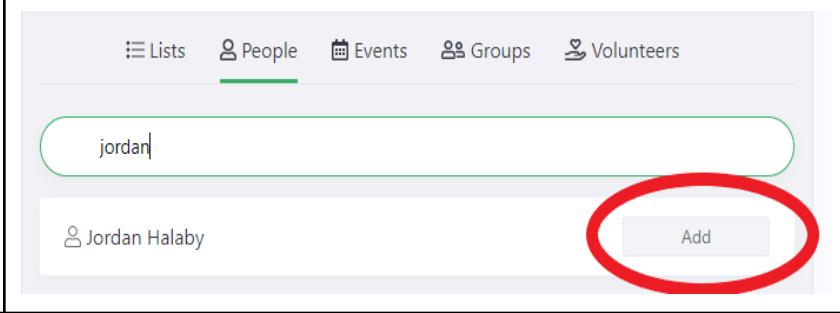
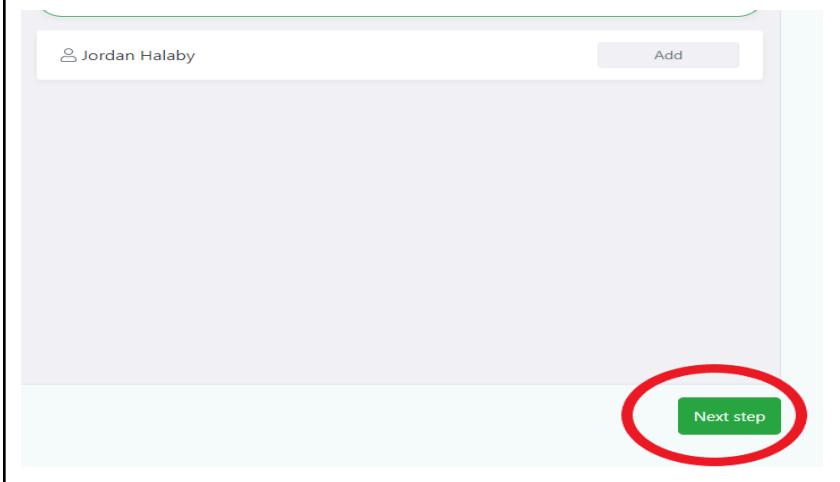
4. Broadcasting Instructions

On the leftmost bar, click the option that has an icon of a microphone and says "Broadcast"

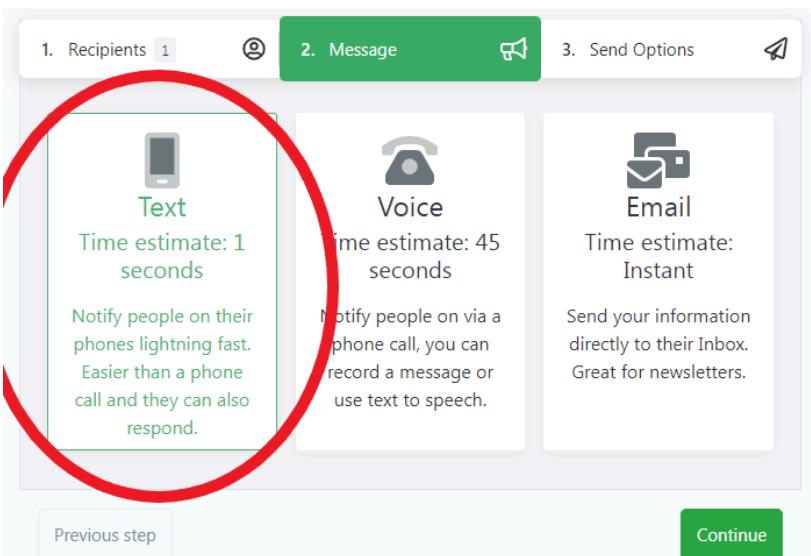


In the top right corner, click on the big green button that says "New Broadcast"

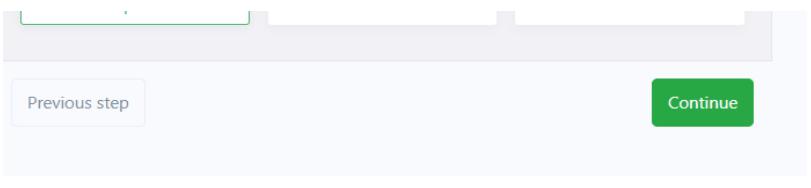


<p>There are 3 steps to send out the broadcast: Recipients, Message, and Sending Options</p>	 <p>1. Recipients 0✓ 2. Message 3. Send Options</p>
<p>For recipients, you can choose people from a predefined list, a group of people on a person-by-person basis, by an event, a pre-defined group of people, or for the center's volunteers</p>	 <p>Lists People Events Groups Volunteers</p> <p>Search...</p> <p>Bryan .TrainingGuy Add</p> <p>Jessica .TrainingPerson Add</p> <p>Laura Abele Add</p>
<p>We will add just me to a broadcast</p>	 <p>Lists People Events Groups Volunteers</p> <p>jordan</p> <p>Jordan Halaby Add</p>
<p>Click "Next Step" to go to the message step</p>	 <p>Jordan Halaby Add</p> <p>Next step</p>

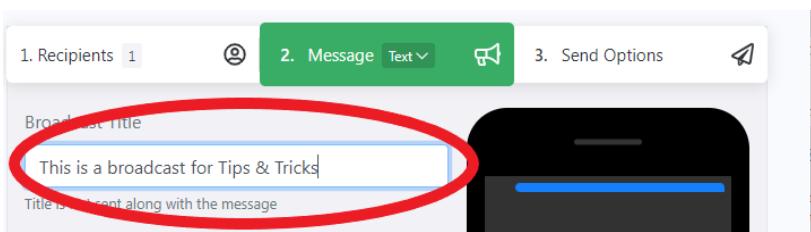
Assuming you want to send a text message (highly recommended), click on the first icon labeled “Text”



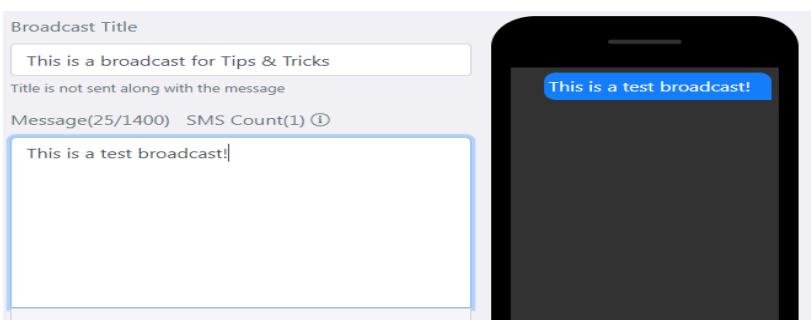
Press “Continue”



In the Broadcast Title field, provide a meaningful title so that you can distinguish this broadcast from prior / subsequent broadcasts



In the message field, provide an informative message to be sent out



You have the option to use variable message snippets, but I highly discourage using these. If you have a question about this, just ask me

Broadcast Title
This is a broadcast for Tips & Tricks
Title is not sent along with the message
Message(0/1400) SMS Count(1) ⓘ
Drag & drop onto message
First Name Last Name Center Address
Center Phone

Press "Next Step" to go to the final step: Sending Options

1. Recipients 1 2. Message Text 3. Send Options ⚡
Send now Estimated Delivery Time: 1 second(s)
Schedule 09/26/2023 12:45 PM

After you send the broadcast, you are able to see a list of recipients of the broadcast - those who were successfully sent to and those who failed

This is a broadcast for Tips & Tricks
Today at 12:48 PM
Broadcast Message: This is a test broadcast!
Sending(1) Failed(0) Success(1) Responses(0)
Jordan Halaby (248) 912-7636 Message Success

5. Add a Photograph to a Member

Click on the "People" button in the top banner



Navigate to the user that you want to upload a picture for

The screenshot shows a software application interface. On the left, there is a search results panel titled "Advanced - Show All - Scan Card" with a search bar and a "Search" button. Below the search bar is a list of users, with the first entry being "Halaby, Jordan" from "South Lyon, MI". To the right of this list is a large user profile card for "Jordan Halaby" located at "10137 Devonshire, South Lyon, MI 48178" with phone number "248-912-7636". The profile card includes fields for "SAMS ID", "Age: 122", and "E-Mail". Below the profile card are several buttons labeled "CLICK TO ACTIVATE PERSONNEL", "CLICK TO ACTIVATE MAILING", "CLICK TO MARRY", "LANGUAGE", "CUSTOM", and "FILE INFO". The main interface area contains various icons and buttons for "REGISTER", "VIEW EVENTS", "TRANSPORT...", "TRIPS", "PAYMENTS", "VOLUNTEER", "EQUIPMENT", "ADD PHOTO", "ASSIGN CARD", "REMINDERS", "GROUPS", "STATISTICS", and "CONTRACTS". At the bottom of the interface, there is a footer with links for "LIVE CAPTURE" and "CONNECT TO WEBCAM".

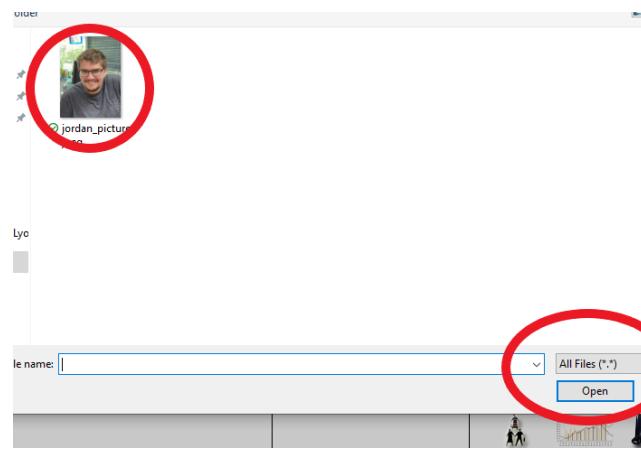
In the middle panel, click on the button labeled "Add Photo"

This screenshot shows the same software interface as the previous one, but with a red circle highlighting the "ADD PHOTO" button in the middle panel. The rest of the interface, including the user profile and other buttons, remains the same.

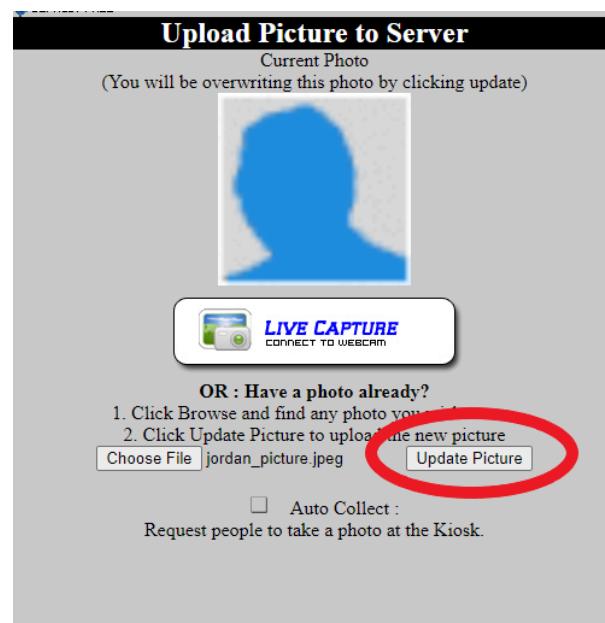
Click on the "Choose File" button

This screenshot shows a "Upload Picture to Server" dialog box. It displays a placeholder image of a person's face and a "LIVE CAPTURE" button. Below the image, it says "OR : Have a photo already?". Underneath that, there are two steps: "1. Click Browse and find any photo you wish to use." and "2. Click Update Picture to upload the new picture". A "Choose File" button is highlighted with a red circle. To its right, it says "No file chosen". Next to the "Choose File" button is an "Update Picture" button. At the bottom of the dialog, there is a checkbox for "Auto Collect" with the sub-instruction "Request people to take a photo at the Kiosk".

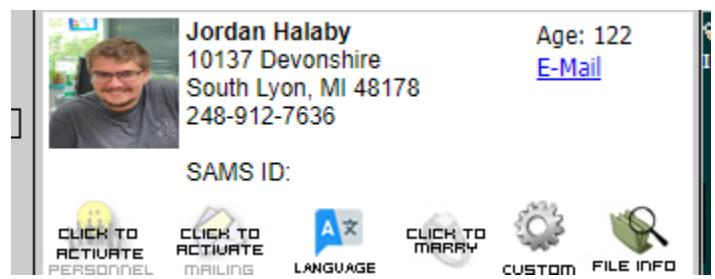
Select the photo that you want to insert



Click on the update picture button



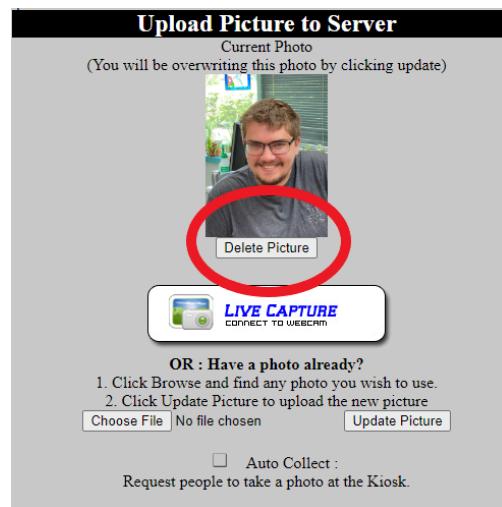
The record will update automatically and you should see the image belonging to the record



If you need to delete or update the image

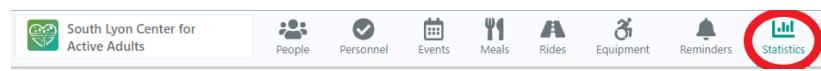
Go to the user's record and click "Add Photo"

Click on the button "Delete Picture"

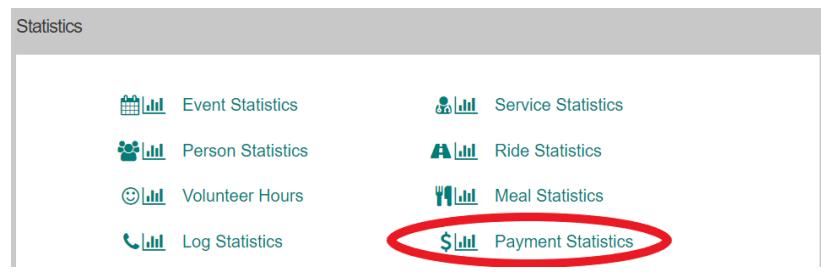


6. See How Much Money is in All Wallets

Start by going to the statistics tab at the top of the screen



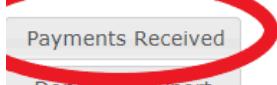
Click on payment statistics



Click on the button labeled "Payments Received"

By Account
 By Type

Today
Yesterday
This Week
Last Week
This Month
Last Month
This Year
Last Year
This Fiscal Year
Last Fiscal Year
Custom Range...

Payments Received 

Donations Export

Filters:
Age: >= 0
Site(s): All

Generate Statistics

Choose a date range - I recommend 1-1-2020 → 1-1-2025

- Payments Received Report by Staff Member
 Payments Received Report by Account
 Individual Payments
 Wallet Transactions
 Refund Report

Select Payment Received Date Range

1/1/2020 1/1/2025 **Show Report**

Click on the option for "Wallet Transactions"

[← Back](#)

Payments Received

Payments Received Report by Staff Member
 Payments Received Report by Account
 Individual Payments
 Wallet Transactions
 Refund Report

Select Payment Received Date Range

1/1/2020 1/1/2025 **Show Report** **Wallet Balances**

Click on the button “Wallet Balances”

Payments Received

- Payments Received Report by Staff Member
- Payments Received Report by Account
- Individual Payments
- Wallet Transactions
- Refund Report

Select Payment Received Date Range

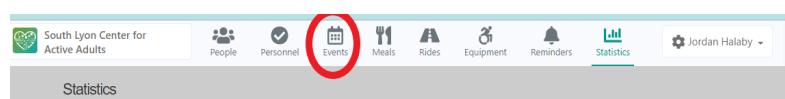
1/1/2020 1/1/2025 Show Report **Wallet Balances**

This will download an excel spreadsheet. Open up the spreadsheet and there is a list of all members with money in their wallet

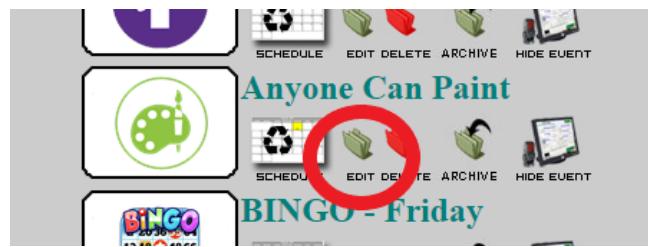
A	B	C	D	E	F	G	H	I
1	Wallet Balances							
2	First Name	Last Name	Date of Birth	Home Phone	Cell Phone	Email	Wallet Balance	
3	1 Wynona	Allen	01/01/1901	248-207-91	248-207-91	wynonah1	113.00	
4	2 Sonia	Ashe	01/01/1901	(248) 787-4		sashe509	3.00	
5	3 Carolyn	Baetz	01/01/1901	(734) 928-4			23.00	
6	4 Pam	Bagosy	01/01/1901	(248) 672-4		pambagos	4.00	
7	5 Sarah	Balbaugh	01/01/1901	(248) 756-4			16.00	
8	6 Katy	Berg	01/01/1901	(248) 444-4		ktbtaxi@at	15.00	
9	7 Adrienne	Brode	01/01/1901		989-284-3	brodejohn	3.00	
10	8 Deb	Broomham	01/01/1901	(734) 645-4		kaczara13	10.00	
11	9 Joyce	Brososky	01/01/1901	(734) 904-4			6.00	
12	10 Brenda	Bux	01/01/1901	(734) 355-1734-355-7	brendabux	20.00		
13	11 Patricia	Bvndas	01/01/1901	248-787-51		aeorae.dat	5.00	

7. Get the Category of an Event

We will view the category of the event: “Anyone Can Paint”



Click on the “Event” button located in the top banner

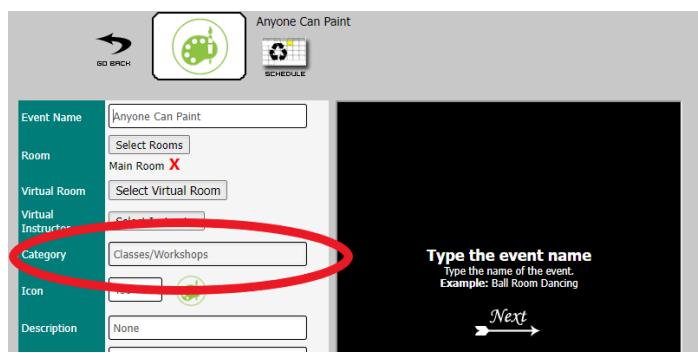


We will view the category of the event: “Anyone Can Paint”	
Click on the “Event” button located in the top banner	
Click on the “Edit” button associated with our event	

Click on the button labeled "Edit Template"



You can view the category of the event on the left side of the screen



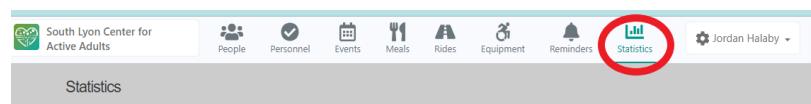
8. Get a Detailed List of Members Participating in a Single Event / Activity

We will get a comprehensive list of members that are participating in: "Holiday Singers"

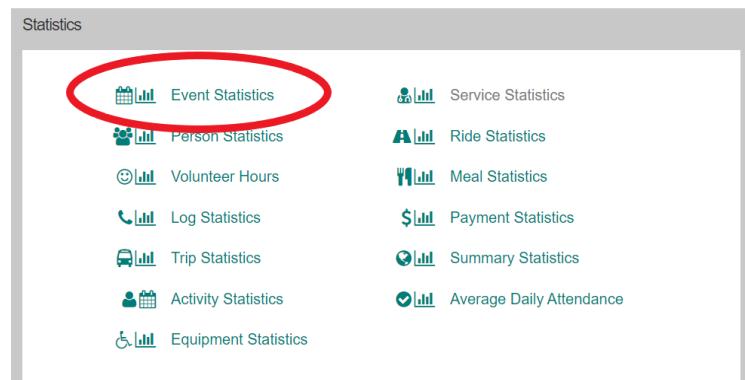
Check the category (using the above guide). In this case “Holiday Singers” is classified as “Special Event”

The screenshot shows a form for creating an event. On the left, there's a vertical teal sidebar with labels: Event Name, Event Date, Room, Virtual Room, Virtual Instructor, and Category. The 'Category' label is circled in red. To the right, there are input fields: 'Event Name' (Holiday Singers), 'Event Date' (9/22/2023), 'Room' (Main Room X), 'Virtual Room' (Select Virtual Room), 'Virtual Instructor' (Select Instructor), and 'Category' (Special Events).

Go to the statistics button located on the top bar



Click on the button for event statistics



Make sure you click on the option labeled “Event Statistics” in the top left corner

The screenshot shows the 'Event Statistics' configuration screen. At the top, there are three radio buttons: 'Event Statistics' (selected and circled in red), 'Event Occurrences', and 'Days at Center'. Below this are date range options: Today, Yesterday, This Week, Last Week, This Month (highlighted in red), Last Month, This Year, Last Year, This Fiscal Year, Last Fiscal Year, and Custom Range... On the right, there are buttons for Filters, Settings, and Columns. A note says 'Events which took place between 09/01/2023 and 09/30/2023'. Under 'Filters', it shows 'Age: >= 0' and 'Site(s): All'. There are 'Generate Statistics' and 'Export' buttons at the bottom.

Choose your time frame

Event Statistics
 Event Occurrences
 Days at Center

Today
Yesterday
This Week
Last Week
This Month
Last Month
This Year
Last Year
This Fiscal Year
Last Fiscal Year
Custom Range...

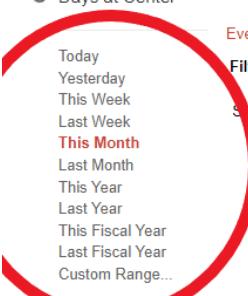
Export

Events which took place between 09/01/2023 and 09/30/2023

Filters:
Age: >= 0
Site(s): All

Generate Statistics

Filters Settings Columns



Press the Generate Statistics button

Event Statistics
 Event Occurrences
 Days at Center

Today
Yesterday
This Week
Last Week
This Month
Last Month
This Year
Last Year
This Fiscal Year
Last Fiscal Year
Custom Range...

Export

Events which took place between 09/01/2023 and 09/30/2023

Filters:
Age: >= 0
Site(s): All

Generate Statistics

Filters Settings Columns



Click on the category link that we found in (b)

Event Statistics



Event Statistics from 09/01/2023 to 09/30/2023

Filters:

Age: >=0

Site(s): All

Category	Duplicated	Unduplicated	60 and Over Guests
Classes/Workshops	104	53	0
Fitness/Exercise	445	127	0
Health Education	54	24	0
Off Site Excursions	32	32	0
Offsite Fitness/Exercise	85	34	0
Public Services	4	4	0
Recreation/Entertainment	151	70	0
Social Activity/Event	13	13	0
Special Events	16	15	0
Total Event Signins	904	303	0

Click on the event name that we are looking for

Event Statistics

Event Statistics from 09/01/2023 to 09/30/2023

Filters:

Age: >=0

Site(s): All

Special Events

Event Name	Duplicated	Unduplicated
Holiday Singers	13	12
Tech Talks with Andrew	3	3
Total Event Signins	16	15

Now you should see a comprehensive list of all participants in our event for the specified time frame

Event Statistics

Print PDF Export Labels Create Group Email Broadcast Event Signup Raffle Winner List

Event Statistics from 09/01/2023 to 09/30/2023

Filters:
Age: >=0
Site(s): All

Holiday Singers

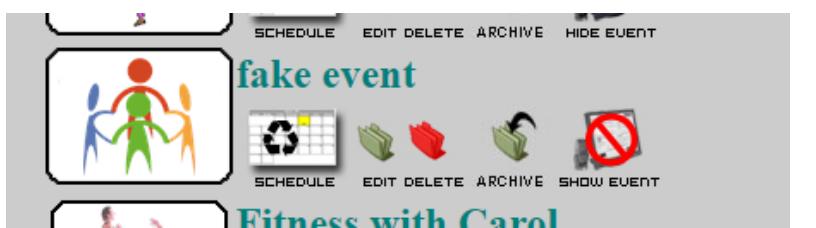
Person	Attendance	Hours	Tickets
1. Full Name: Beetz, Carolyn Home Phone: (734) 928-5672 First Name: Carolyn Municipality: City of South Lyon	1	1.50	0
2. Full Name: Baker, Thais Home Phone: (586) 925-0156 First Name: Thais Municipality: City of South Lyon	1	1.50	0
3. Full Name: Bentley, Linda Home Phone: (248) 486-7074 First Name: Linda Municipality: City of South Lyon	1	1.50	0

9. Archiving and Restoring Events

Find the event that you are interested in archiving. In this case, we will use an event called "fake event"



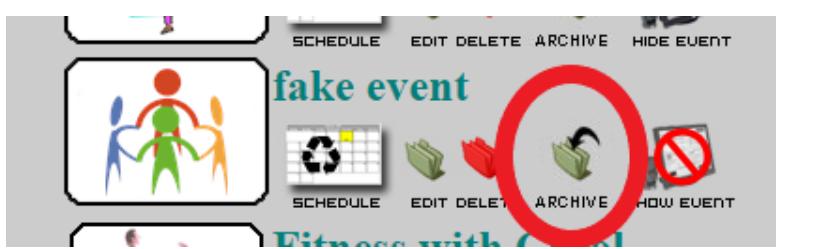
Go to the "Events" button in the top banner



Scroll down to the event that you are trying to archive



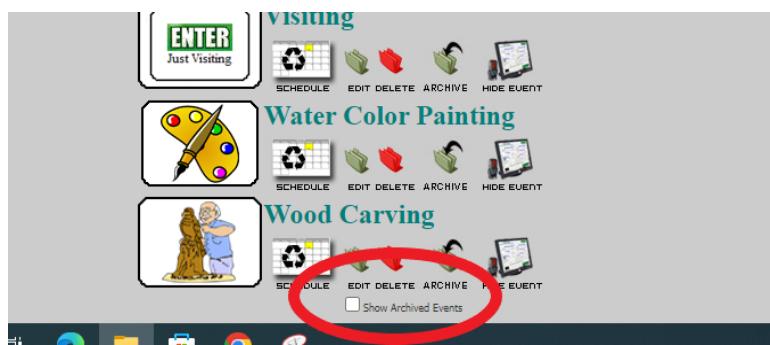
Click on the archive button (I think it looks like a green pepper)



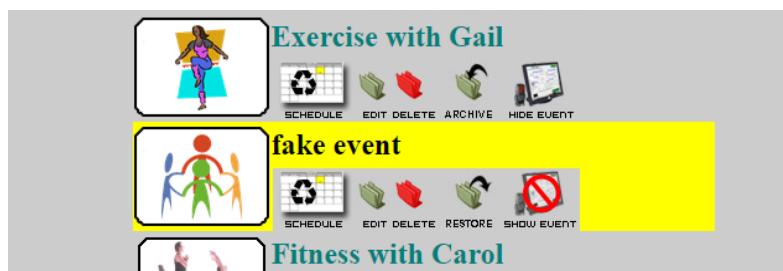
It will automatically drop off the page



To see all of the events marked as archived, scroll down to the bottom of the page and click the tiny checkbox next to the label: "Show Archived Events"



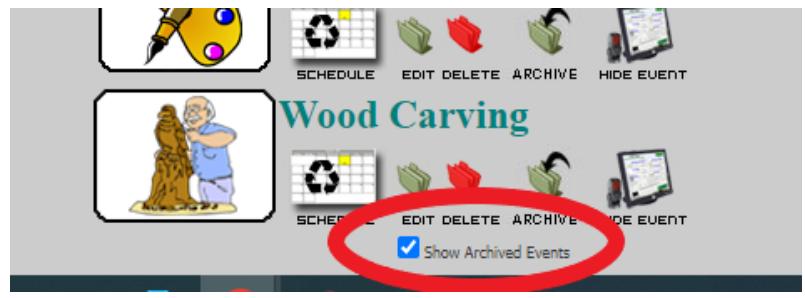
Our event will now be back in the list with a yellow border around it. The yellow means that it is archived



To restore (aka un-archive) an event, go to the event in question and click on the "Restore" button (this one also looks like a green pepper)

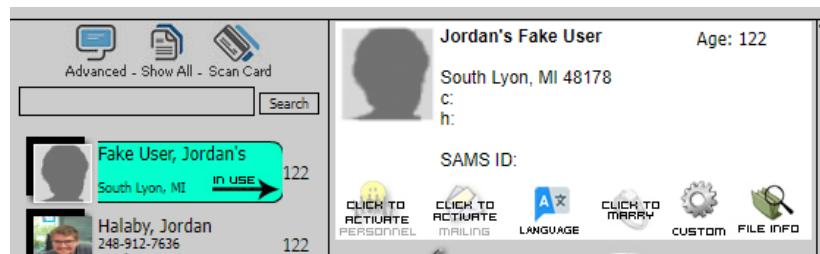


To hide all archived events, scroll back to the bottom and uncheck the tiny box with the label: "Show Archived Events"

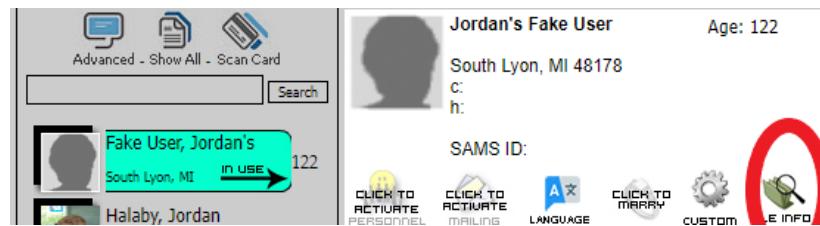


10. Archiving People, Restoring People, Marking as Deceased, and Deleting People

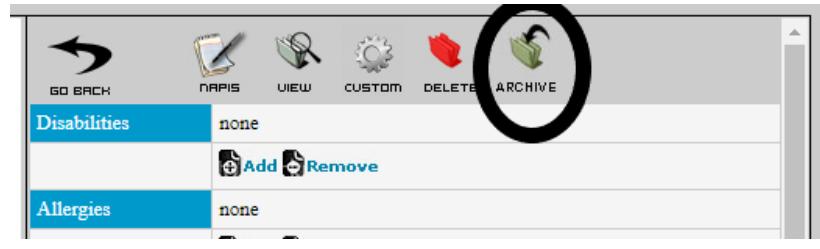
In order to demonstrate how to do this process, I will create a fake record "Jordan's Fake User"



To perform these actions, go to "File Info" on this record



To archive a record, click on the green button labeled "Archive" in the top right corner of the screen



On the next screen, simply press the “Confirm Archive” button

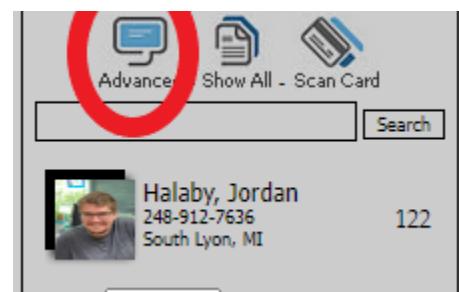
still continue to show up in statistics, event lists, etc.

iew archived people by clicking on Advanced and checking the next to Show Archived People.

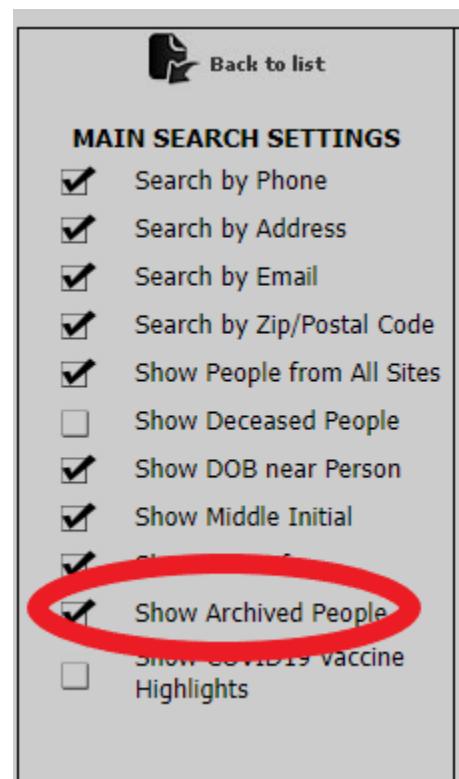
Confirm Archive

First Name	Last Name	Date of Birth
Jordan's	Fake User	1/1/1901

To prove that this user has been archived, go to the top left of the screen and press the “Advanced” button



Click on the box for “Show Archived People”



Go back to the list of people, and search for my fake record. The archived person will have a yellow background

Fake User, Jordan's
South Lyon, MI 122

Halaby, Jordan
248-912-7636 South Lyon, MI 122

To hide archived people, go back to the "Advanced" button and uncheck the box labeled "Show Archived People"

MAIN SEARCH SETTINGS

- Search by Phone
- Search by Address
- Search by Email
- Search by Zip/Postal Code
- Show People from All Sites
- Show Deceased People
- Show DOB near Person
- Show Middle Initial
- Show Site Info
- Show Archived People
- Show COVID-19 vaccine
- Highlights

Now, the fake record will not be shown

Halaby, Jordan
248-912-7636 South Lyon, MI 122

1 of 1

Show Master List
Show Address
Records 1 to 1 of 1

To restore this user, show all archived people and find and click on your record

Go to the button labeled "File Info"

In the top right corner, click on the button labeled "Restore"

Refresh the page and your record should not have a yellow background now. This means that you successfully restored the record

To mark a person as deceased, find your record and go to the button labeled "File Info"

The screenshot shows a software interface for managing contacts. At the top, there are icons for Advanced, Show All, Scan Card, and a search bar. Below this, a contact card is displayed for "Fake User, Jordan's" from South Lyon, MI. The card includes fields for Name, Address, Phone number, and a status indicator "in use". To the right of the card, contact details are listed: "Jordan's Fake User" (Age: 122), "South Lyon, MI 48178", and "SAMS ID: 122". Below the contact card are several buttons: "CLICK TO ACTIVATE PERSONNEL", "CLICK TO ACTIVATE MAILING", "LANGUAGE", "CLICK TO MARRY", "CUSTOM", and a circled "FILE INFO" button.

Scroll down and click the button that says "Yes" next to the label "Deceased"

This screenshot shows a dropdown menu with options for Gender (Female), Language (English), Head of House (radio buttons for Yes or No), and Deceased (radio buttons for Yes or No). The "Deceased" field has a red oval around it, indicating the user should click the "Yes" option.

Press the save button at the bottom

This screenshot shows a contact summary screen. It includes fields for Contact Settings (Last Updated: Oct 27 2023 11:00AM EST), Text, Voice, and Email buttons, and a "Save" button which is highlighted with a red oval.

To show the deceased user, go the "Advanced" button and click the box that says "Show Deceased People"

This screenshot shows the "MAIN SEARCH SETTINGS" page. It lists various search options with checkboxes. The "Show Deceased People" checkbox is checked and highlighted with a red oval. Other options include Search by Phone, Search by Address, Search by Email, Search by Zip/Postal Code, Show People from All Sites, Show DOB near Person, Show Middle Initial, Show Site Info, Show Archived People, and Show COVID19 Vaccine Highlights.

You can tell that a user is marked as deceased if they have an orange background

The screenshot shows a software interface with a search bar at the top. Below it is a list of users:

- Fake User, Jordan's (Age: 122, South Lyon, MI) - This record has an orange background and is marked as deceased.
- Halaby, Jordan (Age: 122, 248-912-7636, South Lyon, MI) - This record has a grey background and is not marked as deceased.

Below the list are navigation buttons (back, forward, search), a download icon, and links to 'Show Master List' and 'Show Address'. At the bottom, it says 'Records 1 to 2 of 2'.

To delete this person, go their record and press the red button that says "Delete"

This screenshot shows a detailed view of a user record:

Jordan's Fake User Age: 122
South Lyon, MI 48178
c:
SAMS ID:

Toolbar buttons: GO BACK, DPRIS, VIEW, CUSTOM, **DELETE** (circled in red), ARCHIVE.

Disabilities: none

Add Remove

Finally, click the button that says "Confirm Delete".

This screenshot shows a confirmation dialog box:

First Name	Last Name	Date of Birth
Jordan's	Fake User	1/1/1901

0 Checkin Data Found
0 Rides Data Found
0 Trips Signed Up For
0 Other Data Found

ould not reduce numbers. There is no activity information for this person.

CONFIRM DELETE (circled in red)

The program will automatically remove the user from the screen



11. Look Up Tag Number

Let's assume that we want to find which member has the tag number: 1035

Click on a random record. In this case, we will use "TrainingPerson, Jessica"

A screenshot of a software application window titled "Advanced - Show All - Scan Card". On the left, there is a list of member records. The first record, "TrainingPerson, Jessica", is highlighted with a red circle. The record details are: Name: TrainingPerson, Jessica, Tag: 122, Phone: (555) 456-8974, Address: Our Town, ST. Below the list are navigation buttons and links for "Show Master List" and "Show Address". At the bottom, it says "Records 1 to 6 of 3770". On the right side of the screen, there is a sidebar with various menu items and their counts: Add Person (3770), Person List, Import People, Manage Dropdown Lists, Merge Duplicates (6), Manual Person Merge, Email List (1785), Mailing Labels (1910), At Risk - Emergency Info, Phone Logs (1), Groups, Birthdays, Time at Center, and Legacy Voice Connect.

In the middle column, click on the button that says "Assign Card"

At the bottom, click on the link that says "Assignment List"

This will provide you with a list of users with tags sorted alphabetically by last name

Full Name ▲	Card Number	Deactivated
Bryan .TrainingGuy	123456	
Jessica .TrainingPerson	3970	
Linda Ackley	300290	
John Adrienne	3567	
Antonio Aguilar	3672	
Charlynn Aguilar	3563	

On the keyboard, initiate the "find" functionality by pressing CTRL+F

Full Name ▲	Card Number	Deactivated
Bryan .TrainingGuy	123456	
Jessica .TrainingPerson	3970	

A little input field will appear, inside this, type our number - 1035

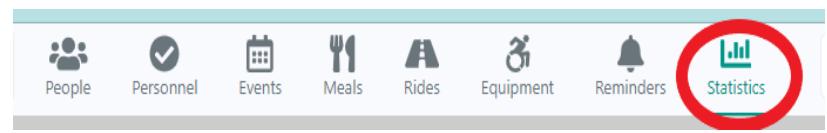
myseniorcenter.net/Legacy/manage_seniors_assigncardlist.asp	
Editor	SL Center for Active...
1035	1/1
Charles Graham	60148
Linda Graham	300253
Linda Gratz	3587
Jan Gray	3724

You will see the owner of this tag number listed

Rose Haggerty	60148
Ardia T. W. Haist	300253
Jordan Halaby	1035
Mike Hale	317
Leonard Hale	60222

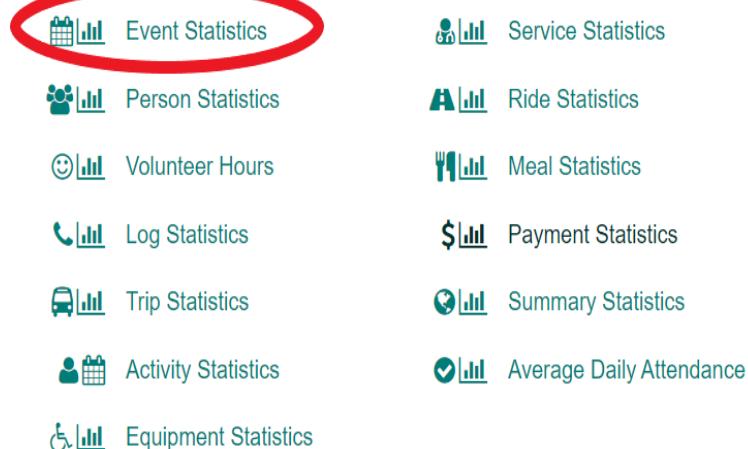
12. Statistics with Filters and Columns

Let's try to view women members of an event (in this case, we will try to find all female members who participated in Bingo on Friday of the previous week). We will use filters to restrict our results to women. We will use columns to present our results with municipality and gender for each record

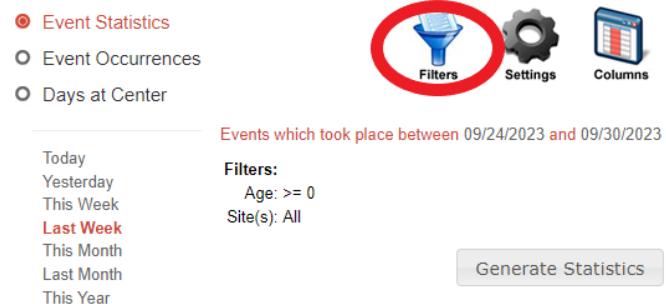


Start by going to "Statistics" on the top bar

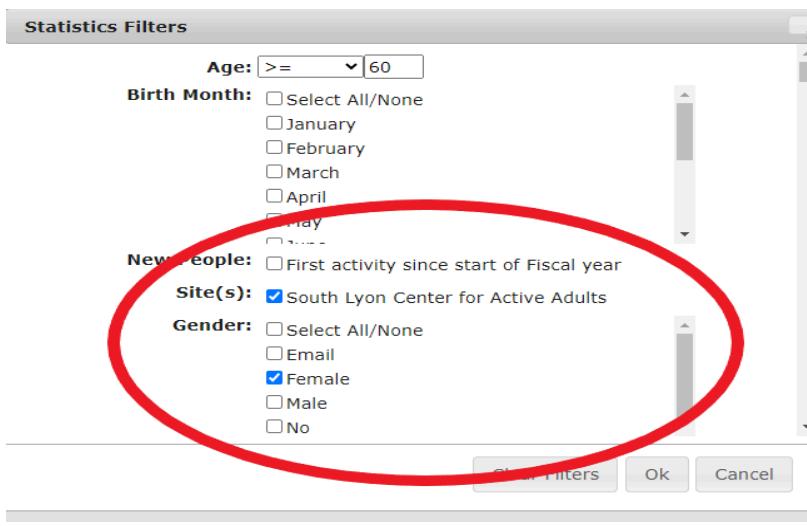
Click on “Event Statistics”



Make sure that “Last Week” is selected on the left. Click on the “Filters” button



Scroll down to Gender and click on the checkbox labeled “Female” and press “OK”



Go to Columns

Event Statistics
 Event Occurrences
 Days at Center

Events which took place between 09/24/2023 and 09/30/2023

Filters:
Age: >= 60
Site(s): All
Gender: Female

Today
Yesterday
This Week
Last Week
This Month
Last Month
This Year

Generate Statistics



Scroll down and check the boxes labeled "Municipality" and "Gender". Press "OK"

Select Person Fields

Residence
 Address
 Address2
 PO Box
 Mailing Route
 City
 State/Province
 Zip/Postal Code
 County
 Municipality
 Township
 Language
 Veteran?
 Archived?
 Head of Household

Click Generate Statistics

Events which took place between 09/24/2023 and 09/30/2023

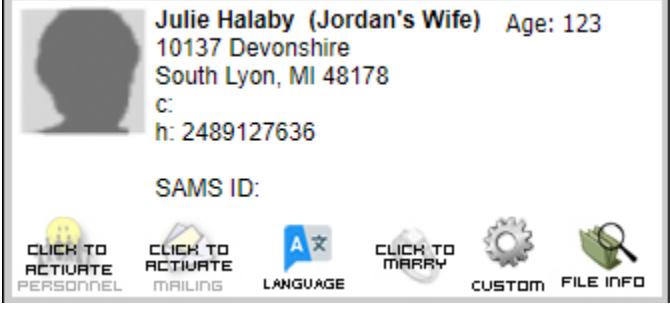
Filters:
Age: >= 60
Site(s): All
Gender: Female

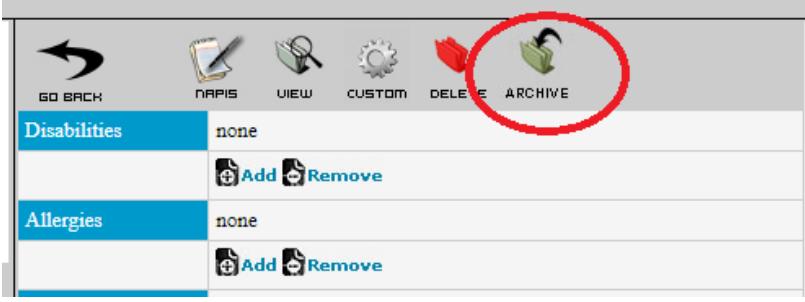
Generate Statistics

Click on "Recreation/Entertainment"

Category	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	Tickets
Classes/Workshops	34	29	0	0	100.83	0
Fitness/Exercise	104	62	0	0	105.83	0
Health Education	6	6	0	0	9.00	0
Offsite Programs	28	18	0	0	61.25	0
Recreation/Entertainment	46	35	0	0	84.58	0
Special Events	5	5	0	0	7.50	0

Click on the event name: “BINGO - Friday”	<table border="1"> <thead> <tr> <th>Event Name</th><th>Duplicated</th><th>Unduplicated</th><th>60 and Over Guests</th><th>Under 60 Guests</th><th>Hours</th><th>Tickets</th></tr> </thead> <tbody> <tr> <td>BINGO - Friday</td><td>13</td><td>13</td><td>0</td><td>0</td><td>16.25</td><td>0</td></tr> <tr> <td>BINGO - Tuesday</td><td>12</td><td>12</td><td>0</td><td>0</td><td>15.00</td><td>0</td></tr> <tr> <td>Dominoes</td><td>6</td><td>6</td><td>0</td><td>0</td><td>13.50</td><td>0</td></tr> <tr> <td>Hand and Foot</td><td>2</td><td>2</td><td>0</td><td>0</td><td>7.00</td><td>0</td></tr> <tr> <td>Mah Jong</td><td>7</td><td>7</td><td>0</td><td>0</td><td>21.00</td><td>0</td></tr> <tr> <td>Pinochle</td><td>5</td><td>5</td><td>0</td><td>0</td><td>10.00</td><td>0</td></tr> <tr> <td>SCRABBLE</td><td>1</td><td>1</td><td>0</td><td>0</td><td>1.83</td><td>0</td></tr> <tr> <td>Total Event Signins</td><td>46</td><td>35</td><td>0</td><td>0</td><td>84.58</td><td>0</td></tr> </tbody> </table>	Event Name	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	Tickets	BINGO - Friday	13	13	0	0	16.25	0	BINGO - Tuesday	12	12	0	0	15.00	0	Dominoes	6	6	0	0	13.50	0	Hand and Foot	2	2	0	0	7.00	0	Mah Jong	7	7	0	0	21.00	0	Pinochle	5	5	0	0	10.00	0	SCRABBLE	1	1	0	0	1.83	0	Total Event Signins	46	35	0	0	84.58	0
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Pinochle	5	5	0	0	10.00	0																																																										
SCRABBLE	1	1	0	0	1.83	0																																																										
Total Event Signins	46	35	0	0	84.58	0																																																										
This will show a list of all women who participated in Bingo last Friday along with their gender and municipality	<p>Event Statistics from 09/24/2023 to 09/30/2023</p> <p>Filters:</p> <ul style="list-style-type: none"> Age: >=60 Site(s): All Gender: Female <p>BINGO - Friday</p> <table border="1"> <thead> <tr> <th>Person</th> <th>Attendance</th> <th>Hours</th> <th>Tickets</th> </tr> </thead> <tbody> <tr> <td>1.  Full Name: Barbett, Violet ID: 100395 First Name: Violet Gender: Female Joined Date: Municipality: City of South Lyon</td> <td>1</td> <td>1.25</td> <td>0</td> </tr> <tr> <td>2.  Full Name: Blum, Sherry ID: 100459 First Name: Sherry Gender: Female Joined Date: Municipality: City of South Lyon</td> <td>1</td> <td>1.25</td> <td>0</td> </tr> </tbody> </table>	Person	Attendance	Hours	Tickets	1.  Full Name: Barbett, Violet ID: 100395 First Name: Violet Gender: Female Joined Date: Municipality: City of South Lyon	1	1.25	0	2.  Full Name: Blum, Sherry ID: 100459 First Name: Sherry Gender: Female Joined Date: Municipality: City of South Lyon	1	1.25	0																																																			
Person	Attendance	Hours	Tickets																																																													
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2.  Full Name: Blum, Sherry ID: 100459 First Name: Sherry Gender: Female Joined Date: Municipality: City of South Lyon	1	1.25	0																																																													

13. Show and Hide Archived / Deceased People	
<p>Let's pretend that Jordan had a spouse, let's call her Julie, that died in early 2024. Like Jordan, she was a member at the center and also is listed as an entry in MySeniorCenter. I created a fake account to demonstrate making a fake user archived and/or deceased and how to show this in MySeniorCenter</p>	 <p>Julie Halaby (Jordan's Wife) Age: 123 10137 Devonshire South Lyon, MI 48178 C: h: 2489127636</p> <p>SAMS ID:</p> <p> CLICK TO ACTIVATE PERSONNEL  CLICK TO ACTIVATE MAILING  LANGUAGE  CLICK TO MARRY  CUSTOM  FILE INFO</p>

<p>To archive a user in MySeniorCenter, click on the user and click on File Info</p>	 <p>Julie Halaby (Jordan's Wife) Age: 123 10137 Devonshire South Lyon, MI 48178 C: h: 2489127636</p> <p>SAMS ID:</p> <p>CLICK TO ACTIVATE PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO</p>						
<p>At the top of the form, click on the green button that says "Archive"</p>							
<p>On the next screen, click on the button that says "Confirm Archive"</p>	 <p>GO BACK</p> <p>Confirm Archive</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Julie</td> <td>Halaby</td> <td>1/1/1901</td> </tr> </tbody> </table>	First Name	Last Name	Date of Birth	Julie	Halaby	1/1/1901
First Name	Last Name	Date of Birth					
Julie	Halaby	1/1/1901					

To view Julie's record (as she is archived), go to the top of the frame and click the button that says "Advanced"

The screenshot shows a search interface with three results listed. At the top, there are three icons: a blue speech bubble, a document, and a card. Below them is a dropdown menu with "Advanced" highlighted and circled in red. To the right of the menu are "Show All" and "Scan Card" options. A search bar and a "Search" button are also present. The results are as follows:

Result	Information	Action
1	Halaby, Jordan 248-912-7636 South Lyon, MI	123
2	Halaby, Stacy (248) 762-7614 South Lyon, MI	123
3	Halaby, Steve 248-444-0710 South Lyon, MI	123

At the bottom, there are navigation buttons: back, forward, and a search bar with the number "1".

From here, check the box next to the words: "Show Archived People"

The screenshot shows the "MAIN SEARCH SETTINGS" page. At the top, there is a "Back to list" link. Below it is a list of search settings, each with a checkbox. The checkboxes for "Show Archived People" and "Show COVID19 Vaccine Highlights" are circled in red.

Setting	Status
Search by Phone	<input checked="" type="checkbox"/>
Search by Address	<input checked="" type="checkbox"/>
Search by Email	<input checked="" type="checkbox"/>
Search by Zip/Postal Code	<input checked="" type="checkbox"/>
Show People from All Sites	<input checked="" type="checkbox"/>
Show Deceased People	<input checked="" type="checkbox"/>
Show DOB near Person	<input checked="" type="checkbox"/>
Show Middle Initial	<input checked="" type="checkbox"/>
Show Site Info	<input checked="" type="checkbox"/>
Show Archived People	<input checked="" type="checkbox"/>
Show COVID19 Vaccine Highlights	<input type="checkbox"/>

Now go back to your member list, and search for "Julie Halaby". Since she is deceased, her tile will be colored yellow

The screenshot shows a software interface for managing a member list. At the top, there are three icons: a speech bubble, a document, and a card. Below them are links: "Advanced", "Show All", and "Scan Card". A search bar with a placeholder and a "Search" button are also present. The main area displays a list of four members:

Member Name	Phone Number	Address	ID
Halaby, Jordan	248-912-7636	South Lyon, MI	123
Halaby, Julie (Jordan's Wife)	2489127636	South Lyon, MI	123
Halaby, Stacy	(248) 762-7614	South Lyon, MI	123
Halaby, Steve	248-444-0710	South Lyon, MI	123

Below the list are navigation buttons for pages 1 through 4, followed by a "Show Master List" link and a "Show Address" link. The message "Records 1 to 4 of 4" is displayed at the bottom.

To mark Julie as deceased, click on her tile

This screenshot shows the same software interface as the previous one, but with a vertical sidebar on the right side containing various management options. The sidebar includes:

- Person
- Import
- Manage (with a checked checkbox)
- Merge
- Manual
- Email L
- Mailing
- At Risk

The rest of the interface is identical to the first screenshot, showing the list of members and the yellow-highlighted tile for Julie Halaby.

Go to "File Info"

Julie Halaby (Jordan's Wife) Age: 123
10137 Devonshire
South Lyon, MI 48178
C:
h: 2489127636

SAMS ID:

CLICK TO ACTIVATE PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO

At the bottom of this form, click on the "yes" button that is adjacent to the "Deceased" label

Julie Halaby (Jordan's Wife) Age: 123

City: South Lyon
State / Province: MI
Zip / Postal Code: 48178
E-mail:
Emergency Name: 50 Characters Remaining
Emergency Relation: 50 Characters Remaining
Emergency Phone: 50 Characters Remaining
Ethnic Status: Please Select
Gender: Female
Language: English
Home Address: Yes No
Deceased: Yes No
Deceased Date:
Seniors Lives Alone: Yes No
Joined Date: 6/17/2024
Text Voice Email

Save the form

Joined Date: 6/17/2024

Do Not Contact Settings: Text Voice Email

Last Updated: Jordan Halaby
Jun 17 2024 10:37AM EST

Save

Now the member's display information will have an orange background - implying that the user is deceased

Julie Halaby (Jordan's Wife) Age: 123
10137 Devonshire
South Lyon, MI 48178
C:
h: 2489127636

SAMS ID:

CLICK TO ACTIVATE PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO

14. Creating Groups / Adding People to Groups

To start the process of creating a group, click on the People tab at the top of the screen

Sheets Docs Jordan's to do list ... Line Dancing Deposit Jordan's Checklist ... SEO

South Lyon Center for Active Adults **People** Personnel Events Meals Rides Equipment

To refresh the screen, click on the button labeled: "Show All"

Advanced Show All Scan Card

Search

	Halaby, Jordan 248-912-7636 South Lyon, MI	123
	Halaby, Stacy (248) 762-7614 South Lyon, MI	123
	Halaby, Steve 248-444-0710 South Lyon, MI	123

From the white list of items, click on the option that says: "Groups"

The screenshot shows a software interface with a left panel displaying a list of guest records and a right panel showing a sidebar menu.

Left Panel (Guest List):

- Advanced - Show All - Scan Card
- Search bar
- List of guests:
 - .Guest 10, Guest 10
South Lyon, MI
 - .Guest 31, Guest 31
South Lyon, MI
 - .Guest 4, Guest 4
South Lyon, MI
 - .Guest 5, Guest 5
South Lyon, MI
 - .Guest 6, Guest 6
South Lyon, MI
 - .Guest 7, Guest 7
South Lyon, MI
- Pagination: 1 / 683
- Show Master List
- Show Address
- Records 1 to 6 of 4097

Right Panel (Sidebar Menu):

- Add Person
- Person List (4087)
- Import People
- Manage Dropdown Lists
- Merge Duplicates (8)
- Manual Person Merge
- Email List (1972)
- Mailing Labels (1904)
- At Risk - Emergency Info (1)
- Profile Logs (1)
- Groups (4)** (This item is circled in red.)
- Birthdays
- Time at Center
- Legacy Voice Connect

To create a group, click on the green "Create Group" button at the top right

The screenshot shows a screen titled "No Selection" with a green "Create Group" button at the top right, which is circled in red.

Fill out the form, keeping in mind all of the yellow labels that describe the group's options

Create a Group

Group Name:	JORDAN	
Notes:		
Sponsor:		
Account:		
Membership Group:	<input type="checkbox"/>	NO
Block Swipe:	<input type="checkbox"/>	NO
Group member can swipe, even if expired.		
Required Group:	<input type="checkbox"/>	NO
Prevents any non-members from Swipe or Event Signup.		
Display in MyActiveCenter:	<input type="checkbox"/>	NO
This group will be NOT be displayed in the Portal		
Group is Free:	<input checked="" type="checkbox"/>	YES
Lifetime:	<input checked="" type="checkbox"/>	YES
No expiration date.		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

To add people to this newly created group, go to the People tab and choose your member

The screenshot shows the People tab interface. On the left, there is a search bar and a list of one member: "Halaby, Jordan" with address "248-912-7636 South Lyon, MI". The list shows "123" records. Below the list are buttons for "Show Master List" and "Show Address". On the right, detailed information for "Jordan Halaby" is displayed, including address "10137 Devonshire", phone numbers "c: 248-912-7636" and "h: 248-912-7636", age "123", and email "E-Mail". A "MEMBER" badge is shown. Below this, a "SAMS ID:" field is present. At the bottom, there are several administrative icons with labels: "CLICK TO ACTIVATE PERSONNEL", "MAILING", "LANGUAGE", "CLICK TO MARRY", "CUSTOM", "FILE INFO", "REGISTER", "VIEW EVENTS", "TRANSPORT...", "TRIPS", "PAYMENTS", "VOLUNTEER", "EQUIPMENT", and "MEALS".

Click on the button labeled "Groups"

The screenshot shows a member profile for Halaby, Jordan, with address details. Below the profile is a navigation bar with various icons. The 'GROUPS' icon, which is a person icon inside a circle, is highlighted with a red circle.

Click the checkmark next to each group that you want this member to join

The screenshot shows a 'CREATE GROUP' page with a list of groups. The 'JORDAN' checkbox is circled in red. Other groups listed include 'Another Test' (Lifetime, Free) and 'Friends Giving' (\$7.00). A renewal choice section is also visible.

15. Create Group Based on Statistics

We want to create a group that embodies all members that live in the “Other” municipality

The screenshot shows the top navigation bar of the software. The 'Statistics' tab is highlighted with a red circle. Other tabs include People, Personnel, Events, Meals, Rides, Equipment, Reminders, and a dropdown menu.

Go to the statistics tab in the top right corner

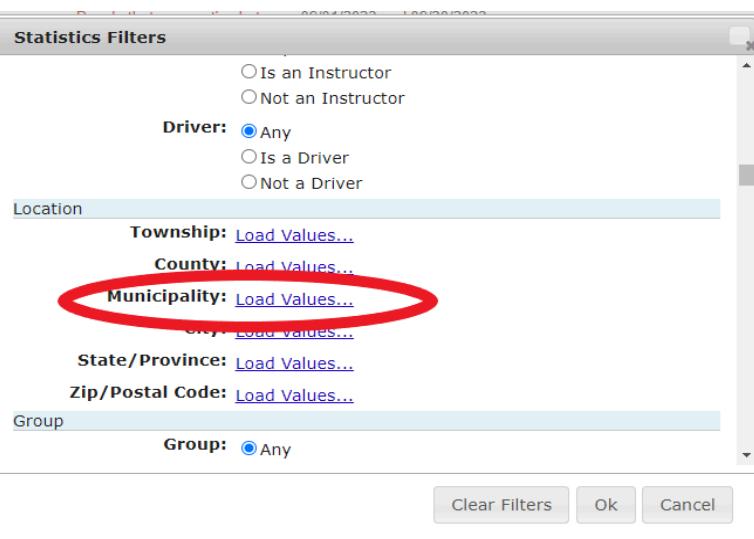
Click on “Person Statistics”



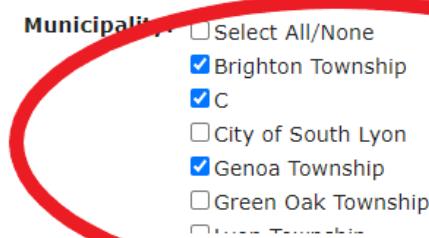
Go to “Filters” at the top of the popup window



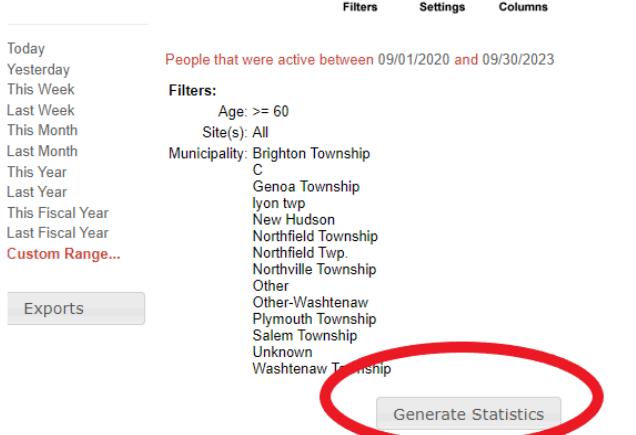
Scroll down to “Municipality” and click “Load Values”



Select all options except for:
City of South Lyon, Green
Oak Township, Lyon
Township, Lyon twp, and
South Lyon



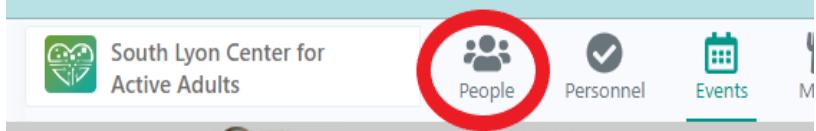
Press “OK”

Click on "Generate Statistics"	 <p>Today Yesterday This Week Last Week This Month Last Month This Year Last Year This Fiscal Year Last Fiscal Year Custom Range...</p> <p>Filters: Age: >= 60 Site(s): All Municipality: Brighton Township C Genoa Township Iyon twp New Hudson Northfield Township Northfield Twp. Northville Township Other Other-Washtenaw Plymouth Township Salem Township Unknown Washtenaw Township</p> <p>Exports</p> <p>Generate Statistics</p>																		
Scroll down to and click on "View all People"	<table border="1"> <thead> <tr> <th>Totals</th> <th>88</th> <th>100%</th> </tr> </thead> <tbody> <tr> <td>Lives Alone</td> <td>Count</td> <td>Percent</td> </tr> <tr> <td>No</td> <td>85</td> <td>96.6%</td> </tr> <tr> <td>Yes</td> <td>3</td> <td>3.4%</td> </tr> <tr> <td>Totals</td> <td>88</td> <td>100%</td> </tr> <tr> <td colspan="3">View all People</td> </tr> </tbody> </table>	Totals	88	100%	Lives Alone	Count	Percent	No	85	96.6%	Yes	3	3.4%	Totals	88	100%	View all People		
Totals	88	100%																	
Lives Alone	Count	Percent																	
No	85	96.6%																	
Yes	3	3.4%																	
Totals	88	100%																	
View all People																			
Press "Create Group" up at the top	 <p>Print PDF Export Labels Create Group Email Broadcast Event Signup Raffle Winner List</p> <p>People that were active between 09/01/2000 and 09/30/2023</p> <p>Filters: Age: >=60 Site(s): All Seniors: Include Seniors with no activity in the date range Municipality: Brighton Township C</p>																		

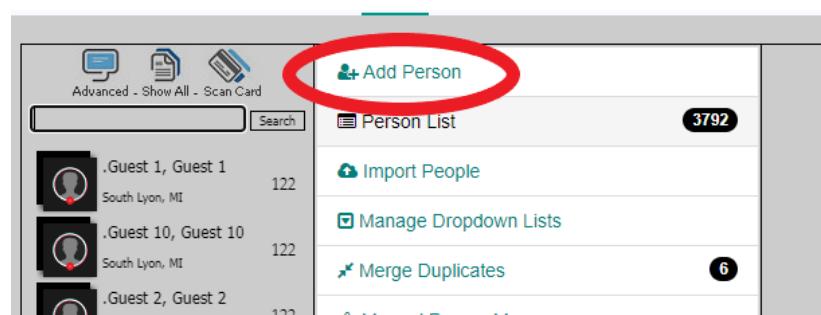
Perform the procedure mentioned in part “Creating Groups / Adding People to Groups” and press save

Create a Group

Group Name:	TEST Group	
Notes:	Hello, this was made by Jordan	
Sponsor:		
Account:		
Membership Group:	NO	
Block Swipe:	NO	Group member can swipe, even if expired.
Required Group:	NO	Prevents any non-members from Swipe or Event Signup.
Display in MyActiveCenter:	NO	This group will be NOT be displayed in the Portal
Group is Free:	YES	
Lifetime:	YES	No expiration date.
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

16. Creating Guest Accounts	
Creating a guest account is no different than creating a real account. The only difference is that we put a period “.” in front of the last name (this will make the guest account appear first on our list of seniors). For our purposes, make the first name “Guest 15” and the last name “.Guest 15”	
Start by pressing the “People” button at the top	

Press the “Add Person” button



Fill in the forms using our guidelines - first and last name are the only fields that need to be filled out

The screenshot shows the 'Add Person' form. It has several input fields: 'First Name' (containing 'Guest 15'), 'Last Name' (containing 'Guest 15'), 'Nickname' (empty), 'Date of Birth' (empty), 'Phone' (empty), and 'Cell Phone' (empty). To the right of the form is a large black box containing the text 'Type the Person's Last Name' and a smaller note 'Type the last name of the Person. Example: Lojek, Andersen, Youngs'. A red circle highlights the 'First Name' and 'Last Name' fields.

Click the “Add” button at the bottom of this form

The screenshot shows a registration form with four blue-tinted input fields: 'County', 'Municipality', 'Township', and 'SSN'. Below these fields is a grey section containing an 'ADD' button, which is circled in red. At the bottom of this section is the text 'Click here to print a blank registration form.' with a blue link.

On the next screen, ignore all of the fields and press “Save”

The screenshot shows a detailed profile form for 'Guest 15, Guest 15'. The left side lists various personal and demographic details with dropdown menus and radio buttons. The right side lists medical information like allergies and emergency contacts with input fields. At the bottom of the page are two buttons: 'Save' and 'Save And Add New', with a red circle highlighting the 'Save' button.

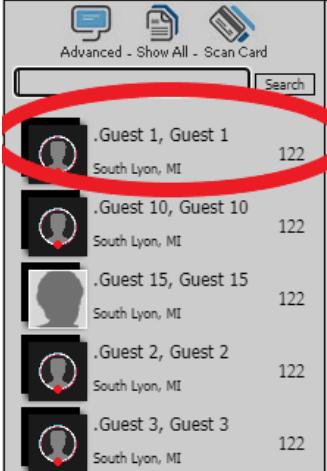
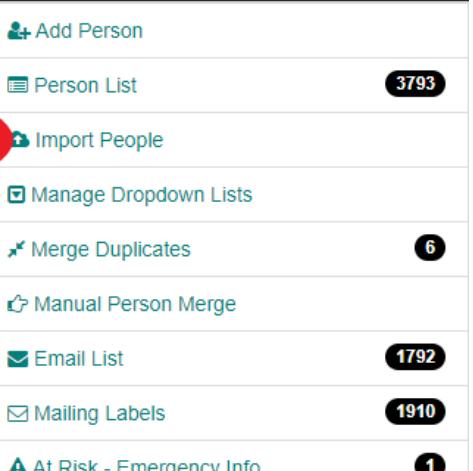
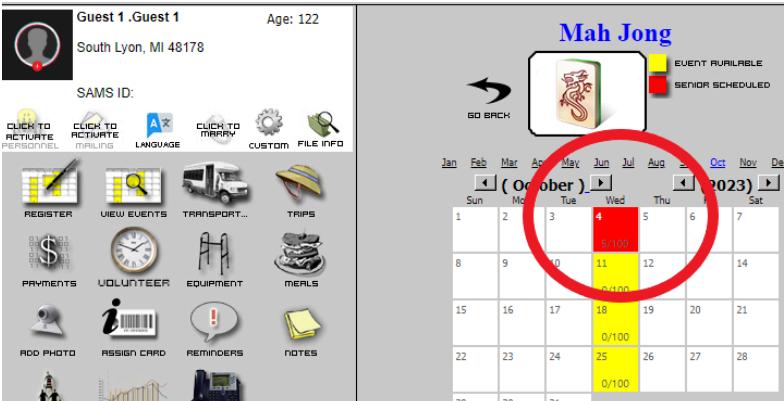
The guest account can now be found on the list of seniors

Advanced - Show All - Scan Card		
	.Guest 1, Guest 1 South Lyon, MI	122
	.Guest 10, Guest 10 South Lyon, MI	122
	.Guest 15, Guest 15 South Lyon, MI	122
	Guest 2, Guest 2 South Lyon, MI	122
	.Guest 3, Guest 3 South Lyon, MI	122
	.Guest 31, Guest 31 South Lyon, MI	122

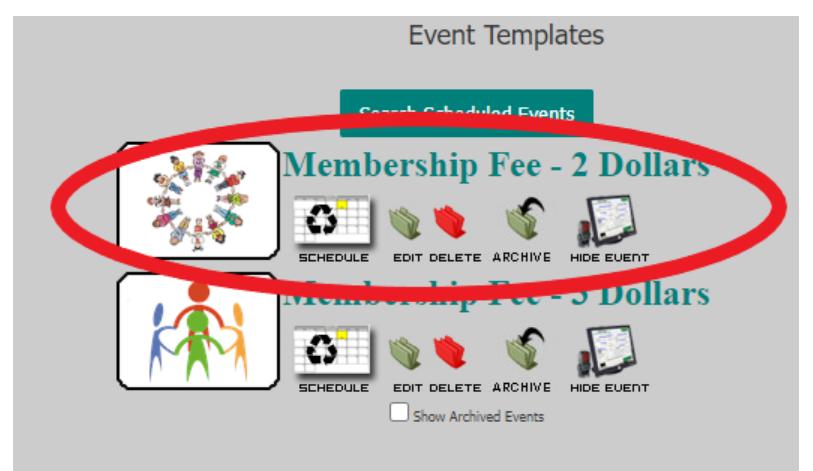
Finally add the following image to the new account (this is so that we can identify guest accounts by looking at a quick glance)



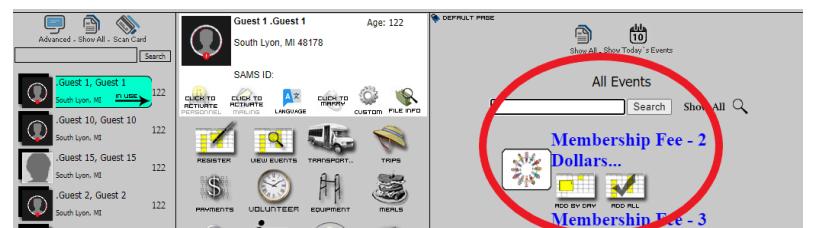
17. Using Guest Accounts

<p>Let's assume that Jordan decides to bring his Grandma who is visiting from out of town and wants to play Mah-Jongg. We don't want to charge my poor Grandma \$37 if she is only going to be in town for a week or two. To solve this problem, we should charge each guest a one-time-per-day cover fee to take advantage of the center's mah-jongg game</p>	
<p>In order to satisfy our need to have everyone utilize MySeniorCenter, we will use a guest account and add that account tot the class in question</p>	
<p>To do this, go to a guest account of your choosing (one account can only be used to represent one guest person - Guest 1 cannot be used twice for the same event on the same day)</p>	 
<p>Add the guest account to the class or event</p>	

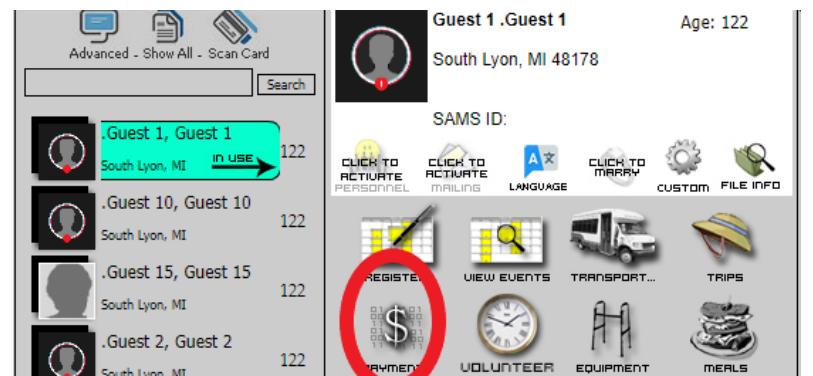
Dealing with payments is not too complicated. First, determine whether the event has a 2 or 3 dollar daily membership fee. Since Grandma wants to play Mah-Jongg, she only needs to pay \$2 for the daily membership



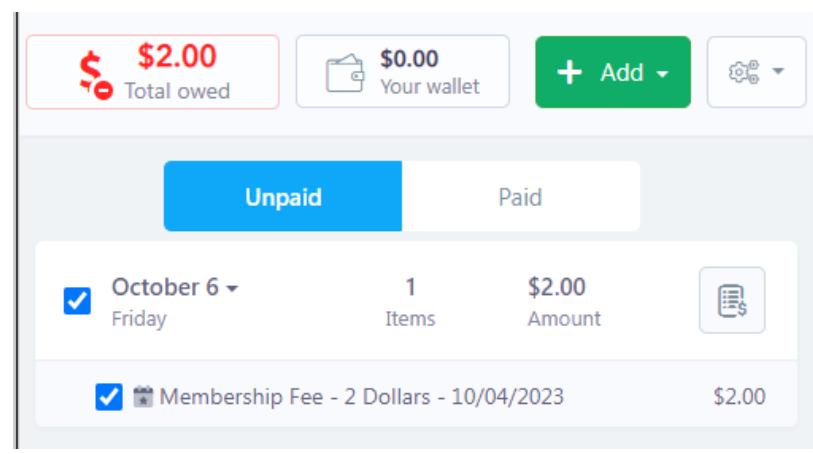
Just like you would add anyone to any event, add your guest account to the event: "Membership Fee - 2 Dollars"

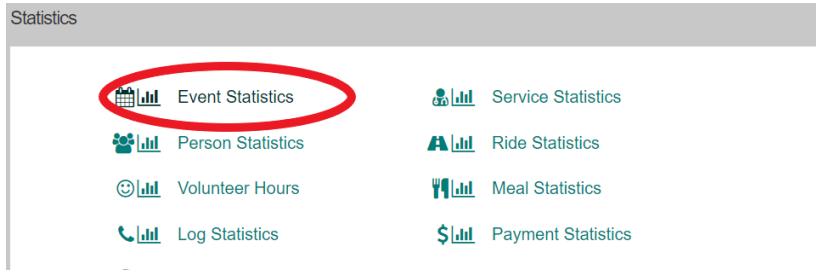
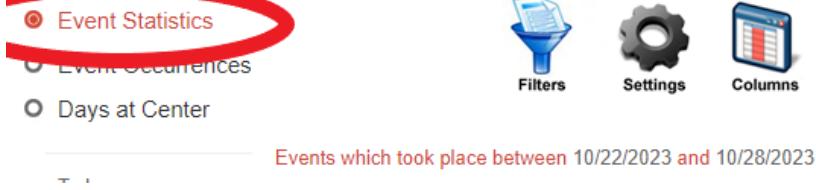
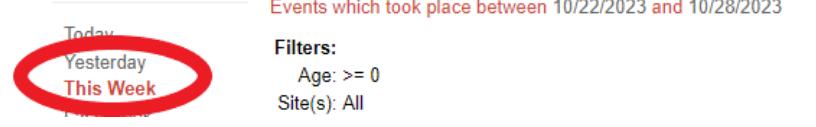


While looking at your guest account, click on the payment icon

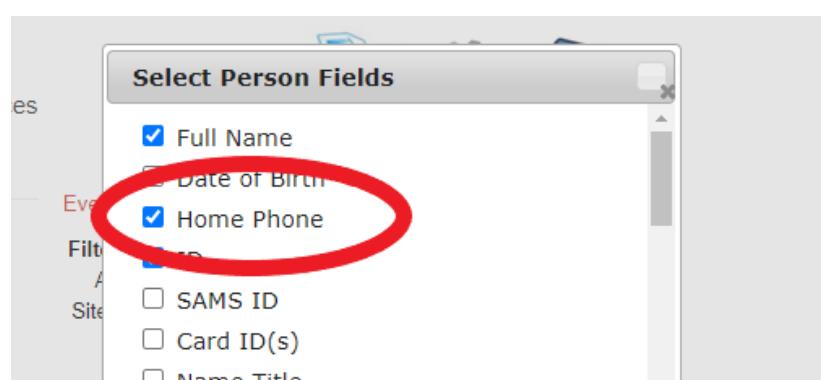


Grandma's daily membership will be displayed on this screen. Provide the payment as you usually would



18. List All Members of a Certain Event with Columns	
Assume that we want to find all members that participated in Wood Carving during this current week. To practice our usage of columns, we will obtain the “Home Phone” for each attendee	
Start by clicking on the “Statistics” button at the top	
Click on “Event Statistics”	
Make sure that “Event Statistics” is marked	
Change the date range to “This Week”	
Click on the “Columns” button	

Click on the option “Home Phone” from the list of columns and press “OK”



Click on the “Generate Statistics” button

Events which took place between 10/22/2023 and 10/28/2023

Filters:

Age: >= 0

Site(s): All

Generate Statistics

Since Wood Carving is considered a “Class/Workshop”, click on that link

Event Statistics from 10/22/2023 to 10/28/2023

Filters:

Age: >= 0

Site(s): All

Category	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	Tickets
Classes/Workshops	40	40	0	0	100.50	0
Fitness/Exercise	107	81	0	0	109.00	0
Offsite Fitness/Exercise	1	1	0	0	2.25	0
Public Services	1	1	0	0	12.00	0
Recreation/Entertainment	30	28	0	0	57.50	0

Finally, click on “Wood Carving”.

Event Name	Duplicated	Unduplicated
Anyone Can Paint	12	12
Greeting Card Making	6	6
Hypertension Self Management	9	9
Visiting	7	7
Wood Carving	6	6

This will show us our list

3.	 Full Name: Hirshfield, Arthur Home Phone: 248-349-8306 ID: 104717 First Name: Arthur Gender: Male Joined Date: 06/29/2023 Municipality: Other	1	1.92	0
4.	 Full Name: Tolonen, David Home Phone: 586-246-9768 ID: 102752 First Name: David Gender: Male Joined Date: Municipality: City of South Lyon	1	1.92	0

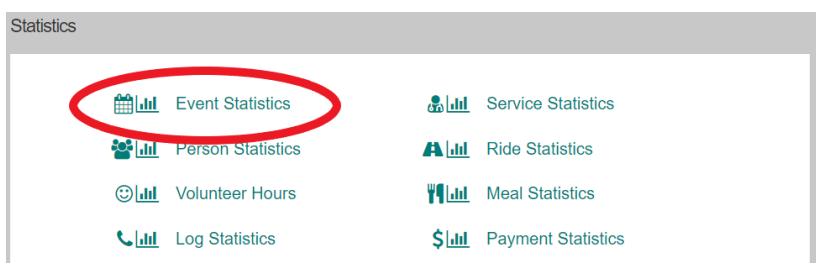
19. Convert an Event to a Group

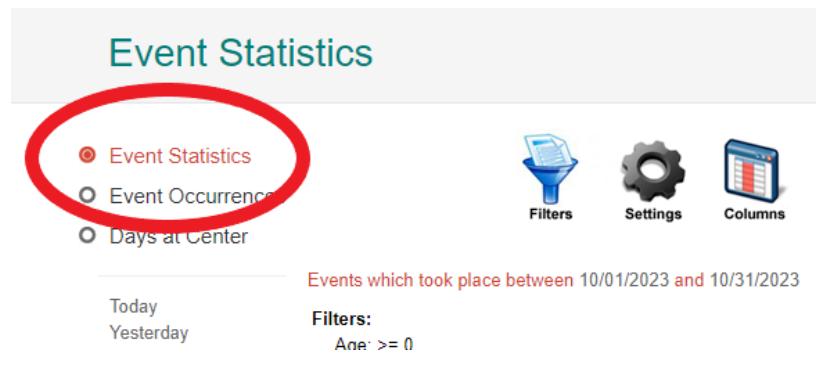
So, sometimes groups can be used to track users, create statistics, track attendance, broadcast, and more. Let's say that you want to create a group based off of Line Dancing

To begin, we will click on the "Statistics" tab at the top of the screen



Next we will click on the "Event statistics" button



Make sure that "Event Statistics" is checked	 <p>Event Statistics</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Event Statistics <input type="radio"/> Event Occurrences <input type="radio"/> Days at Center <p>Events which took place between 10/01/2023 and 10/31/2023</p> <p>Today Yesterday</p> <p>Filters: Age: >= 0</p> <p>Generate Statistics</p>																																										
Choose your time frame, for our purposes, we will use "This Month"	<p>Events which took place between 10/01/2023 and 10/31/2023</p> <p>Today Yesterday This Week This Month This Year</p> <p>Filters: Age: >= 0 Site(s): All</p> <p>Generate Statistics</p>																																										
Click the "Generate Statistics" button	<p><input checked="" type="radio"/> Event Statistics</p> <p><input type="radio"/> Event Occurrences</p> <p><input type="radio"/> Days at Center</p> <p>Events which took place between 10/01/2023 and 10/31/2023</p> <p>Today Yesterday This Week Last Week This Month Last Month This Year</p> <p>Filters: Age: >= 0 Site(s): All</p> <p>Generate Statistics</p>																																										
On the left side, click on the link: "Fitness/Exercise"	<table border="1"> <thead> <tr> <th>Category</th> <th>Duplicated</th> <th>Unduplicated</th> <th>60 and Over Guests</th> <th>Under 60 Guests</th> <th>Hours</th> <th>Tickets</th> </tr> </thead> <tbody> <tr> <td>Classes/Workshops</td> <td>203</td> <td>96</td> <td>0</td> <td>0</td> <td>577.33</td> <td>0</td> </tr> <tr> <td>Fitness/Exercise</td> <td>500</td> <td>141</td> <td>0</td> <td>0</td> <td>505.50</td> <td>0</td> </tr> <tr> <td>Health Education</td> <td>52</td> <td>27</td> <td>0</td> <td>0</td> <td>74.00</td> <td>0</td> </tr> <tr> <td>Off Site Excursions</td> <td>37</td> <td>37</td> <td>4</td> <td>0</td> <td>215.83</td> <td>0</td> </tr> <tr> <td>Offsite Fitness/Exercise</td> <td>180</td> <td>66</td> <td>0</td> <td>0</td> <td>387.25</td> <td>0</td> </tr> </tbody> </table>	Category	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	Tickets	Classes/Workshops	203	96	0	0	577.33	0	Fitness/Exercise	500	141	0	0	505.50	0	Health Education	52	27	0	0	74.00	0	Off Site Excursions	37	37	4	0	215.83	0	Offsite Fitness/Exercise	180	66	0	0	387.25	0
Category	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	Tickets																																					
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Fitness/Exercise	500	141	0	0	505.50	0																																					
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Off Site Excursions	37	37	4	0	215.83	0																																					
Offsite Fitness/Exercise	180	66	0	0	387.25	0																																					
On the next screen, click on the link: "Line Dancing"	<table> <tbody> <tr> <td>Kymm-Kaiut Yoga</td> <td>78</td> <td>27</td> <td>0</td> </tr> <tr> <td>Line Dancing</td> <td>36</td> <td>22</td> <td>0</td> </tr> <tr> <td>Line Dancing on Tuesdays</td> <td>13</td> <td>13</td> <td>0</td> </tr> </tbody> </table>	Kymm-Kaiut Yoga	78	27	0	Line Dancing	36	22	0	Line Dancing on Tuesdays	13	13	0																														
Kymm-Kaiut Yoga	78	27	0																																								
Line Dancing	36	22	0																																								
Line Dancing on Tuesdays	13	13	0																																								
At the top of the next screen, click on the button "Create Group"	<p>Print PDF Export Lab Create Group Email Broadcast Event Signup Raffle Winner List</p> <p>Event Statistics from 10/01/2023 to 10/31/2023</p>																																										

Fill out the form for the group and press save

Create a Group

Group Name: Line Dancing Test

Notes: This is just for testing

Sponsor:

Account:

Membership Group: NO

Block Swipe: NO Group member can swipe, even if expired.

Required Group: NO Prevents any non-members from Swipe or Event Signup.

Display in MyActiveCenter: NO This group will be NOT be displayed in the Portal

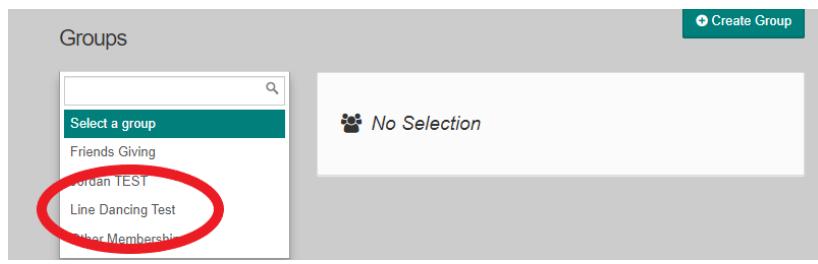
Group is Free: YES

Lifetime: YES No expiration date.

Created Date: 10/02/2020

Save Cancel

Your group should now appear in the list of groups



20. Show / Hide events from the Kiosk - But Not From Us

Let's say that we want to create a group for internal usage (such as a daily membership fee) for non members. To do this, we can create a hidden event

First Create the Event, I will call it “Jordan’s Fake Event”.

Event Name	Jordans Fake Event
Room	Select Rooms
Virtual Room	Select Virtual Room
Virtual Instructor	Select Instructor
Category	
Icon	
Description	None
Instructor	
Time Begin	10:20 AM
Time End	11:35 AM
Max Signups	50
Cost Per Event	0
Event Sponsor	
Account	-- Select Account --
Notes	None

Next, we will update the events schedule so that the event occurs on today's date (10/26/23)

You are currently in add mode.
Clicking a day will add the event.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
									(October)		
Sun	Mon	Tue	Wed	Thu	Fri	Sat			(2023)		
1	2	3	4	5	6	7					
8	9	10	11	12	13	14					
15	16	17	18	19	20	21					
22	23	24	25	26	27	28					
29	30	31									



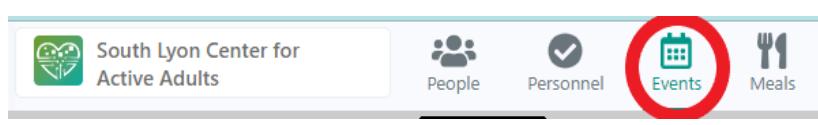
Display Complete Event History

< Prev Month **October 2023** Next Month >

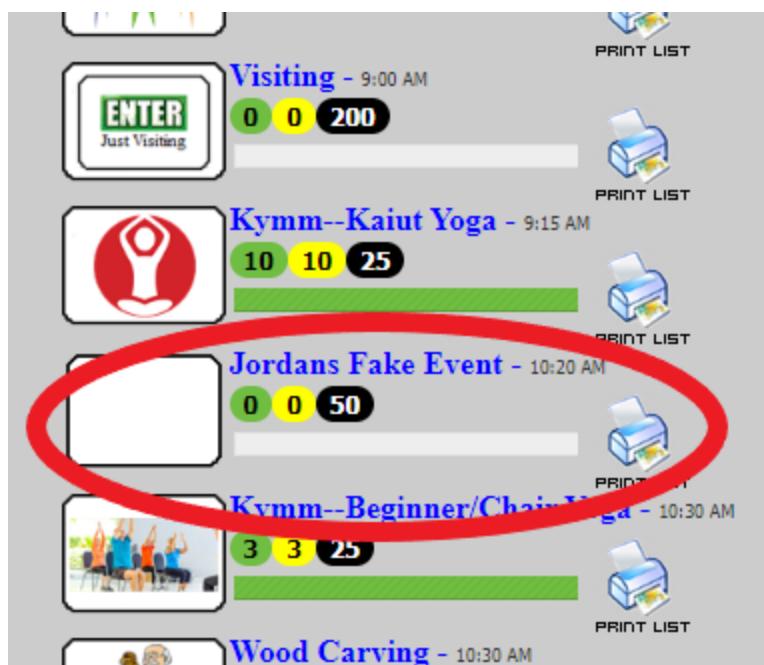
Jordans	10/26	Thu	10:20a-	0/50	Free	Rm:	11:35a	today
Fake								
Event								

Display Events Scheduled after October 2023

Click on the Events button up at the top



Now we should be able to see "Jordans Fake Event" in the list of today's events (on the right side of the screen)



Go to the left side of the screen and scroll down to "Jordans Fake Event"



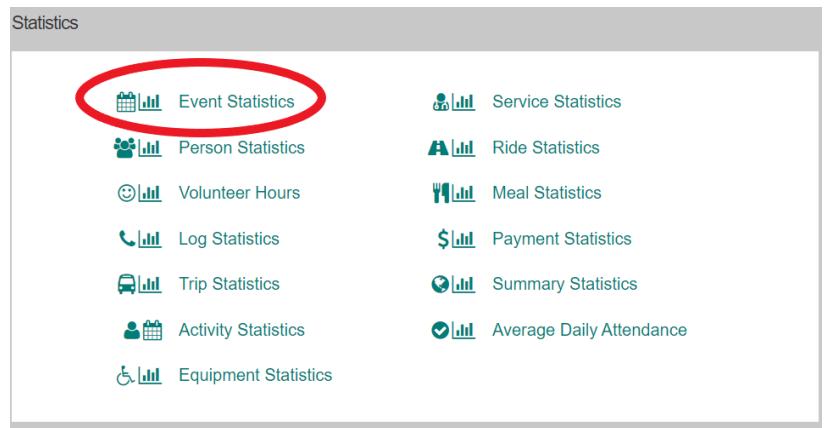
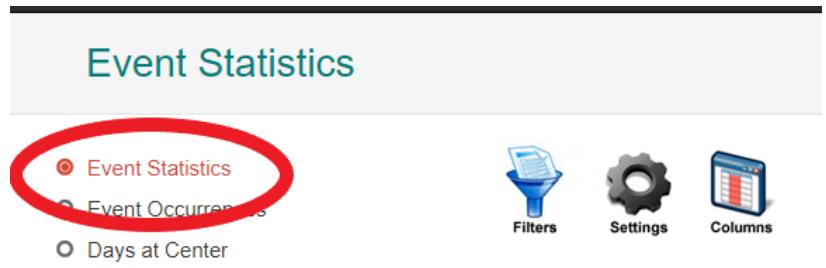
Next click on the button that says "Hide Event"



Now on the right column, you should see that this event is marked as hidden



21. Duplicated VS. Unduplicated

<p>In order to demonstrate the difference between duplicated and unduplicated, we will begin with an example (and then define each later on). Let's say that we want to obtain the attendance of a certain event - Ageless Strength - for the current year</p>															
<p>First go to the statistics tab at the top of the screen</p>															
<p>Click on "Event Statistics"</p>	 <table border="0"> <tr> <td> Event Statistics</td> <td> Service Statistics</td> </tr> <tr> <td> Person Statistics</td> <td> Ride Statistics</td> </tr> <tr> <td> Volunteer Hours</td> <td> Meal Statistics</td> </tr> <tr> <td> Log Statistics</td> <td> Payment Statistics</td> </tr> <tr> <td> Trip Statistics</td> <td> Summary Statistics</td> </tr> <tr> <td> Activity Statistics</td> <td> Average Daily Attendance</td> </tr> <tr> <td> Equipment Statistics</td> <td></td> </tr> </table>	Event Statistics	Service Statistics	Person Statistics	Ride Statistics	Volunteer Hours	Meal Statistics	Log Statistics	Payment Statistics	Trip Statistics	Summary Statistics	Activity Statistics	Average Daily Attendance	Equipment Statistics	
Event Statistics	Service Statistics														
Person Statistics	Ride Statistics														
Volunteer Hours	Meal Statistics														
Log Statistics	Payment Statistics														
Trip Statistics	Summary Statistics														
Activity Statistics	Average Daily Attendance														
Equipment Statistics															
<p>Make sure that "Event Statistics" is checked</p>	 <table border="0"> <tr> <td><input checked="" type="radio"/> Event Statistics</td> <td><input type="radio"/> Event Occurrences</td> <td><input type="radio"/> Days at Center</td> </tr> </table> <div style="text-align: right;"> Filters Settings Columns </div>	<input checked="" type="radio"/> Event Statistics	<input type="radio"/> Event Occurrences	<input type="radio"/> Days at Center											
<input checked="" type="radio"/> Event Statistics	<input type="radio"/> Event Occurrences	<input type="radio"/> Days at Center													

Since we are looking for the current year, make sure that "This Year" is selected

Days at Center

Events which took place between 01/01/2023 and 12/31/2023

Filters:

Age: >= 0
Site(s): All

This Year

Generate Statistics

Export

Click on Generate Statistics

Yesterday
This Week
Last Week
This Month
Last Month
This Year
Last Year
This Fiscal Year
Last Fiscal Year
Custom Range...

Age: >= 0
Site(s): All

Generate Statistics

Export

Click on the option labeled "Fitness/Exercise"

Classes/Workshops	1459	297	0	0	4,615.92	0
Fitness/Exercise	5509	361	0	0	5,571.42	0
Health Education	696	73	0	0	1,229.17	0

On this screen, look at the line for "Ageless Strength". Here you will see that the attendance for Duplicated is **117** and Unduplicated is **30**

Event Name	Fitness/Exercise					
	Duplicated	Unduplicated	60 and Over Guests	Under 60 Guests	Hours	
Ageless Strength	117	30	0	0	117.00	
Cardio and Weights with Carol 10:30 class	1010	70	0	0	1,010.00	

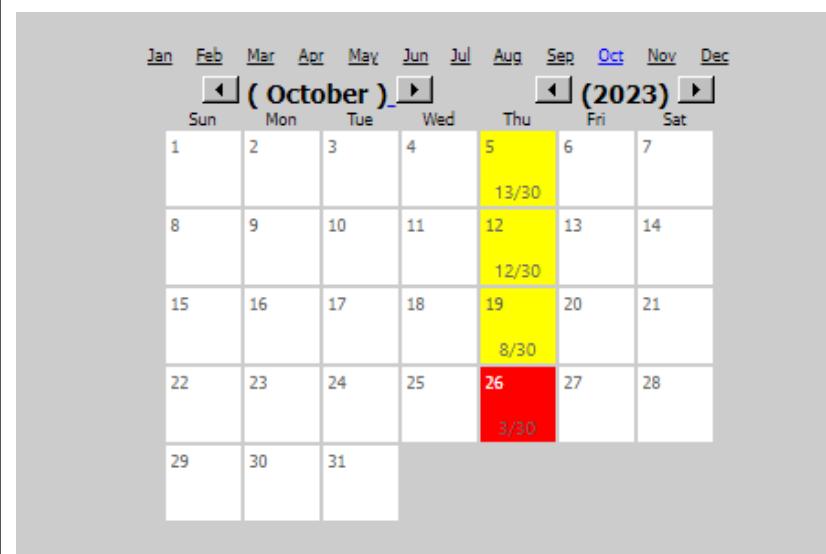
What this means is that **30** different people attended this event this month, and there were a total of **117** attendances (some people attended more than once)

If this is still unclear, ask me

22. Remove Fees from Classes

Let's say that I am a personal friend of the person that teaches Line Dancing. Because we are friends, she allows me to participate in the class for free. We still want me to be enrolled in the class (for attendance, statistics, and reporting) but we don't want me to be charged

Start by enrolling me in the class as per usual

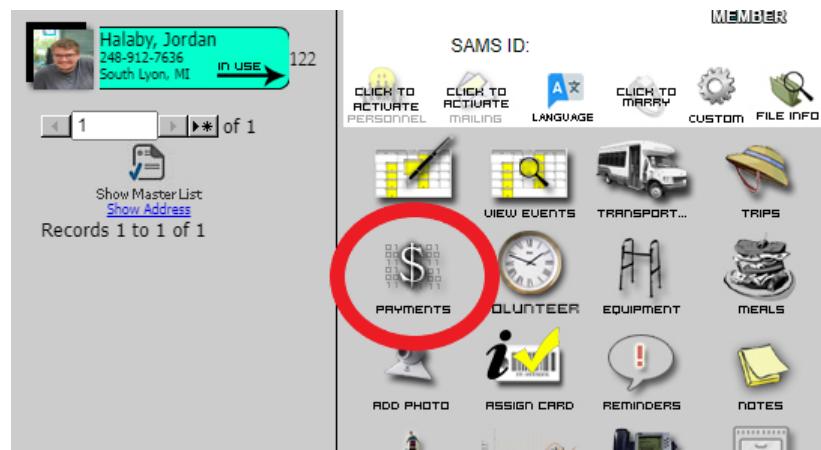


Click on the "People" tab at the top of the screen

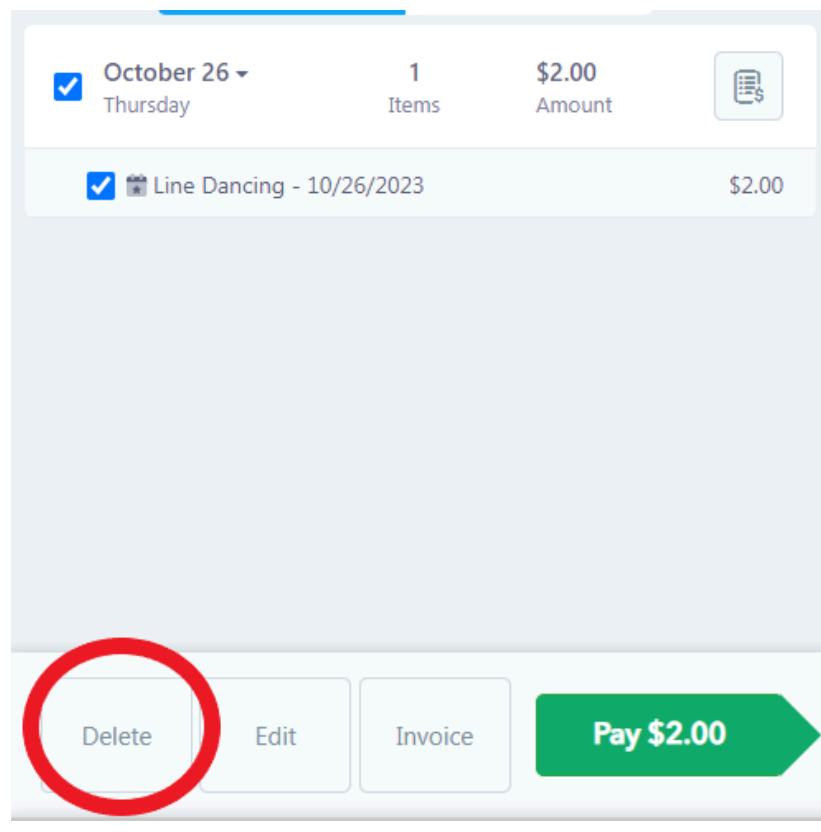


Go to my record in the left hand area

In the middle column, click on the “Payments” button



At the bottom of the right hand area, click on “Delete”



Now we can see that no money is owed and that I am still registered for the class

The screenshot shows a software interface with a dark background. At the top, there are three icons: a magnifying glass, a document, and a calendar. Below them are links: 'Show Recent' (highlighted in blue), 'Show All', and 'Show Range'. In the center, there is a large 'PRINT' button with a printer icon. To the right of the button, there is a list of events:

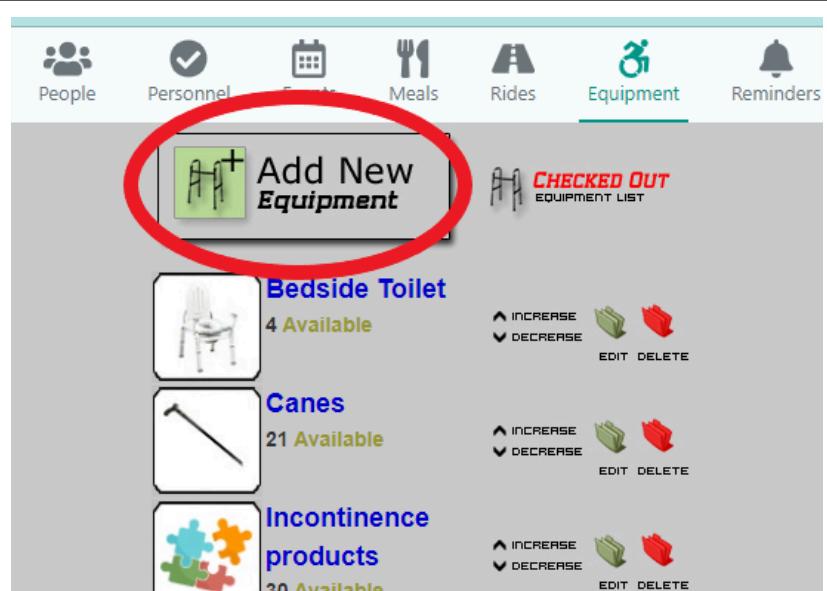
- Fake event - 4/50 - Monday, September 11, 2023
6:00 PM - 6:15 PM
- Visiting - 3/200 - Tuesday, October 24, 2023
9:00 AM - 3:30 PM
- Line Dancing - 3/30 - Thursday, October 26, 2023
12:00 PM - 1:05 PM

23. Get Attendance for Fiscal Year - By Municipality

24. Creating, Checking Out, and Returning Equipment

Create an Equipment Item	
Start by going to the equipment tab on the top bar	<p>The top navigation bar contains several icons with labels: People (two people), Personnel (checkmark), Events (calendar), Meals (fork and knife), Rides (car), Equipment (camera), Reminders (bell), and Statistics (bar chart). The 'Equipment' tab is circled in red.</p>

Click on the button: "Add New Equipment"



Fill out the form - fill out name, category, quantity, icon, and notes

Name	Jordans Walker
Icon	2
Category	Mobility
Quantity	100
Notes	

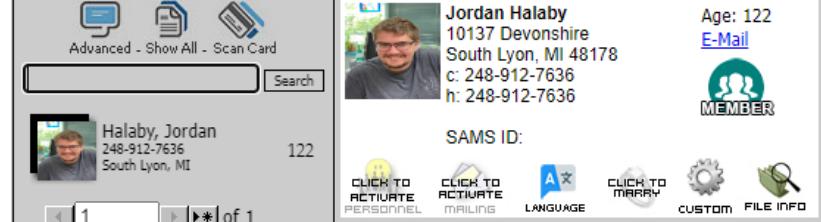
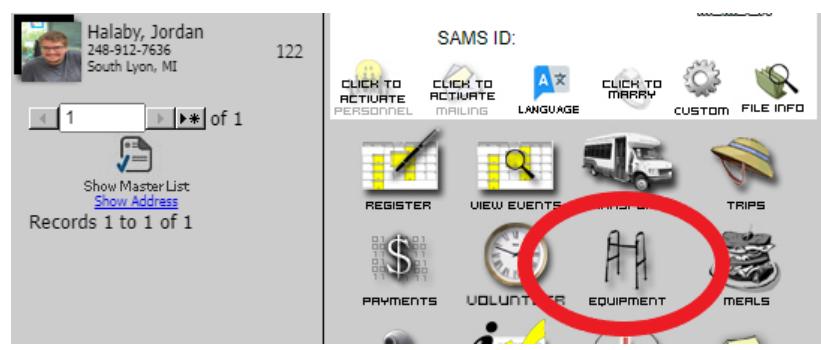
Add Equipment

Press the button: "Add Equipment"

Name	Jordans Walker
Icon	2
Category	Mobility
Quantity	100
Notes	

Add Equipment

Check Out an Equipment Item

<p>We will try to check out the item “Jordans Walker”. Start by going to the “People” option up at the top of the screen</p>	
<p>Search for the user that you are going to check something out with. In this case, we will use my record</p>	
<p>Click on the button with the walker that says “Equipment”</p>	
<p>Click on the button at the top that says “Rent Out Item”</p>	

In the new window that appears, find the equipment that you are looking for and press the big button that says "Give Out Item"

The screenshot shows a web browser window titled "MySeniorCenter - Google Chrome" with the URL "southlyonmi.myseniorcenter.net/Legacy/mana...". The page displays a list of equipment items:

- Bedside Toilet**
4 Available
Give Out Item
- Canes**
21 Available
Give Out Item
- Incontinence products**
30 Available
Give Out Item
- Jordans Walker**
100 Available
Give Out Item
- Jordans Wheel Chair**
99 Available
Give Out Item

A red oval highlights the "Give Out Item" button for the Jordans Walker.

Determine whether or not you want this item to be returned. Make your decision here



If you want the item to be returned but don't want to set a date for it to be returned, mark the "Due Date" as a date far in the future. For these purposes, I will mark it as 11/11/2023

You have selected

Check Out Date	11/10/2023
Due Date	11/11/2023

Rent Out

Now, if you return to the person's record, and click on the "Equipment" icon again, you should see that they have rented out the item in question

Rent Out Item

Item	Due Back
Canes Medical Loan Closet	Returned 10/30/2023
Jordans Wheel Chair Mobility	Returned 11/9/2023
Jordans Walker Mobility	11/11/2023

RETURN

To Return the Equipment Item

Start by going to the record of the person that is returning the equipment

Advanced - Show All - Scan Card

Halaby, Jordan 248-912-7636 South Lyon, MI 122

Jordan Halaby
10137 Devonshire
South Lyon, MI 48178
c: 248-912-7636
h: 248-912-7636

SAMS ID:

[CLICK TO ACTIVATE PERSONNEL](#) [CLICK TO ACTIVATE MAILING](#) [LANGUAGE](#) [CLICK TO MARRY](#) [CUSTOM](#) [FILE INFO](#)

Click on the button labeled "Equipment"

Jordan Halaby
10137 Devonshire
South Lyon, MI 48178
c: 248-912-7636
h: 248-912-7636

SAMS ID:

[CLICK TO ACTIVATE PERSONNEL](#) [CLICK TO ACTIVATE MAILING](#) [LANGUAGE](#) [CLICK TO MARRY](#) [CUSTOM](#) [FILE INFO](#)

REGISTER	VIEW EVENTS	PAYMENTS	VOLUNTEER	EQUIPMENT	TRIPS	MEALS
----------	-------------	----------	-----------	-----------	-------	-------

Press the red button labeled "Return"

Item	Due Back
Canes Medical Loan Closet	Returned 10/30/2023
Jordans Wheel Chair Mobility	Returned 11/9/2023
Jordans Walker Mobility	11/11/2023
Canes Medical Loan Closet	Kept

[RETURN](#) [Edit](#)

[RETURN](#) [Edit](#)

[Edit](#)

The page should automatically show that the red button is gone and the item says “Returned by {Date}” under the “Due Back Column

 Rent Out Item	
Item	Due Back
Canes Medical Loan Closet	Returned 10/30/2023
Jordans Wheel Chair Mobility	Returned 11/9/2023
Jordans Walker Mobility	11/11/2023
Canes Medical Loan Closet	Returned 11/10/2023

How to View a Comprehensive List of Who Currently Checked Out Equipment

First go to the “Equipment” button at the top of the screen



Click on the button at the top that says “Checked Out Equipment List”



Here is a list of all members who have currently checked out an item

Due And Past Due Equipment				
Entries in red are past due, entries in orange are rentals to people who are deceased.				
Due Back Date	Checked Out Date	Equipment Name	Checked Out By	
11/11/2023	11/10/2023	Jordans Walker	Jordan Halaby	X
11/10/2024	11/9/2023	Jordans Wheel Chair	Guest 1 .Guest 1	X

Although I find this next step a little redundant, you can click the green link that's labeled as the person's name

Due And Past Due Equipment

Entries in red are past due, entries in orange are rentals to people who are deceased.

Due Back Date	Checked Out Date	Equipment Name	Checked Out By	
11/11/2023	11/10/2023	Jordans Walker	Jordan Halaby	X
11/10/2024	11/9/2023	Jordans Wheel Chair	Guest 1 .Guest 1	X

This brings up a list of all items that the user has ever checked out

Item	Due Back	
Canes Medical Loan Closet	Returned 10/30/2023	Edit X
Jordans Wheel Chair Mobility	Returned 11/9/2023	Edit X
Jordans Walker Mobility	11/11/2023	Edit X
Canes Medical Loan Closet	Returned 11/10/2023	Edit X

How to Run a Statistic to View all Equipment Activity

Go to the statistics button at the top of the screen



Click on Equipment Statistics	 <p> Log Statistics Payment Statistics Trip Statistics Summary Statistics Activity Statistics Average Daily Attendance Equipment Statistics</p>
Let's assume that we want to get a report for all equipment that was loaned out this month	<p> By Category</p> <hr/> <p>Today Yesterday This Week Last Week This Month Last Month This Year Last Year This Fiscal Year Last Fiscal Year Custom Range...</p> <p>Equipment checked out between 11/01/2023 and 11/30/2023</p> <p>Filters: Age: >= 0 Site(s): All</p>
Press the button that says "Generate Statistics"	<p> Filters Settings Columns</p> <p>Equipment checked out between 11/01/2023 and 11/30/2023</p> <p>Filters: Age: >= 0 Site(s): All</p> <p> Generate Statistics</p>

Click on the category that your equipment belongs to. In the case of “Jordan’s Walker”, we will click on “Mobility”

Equipment checked out between 11/01/2023 and 11/30/2023

Filters:

Age: >=0

Site(s): All

Category	Duplicated	Unduplicated
Medical Loan Closet	1	1
Mobility	2	2
Totals	3	2

[View all People](#)

Click on the equipment name - “Jordan’s Walker”

Mobility

Equipment	Checkout Count
Jordans Wheel Chair	1
Jordans Walker	1
Totals	2

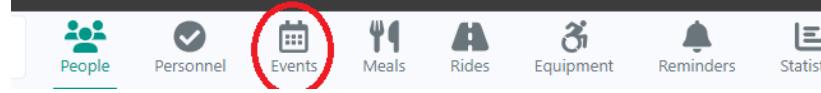
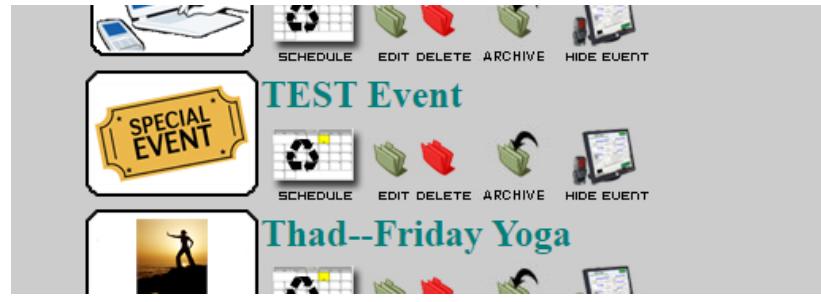
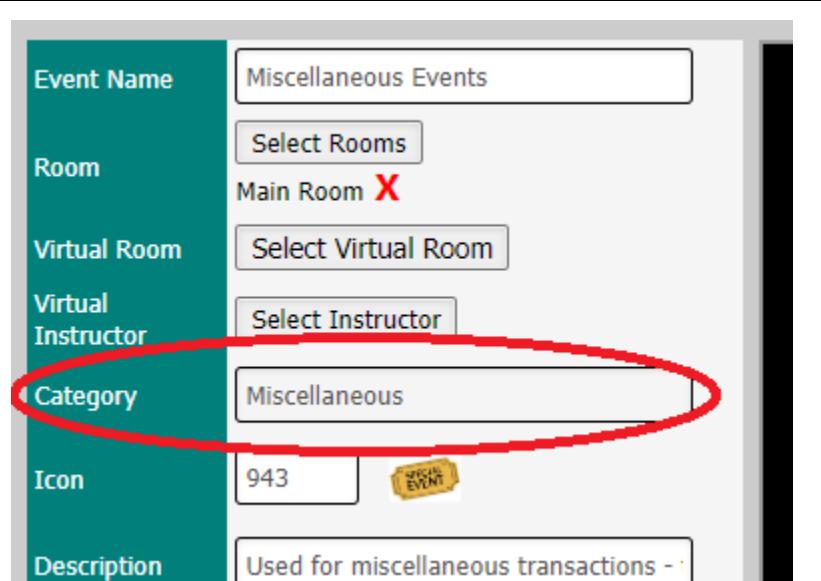
[View all People](#)

This gives a list of all people that have borrowed “Jordans Walker” in the past month. However, this list does not show whether or not they have returned it

Mobility > Jordans Walker

Name	Quantity Checked Out
1.  Full Name: Halaby, Jordan Home Phone: 248-912-7636 ID: 104785 First Name: Jordan Gender: Male Joined Date: 09/14/2023 Address: 10137 Devonshire City: South Lyon Municipality: Green Oak Township	1

25. Managing Categories

<p>The first category we will manage is the Event category. To do this, go to the Events Tab at the top of the screen</p>	
<p>Go down to any event and click on the edit button. My suggestion is to use a TEST event</p>	
<p>Click on "Edit Template"</p>	
<p>Click on the input field next to "Category"</p>	

At the top of the screen, click on “Manage Categories List”

This gives a list of Event categories that you can edit, or delete

Manage Event Categories				
Create New Category				
ID	Category	Description	MyActiveCenter Category	
20	Classes/Workshops	Example: Art Class, Computer Class, Languages	learning	Edit Delete
51	Deposit Records	Used for daily deposit reporting such as donations, fundraising, and internal activity	unsorted	Edit Delete
22	Fitness/Exercise	Example: Meditation, Workout routines, Group Stretching	Health and Fitness	Edit Delete
48	Health Education	Example: Health promotion and prevention of health risks	Health and Fitness	Edit Delete
21	Health Screenings	Example: Blood Pressure, Eye Sight, general checkups	Health and Fitness	Edit Delete
...	Miscellaneous	Used for miscellaneous and unique costs for a member (typically used)	unsorted	Edit Delete

Next, we will manage the categories for Equipment. Go to the “Equipment” tab at the top of the screen



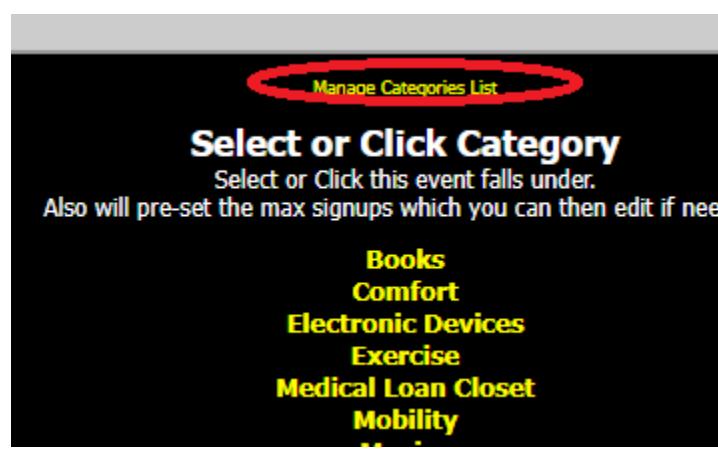
Choose an equipment item from the list of equipment and press the edit button



Click on the input field next to the label that reads: "Category"

Event Name	Jordans Wheel Chair
Icon	3
Category	Mobility
Quantity	99
Notes	This is for demonstrative purposes

This brings up a list of current Equipment categories. Click on the "Manage Categories List" at the top of the screen



This gives us a list of categories that are available to edit and delete

The screenshot shows a web browser window with the URL southlyonmi.myseniorcenter.net/lega.... The page title is "Close and Refresh Category List". Below the title are two blue links: "Add" and "Category Name". A table follows, listing eight categories with "Edit" and "Delete" links for each:

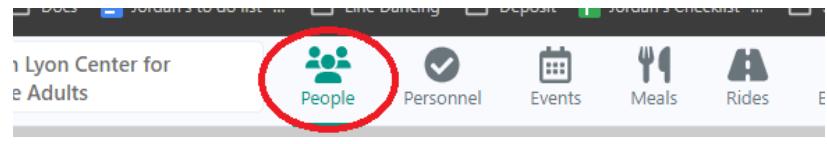
Category Name		
Comfort	Edit	Delete
Mobility	Edit	Delete
Safety	Edit	Delete
Electronic Devices	Edit	Delete
Books	Edit	Delete
Movies	Edit	Delete
Exercise	Edit	Delete
Medical Loan Closet	Edit	Delete

Below the table is a pagination section: "Page 1 of 1" and "Records 1 to 8 of 8".

26. Adding a Charge

Let's assume that we have to add a charge to Jordan's account

Click on the "People" button at the top of the screen



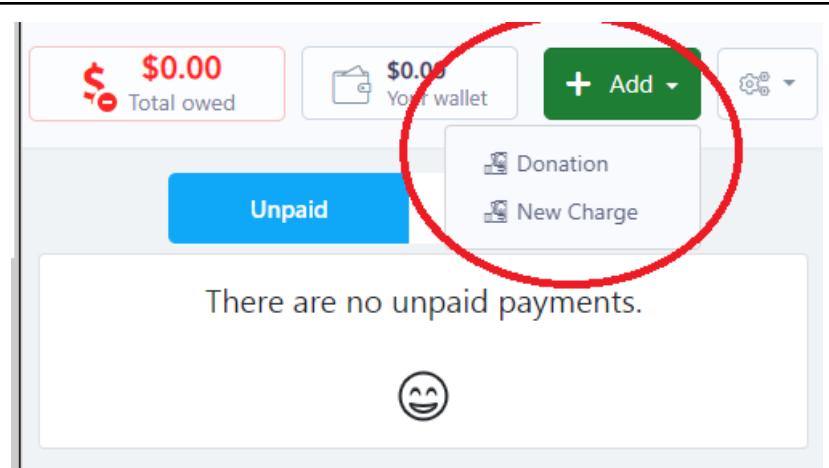
Click on the member that you want to charge

The screenshot shows a list of members in a software application. At the top right is a search bar and a 'Search' button. Below the search bar is a red circle with an arrow pointing to the status bar of the first member listed. The status bar for the first member, 'Halaby, Jordan', displays 'IN USE'. The other two members listed are 'Halaby, Stacy' and 'Halaby, Steve'. Each member has a small profile picture, their name, phone number, address, and a '123' status indicator. Below the list is a navigation bar with arrows, a page number '1', and a total count 'of 1'. At the bottom are links to 'Show Master List' and 'Show Address', and a note 'Records 1 to 3 of 3'.

Click on the button for Payments

The screenshot shows a member profile for 'Jordan Halaby'. At the top left is a photo of Jordan Halaby. To the right of the photo are his details: 'Jordan Halaby', '10137 Devonshire', 'South Lyon, MI 48178', 'C: 248-912-7636', and 'h: 248-912-7636'. To the right of these details are links for 'Age: 123' and 'E-Mail'. Below the details is a 'MEMBER' icon. Below the member information is a section titled 'SAMS ID:' with several buttons: 'CLICK TO ACTIVATE PERSONNEL', 'MAILING', 'LANGUAGE', 'CLICK TO MARRY', 'CUSTOM', and 'FILE INFO'. Below this is a grid of 16 icons representing various functions. The 'PAYMENTS' icon, which features a dollar sign (\$) symbol, is highlighted with a red circle. Other icons include 'REGISTER', 'VIEW EVENTS', 'TRANSPORT...', 'TRIPS', 'VOLUNTEER', 'EQUIPMENT', 'MEALS', 'ADD PHOTO', 'ASSIGN CARD', 'REMINDERS', 'NOTES', 'GROUPS', 'STATISTICS', 'LOGS', and 'FILES'. At the bottom left is a 'CONTRACTS' icon.

Click on the “New Charge” button



Fill out the form to the needed specifications

This screenshot shows a 'New Charge' form. The 'Category' section has a blue button labeled 'Misc.' which is currently selected. Other options include 'Refund'. Below that, the 'Date' is set to '06-17-2024' and the 'Account' is set to 'Normal Events'. The 'Notes' field contains the text 'Jordan TEST'. Under 'Payment Method', the dropdown menu is set to 'Unpaid'. At the bottom, there are three buttons: 'Cancel', a '\$' sign followed by a text input box containing '100', and a large green button labeled 'Charge \$100.00'.

Now the charge is listed in the Payment page

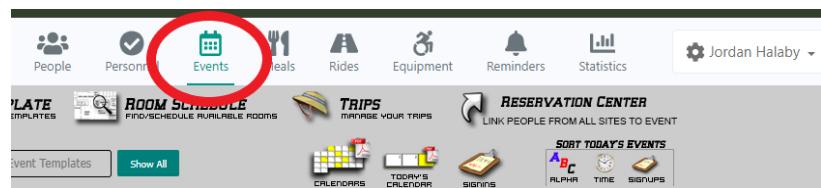
The screenshot shows a payment interface. At the top, there are three boxes: one with a dollar sign icon and '\$100.00' labeled 'Total owed', another with a wallet icon and '\$0.00' labeled 'Your wallet', and a green button with a plus sign and 'Add' followed by a dropdown arrow. Below these are two tabs: 'Unpaid' (which is highlighted in blue) and 'Paid'. Under the 'Unpaid' tab, there is a table with the following data:

June 17 ▾ Monday	1 Items	\$100.00 Amount
<input checked="" type="checkbox"/> Misc.		\$100.00

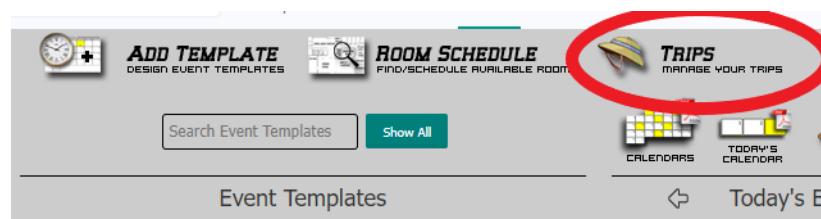
27. Setting up Trips

Start by creating the trip

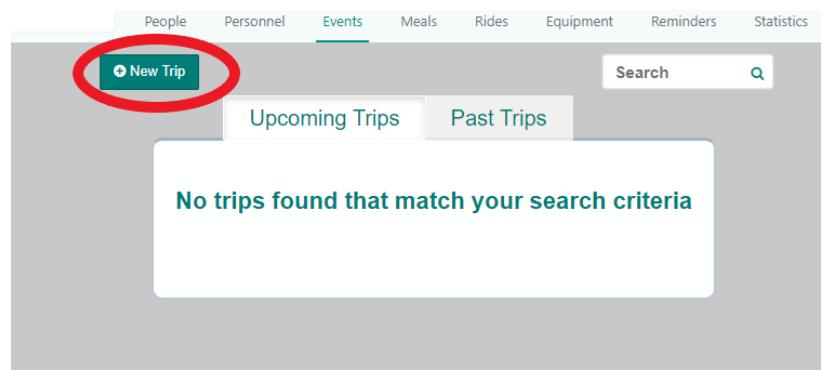
Start by clicking on the "Events" tab at the top of the screen



Click on the button that says "Trips"



On the new page, click on the green button for "New Trip"



Fill out the form

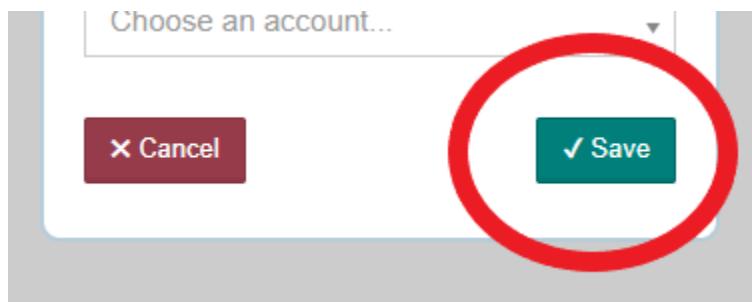
Name the trip
Choose an icon
Choose a category
Create a description of the trip
Pick the start and end dates
Fill out the rest of the form at your discretion

The screenshot shows a trip creation form with the following fields:

- Trip Name: A text input field.
- Icon: A dropdown menu showing the number "0".
- Category: A dropdown menu with the placeholder "Choose a category...".
- Description: A text input field.
- Trip Start: A date input field showing "02/12/2024".
- Trip End: A date input field showing "02/12/2024".
- Min Signups: An input field showing "0".
- Max Signups: An input field showing "100".
- Total cost to center: An input field.
- Trip Agency: A dropdown menu with the placeholder "Choose an agency...".
- Trip Sponsor: A dropdown menu with the placeholder "Choose a sponsor...".
- Trip Account: A dropdown menu with the placeholder "Choose an account...".

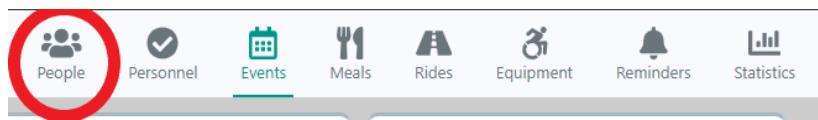
At the bottom are two buttons: a red "X Cancel" button and a green "✓ Save" button.

Click on the button for "Save"



Now we will invite Jordan to this new trip

Start by going to the "People" tab at the top of the screen



Pick the person's record who you wish to add to the trip

Advanced - Show All - Scan Card

Search

Halaby, Jordan
248-912-7636
South Lyon, MI

123

Jordan Halaby
10137 Devonshire
South Lyon, MI 48178
c: 248-912-7636
h: 248-912-7636

SAMS ID:

Age: 123
E-Mail

MEMBER

CLICK TO ACTIVATE PERSONNEL MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO

Click on the button for "Trips"

Jordan Halaby
10137 Devonshire
South Lyon, MI 48178
c: 248-912-7636
h: 248-912-7636

Age: 123
E-Mail

MEMBER

SAMS ID:

CLICK TO ACTIVATE PERSONNEL MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO

REGISTER VIEW EVENTS TRANSPORT... TRIPS

PAYMENTS VOLUNTEER EQUIPMENT MEALS

ADD PHOTO ASSIGN CARD REMINDERS NOTES

GROUPS STATISTICS LOGS FILES

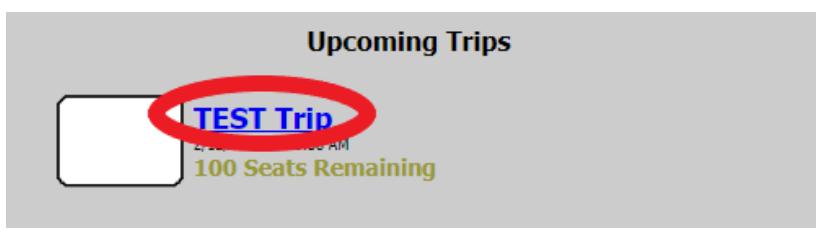
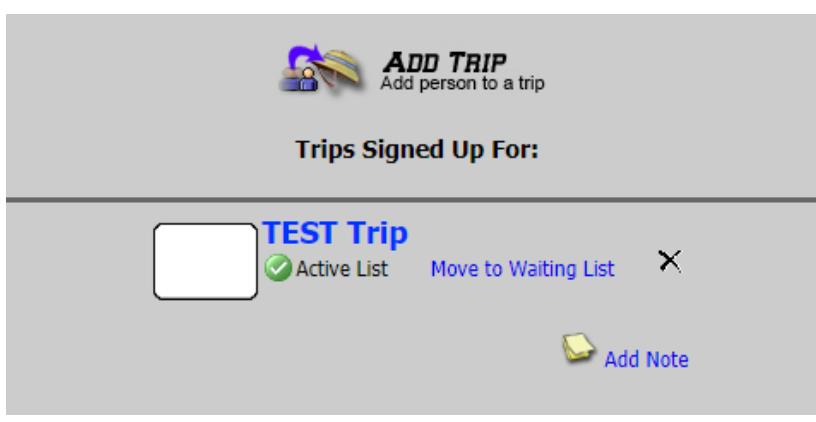
CONTRACTS

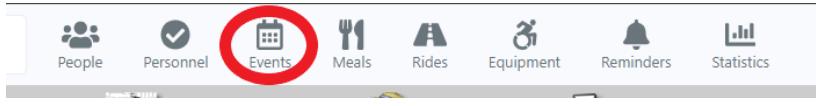
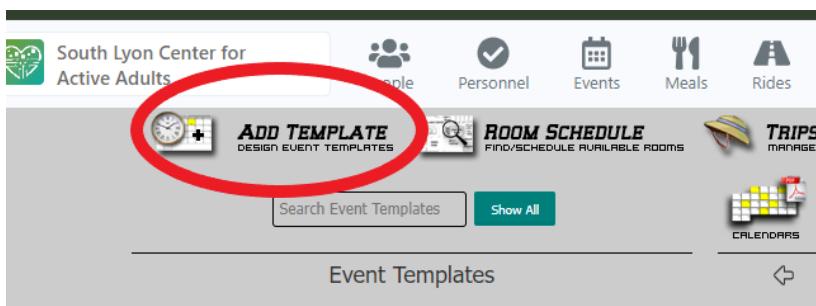
On the new frame, click on the button for "Add Trip"

DEFAULT PAGE

ADD TRIP
Add person to a trip

Trips Signed Up For:

Click on the label for our new trip	
Now this person has been added to the trip	

28. Creating Event Series	
Start by going to the “Events” tab at the top of the screen	
Click the button for “Add Template”	

Fill out the event template as normal

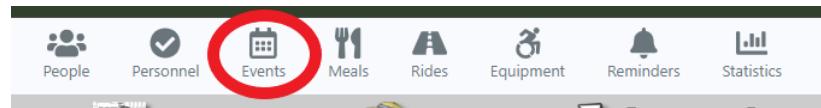
Event Name	Another Series Test
Room	Select Rooms TEST X
Virtual Room	Select Virtual Room
Virtual Instructor	Select Instructor
Category	TEST
Icon	1 
Description	None
Instructor	
Time Begin	12:30 PM
Time End	03:30 PM
Max Signups	123
Cost Per Event	0
Event Sponsor	Normal Events
Account	-- Select Account --
Notes	None

Click the button for "Create Master Event"

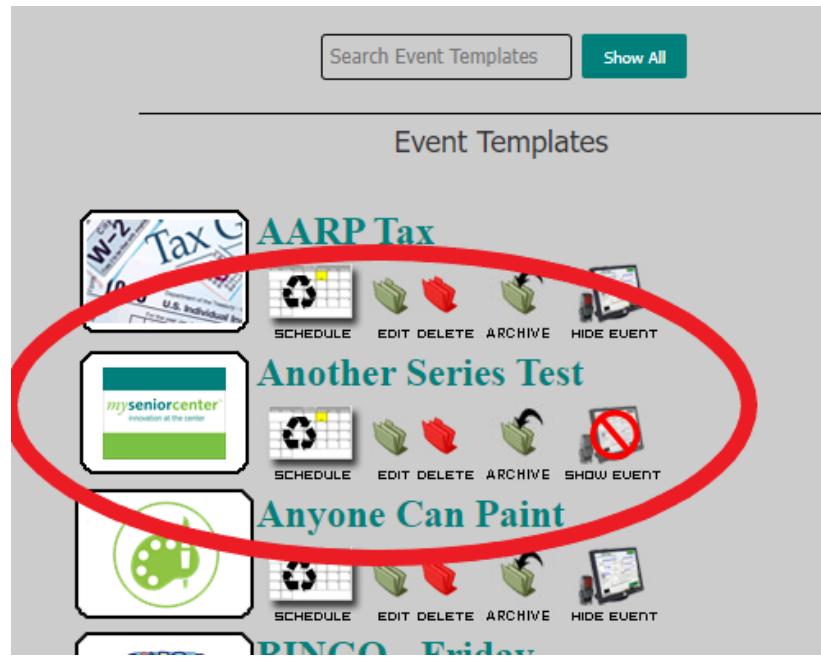
Event	U
Event Sponsor	Normal Events
Account	-- Select Account --
Notes	None

Create Master Event

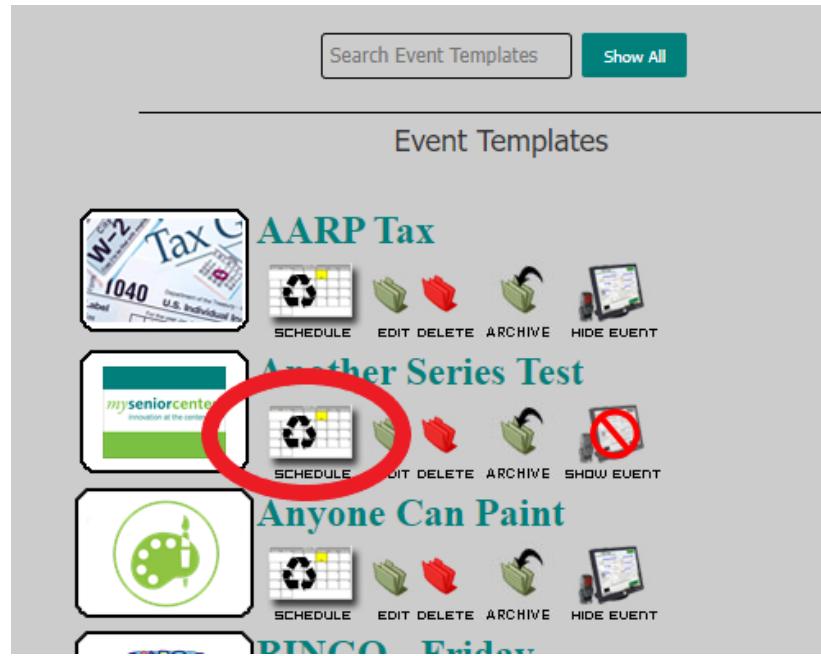
Click on the “Events” tab at the top of the screen



Scroll down to your newly created event



Click on the “Schedule” button



Choose the days that you want to schedule the event for

You are currently in add mode.
Clicking a day will add the event.

(February) (2024)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

Another Series Test

Display Actions

Display Complete Event History

< Prev Month February 2024 Next Month >

Another Series Test	02/19 Mon	12:30p-03:30p	0/123 Free	Rm: TEST
Another Series Test	02/20 Tue	12:30p-03:30p	0/123 Free	Rm: TEST
Another Series Test	02/21 Wed	12:30p-03:30p	0/123 Free	Rm: TEST

Click on the button labeled "Actions"

Another Series Test

Display Actions

Display Complete Event History

< Prev Month February 2024 Next Month >

Another Series Test	02/19 Mon	12:30p-03:30p	0/123 Free	Rm: TEST
Another Series Test	02/20 Tue	12:30p-03:30p	0/123 Free	Rm: TEST
Another Series Test	02/21 Wed	12:30p-03:30p	0/123 Free	Rm: TEST

In the dropdown menu click on the button for "Add Series"

The screenshot shows a software application window titled "Another Series Test". At the top, there are two buttons: "Display" and "Actions". A red circle highlights the "Actions" button, which has a dropdown menu open. The dropdown menu is titled "Series" and contains the option "+ Add Series". Below this, there are four other items: "Excel Range", "Healthways", "Silver & Fit", and "Senior Dine Program".

Click on the day that starts the series

The screenshot shows a software application window displaying a list of events for the month of February 2024. The title bar says "Display Complete Events" and the month is set to "February 2024". A red circle highlights the first event in the list, which is scheduled for Tuesday, February 20, at 12:30p. The event details are: "Another Series Test" starting at 03:30p. The list continues for the rest of the week.

Date	Day	Start Time	End Time	Room	Description
02/20/2024	Tue	12:30p	03:30p	Free	Another Series Test
02/21/2024	Wed	12:30p	03:30p	Free	Another Series Test
02/22/2024	Thu	12:30p	03:30p	Free	Another Series Test
02/23/2024	Fri	12:30p	03:30p	Free	Another Series Test

Click on the day that ends the series

Display Complete Event History

< Prev Month February 2024 Next Month >

Another Series Test	02/20	Tue	12:30p-	0/123	Free	Rm:
			03:30p			TEST
Another Series Test	02/21	Wed	12:30p-	0/123	Free	Rm:
			03:30p			TEST
Another Series Test	02/22	Thu	12:30p-	0/123	Free	Rm:
			03:30p			TEST
Another Series Test	02/23	Fri	12:30p-	0/123	Free	Rm:
			03:30p			TEST

Display Events Scheduled after February 2024



Name the series and fill out the rest of the fields on the popup

Edit Series

Series Name:	Another Series Test series
Start Date:	02/19/2024
End Date:	02/23/2024
Series Total:	5 Events in Series
Cost of Series:	\$ 0
Notes:	

When done, click on the button for “Save Changes”

The screenshot shows a software window for managing events. At the top, there are fields for 'Event Name', 'Registration Start Date and Time', and 'End Date'. Below these, a section labeled 'Discount(s)' contains the text 'New Discount'. At the bottom of the window, there are two buttons: 'Delete Series' (blue) and 'Save Changes' (white). A large red circle highlights the 'Save Changes' button. Below the window, a list of events is visible, including 'Another Series Test' with details like '02/23 Fri 12:30p- 03:30p'. A link 'Display Events Scheduled after February 2024' is also present.

29. Creating Event With Different Time Slots

Let's assume that we want to create a new event that starts at different times depending on the day of the week

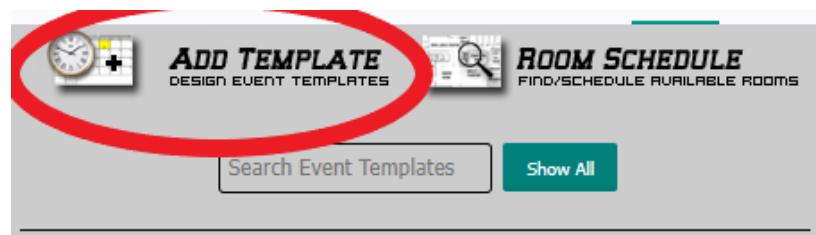
We will create an Event that has the following time schedule:

10:00 - 11:00 Mondays
11:00 - 11:30 Wednesdays
9:00 - 10:00 Fridays

Start by clicking the “Event” tab at the top of the page



Click on the button for "Add Template"



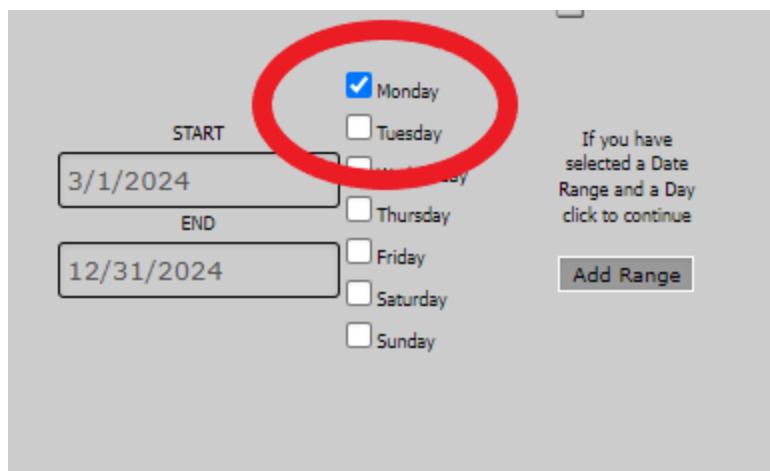
Fill out the event template, but momentarily ignore the fields for "Time Begin" and "Time End"

Event Name	Multi-TEST
Room	Select Rooms TEST X
Virtual Room	Select Virtual Room
Virtual Instructor	Select Instructor
Category	TEST
Icon	1
Description	None
Instructor	
Time Begin	
Time End	
Max Signups	123
Cost Per Event	0
Event Sponsor	Normal Events
Account	-- Select Account --
Notes	None

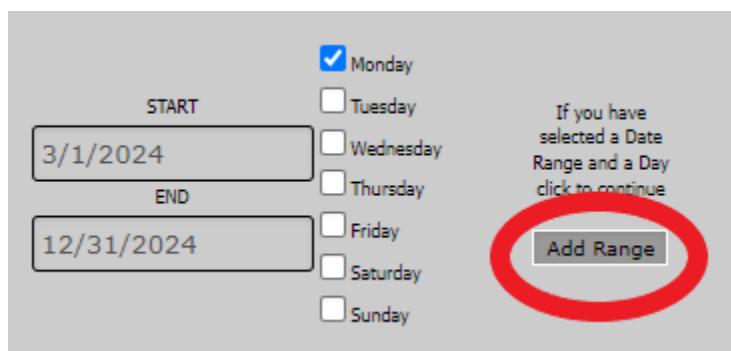
Create Master Event

<p>For time begin and end, we will use Monday's schedule</p> <p>Time Begin: 10:00 Time End: 11:00</p>	<p>Time Begin 10:00 AM Time End 11:00 AM</p>
<p>Click on the button for "Create Master Event"</p>	<p>Event Sponsor Normal Events Account -- Select Account -- Notes None Create Master Event</p>
<p>Click on the "Event" tab at the top of the page</p>	<p>People Personnel Events Meals Rides Equipment Reminders Statistics Jordan Halaby</p>
<p>Scroll down to the event that we just created</p>	<p>Miscellaneous Events Multi-TEST Nutrition for Healthy Aging</p>
<p>Click on the "Schedule" button</p>	<p>SCHEDULE EDIT DELETE ARCHIVE SHOW EVENT</p>
<p>Click on the "Auto Fill-in Range"</p>	<p>SEARCH BY ROOM AVAILABLE</p>

Click on the “Monday” option



Click on the button that says “Add Range”

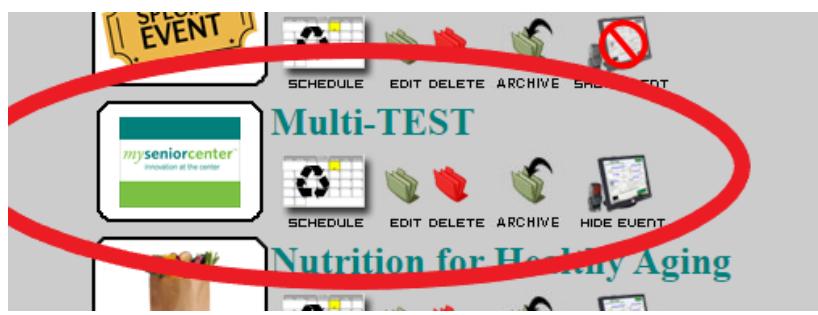


The following procedure is going to be performed for each of the scheduled times

Go to the “Event” tab at the top of the screen



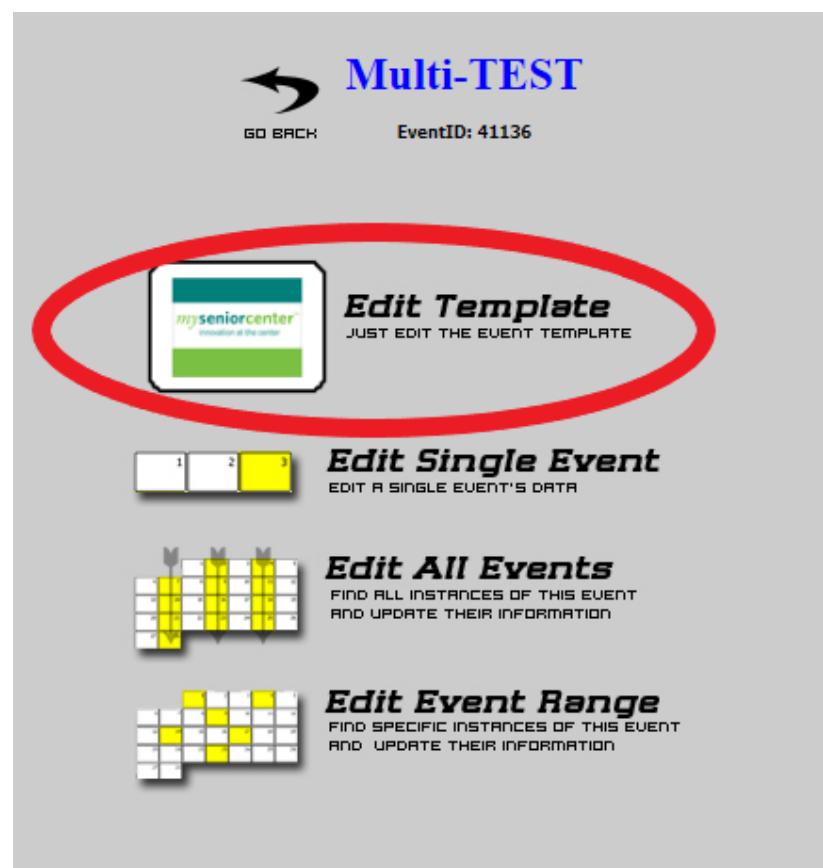
Scroll down to our event



Click the edit button

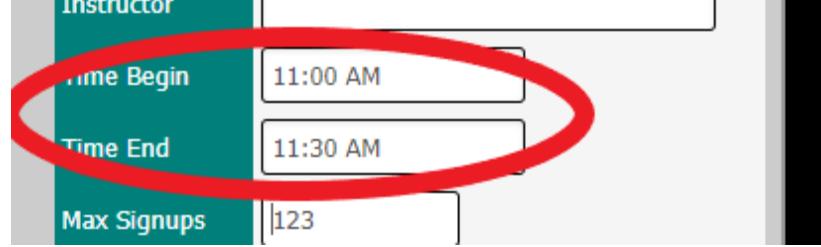
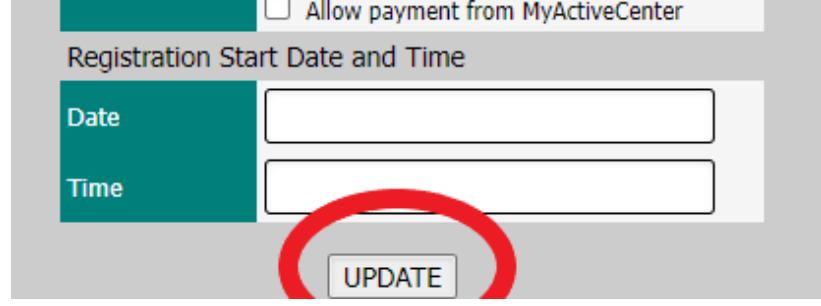
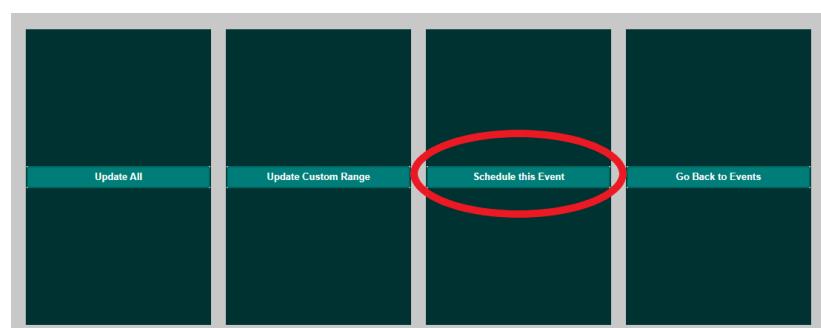
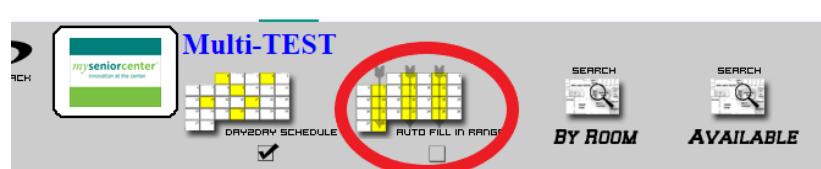
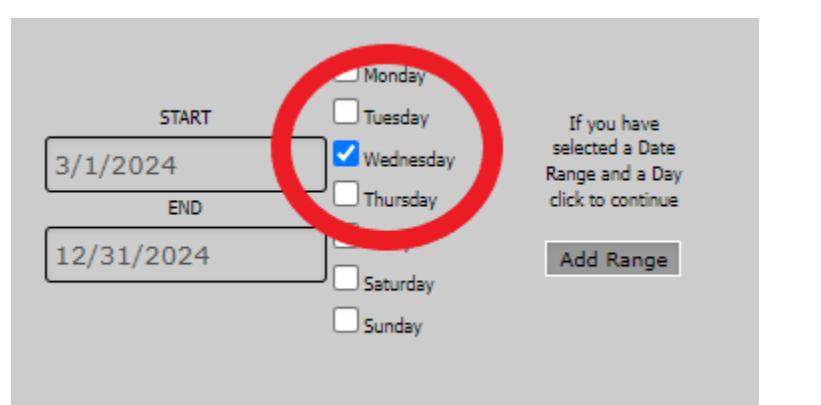


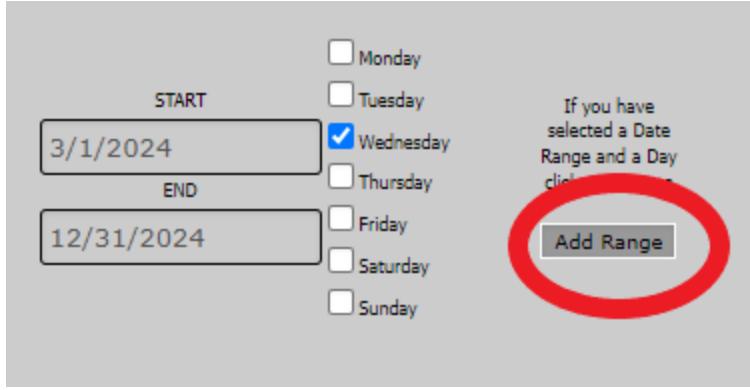
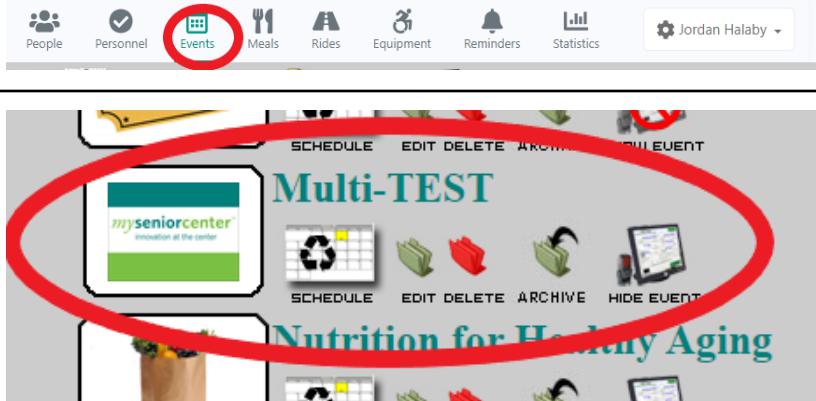
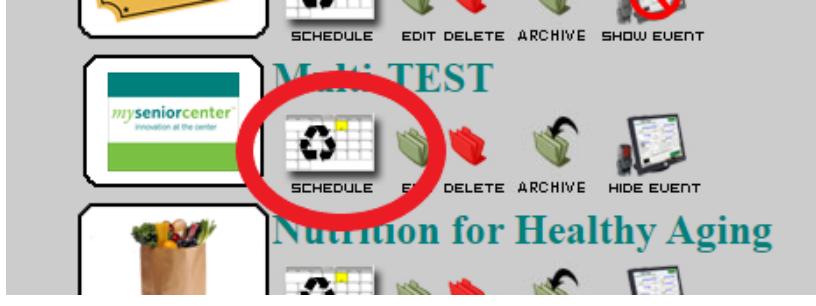
On the next screen, click on the button for "Edit Template"



Now we just have to update the Time Begin and Time End

This screenshot shows the "Edit Event" form for the "Nutrition for Healthy Aging" event. It includes fields for "Instructor" (empty), "Time Begin" (set to "10:00 AM"), "Time End" (set to "11:00 AM"), "Max Sign Up" (set to "123"), and "Cost Per Event" (set to "0"). The "Time Begin" and "Time End" input fields are circled in red.

<p>Since we are dealing with 11:00 - 11:30 - Wednesdays, enter 11:00 into "Time Begin" and 11:30 into "Time End"</p>	
<p>Click on the "Update" button</p>	
<p>THE NEXT STEP IS VERY IMPORTANT</p>	
<p>Click on the button for "Schedule this Event"</p>	
<p>Click on the option for "Auto Fill-in Range"</p>	
<p>Click on the option for Wednesday</p>	

Click on the button for “Add Range”	
Repeat these steps for every instance of our schedule	
To check your work, follow these steps	
Click on the “Events” tab at the top of the screen	
Scroll down to our newly created event	
Click on the “Schedule” button	

This will show you all of the days / times that this event takes place in

The screenshot shows a software interface for managing events. At the top, it says "Multi-TEST" with "Display" and "Actions" buttons. Below that is a section titled "Display Complete Event History" with buttons for "< Prev Month", "March 2024", and "Next Month >". The main area has a calendar for March 2024 with days from 1 to 31. Days 4, 11, 18, 25, and 31 are highlighted in yellow and contain the text "0/123". To the right of the calendar is a table of events:

	03/04	Mon	10a-	0/123	Free	Rm:	TEST
Multi-TEST			11a				
	03/06	Wed	11a-	0/123	Free	Rm:	TEST
Multi-TEST			11:30a				
	03/11	Mon	10a-	0/123	Free	Rm:	TEST
Multi-TEST			11a				
	03/13	Wed	11a-	0/123	Free	Rm:	TEST
Multi-TEST			11:30a				

30. Removing a Schedule from an Event

Let's assume that we have an event - in this case "TEST Event" that has already been scheduled for Mondays, Wednesdays, and Fridays

The screenshot shows a software interface for managing events. At the top, it says "TEST Event" with "Display" and "Actions" buttons. Below that is a section titled "Display Complete Event History" with buttons for "< Prev Month", "June 2024", and "Next Month >". The main area has a calendar for June 2024 with days from 1 to 30. Days 17, 24, and 30 are highlighted in yellow and contain the text "0/123". To the right of the calendar is a table of events:

	06/17	Mon	06:45a-	0/123	Free	Rm:	TEST
TEST Event			03:20p				
	06/19	Wed	06:45a-	0/123	Free	Rm:	TEST
TEST Event			03:20p				
	06/21	Fri	06:45a-	0/123	Free	Rm:	TEST
TEST Event			03:20p				
	06/24	Mon	06:45a-	0/123	Free	Rm:	

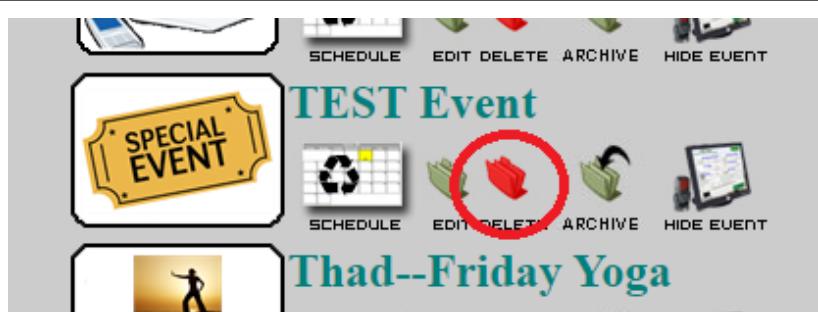
Now we want to remove Mondays and Fridays from the schedule

The screenshot shows a navigation bar with several tabs: People, Personnel, Events (which is circled in red), Meals, Rides, Equipment, Reminders, and Statistics. Below the navigation bar is a section for "TEST Event" with buttons for SCHEDULE, EDIT, DELETE, ARCHIVE, and HIDE EVENT.

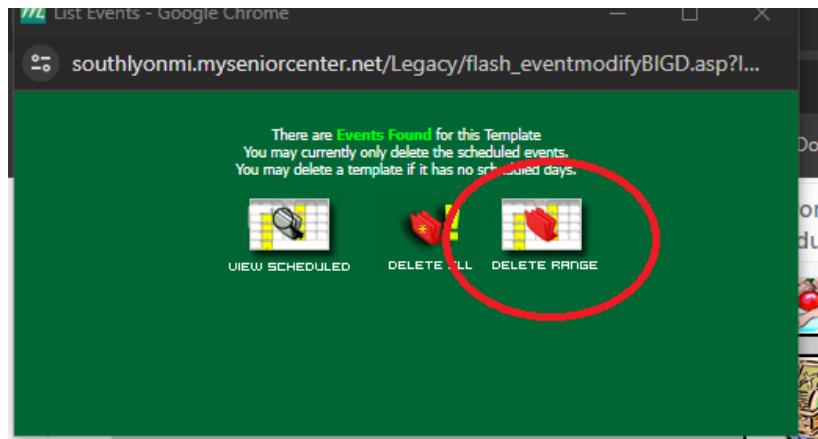
Scroll down to your event

The screenshot shows a list of events. At the top, there are buttons for SCHEDULE, EDIT, DELETE, ARCHIVE, and HIDE EVENT. Below that is a section for "TEST Event" with a "SPECIAL EVENT" ticket icon. Further down is a section for "Thad--Friday Yoga".

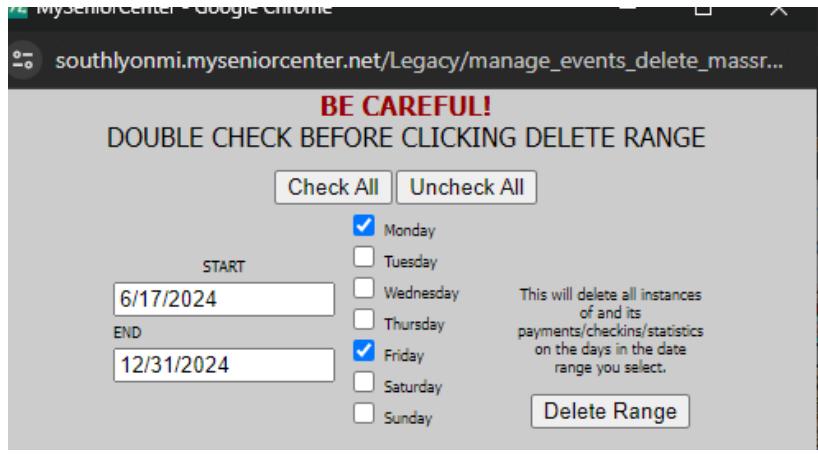
Click on the button that says "Delete"



A new window appears, click on the button that says "Delete Range"



Click on the check boxes for Monday and Friday



Click the button labeled "Delete Range"

southlyonmi.myseniorcenter.net/Legacy/manage_events_delete_massr...

BE CAREFUL!
DOUBLE CHECK BEFORE CLICKING DELETE RANGE

START

END

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

This will delete all instances of and its payments/checkins/statistics on the days in the date range you select.

To check our work, scroll down to our event and click on the button that says "Schedule"



This schedule now shows that only Wednesdays are included in the schedule

