

Parks and Rec 2.5.2.1 Release Guide

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Account

Non-Binary Gender Option



- A non-binary gender option has been added when selecting gender during the sign-up process or editing members. The new option can also be found in the following places:
 - Associated Members under Rental Check-in.
 - Participant Report (Detailed, Summary and Excel).
 - Members overview.

Program Registration



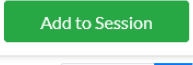

Adding Members of a Waitlist to a Session

- Navigate to Admin > Overview > Session Listing > Select “Show Participants”.
- A new option for Admins called “Add to Session” (figure 1-1). has been added next to each waitlist member.






Session Participants Chess February Break – test

Name	Email	Phone Number	
BAS Admin	basgovadmin@demo.com	518-371-6869	 

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Name	Email	Date Added	Email Sent	
Barb Quay	kylemquay@gmail.com	07/27/2020 2:02 PM	07/27/2020 2:06 PM	 
Chris Quay	kylemquay@gmail.com	06/09/2021 8:35 AM		 

Previous 1 Next

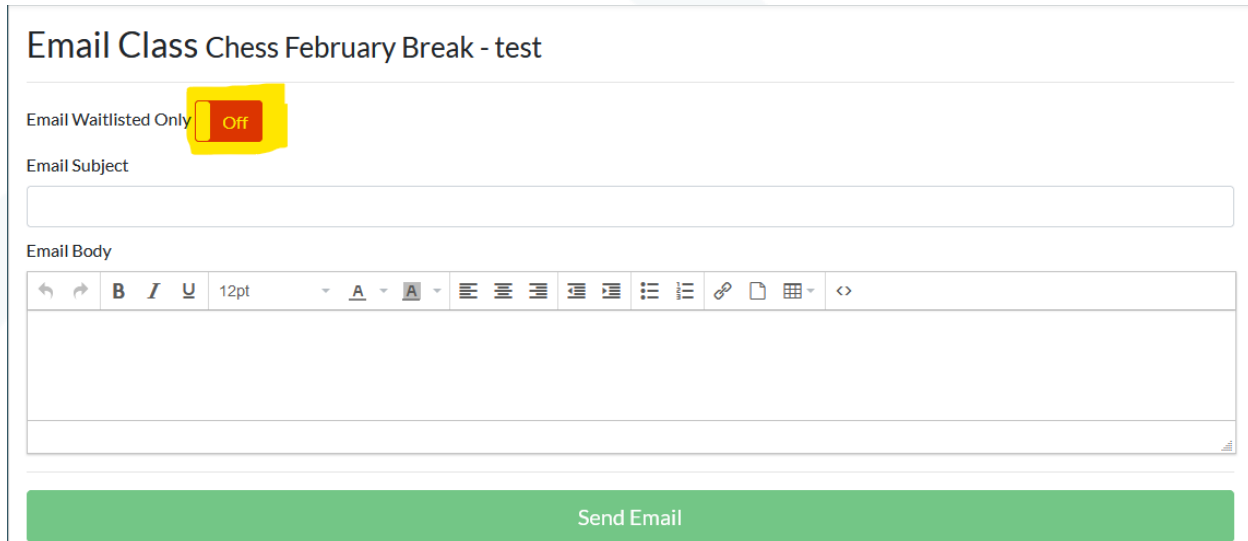






1-1

- When “Add to Session” is selected, the user is prompted to make sure they want to add the member to avoid mistakes.
- If seats are available, the member will be added to the session. If the session is full, it will still add the participant and increase the max size of the session by 1.
- After the Admin accepts the prompt to add the member to the session, they will be directed to the payment modal in transaction management to apply the payment for the participant.

Filter to Target Waitlist Members on the “Email Class” Screen

- Admins can navigate to Admin > Programs > Session Listing > Select “Email Class” from any session (figure 1-2).
- Instructors can navigate to Programs > All Sessions > Select “Email Class” from any session (figure 1-2).
- The new option is called “Email Waitlist Only” and is defaulted to “Off.”

A screenshot of the 'Email Class Chess February Break - test' configuration screen. The 'Email Waitlisted Only' toggle is highlighted with a yellow box and is currently set to 'Off'. Below it is an 'Email Subject' text box and an 'Email Body' rich text editor with a toolbar. At the bottom is a green 'Send Email' button.

Email Class Chess February Break - test

Email Waitlisted Only Off

Email Subject

Email Body

Send Email

1-2

Reports

“Detail” option on the Pool Revenue Report

- A new toggle option has been added to the Pool Revenue report criteria selection screen with the following two options:
 - Summary (default) – produces the current report that only lists total per fee collected.
 - Detail – will produce the report that lists each individual payment that makes up each fee total.
- New columns added:
 - Payor (name of the payor).
 - Type (payment method).
 - Via (online or counter represented on the report as “O” or “C”).
 - Receipt Number.
- If a payor used multiple payment methods that paid off a single fee or multiple fees on the report, there will be a two per payment method under each fee that was satisfied with the payment that would share the same receipt number.

- If a single payment method covered multiple fees there will be a row under each fee that was paid for with the same payor name and receipt number with the amount that was applied to each fee.
- The total for each fee on the report will list at the bottom of all the details rows with a label to the left on the total row: “(Fee Name) Total” in bold.
- The reports group by pool name-season which also has a total. The pool name-season total will have a label: “(Pool Name) (Pool Season) Total.”
- Payment Method totals for online vs. counter will list beneath the grand total.

“Detail” option on the Program Revenue Report

- A new toggle option has been added to the Program Revenue report criteria selection screen with the following two options:
 - Summary (default) – produces the current report that only lists total per fee collected.
 - Detail – will produce the report that lists each individual payment that makes up each fee total.
- New columns added:
 - Payor (name of the payor).
 - Type (payment method).
 - Via (online or counter represented on the report as “O” or “C”).
 - Receipt Number.
- If a payor used multiple payment methods that paid off a single fee or multiple fees on the report, there will be a two per payment method under each fee that was satisfied with the payment that would share the same receipt number.
- If a single payment method covered multiple fees there will be a row under each fee that was paid for with the same payor name and receipt number with the amount that was applied to each fee.
- The total for each fee on the report will list at the bottom of all the details rows with a label to the left on the total row: “(Fee Name) Total” in bold.
- The reports group by pool name-season which also has a total. The pool name-season total will have a label: “(Program Name) (Session Season) Total.”
- Payment Method totals for online vs. counter will list beneath the grand total.

“Detail” option on the Facility Revenue Report

- A new toggle option has been added to the Program Revenue report criteria selection screen with the following two options:
 - Summary (default) – produces the current report that only lists total per fee collected.
 - Detail – will produce the report that lists each individual payment that makes up each fee total.
- New columns added:
 - Payor (name of the payor).
 - Type (payment method).

- Via (online or counter represented on the report as “O” or “C”).
- Receipt Number.

- If a payor used multiple payment methods that paid off a single fee or multiple fees on the report, there will be a two per payment method under each fee that was satisfied with the payment that would share the same receipt number.
- If a single payment method covered multiple fees there will be a row under each fee that was paid for with the same payor name and receipt number with the amount that was applied to each fee.
- The total for each fee on the report will list at the bottom of all the details rows with a label to the left on the total row: “(Fee Name) Total” in bold.
- The reports group by pool name-season which also has a total. The pool name-season total will have a label: “(Facility Name) (Season Season) Total.”
- Payment Method totals for online vs. counter will list beneath the grand total.

“Detail” option on the Rental Revenue Report

- A new toggle option has been added to the Program Revenue report criteria selection screen with the following two options:
 - Summary (default) – produces the current report that only lists total per fee collected.
 - Detail – will produce the report that lists each individual payment that makes up each fee total.

- New columns added:
 - Payor (name of the payor).
 - Type (payment method).
 - Via (online or counter represented on the report as “O” or “C”).
 - Receipt Number.

- If a payor used multiple payment methods that paid off a single fee or multiple fees on the report, there will be a two per payment method under each fee that was satisfied with the payment that would share the same receipt number.
- If a single payment method covered multiple fees there will be a row under each fee that was paid for with the same payor name and receipt number with the amount that was applied to each fee.
- The total for each fee on the report will list at the bottom of all the details rows with a label to the left on the total row: “(Fee Name) Total” in bold.
- The reports group by pool name-season which also has a total. The pool name-season total will have a label: “(Rental Name) Total.”
- Payment Method totals for online vs. counter will list beneath the grand total.

Registration Date on the Participant Report

- The Participant Report is run by clicking on the Participant Icon to the right of each session from the search results on the main page. Click the Detail or Summary button to run the report. Both versions of the report will have a new column added.
- A new column called “Registration Date” has been added to the right of the Registrant Column. The Alt Phone # column has been removed.

Pool Registration

ID Card Defaults in Pool Membership Types

- Navigate to Admin > Overview Membership Types (in pool section). After clicking a membership type or adding a new membership type, the “Edit Membership Type” screen will now have the two following fields added (figure 1-3):
 - Default ID Template (defaults to none).
 - Default ID Classification (defaults to none).

Edit Membership Type Individual Membership 2

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Membership Type Name: Individual Membership 2 In-Office Only Res/Non-Res

Active
 No
 Both
 Res
 Non-Res

Description: Individual Membership

Fee Type: Individual Membership 2 Fee Basis: Per Member

	Res	Non-Res
\$	129.00	\$ 129.00

Ages: Min No Min Max No Max # Members: Min 1 Max 1

Add-Ons: Babysitter Group Code:

Default ID Template

Default ID Classification

-- Quick Print Disabled -- -- None --

Save

1-3

Quick Print ID Cards option for Pool Admins

- A new switch called “Quick Print ID Cards” has been added to the Pool Admin page, accessed by clicking on Pools > Pool List > Selecting a Pool Name.
- The new option is defaulted to off. When enabled, the user will be able to click the ID icon from the member search which will queue the ID card to immediately print and show a message that the ID was queued on top of the screen.
- The user will be left on the same search results page so they can continue to queue additional cards if needed.
- The Quick Print option will only exist if a default template exists on the Membership Type.

Indicator of Associated ID Cards for Each Pool Member

- Under the Pool Member search page, an indicator of if a member has/does not have an ID card associated to them has been added.
- If Quick Print is enabled and the user doesn't have an ID Card for that Pool/Pool Season yet, the icon will be green.
- If Quick Print is **not** enabled and the user doesn't have an ID Card for that Pool/Pool Season yet, then the icon will be grey.
- If the user already has an ID Card for that Pool/Pool Season, then the icon will be red regardless of if Quick Print is enabled or not.
- Additional ID Cards can be printed regardless of the status.

ID Cards

Default Header Text Option to ID Card Templates

- The Header Text Field that is on the Queue ID Card screen (accessed by clicking the card icon from the pool member search or by going to the members page and clicking on the “New ID” button) was previously updated from the system Setting page.
- Now, the Header Text Field is found in the ID Card Templates. This new field is required to save a template.