Parks and Rec - System Efficiency

Outline

- Shared Calendar Programs
- Optional Fees for Programs
- Transferring a Participant to a New Session
- Adding a Waitlist Member to a Session as an Admin User
- Emailing the waitlist of a session
- Pool Member Check-In
- Pool Non-Member Daily Entry
- Site Files
- Transaction Management- Refunds and Invoice
- ID Printing and Scanning
- Rental Module Overview

Shared Calendar Program

- Allows for multiple program sessions to be listed on a Shared Calendar to view availability.

Program Session Calendar

Select sessions to register for **BAS Admin** then click an "Add To Cart" button below.

September 1 – 30, 2021 [Day] [Month] [Today]   [Help] [<] [>]

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	11
12	13 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	14 9a Daily Camp ($50.00)	15 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	16 9a Daily Camp ($50.00)	17 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	18
19	20 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	21 9a Daily Camp ($50.00)	22 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	23 9a Daily Camp ($50.00)	24 8a Daily Trip ($75.00) 9a Daily Camp ($50.00)	25

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Optional Fees for Programs

- Optional fees can be configured for programs which gives the resident a choice at the time of the reservation to make additional purchases. To configure these fees set a fee on the Fees tab of the Program Administration
page as optional.

On	Optional	Optional Jersey Fee	$20.00	$20.00

Adult Soccer Camp Session 1

| Back to Results | | | | | Search Members |

Session Dates	Days of Week	Location(s)	Grade/Age	Filled	
09/06/2021–10/15/2021	S M T W T F S	Soccer Field 1		3/30	More Info

John Smith Resident	$160.00
○ Optional Jersey Fee	$20.00

Transferring Participants to Different Sessions

- To move a participant search for the program the participant is currently in from the main screen and click on the participant Icon for that session. Cancel the participant using the trash can icon.

Session	Session Dates	Days of Week	Location(s)	Grade/Age	Filled			
Session 1	09/06/2021–10/15/2021	S M T W T F S	Soccer Field 1		3/30	Info	Register	
Session 2	09/13/2021–10/14/2021	S M T W T F S	Soccer Field 2		3/25	Info	Register	

- **Next go to Transaction Management and search for the transaction that included the participant being transferred. Click the View button to the right of the transaction and then click the Void button.**

- **Go to the main page, search for the session the participant is being transferred into and click Register. Find the participant using the Search Members button and add the registration to the shopping cart.**
- **Use the Pay at Counter option, then click on the View button next to the Pending transaction from Transaction Management to back enter the payment information as It was originally received.**

Adding Waitlist Members to a Session

- **Admin users can add members from the waitlist to a session at any time by clicking on the Participant Icon to the right of the session from the main search and utilizing the Add to Session option.**

Email the Waitlist Members

- **Go to Programs > All Sessions and click on Email Class for the session that needs to be emailed. Turn on the Email Waitlisted Only option prior to sending the email.**

Pool Member Check-In

- Pool members can be checked in by going to Pools > Member Check-in/Search. Find the member using the search fields then click on the Check-in/Out option.
- To check-out a member, the Check-In/Out option must be clicked on a member who is already checked in for the day and then an option to check-out will be present.

Name / Member #	Pool	Contact Info		
Smith, Amy #52	Community Pool 2021 Season Family Membership	jsmith@email.com 555-444-6666 101 Main st, Albany, NY 12205	Check-In/Out	📋 👥 📇

Amy Smith checked in at 1:04 PM

Check Out

Name	Member #	Checked In	Checked Out	
Smith, Amy	1	1:04 PM	Not Checked Out	🗑

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Pool Non-Member Daily Check-In's

- **To configure daily entry fees for non-members, go to Pools > Pool List. Click on a pool name from the list and set the Daily Weekday and Weekend Guest fees from the Guest/Daily Fee Setup tab.**

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Daily Weekday Guest Fee						
Daily Entry Non-Member Weekday fee	⌄	Res	$	10.00	Non-Res	$ 15.00

Daily Weekend Guest Fee						
Daily Entry Non-Member Weekend Fee	⌄	Res	$	15.00	Non-Res	$ 20.00

Daily Weekday After Hours Guest Fee/Start Time

Daily Entry Non-Member Weekend Fee	⌄	Choose time	Res	$	15.00	Non-Res	$ 20.00

Daily Weekend After Hours Guest Fee/Start Time

Daily Entry Non-Member Weekend Fee	⌄	Choose time	Res	$	15.00	Non-Res	$ 20.00

- Non-member daily entries are recorded from Pool Member Check-In/Search page. Select a single pool from the pool list and then click the Daily entry button to log the entry.

Site Files

- Documents such as PDF's can be hosted on the Parks and Rec website by going to Admin > Overview > Site Files. Once the files are saved, they can be inserted into areas such as the program, pool, or facility descriptions as links to be downloaded by residents.

Transaction Management

- Transactions can be refunded directly from transaction management by finding the transaction and clicking on the View button to the right of the record. The refund option is in the lower left corner.
- The Invoice option is found when clicking the view button next to any transaction. It can be used to show unpaid balances from a transaction. The Invoice also can be used as a secondary receipt option for fully paid transactions that trifolds into a standard windowed envelope.

ID Printing and Scanning

- ID Cards can be printed from any members profile or from the pool member search screen.
- These cards can be scanned to see what any resident Is currently signed up for and to check in and out of a pool.

Queue New Card John Smith

Template

Default - Horizontal

Header Text

Town of Anywhere

Issue Date

09/07/2021

Classification

Select ▾

Expiration Date

Town of Anywhere

John Smith
DOB: 02/21/2009
Issued: 09/07/2021

101 Main St.
Albany, NY 12205
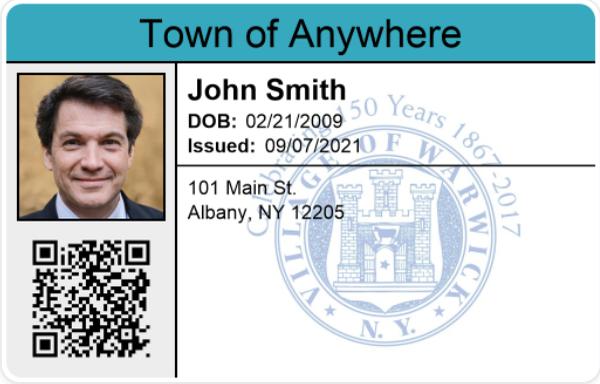
Queue Print Job

Rental Module

- The Rental module allows for an inventory of items such as lockers or docks to be rented and renewed.
- Different fees can be charged for different types of units.
- The ability to accept down payments and subsequent partial payments allows residents to pay off balances over time with a set due date.
- Easily communicate with the unit holders through the website using the email feature.