

RecChat: COVID-19 Response

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Bulk Cancellations

Can Bulk Cancellations be used for prorated refunds?

At this time no. To prorate the refund you would have to use the Roster Fee Change function.

Can you add a reference to the process?

Yes! If you have a question linked as a field type of VSI Function – Cancellation Code or VSI Function Cancellation Reason, the Section cancel screen will have a place to input that reason which will print on receipts.

Does the bulk cancellation option allow for patrons to choose their refund option?

Unfortunately no, this is an either or situation.

What is the text found in the bulk cancellation email?

This would be the standard language found on your cancellation receipts. It cannot be modified on the cancellation screen on the fly.

Is there an option to bulk cancel Firm Facility Reservations?

There is currently no option to bulk cancel firm reservations, only Hold or Tentative statuses.

Can you cancel multiple sections at one time?

No – this is a one section at a time process. It does cancel all enrollments in a section, however.

Can you bulk cancel Trips?

You can, but it is similar to activities in that it is trip by trip, and not a range.



Is there a bulk cancellation for tickets?

Yes, this is a ticket code by ticket code cancellation, however.

What is the difference between member date and expiration date in Membership Bulk Change?

Member date is the dates between which the pass was purchased. Expiration dates are the dates between which the pass expires.

Is there a similar process to bulk cancel in RecTrac 10.3?

Yes there is: Daily - Activity - Activity Cancel All

Refunds

Can you refund a household credit generated from the cancellation or fee change process to a credit card?

This is currently not an option. The item would have to be cancelled on WebTrac to be refunded back to the credit card.

Does refund finance option allow you to refund back to credit cards?

Refund Finance is a separate refund option and cannot be refunded back to a credit card.

Fees and Billing

Can you change installment bills in bulk?

This can be done by going to Management • System Management • Bulk Installment Billing change. You'd choose the dates you want to change and the fees you'd like to change.

Will extending passes for a month increase the billing by a month?

No – the membership bulk change will only push out or reduce expiration dates.



We are considering skipping a month of billing, can we do this?

You can certainly choose to not to run a billing cycle. On the installment billing screen, just don't process bills dated for the date you run billing on for that month. You can then delete the bills manually at a later date if desired.

Optionally, you could bulk change the installment billing fee for the month skipped down to \$0.00 and run billing as normal if you didn't want Past Unbilled Records to display in certain reports.

Will Fee increases show in the patron's purchase history?

Yes – fee changes will be reflected in the patron's purchase history

General Questions and Answers

Is there a way to extend Passes in Bulk?

Yes. This is done through the Bulk Pass Member update Program found in Pass Management.

Our office needs a copy of the refund receipt printed out because we have to process refunds through our finance dept. There is no option to print the receipts?

This can be done through the Bulk Print Program found in Period End Processes. You can choose the Print type of Activity Section Cancel – All and choose the date range/user and time that the receipts would have been generated

Is there a report that will show how much revenue is lost?

The module specific bottom line reports will allow you to gather this financial information.

Can you both email and text a household from a RecConnect?

If process emails is on and you do not toggle on "Skip Text if email is available," both will be sent.



Can Members cancel their memberships online?

Yes – the daily processing profile would have to allow for cancellations in the module, and the refund option of refund now would need to be allowed in the Payment Profile for the WebTrac user.

If using the Classic UI, where would I find Bulk Installment Billing Change?

Management • System Management • Bulk Installment Billing Change (Under Period End Processes).