Spring 2023 Updates Webinar Outline (3/27/23)

All examples are on the Demo Training Site (please call client services if you need access).

System Wide- Refreshers

- Our Knowledge Base is here to help! Check the question mark at the top of the page, in each nav area, or below the management home page quick utilities.
- User setting feature where admins can choose what users have access to (or which navigation tabs they can access). (Custom User Privileges)
- We have new email addresses to make it easy: client support support@myrec.com, billing inquiries billing@myrec.com, and design help design@myrec.com.

Check out and Receipts

- Account transactions, such as refunds, can be emailed from an account independent of any invoice that may be related.
- When purchasing POS items from an account, the receipt/invoice will indicate which member was selected for that item.
- Wording on the include balance checkbox when sending invoice/receipt emails was updated to indicate that it also includes account credit.
- When viewing the Registrations tab for an account or member on the management side, items listed can be sorted by clicking column titles.

Activities and Registrations

- Transfer Process Update- This new process will auto-apply credit generated from the previous item to the new item if a previous payment was made.
- A clarifying example was added to the advanced activity due dates setup area.
- Time slots can be shown on advanced activity rosters.
- A check box to Allow Overbooking has been added to the Edit All Activities feature for all activity types.
- Custom Gender added to Gender Dropdowns. This does not affect gender gating activities however.

Facilities and Reservations

- Reservation bills no longer display amount owed as a cumulative tally, but instead factor the amount for each date.

- If a permit has canceled dates, a checkbox will allow them to be hidden prior to manually emailing the permit or when on public view.
- On facility creation, the Map setting, while not on by default, can be turned on and saved to display a map based on the entered address.

Reports

- All reports that can be exportable are now exportable.
- The deposit return report can be run by reservation date instead of invoice date and, if so, can be filtered by facility.
- The POS Options report has an ability to filter out canceled purchases.

Accounts

- If allowed by user settings, unsettled transactions can be voided directly to the gateway at the same time from accounts & facility portal (Authorize.net & MX gateways only).
- Due dates listed in accounts can be paid directly on with the amount for that due date pre-filled. This lists the oldest due date for each.
- There is now a setting to require emergency contact fields for adult members in Administration > Settings > Account Settings.
- When using a residency factor such as address lookup or zip code, editing an account address will check for a residency change & update.
- When using Address Lookup setting, an override checkbox can be used to change residency. If an address is updated, the residency may change.
- When using Everyone is Resident/Everyone is Non-Resident settings, accounts can be edited to a different residency.
- A password can be set in admin > settings where required docs are created. Docs can be set to require a password to view/edit in accounts.
- If an account member is set to a status of inactive or deceased and is not last in the account, a new primary billing contact is required.
- The last active member of an account can be set to a status of deceased, which will deactivate the member and account (same as inactive).
- If using the account creation disclaimer function, agreements are saved to the account, asked on login if not agreed to, and asked yearly.
- Payment plans can be created from account balances for custom recurring payments on certain gateways.
- The messages tab in accounts now includes communications logs, where you can add notes on interactions with the account for staff use.

- **Public Side:** When viewing a public calendar for a coach account, a link is present for the coach to see their coaching activities in a list.
- The public side roster link for coach accounts has been moved to the main part of the household nav on mobile view and account lower links.
- There is a link to view the account calendar in a mobile list version from the public calendar for all accounts.
- Public accounts can now add and edit secondary guardian designations for non-adult account members.
- If an email address is the first listed for the primary contact on multiple accounts, the password reset function will note a need to call.

Misc

- We are starting the year off with our newly named newsletter the "MyRecord."
- We'd love to use your photos in an upcoming newsletter, see below to submit!
- Membership Cards- Order them!
- POS barcode scans using the Axess Door system can limit entry based on product settings and report scans like other POS barcode scans.

What's Coming

- We have plans to update the public programs list area with easy-to-access categories. Take a look at Misc > Upcoming Changes to learn more.

You can and should (on your mgmt home page):

- Update your home page photos with buttons
- Check the Updates for the newest functionality weekly
- Sign up for our Monthly Newsletter (check your spam folder)
- Attend quarterly live webinars

Help Us Help You Grow
- See what we're working on from Misc > Upcoming Changes.
- Ask what others are doing in Misc > Discussion Board.
- Check us out on Instagram, Twitter, Facebook and Linked in.
- We care about your feedback and would love your Facebook Review: https://www.facebook.com/MyRecDept/reviews/