

Spring 2024 Updates Webinar Agenda (3/14/24)

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

Activities and Registrations

- Registration Payment Plans- APP vs RPP quick review for those with Authorize.net and MX Merchant Gateways. [Check KB for video, and articles.](#)
- Removal of Subscription settings for creating new Memberships and Advanced Activities- use new Payment Plans option.
- After choosing a member to register, the choice of 'Today' has been added to the Date Range drop down menu in the Activity Search. This will filter out any activities not running on the current day.
- We added a check box if the department wants management to be able to bypass required documents during checkout.

Memberships

- We added additional filters to help narrow the Search process for memberships during management registration.

POS

- We added the invoice date to the account Point of Sale screen on management and Products screen on the public side.

Facilities

- When assigning facility types, one must assign a type to the main facility in order for the type to be recognized in the activity schedule edit information facility type drop down. Facility types assigned to areas should be recognized in all areas where one can search by facility type.
- All reservation hours are reporting using hours and minutes. We added the total hours to the bill page with a q mark explaining that they are total billable hours.

Reports

- Added a key at the bottom of Reports>Financial Reports>Cancellation Report to identify what the letters in the left-hand column of the report mean.
- We added a new Munis export for Munis ERP Pro 10.

Email & Text Blasts

- Accounts that contain a shared member now receive text blasts for items in which the shared member is registered. This was already true in email blasts.

Misc

- Registration Payment Plans have replaced the Recurring Subscription. Current Recurring Subscriptions will be able to finish out their terms, however, new subscriptions will need to be created in the form of an RPP. We did a special webinar on this for those departments who were utilizing this feature! It is in the Knowledge Base for review.

Reminders:

- Membership Cards- Order them! New Vendor- quicker turnaround time/ cheaper.
- Check the Updates for the newest functionality weekly.
- Sign up for our Monthly Newsletter (check your spam folder).
- Attend quarterly live webinars.
- See what we're working on from Misc > Upcoming Changes.
- Ask what others are doing in Misc > Discussion Board.
- 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.
- Check us out on Instagram, Twitter, Facebook and Linked in.