# Winter 2022 Updates Webinar Outline (12/20/2022)

All examples are on the Demo Training Site (please call client services if you need access). Demo Training site is refreshed in January and July.

**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 Activities**

- Automatic payments you can set up on balances owed are almost ready for a full release (ie Payment Plans). Want to be one of the first adopters? Let us know!

**Facilities and Reservations**

- When editing facility requests on the management side, staff notes can be added for internal reference that's only visible on the request.
- When deleting/modifying reservation dates from the same schedule, refunds may be sent back to credit card if paid that way and in time.
- Facility requests can now use buffers in their schedules. The public side uses what's set on the facility and the mgmt side can edit it.

**Reports**

- There is now a summary version of the Scan Options membership report that groups results by member.
- The Access Scan report in membership/facility/POS reports shows a summary and chart of scan concentration by day of the week in those dates.
- A column has been added for Required Document and Missing Document activity and membership reports to show if the document was optional.
- The Disclaimer Completion activity report can filter the date range to week and month time frames of adv activities using separate billing.
- A disbursement export report has been added to financial reports.

- The Compare dashboard defaults to showing 1 month of data instead of 3 for faster loading.
- Access scan in, access scan out, and orphan reports have been combined into one report with the functions of all three.
- A checkbox has been added to Option Report in POS reports to choose whether to include or exclude cancelled purchases.
- The options dropdown within a product in the Option Report (POS reports) now includes a Show All choice to see of that option's selections.
- A new report in POS reports shows how many scans remain for POS products using a barcode that have any scans left.
- An Overpaid Transaction report in financial reports shows transactions where some or all of the payment was not applied to an item.
- The cancellation report in financial reports can be filtered down by any item using an added search field.

## Accounts

- Standard activity registration transfer has been retired in favor of the more flexible cancellation & re-registration process.
- During the registration cancellation process, the registrant and payer names will show in their own, appropriately named, columns.
- Adjustments for reservation date edits/deletions may now be applied per schedule for more accuracy.
- Explanatory question marks were added to the Add Date, Add Facility, Reservation Group, & reservation group Date areas in a reservation.
- When canceling adv. activity registrations, other weeks/months related to the same activity can be canceled at once for the same person.
- When moving someone from a waitlist, there is a new option to bring you to place where you can adjust the amount that's owed after the move.
- Public accounts can see an Account Credit History from inside the finance area of their accounts, tracking flow of credits.

## Misc

- All dates in a quick-add show on view, edit, and delete from any date within it. There is an option to delete some dates or the full item.
- The link to add a change request now directs you to call client support so we can better help document details and find solutions.
- Search and filter functionality is available for all users on Misc > Dashboard.

- Version 4 of Google Analytics may be used for tracking site visitors. Call us if interested.

**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.
- Price Increase effective January 2023
  - As you know, we value your business and have enjoyed working with you and have achieved some great results along the way. Like any business though, our own operating costs do increase over time. To maintain the level of service you're accustomed to, this modest increase is necessary, so we wanted to communicate this to you in good time. We're confident that our prices remain competitive within our sector for the quality of the service that we provide and, as always, we're focused on the results we provide to clients. Our prices will be increasing starting with your January 2023 invoice. Thanks again for your business, and please contact billing@myrec.com if you have any questions about your new prices.

**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 Quarterly Newsletter (check your spam folder)
- Attend quarterly live webinars

**Reminders**
- We have a Musco connection available to send your event schedule to ControlLink for lighting control.
- Need receipt printers, card scanners, or other equipment? Visit our POS portal – also check out the equipment guide for all items tested to work in our system.
- Our Constant Contact partnership can give you a discount on email advantages, marketing and more.

**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/