# 2020 VT User Group Outline

## Accounts

- Grade and Gender are now optional in that you can choose not to use that field altogether
- Organizations can have the same phone numbers as household accounts
- Default emergency contact fields were added to account creation for easy prefills on added members
- Residency can be determined by zip code for new accounts based on zip code settings
- Invoice numbers have been added on activity and membership registration tabs for easier access to make adjustments
- Email addresses in accounts and member profiles are clickable for an easy way to direct email.
- A display if activities are cancelled in an account's registrations tab
- A way to see all active registrations at once from an account to cancel multiple items at the same time

## Activities

- Team score entry has been made even easier (can import schedule on the score input)  GO over team sports
- Registrants can place themselves on pre-created teams - this not only works for sports, but also bus seats, garden plots, vendor booths, etc.
- Promo code discounts can be limited to once per account or once per registrant
- Activities that have associated add-on purchases have a report for the add-ons in the program
- A way for standard activities to automatically reduce fees for those registering late (pro-rate)
- Adding receipt notes with links to meeting details for virtual programs
- A way to restrict standard activities so customers can only register for one activity in a program per day, per week, etc.
- Setting up activities to collect registrations without payment for possible future events- $0 deposit
- Cancelling activities to stop future registration- for refunds individually or for credit in bulk

- On rosters: Digital check in Q/A in response to COVID- do you have a fever?, etc
- Custom Form for Pre-screen on Home Page

**Advanced Activities**
- Pricing options chosen can be viewed on attendance sheets
- Attendance sheets for time-based activities can display all registrants by time slot.
- Pricing options can be set to not allow purchase if any date within the selection is full (On pricing option- *Disallow Purchase if Dates Missing*)
- Sibling discounts can be set on the program level to apply to multiple activities within
- Single member discounts can be added to advanced activity programs for single day options
- Age discounts on advanced activities - everyone can register together under one seat cap and be charged different fees by age
- View of remaining seats for advanced activities by time slot
- Time slot purchases in advanced activities can be limited to a set amount per day.

**Memberships**

- Scan notes can be added to memberships to display a message when scanning a card in
- Bulk updates to extend the expiration dates of existing memberships
- Age discounts on memberships - everyone can register into the same membership type under the same seat cap and be charged different fees by age
- Scan In/Out combine feature -When using both check in and check out features, the check in screen will display the count of members on site (checked in and haven't checked out yet) for help with facility capacity control.
- Pausing memberships for future reactivation and what this means for expiration dates

**Reservations**

- Removed reservation dates appear as cancelled and do not delete- Dates are no longer deleted from reservations, but instead are cancelled so a history remains

- Reservations, permits, and receipts show cancelled dates as crossed out or similar.
- Reservations and requests can require or recommend documents during checkout
- The reservation availability chart opens on-page for easier transfer of dates to the form fields. Looking to update.
- Public reservations can be restricted by facility in terms of start and end date
- Public reservations display on the public calendar as "Reserved" by default

**Facilities**

- A way to mark your facilities as open, closed, or partial with notes to explain more
- Reminder: We have a Musco connection available to send your event schedule to ControlLink for lighting control

**Calendar**

- Quick events can be added to the calendar without reservations using the Quick Add tool
- (Calendar Export) Head over to your main management side calendar to find the Export link. You can set a date range from the popup and any facilities you had selected on the calendar will export to a file that can be imported into Mac, Microsoft, or Google calendars so you can check your events from wherever you like

**Checkout**

- Global and custom disclaimers (mgmt. side) can be electronically signed (touchscreen or mouse in office) or emailed to the customer. You can also mark disclaimer as printed or already on file- show where stored.
- The ability to refund directly to the credit card via Authorize.net or MX Merchant when making an adjustment
- Seat caps are checked immediately when clicking add to cart during standard checkout in addition to checks on page load and when proceeding from cart to payment. Versus High Demand

**Point of Sale**

- Gift certificates can be redeemed from within the POS area of the facility portal
- Check the Refund section of the facility portal for a detailed list of purchased products by invoice.
- Gift certificates can have a variable amount to be set during management checkout.
- Products can be assigned to locations so on checkout you can see just what's at that facility.
- Users who are assigned to locations automatically see their location for POS checkout if products are assigned to locations.
- Reminder: Need receipt printers, card scanners, or other hardware? Visit our POS portal – New items added

**Email**

- Email blasts can be scheduled for future sending (and edited before send if need be)
- Reminder: Email blasts can be sent through Constant Contact for templates, scheduling, list control (targeted groups), spam avoidance for better receipt of pertinent information- there's even a discount.
- Email blasts can be sent to the purchasers of selected products
- Email blasts can have the recipient for replies set on each one- example- when doing a blast by activity, you can choose options recipient as well
- Email blasts can be sent to those with cancelled registrations.
- The message that gets emailed when someone is moved from a waitlist can be customized
- Email- Reminders are automatically emailed 3 days before set due dates on activities & reservations
- Email blasts to active registrants, those on waitlists, and those with cancelled registrations can be quickly started from the registrations tab of an activity.

**Reports**

- An export is available for the Admins financial software within finance reports

- Comparison reports for activities by popularity and revenue show both metrics at once
- The budget group income summary report can be filtered by budget group.
- New program and membership reports were added to show income and balances together.

**General**

- Temporary passwords can be generated for new members and have notes attached to their email
- The public department info main page and program list have customizable titles & intro text
- If you have Authorize.net or MX Merchant as your gateway, you can access direct refunds (in most cases), credit card storage for future use, in-system batch reporting, and more
- Photo captions are required and they display on hover when viewing public side images. Coming: will be able to update all captions at once
- Using system alerts, home page messages, and account messages to relay information- **Embedding Videos Guide**

**What's Coming:**
Working on limitations to areas, seat caps
MX Merchant
Custom User Privileges
Facility & Checkout Simplification

**You can:** Visit the Online Help for how-to videos and guides
Check the Updates for the newest functionality weekly
Sign up for our Quarterly Newsletter

**Questions from the Chat**

**Tips and Tricks Sheet**

**ADA Compliance Accessibility Updates**

**Color Contrast**
We reviewed all our sites. If you decide to keep your colors after we contacted you, we will ask for a written agreement to acknowledge that we have informed you of contrast issues in legibility and that you take responsibility for any issues your readers may have to that end. We have also turned off the edit colors feature to preserve results. We will be happy to turn it back on for those that request it after we've gone over contrast requirements and the liability agreement together. We've even added a contrast checker to the edit colors area to help you out - and a new color picker too!

**Photo Captions**
The default photos in our system come with alternative text that help those unable to view the images understand what they're displaying. But we haven't always required captions for alternative text on uploaded photos in the past. We have now added this requirement and strongly encourage you to review any photos in your photo pool or ones you've uploaded to programs, facilities, etc. to make sure they all have captions. Images without captions will fall under your responsibility. We regret that we cannot update the image captions for you, but we are here to help you find them and update them yourselves.

**Photo Display**
We're looking into a new home page photo display that is easy to use with a mouse, slower in speed, and may not auto-start. It will be replacing the current home page photo carousel.

**Regarding the Reply-to Email Setting**

We reviewed the email portion of the system, and found that having multiple email addresses in the reply-to setting for system emails or email blasts was resulting in replies not being able to be sent. This was dependent on the email service used to send the reply, and as we cannot control the service being used, we had to limit the reply-to settings to one email address to ensure that all replies are able to be sent properly. To see what your current reply-to settings are, visit Misc > Features Available and scroll to the bottom of the page (This is an advanced setting, so if you need a change, please call). We also recommend taking advantage of a new reply-to setting on email blasts that allows for marking specifically who should get replies when sending bulk emails.