

#95a - CYMS Training Guide – Getting Activities Ready for the Web

(Updated 19 Feb 13)

What Activities Should Appear on the Web?

ACTIVITIES NOT SUITABLE FOR WEB ENROLLMENT:

- Full Day Care
- Part Day Care
- Part Day Pre-School
- Camps (CDC, SA or MST)
- Etc. . . .

RECOMMENDED WEB ACTIVITIES:

- Trips
- Youth Sports/Clinics
- EDGE! activities
- SKIES Unlimited classes (including installment billed SKIES classes),
- Select Boy's and Girl's Club Classes

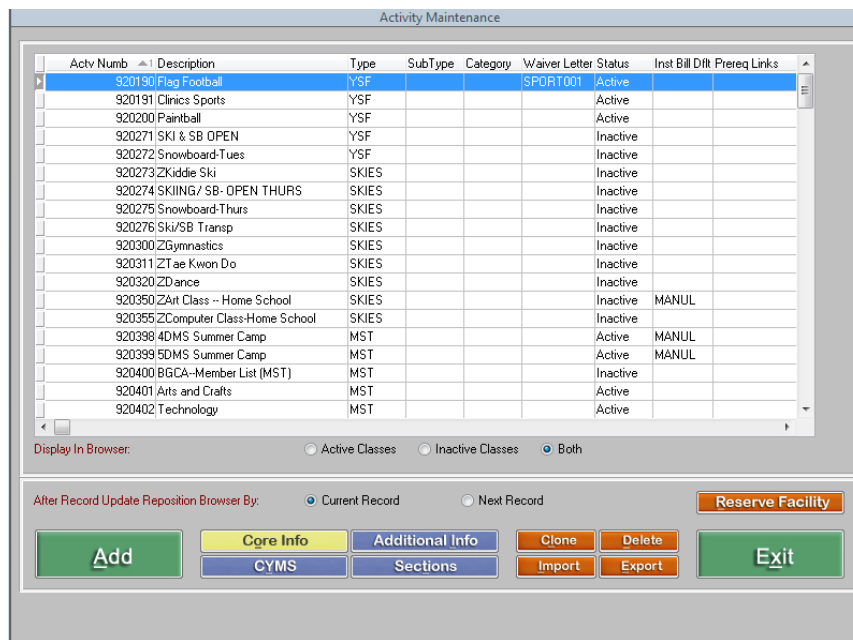
Note #1: If you give [Multi-Child Discounts](#) on Sports, Classes or Trips (if Trips are managed through the Activity Module) where Child 1 is charged one amount and Child 2, a different amount, a special activity setup is required.

- Many bases currently manually change the additional child fee during the enrollment process. Since parents do not have the ability to change their fees on the Web, CYMS must be set up to do it automatically.
- Refer to [Topic Doc -- Multi-Participation_Multi-Class Discounts](#) **BEFORE** adding any programs with multiple child discounts to the Web. Special setup is required!
 - Use the **Section Link Logic**.
 - You **must link a User Code to every Sports Class** since a Blank section link on two different sports classes is essentially a match.

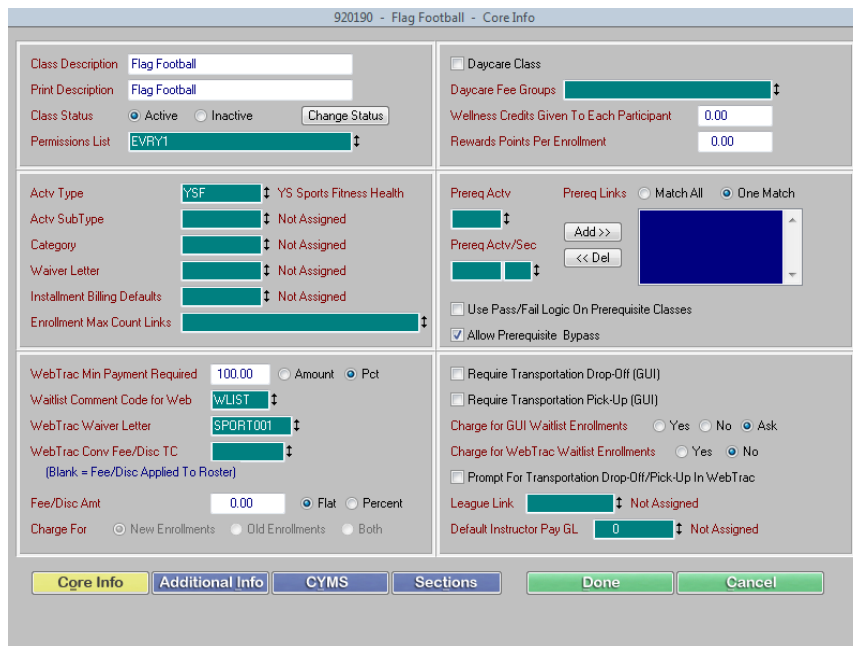
Note #2: If the class you are making Web Ready is an [Installment Billed class](#), specialized setup is required. Refer to the section below titled [Extra Steps for Making Installment Billed Classes Web Ready](#) before adding any installment billed classes to the web.

Making A Single Activity 'Web Ready' for Enrollments

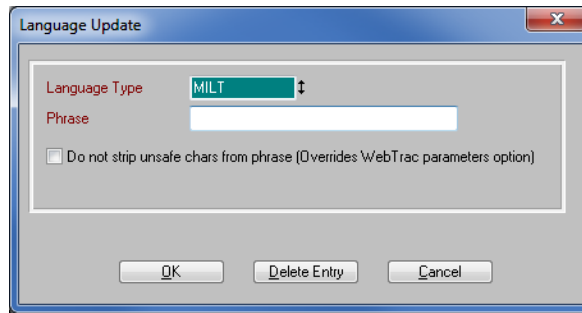
1. Go to **File Maintenance** → **Activity** → **Activity Maintenance**
2. Find and highlight the activity you wish to make available on the web and click **Core Info**.



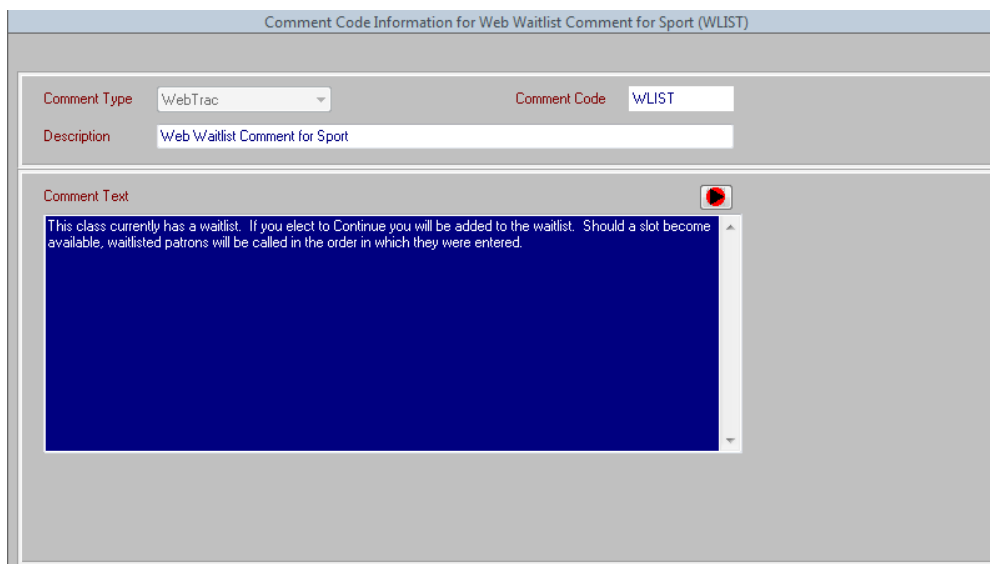
3. Verify the following information on the **Core Info** screen:



- **Class Description.** Ask yourself: “Will this Class Description make sense to a customer on the Web or is it something that makes more sense to my employees?”
 - If you need the Description to say **one thing for your clerks** and **something else for your Web customers**, click in the Class Description field and **hit CTRL-L**.
NOTE: CTRL-L logic works in most **data** fields – like Activity Description, Spec Description, Misc Comments, etc.

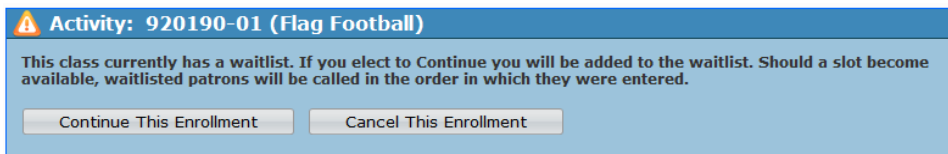


- ❖ **Language Type.** Right click and change to **MILT**
 - ❖ **Phrase.** Whatever you enter here will be the Class Description the customer sees on the Web. If this is blank they will see the Class Description that your clerks see in the GUI application.
 - ❖ **'Do not strip...'** **toggle.** This toggle can be ignored, unless you need to override the 'Strip Unsafe Chars from Lang Codes', if on, in the Web Parameter Records.
 - ❖ If you wish to remove the Phrase that is there click on **Delete Entry**
 - ❖ When finished, click **OK**
- **Category** is a searchable field on the web and a great way for patrons to filter their enrollment options on the web. At some point FMWRC will provide a list of standard categories for all bases. Once that has been done, please verify the Category linked to your Activity is the correct one.
 - **WebTrac Min Payment Required - Mandatory.** If you require **full payment** for enrollments into this program on the Web enter **100.00**. Make sure to toggle **Pct**.
 - **Waitlist Comment Code for the Web.** If you allow 'Rectrac' waitlist enrollments on the web (as determined by your **Webtrac Parameter** settings on the Mod 2 screen in File Maintenance→System→Parameters), you should add a "local" **Waitlist Comment Code for Web**.

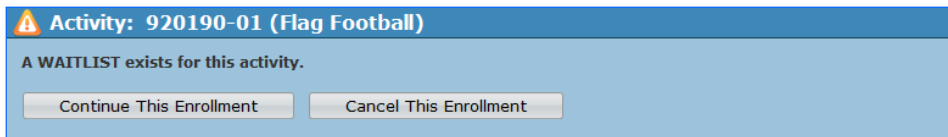


- See sample above for a sports waitlist. If the rules for SKIES or other sports are different, you would create/link a different code:

- During a Web enrollment where a waitlist exists, the information contained in the **Waitlist Comment** will display for the patron.



- **If you leave the Waitlist Comment Code blank**, the message below will be displayed during the Web enrollment:



- To add a **Waitlist Web Comment** to this class, right click, find the code and **Select** it.
 - To make a new **Waitlist Web Comment** enter your code, then **Tab** and click **Yes**.
 - Enter a **Description, Comment Text**, and then click **Done**.
 - If you need to update this comment at a later date, you may do so in **File Maintenance**→**System**→**Other Maintenance**→**Comment Code Maintenance**.
 - **WebTrac Waiver Letter.** Right click and select a unique **Letter Header** that will present the **Waiver Letter** you wish the patron to view prior to this enrollment being added to the shopping cart. If left empty no waiver will show, even if there is a **Waiver Letter** linked above for the activity.
 - When linked patron must acknowledge the waiver (Print or Agree depending on Setup) before they can proceed. If they choose to Disagree the enrollment is canceled.
 - For more details on the setup of this feature see [WebTrac Waiver Letter Setup](#) below.
 - **WebTrac Conv Fee/Disc TC & Fee/Disc Amt.** Leave blank, not in use at this time
 - **Charge for WebTrac Waitlist Enrollments.** Recommending to set this to No and only charge the fee when the child is moved to a enrolled status on the roster
4. When finished, click **Sections** select the section to you want to make Web ready and click **Core Info** to advance to that screen.

Activity:920190 (Flag Football) - 01 - Flag Football - Core Info

Spec Desc:
 Custom Desc:
 Sec Status: Active Inactive Pending Cancelled
 Lottery Opt: Normal Only Loto Only Both
 Season: Year

Beginning Age: Ending Age:
 Beginning Grade: Ending Grade:
 Aging Date:
 DR Born Between: -
 Gender Opt: Coed Enroll Males Only Females Only

Beg Date: Beg Time: Class Count:
 End Date: End Time: Holiday Dates:
 Meet Days: Mon Tue Wed Thu Fri Sat Sun

Fac Type: Gymnasium How Many?
 Fac Loc: Youth Svcs (Drum) One Fac Multiple
 Fac Id: YS Gym

Maximum Count: Minimum Count:
 Maximum W/List Cnt:
 Max Res Count: Max N/R Count:

Fee Codes

Fee Codes	GUI Begin Date	GUI Time	GUI End Date	GUI Time	WEB Begin Date	WEB Time	WEB End Date	WEB Time	Override
	11/01/2012	00:00	01/31/2013	23:59	11/01/2012	00:00	01/25/2013	23:59	<input type="checkbox"/>

Add Select Today All Today Delete

Core Info Core Info 2 Fees Comments WebTrac Done Cancel

5. Verify the following information on this **Core Info** screen

- **Spec Desc:** This is what your clerk sees in Global Sales – to make activities easy to sort/locate and because of limited typing space, some of these descriptions are very cryptic. This is also what the **customer will see** on the web prior to adding the Activity to their Shopping Cart, if the **Custom Desc** below still reads 'Not Assigned'. Carefully evaluate: Is this description specific enough? Is it worded/spelled correctly? Will Web customers understand it?
- **Custom Desc:** Shows you what (if anything) has been entered as a **Custom Description** for the Web customers. If nothing has been entered then it will read 'Not Assigned'.
 - **If you wish to change the Custom Desc for your Web Customers,** click into the **Spec Desc** field – then hit **CTRL-L**. This takes you to the **Language Update** screen (just like on the Activity Name) and gives you a **place to enter a longer and more “customer friendly” Web specific description for the section.**

Language Update

Language Type:

Phrase:

Do not strip unsafe chars from phrase (Overrides WebTrac parameters option)

OK Delete Entry Cancel

- ❖ **Language Type.** Right click and change to **MILT**
- ❖ **Phrase.** Whatever you enter here will be the Description the customer sees (Fig 5a) for this Activity/Section on the Web. If this is blank they will see the Spec Desc that your clerks see in the GUI application (Fig 5b).
- ❖ **'Do not strip...' toggle.** This toggle can be ignored, unless you need to override the 'Strip Unsafe Chars from Lang Codes', if on, in the Web Parameter Records.
- ❖ If you wish to remove the Phrase that is there click on **Delete Entry**

- ❖ When finished, click **OK**

WebTrac screen with Custom Desc Phrase:

920190 - Flag Football							
Activity	Description	Fees	Ages	Dates	Days	Time	
920190-01	U12 Flag Football	\$0	6 years to 12 years	02/02/13 - 03/30/13	M, F, Sa	00:00 - 00:00	  

WebTrac screen without Custom Desc Phrase:

920190 - Flag Football							
Activity	Description	Fees	Ages	Dates	Days	Time	
920190-01	Flag Football	\$0	6 years to 12 years	03/02/13 - 04/27/13	Sa	09:00 - 11:00	  

- **Section Status.** Is the section marked Active?
- **Beginning Age/Ending Age, Beginning Grade/Ending Grade.** Are these correct? Web patrons will ***not be able to override Age or Grade conflicts*** – they simply will not be allowed to enroll.
 - **NOTE:** If you do not process your **Grade Bumps** each year or feel that the **Grades on your family members are NOT accurate** you should enter 0.00-99.00 as your Grade range and **let the Age Range** do the work for you.
 - ❖ Additionally, if you think your grades are not accurate and are using 0.00-99.00 as your Grade range you should also remove Grade from **WebTrac Parameters on the Mod 3 screen** so it isn't a Viewable or Hidden Search Field for the Activity Module.
 - ❖ **Do not** make your Grade Range 0.00-99.00 **and** then leave Grade as a valid search option – if you do that, a Grade 4, 5, etc. search will pop all activities with a grade range of 0.00-99.00. That won't make the customers happy!
- **Aging Date, OR Born Between.**
 - **Aging Date:** This is the date used to calculate the child's age for comparison to the Beginning Age/Ending Age above
 - ❖ Typically this is either the begin date of the section or the end date of the section indicating the child must be within the age range at the start or end of the program.
 - ❖ Leave this blank if using the Born Between option
 - **Born Between:** In what date range does the child have to have been born in to be allowed to play?
 - ❖ This can be useful for the under X type of sport setups. Instead of focusing on an arbitrary date and age you can give a specific range for a child's allowed Date of Birth.
 - If you leave the **Aging Date** and the **Or Born Between** fields blank it will look at the child's age as of the day of the enrollment.
- **Gender Opt.** Is this flagged appropriately?
- **Beg Date/End Date, Beg Time/End Time and Meet Days.** Are these accurate?
- **Max Count, Max Res and Max N/R Count.** All three of these fields should be ***the same number*** – how many total children will you allow to enroll in this class (Web and in-office enrollments)?
- **Max W'List Count.** If the class is full and you allow children to be placed on the 'Rectrac style' waitlist, how many children can be added before you stop taking names?
- **Fac Type/Location/ID.** Is this really where the program will be held? If a patron clicks to view Facility Details, the location, address and phone numbers will display. Do these need to be changed? If so, go to File Maintenance→Facility→Facility Location Maintenance

- **WEB Begin Date.** Select the date you want this section to start allowing registrations via the Web. Double click on the field to make it active then right-click to open the calendar function
- **WEB Time.** Select the time you want this section to start allowing registrations via the Web. Usually one minute past midnight (00:01)
- **WEB End Date.** Select the date you want this section to stop allowing registrations via the Web. Double click on the field to make it active then right-click to open the calendar function
- **WEB Time.** Select the time you want this section to stop allowing registrations via the Web. Usually one minute before midnight (23:59)

6. Click **Core Info 2** to proceed to that screen

7. Verify the following information on the **Core Inro 2** screen:

- **Sports Physical Option.** Do you require a Sports Physical to participate in this activity? Should the physical be **Valid When Enrolling** (on the day of enrollment), **Valid When Section Begins** (on the day the section begins), **Valid Throughout Section** (through to the End Date of the section) or **Not Required**
- **Require Pass Membership.** Do you require someone to have a valid registration before enrolling into this class?
- **Pass Types.** Which pass type(s) must a customer have to enroll into this class. If more than one pass is linked, only one of the passes is required to be active during enrollment.
- **Pass Status Option.** Should the pass be Active When Enrolling (as of the current date), Active When Section Begins (as of the Beg Date for the section) or Active Throughout Section (as of the End Date for the section)?
- **Question Groups.** Question Groups are ways to ask patrons for information during the enrollment process. For example, T-shirt size.
 - For **Question Groups** to work on the web, you must enable it in **Webtrac Parameters on the Mod 1 screen – Show Questions.**

- ❖ Depending on why you have the questions linked and how critical the information is, you might consider requiring answers. This means the patron must provide an answer to proceed. If this is not turned on, the patron can leave the question blank.
- ❖ To make this change go to File Maintenance→System→Other→Question Group Maintenance. Find and highlight the **Question Group**, then click the **Questions** button, then find and highlight question you wish to modify and click **Change** and enable **Require an Answer** on all the appropriate questions.
- You should also carefully review your questions for accuracy (will this question make sense to a person enrolling on the web or is this question more geared to making sense to my clerks?), spelling and use radio sets when you can to better control your answers.
- NOTE: Do not** change your questions if you have started taking enrollments and have answers locked in.
- **Waitlist Ques Groups.** Question Groups are ways to ask patrons for information during the enrollment process. For example, T-shirt size.
- **Section Link.** If this is a Sports class or any class or trip where you allow a Multi Child Reduction, please refer to the **Topic Doc – Multi Participant/Multi Class Discount** and do the special setup exactly as instructed. If initial setup has been done, you can right click in the green field and link the appropriate code.
 - **Example:** If 2 children in the same family sign up for baseball. Child 1 should get charged \$40 and the child 2 should get charged \$35.
 - If this is not set up and linked properly, Child 1 and Child 2 would both get charged \$40.
 - If you do not fully understand this process, please call VSI for Assistance.
- **Keyword Search.** Does the data that is entered here relate to this section? When patrons do searches for programs, this is the field we are looking at to find matches.
 - Don't be afraid to enter more than 1 word.
 - For example, if it was baseball season, parents might search for baseball in several different ways -- so, your key word search might look something like this:

Baseball T-Ball TBall T Ball Softball
 - **If this field** is empty we will use the **Spec Desc** on the **Core Info** page to populate the field once **Done** is clicked. We **do not** use the **Phrase** field on the **CTRL-L** screen for matches.
 - If the Keyword Search field is 'manually' populated these will be the only terms used for search matching on the web.
- **Receipt Document.** Upon completion of the web activity enrollment a customer will have the ability to print their web receipt and the “receipt document(s)” you link here
 - **For example**, you might have a marketing flyer that shows all the trips that are occurring this year that you want everyone to get when they sign up for a trip
 - This document can be linked by right clicking in the field and either highlighting an existing Doc Code(s) and clicking **Select**, or clicking New to create a new code.
 - For more information on creating a new code please see the section below titled **Standard Document Code Maintenance**
 - Document codes linked here will only print out during a Web or GUI enrollment if selected to do so within the Document Code maintenance
 - ❖ For example: There can be one document code link for a specific document to print with Web Enrollments and completely different code linked to print a completely different document during an enrollment at the office
- All other **Core 2** fields have no bearing on Web enrollments.

10. Click **Comments** to proceed to the **Comments** screen.

Activity:920190 (Flag Football) - 01 - Flag Football - Comments

Comment Code: PHY ↓ Physicals View

Misc Comments

Brochure Code: Not Assigned View

Brch Comments

Maint Code: Not Assigned View

Maint Comments

Roster Code: Not Assigned View

Roster Comments

Tickler Code: Not Assigned View

Tickler Cmnts

Core Info Core Info 2 Fees **Comments** WebTrac Done Cancel

11. Verify the accuracy of the following information on the **Comments** screen.

- **NOTE:** All information linked in the **Comment Code**, **Misc Comments**, **Brochure Code**, **Brch Comments** are viewable on the Web when a patron clicks for Item Details (for example, during an Activity Search) – so all of these notes need to be reviewed within CYSS and also be cleared by your local Marketing Office before you place the activity on the web.
- **Comment Code** and **Brochure Code**. These are typically generic in the sense that you can create one and link it to more than one section.
 - **For example**, you might have a **Comment Code** linked to all your Baseball sections that tells parents to arrive 30 minutes early for games and that all equipment will be provided.
 - A **Brochure Code** might be more marketing slanted than informational for the parent. **For example:** Enroll in Baseball now!
 - Recommend using the Activity Setup-Skies Sample Web Descriptions document for help entering the Brochure Codes.
- **Misc Comment** and **Brochure Comment**. These are typically more specific to the **section** you link them to.
 - **For example**, you might want to enter **Misc Comments** to Section 1 saying that their games will be played on Mon and Wed at 6:00 and another Misc Comment to Section 2 that says their games will be played on Tue and Thu at 6:00.
 - Recommend using the Activity Setup-Skies Sample Web Descriptions document for help entering the Brochure Comments.

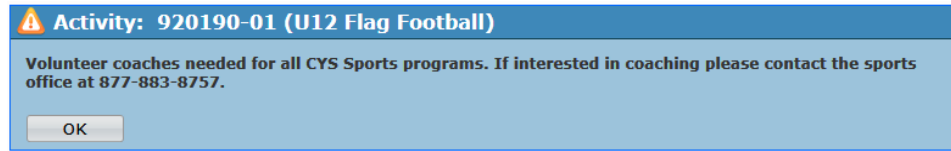
12. Click **WebTrac** to proceed to the **WebTrac** screen.

13. Verify the accuracy of the following information on the **WebTrac** screen.

- **Allow Section Reg on Web**: Should be set to **Both**
- **Display Section on Web**: Should be set to **Yes** (once everything is ready)
- **Allow Waitlist Enrollments on the Web**: Do you allow web patrons to put themselves on the 'Rectrac style' waitlist (not the child care waitlist)?
 - This section level setting **does not** override the **Allow AR/RN/TP Waitlist Reg** toggle found on the **Mod2** screen of the **Web Parameter Record**
 - If you wish to allow waitlist enrollments on a program, it must be allowed **both** here at the **Section level and** at the **Web Parameter level**.
- **Comment Code**: Yet another place to enter information about your program that will show on **both** the customer's web receipt **and** when the customer clicks to view Item Details.
 - **Why use this Comment Code vs the Comment Code on the Section Comments/Misc screen?**
 - ❖ The **Comment Code on the Web/Tele screen** relates strictly to your web customers and prints **only on Web receipts**.
 - ❖ The **Comment Code on the Comments/Misc screen** relates to your Web and office (GUI) patrons and **prints on both receipts**.
 - If a Comment Code and Web Comment Code exist on the same class a Web Enrollee **will see both comments on his/her receipt**. A GUI enrollee will only see one.
- **Web Ticklers**. Typically these are reminders for parents that pop up during the web enrollment process.
 - **Comments** and **Misc Comments** do not pop up during the web enrollment process.
 - However, **Comments** and **Misc Comments** do print on the Web and GUI receipts. Ticklers and Brochure Comments **do not** print anywhere.

- Take advantage of these various ways to communicate activity details to your patrons.
- Remember, on the web you don't have clerk/patron interaction so anything you can do to prevent a phone call will pay dividends later

Example of a Web Tickler:



- **Web Section Image.** FMWRC has provided a variety of images that can be linked to your activity sections. These images are all housed on the master server at Fort Sam Houston. You cannot add local photos. For a list of images and image names see the Activity Setup-Draft Web Image Catalog.pdf.
 - **Example:** You may want to link a .jpg photo file of children playing soccer to your soccer classes, etc.
 - To link a Web Section Image to your class enter the following:


```
\\rt_cy\<yourphoto>.jpg
```

 where <yourphoto> is the actual name of the .jpg on the Web Server.
 - This image displays when the patron clicks to view Item Details and during certain program searches on the web.
 - These images are centrally stored on the **Web Server** in Texas in the rt_cy folder.
 - If a base wishes to use an image that is not already out on the Web Server, FMWRC must approve it. First check available photos. If you feel you have a photo to add to the Army-wide catalog, email it to linda.shiles@us.army.mil for consideration. Photos will be cropped and sized to fit the web format (130 x 130).
- **Res Max Count:** Enter the maximum number of patrons you will allow to sign up on the web.
 - **Example:** On the **Section Core 2 screen** your class may be set up to accept a Max Count of 50 people.
 - On the **Web/Tele screen** you can indicate how many enrollments of that 50 can be done via the web.
 - Typically, the number here would match the Section Core 2 Max Count, but if you have concerns that all patrons might not have access to computers, you may wish to limit your web enrollments.
- **N/R Max Count:** Enter the same number as above.
- **Click Done:** Your class should now be viewable and open for registration on the web. It is a good idea to look at all aspects of the class from the web perspective to review setup for accuracy and text spacing. **If you wish to only make your class viewable on the web but not open for registrations** you can set the **Allow Section Reg on Web** to **None** and the **Display Section on Web** to **Yes**. This allows you to 'see' what you are doing (and your customers can see what you are doing as well) **but** the web patrons will not be able to enroll. Once you are done, make sure you remember to set the **Allow Section Reg on Web** back to **Both**.

Extra Steps for Making Installment Billed Classes Web Ready

Prior to making your **Installment Billed** classes (your SKIES classes) ready for web enrollment, be aware that patrons signing up via the web **will not be allowed** to set themselves up for **Auto Debit** until Version 10.2. The other consideration in allowing an installment billed class to be enrolled in on the web is in regards to the initial fee to charge. Do we always charge \$0, some flat amount, or should it be contingent on how certain questions are answered? These details are important to address and require very specific setup. Please see below for further details.

Caution: You should **not** be putting installment billed programs like Full Day Care, Part Day Pre-School, CDC Camps, SA Camps or MST Camps, etc. on the web !!!

To make an **Installment Billed** class (like Skies) Web Ready for enrollments, **in addition to steps 1-23** found in the above section (**Making A Single Activity 'Web Ready' for Enrollments**), you will **ALSO** need to do the following:

1. Go to **File Maintenance** → **Activity** → **Activity Maintenance**. Find the activity and click **Core Info**.
2. Make a note of what is in the **Installment Billing Default** field. We will need this later.



3. Click **Sections**
4. Find the Section and click **Fees**.
5. Go to the **Fees** Screen.

Activity:950400 (Taekwondo Classes) - 01 - Taekwondo White - Fees/Charges

Bill Code	Order #	Fee Req	Fee Codes	Discount	Fee Amount	Fee Count	IB Amt	IB Init	Instructor	On/After
SKIES	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	70.00	35.00	No	
SKILC	2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	0.00	0.00	No	

Add Delete

Late Fee Amount To Assess: 0.00 Begin Assessing Late Fee On: [dropdown] Multi-Part/Multi-Class Disc: [dropdown]

Late Fee Line Number: [input] Charge Late Fee Mult Times If Unpaid Prorate Fees By Class Count

Require Manual Fee Calculation

Core Info Core Info 2 **Fees** Comments WebTrac Done Cancel

- The **Fee Amount** field is **not** relevant for Installment Billed classes. Enter **0.00**
- The **IB Amount** represents the amount you wish to charge this person each time you run billing for this program. If this is a monthly billed class, this should represent a monthly amount.
- The **IB Init Amount** represents the amount that **every** patron will be charged during the enrollment process.

Scenario 1: Patrons who sign up in February **will not** be allowed to participate in February's classes and **will not** be charged a flat or prorated fee during the enrollment process.

Bill Code	Order #	Fee Req	Fee Codes	Discount	Fee Amount	Fee Count	IB Amt	IB Init	Instructor	On/After
SKIES	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	70.00	0.00	No	
SKILC	2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	0.00	0.00	No	

- **IB Amount** is \$70.00 (the monthly fee for this program).
- **IB Init Amount** is 0.00 because we don't want to charge this customer during the enrollment process.

Scenario 2: Patrons who sign up in February **will** be allowed to participate in February's classes and **will** automatically be charged a flat fee during the enrollment process. In this example, if you sign up on 2/2, 2/8 or 2/26, etc. you would be charged \$35 during the enrollment process.

Bill Code	Order #	Fee Req	Fee Codes	Discount	Fee Amount	Fee Count	IB Amt	IB Init	Instructor	On/After
SKIES	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	70.00	35.00	No	
SKILC	2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	0.00	0.00	No	

- **IB Amount** is \$70.00 (the monthly fee for this program)
- **IB Init Amount** is \$35.00 to be charged to all patrons during the enrollment process.

Scenario 3: Patrons who sign up in February will be prompted with Questions during the enrollment to determine what their fee should be. The customer's answer will determine their fee. If you go with this method, the onus will be on the instructor to ensure that children in his/her sessions have truly paid and paid the correct amount.

- To set up **Question Groups that charge fees** please refer to the [Topic Doc – Using Question Groups to Charge Fees 10.3.-w.pdf](#).
 - In this example, no matter when the customer signs up they will be prompted with the following similar questions. If you go this route you need to carefully work on the phrasing of these questions – ultimately only want the customer to answer 1 of them. We recommend contacting VSI for assistance.

Activity Registration Questions

I will begin attending this class next month

I will begin this program prior to the 15th

I will begin this class after the 15th

REQUIRED DATA *

- **If Question 1 is answered yes**– the customer would not be charged any up front fee, but would be setup for ongoing Installment billing beginning the following month.
- **If Question 2 is answered yes** – the customer would be charged an entire month's fee up front and be setup for ongoing Installment Billing.
- **If Question 3 is answered yes** – the customer would be charged a ½ month's fee up front and be setup for ongoing Installment Billing.

• **Scenario 3 Screen Shot: Sample Questions**

Number	Answer Type	Text	Fee Type	Active	Question Group
1	Logical	I will begin attending this class next month		Yes	IBQ4SKIE
2	Logical	I will begin this program prior to the 15th	WHOLE	Yes	IBQ4SKIE
3	Logical	I will begin this class after the 15th	HALF	Yes	IBQ4SKIE

- **Notice** – Question 1 is **not** linked to a Fee Type since we do not want the customer to be charged if they do not plan on attending the class until the following month.

• **Scenario 3 Screen Shot: Fees**

Activity:950400 (Taekwondo Classes) - 01 - Taekwondo White - Fees/Charges

Bill Code	Order #	Fee Req	Fee Codes	Discount	Fee Amount	Fee Count	IB Amt	IB Init	Instructor	On/After
SKIES	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	70.00	0.00	No	
SKIES	2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	0.00	70.00	No	
SKIES	3	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0.00	1	0.00	35.00	No	
SKILC	4	<input type="checkbox"/>		<input type="checkbox"/>	0.00	1	0.00	0.00	No	

Shift the screen to the right to see the Fee Types that will used based on the selections made.

Activity:950400 (Taekwondo Classes) - 01 - Taekwondo White - Fees/Charges

Bill Code	Discount	Fee Amount	Fee Count	IB Amt	IB Init	Instructor	On/After	On/Before	Fee Type	Fee Rec
SKIES	<input checked="" type="checkbox"/>	0.00	1	70.00	0.00	No				
SKIES	<input checked="" type="checkbox"/>	0.00	1	0.00	70.00	No			WHOLE	
SKIES	<input checked="" type="checkbox"/>	0.00	1	0.00	35.00	No			HALF	
SKILC	<input type="checkbox"/>	0.00	1	0.00	0.00	No				

- **IB Amount** is \$70.00 (the monthly fee for this program).
- **IB Init Amount** is either \$70.00, \$35.00 or \$0.00 depending on the selections made during the enrollment process.

Special Note: Why You Can't Use Prorate Fees By Class Count:
 When Prorate by Class Count is selected, the system takes the IB Init Amount and prorates based on the **entire** duration of the class rather than the rest of the current month.

6. Once you have your Fees updated correctly click **Done**.
7. Go to File Maintenance→System→Finance Codes Maintenance→Installment Billing Default Template Maintenance.
8. Select the **Default Billing Template** you wrote down in Step 2 and click **Change**.

The screenshot shows a software configuration window for 'Installment Billing Default Template Maintenance'. The 'IB Default Code' is 'SKIES' and the 'Description' is 'SKIES Monthly I-Billing'. Under 'Interface Mode', 'Auto' is selected. Under 'Web Usage Allowed', 'Always' is selected. The 'Billing Frequency and Dates' section has 'Monthly on This Day' selected with 'Day 1' set to 1. The 'Billing Start Date Rules' section has 'Start with Next Billing Cycle' selected. The 'Pay Options' section has 'Auto-Debit from Credit Card' and 'Installment Bill' selected. The 'Default Pay Option' section has 'Installment Bill' selected. At the bottom, there are 'Done' and 'Cancel' buttons.

9. Key Fields:

- **Interface Mode:** Must be set to **Auto**.
- **IB Required:** Must be selected.
- **Web Usage Allowed:** Must be set to **Always**.
- **Billing Frequency and Dates:** Usually this would be **Monthly on This Day** and **1**
- **Billing Start Date Rules:** Typically this would be Start with Next Billing Cycle
- **Skip:** Typically set to 0
- **Default Number of Bills:** 60
- **Allowable Pay Options:** Select **Auto Debit from Credit Card** (if you allow customers auto debiting) and **Installment Bill**.
 - **Note:** With version 10.3 customers who sign up on the web **will** be able to set themselves up for Auto Debit.
- **Default Pay Option:** Select Installment Bill

10. Click **Done**.

To Remove an Activity from the Web

1. Go to **File Maintenance → Activity → Activity Maintenance**
2. Find the activity you wish to remove from the web highlight it and click the **Sections** button.
3. Find the section you wish to remove from the web highlight it and click the **WebTrac** button to proceed directly to the **WebTrac** screen.

Activity:920190 (Flag Football) - 01 - Flag Football - WebTrac

Allow Section Reg on Web: None
Display Section on Web: No
Allow Waitlist Enrollments on Web?

Comment Code: wEBCM Web Comment View
Web Tickler: COACH Volunteer coaches needed View
Web Section Image: cys3.jpg
Web Up Sell Sections:
 Web Event
Event Title:

Res Max Count: 35 Res Enrolled: 0
N/R Max Count: 35 N/R Enrolled: 0

Core Info Core Info 2 Fees Comments * WebTrac * Done Cancel

- **To disallow further enrollments into this program on the web, Allow Section Reg on Web** should be set to **None**
 - **To completely remove this program from the web, Display Section on Web** should be set to **No**
4. Click Done

Making Activities 'Web Ready' for Enrollments – In Bulk

There is a “bulk process” to get your Activities web ready; however, VSI recommends that at least for the first year you do not use this process. You need to get fully comfortable with the **manual process** and the meaning of each field/setting before you start applying settings to groups of activities !!!! One wrong toggle could cause a lot of “undoing” time.

You should only use this program **AFTER** you have **verified specifics of your setup for each class** – Dates, Gender, Descriptions, Fees, Max Counts, etc. Remember once a class is on the web customers can enroll into them regardless of whether your data is ‘right’.

As always the **F1** help screen is very useful if you have questions about specific fields not answered here.

1. Go to **Utilities → System → Webtrac Utilities → Bulk Webtrac Settings**

2. Enter the **Beginning Activity** and **Ending Activity**. Double check your range to make sure you truly wish to make every class in the range available for enrollment on the web.
3. Toggle to **Include Active Sections** only. Leave the **Section Date Range** 7/1/1985 thru 12/31/2099.
4. Turn on the toggle **Update Enroll/Display**.
Web Enroll: Select **Both** and **Web Display:** Select **Yes**.
5. Turn on the toggle **Update Waitlist Toggle** if you wish to update the toggle **Allow Waitlist Enrollments on the Web** for the selected activities.
6. Click **Next >>**
7. Select the toggle to **Update Webtrac Enroll Dates** there are many ways this setup could be done. Below is a common example. As always the **F1** Help should be used for field level help.

- Select the **Change** radio button so that existing line Core 1 data will be updated
- Click **Add** to insert a new line item
- The **Fee Codes** column should stay blank since they are not used in CYMS
- The **Web Beg Date** and **Web End Date** can be left at the default
- The **Web Time** after each of those dates should be set to 00:00AM and 23:59PM respectively

Special Note: Why you must use 24Hr Standard and AM/PM:

While it is expected that your database is set to the 24Hr standard time method this Utility needs to have the AM and PM fields filled in. So if you enter it as above you will get the desired entry on the Core Info screen for your database

- The **+/- Beg Days** and **+/- End Days** work with the **Beg Date Opt** and **End Date Opt** by adding or subtracting days from your selection
 - **Beg Date Opt** allows the beginning Web Enrollment dates to be set by the **Selected Date** to the left (**Web Beg Date**), or dynamically based on the **Sec Beg Date**, or the **Beg Enroll Date** on the Activity/Section Core Info page
 - **End Date Opt** allows the ending Web Enrollment dates to be set by the **Selected Date** to the left (**Web End Date**), or dynamically based on the **Sec Beg Date**, **Sec End Date**, or the **End Enroll Date** on the Activity/Section Core Info page
 - The **Override** toggle should remain off
8. Select the toggle to **Update Webtrac Enrollment Counts**
- **Res Max Count and N/R Max Count:** Toggle to **Use Section Count** unless you only want a certain percentage of parents to be able to sign up via the web
9. Select the toggle for **Update Webtrac Comment Code** if you wish to set the same code for all activity/sections in your range
10. **Click Process** (there is a **Next >>** button, however, that screen is for other modules)

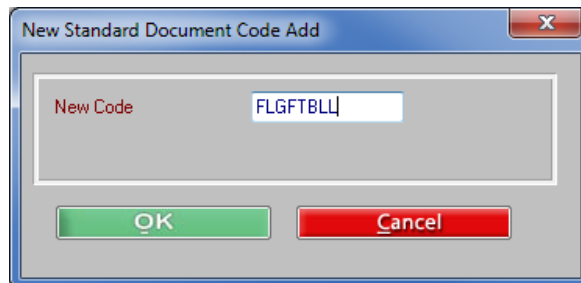
WebTrac Waiver Letter Setup

The WebTrac Waiver Letter can be the same as the Waiver Letter linked to the activity or it can be unique for the web. It is displayed to the patron during a Web Activity Enrollment. There are a few pieces that need to be in place in order to do this.

Standard Document Code Maintenance

If you find that there is a new **Document Code** needed you can either create on the fly or use **File Maintenance → System → Other Maintenance → Standard Document Maintenance**. The second option is also where you would modify an existing **Document Code** see below

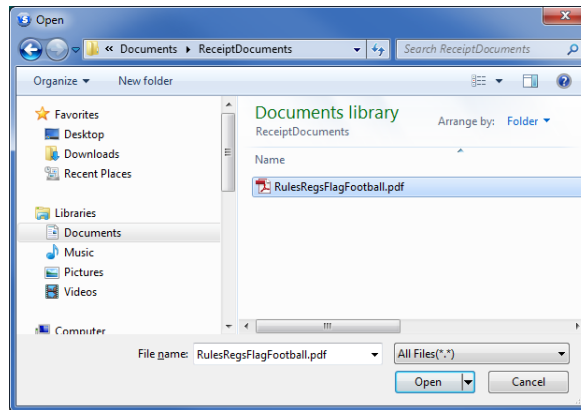
- Click on **New** if in the **Document Links** of **Activity/Section Maintenance** or **Add** if in **Standard Document Maintenance**. You will be taken to the **New Standard Document Code Add** box



- Add your code and click **OK**

- You will be taken to the **New Standard Document Code Screen**

- Apply to GUI** or **Apply to WebTrac**: Toggle on if this code will apply to GUI or WebTrac transactions
- Description**: Provide a description for this code. Helpful when choosing a code later on
- File Name**: Right click in this field to be taken to an **Open** dialogue box. Browse to and select your file that is accessible to your client either on a local or mapped hard drive. Once selected click on **Open**



- NOTE**: Once you click **Open** the file will be stored in the database so that it is accessible to any client workstation and the Web. Depending on your settings the file will be removed from the location where you found it. You can always use the RecTrac File Explorer later to find the document (ALL Files In RecTrac Database->documents->standarddocs) and reprint it manually if need be
- Print For**: Select New Record since all payments are made at the time of registration. The other options can be ignored
- Click **Done**

Your **Document Code** is now ready for use.

If you need to modify an existing **Document Code** go to **File Maintenance → System → Other Maintenance → Standard Document Maintenance**

- Highlight the code that needs modification and click **Change**

- Modify the settings as needed.
- If there is a change to the document itself make the changes first and save the document on the workstation. You can then re-link the document to start using the changes