

01c - CYMS Quick Guide – Daily Processing Device (10.3 – May 2011)

The **Daily Processing Device** controls which screen users default to when clicking on the **Global Sales** icon and selecting a household. **For example**, clerks in the Centers might default to **Global Sales Payment** because they take payments on a daily basis, while clerks at Central Registration might default to **Pass Registration** because they primarily issue passes before collecting any money.

While this is a great time saving feature for day-to-day operations at the Installation level, it makes the process of writing Training Guides more difficult, since not everyone will be looking at the same **Global Sales** screen.

To help avoid confusion, the top of all relevant Training Guides now contain a **Daily Processing Assumption** that explains which default view (Global Payment Processing, Activity Registrations or Pass Memberships) is being used.

Your default view may not be the same as the **Daily Processing Assumption**, and that is why we have prepared this document.

This Training Guide explains the different default views in detail and tells you how to maneuver from your default view to the relevant processing screen needed to complete a transaction in CYMS.

More About the Daily Processing Device:

The **Daily Processing Device** controls a user's default Global Sales view. To edit your Daily Processing devices:

Go to **Files → System → Device Maintenance → Printer/Device Maintenance**

Highlight the Daily Device you wish to edit and click **Change** and then click **Next**. This will bring you to the **Global Sales** screen of the device.

Figure 1: The Daily Processing Device/Global Sales screen

The screenshot shows the 'Global Sales' configuration screen for a device. The interface includes a red header with four tabs: 'Daily Proc', 'Global Sales' (which is selected), 'Modules', and 'Facility Grid'. The main content area is split into two columns. The left column contains a section titled 'Prompt for Household in:' with five checkboxes: 'Facility Reservations' (checked), 'Point-of-Sale' (unchecked), 'Rental Reservations' (checked), 'Court Reservations' (checked), and 'Global Sales' (checked). Below this is a 'Global Sales Default' label and a dropdown menu currently set to 'Activity Registration'. The right column contains several sections of settings: 'Output Selection Default to Print' (unchecked), 'Output Selection Default to Preview' (checked), and 'Output Selection Default to Email' (unchecked); 'Auto-Select Passes for Member Visits in Global Sales' (checked), 'Auto-Select Daily Visits For NonMembers in Global' (unchecked), and 'Visit Processing from HH Selection' (unchecked); 'Display Family Member Links' with three radio buttons: 'On Selection' (selected), 'In Comments', and 'Never'; and 'Default to Payment Screen on Open of Global Sales' (unchecked) and 'Default to Module Details Screen for Payment' (checked). At the bottom of the screen are three buttons: 'Next', 'Done', and 'Cancel'.

Important Fields on the Daily Processing Device:

Three (3) fields control the default Global Sales view:

1. **Global Sales Default** field, located on the left-hand side of the screen
2. The **Default Payment Screen on Open of Global Sales** toggle, located on the lower right-hand side of the screen
3. The **Default Module Details Screen for Payment** toggle, located immediately below that.

Global Sales Default: This drop-down list controls which module you want CYMS to default to when clicking Global Sales and selecting a household.

Default To Payment Screen on Open of Global Sales: Enabling this toggle will override the **Global Sales Default** field and bring users immediately to the **Global Payment** screen for the household selected, allowing them to quickly and easily enter payments. This is a great default setting for most clerks in most centers.

Default to Module Details Screen for Payment: This should be selected for **all** CYMS users.

EXAMPLES

Example 1. If your **Global Sales Default** drop-down is set to **Activity Registration** and your **Default to Payment Screen on Open of Global Sales** is **de-selected**, your screen will look like this when you go into Global Sales and select your household:

Mem	Last Name	First Name	Birthday	Age	Ge
1	Messier	John		0 Yr	Fer
2	Messier	Kathy		0 Yr	Ma
3	Messier	Liam	08/24/2005	5 Yrs 8 Mos	M

Figure 2: The Global Sales screen set to default to Activity Registrations, as described above.

Users wanting to register a child for an activity would simply right-click in the **Activity No** field located on the upper right-hand corner of the screen. Should users need to process a pass registration, transfer or renewal, they would click the appropriate **Hot Button** located on the bottom of the screen, and the selection box on the upper right will change accordingly.

The screen shot below shows the change after clicking **Pass Transfer**.

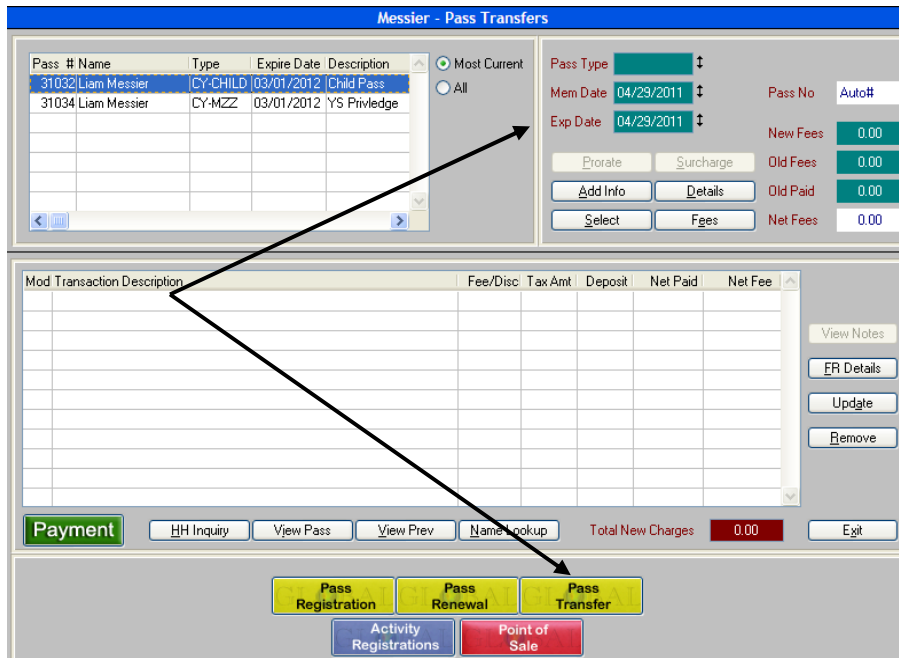


Figure 3: The Global Sales screen now set for Pass Transfers after clicking the ‘Pass Transfer’ button. Note the change of fields on the upper right.

Example 2: If your **Global Sales Default** drop-down is set to **Pass Registrations** and your **Default to Payment Screen on Open of Global Sales** is **de-selected**, your screen will look like this when you go into Global Sales and select your household:

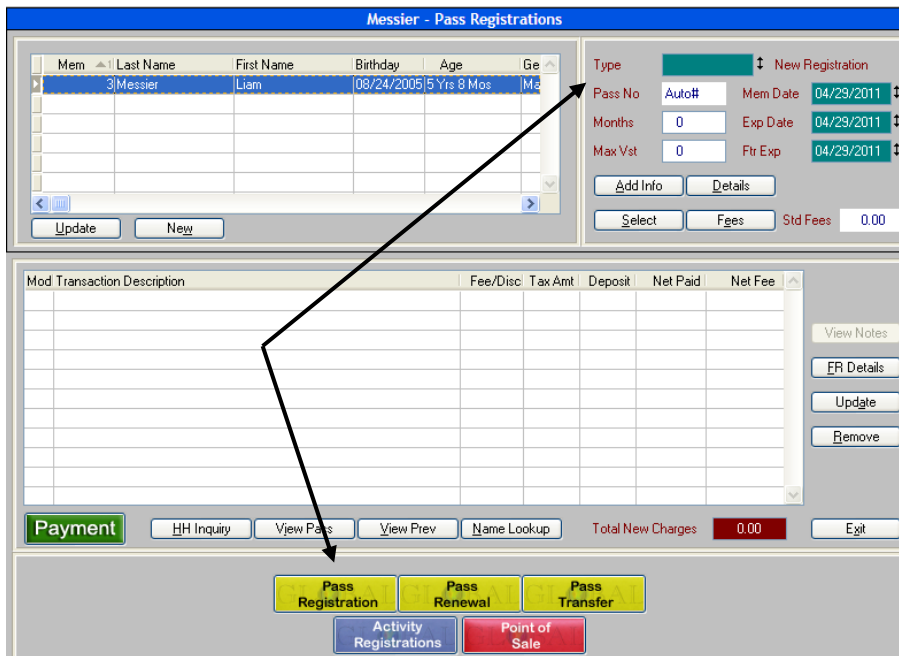


Figure 4: The Global Sales screen set to default to Pass Registrations, as described above.

As above, if the user’s screen defaults to Pass Registration, and the user has to perform a Pass Transfer or Activity Registration, the user would simply click the correct **Hot Button** at the bottom, and the top right of the screen will change appropriately.

Example 3: If both the **Default to Payment Screen on Open** and the **Default to Module Details** toggles are **selected**, your screen will look like this after clicking Global Sales and selecting your household.

This is the **best default setting for most clerks in most centers.**

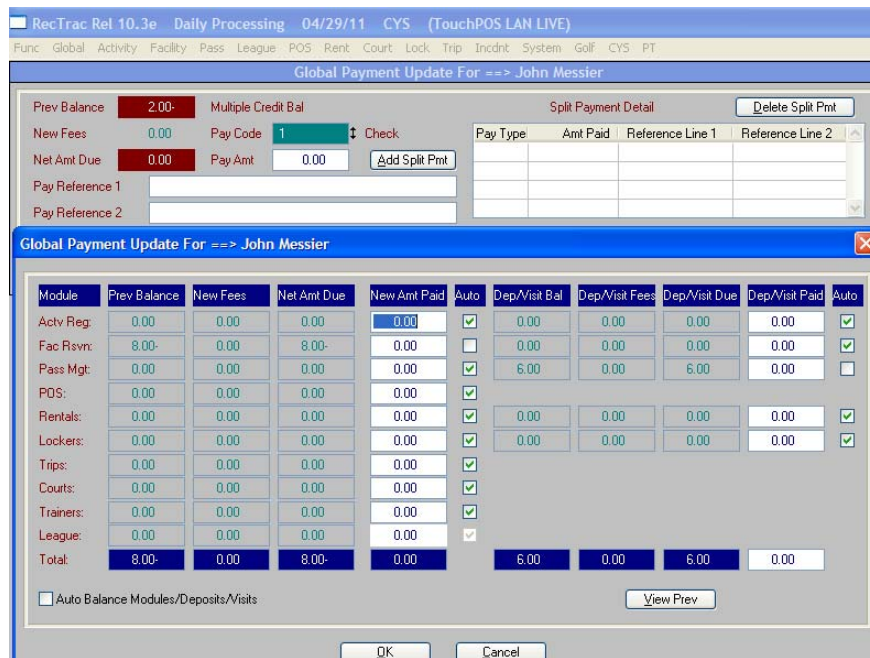


Figure 5: The Global Sales screen set to default to the Module Details Payment screen, as described above.

Processing a Registrations, Transfers and etc. from this default view:

If users with this default setting have to process an Activity Registration or Pass Transfer, etc, they would simply click **Cancel**, located at the bottom of the screen, and then click the correct **Hot Button** located at the bottom of the **Global Sales** screen. The top half of the screen will change appropriately, as **Figures 6** and **7** illustrate.

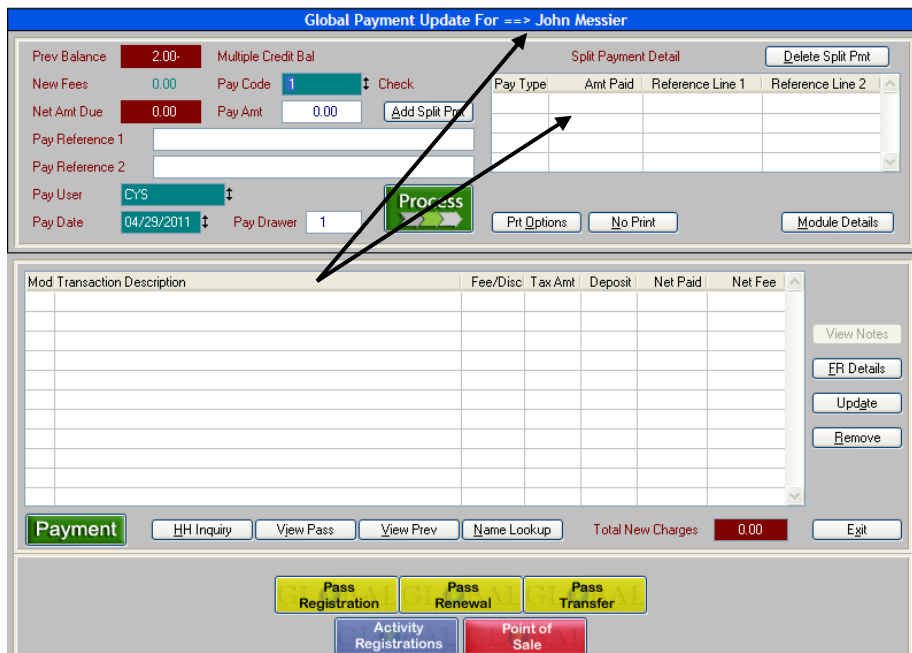


Figure 6: The Global Sales screen after the user clicks 'Cancel' to get out of the Module Details screen. The *Split Payment* browser, located on the upper right-hand corner, indicates the user is still on the Payment Screen. Note that the selected Household (John Messier) remains the same.

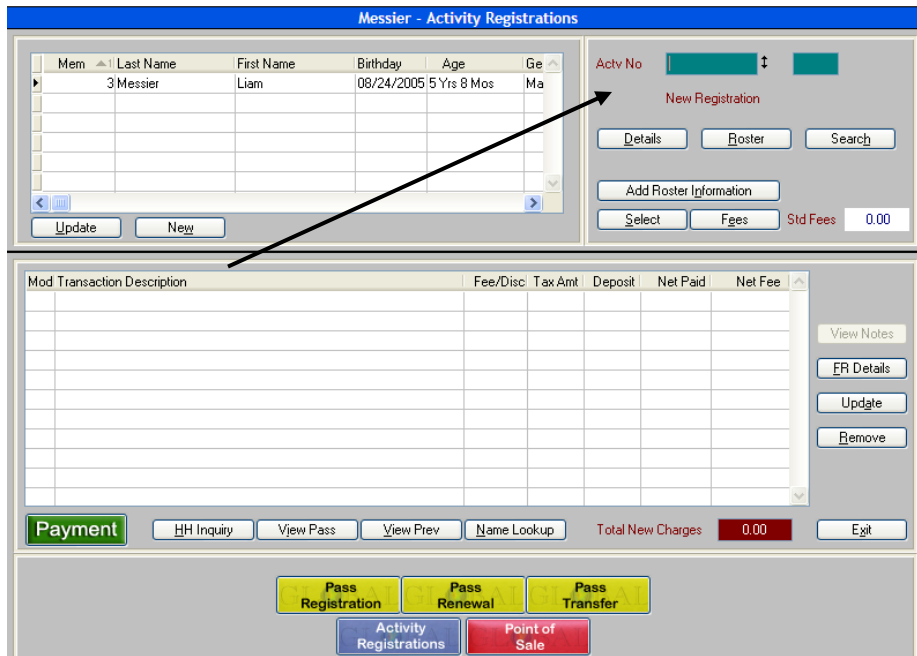


Figure 7: The Global Sales screen after the user clicks Activity Registrations. Note how the field on the upper right-hand corner of the screen has changed.

VSI Recommendations:

- **All CYMS users should have *Default to Module Details Screen for Payment* selected.**
- **Most Clerks will have both *Default to Module Details* and *Default to Payment Screen on Open of Global Sales* selected. (See Figure 5 above)**
- **Most Managers will *not* default to the Payment screen on Open of Global. Their Global Sales Default will be Activity Registration. (See Figure 2 above)**
- **Central Registration Clerks and Managers will *not* default to the Payment screen on Open of Global. Their Global Sales Default will be Pass Registration. (See Figure 4 above)**

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