

Standard Program/Activity Creation

Here is a quick step-by-step on how to create an activity. Activities are what your customers will be registering for. They populate your calendars and their registrants populate their rosters.

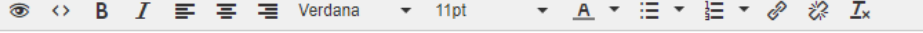
Step one: Creating a Program

Add New Program

Add New Program

Program Name:

Description:

 Verdana 11pt

This Program will train you how to enter an activity

Powered by TinyMCE

Words: 10

Upload Image

Order #:

Show Seat Counts

Hide From Public

Use Program Sub-Headings

Hide Seat Count Starting on:


Coordinator Name:

Coordinator Phone:

Program Type:


Standard Activity Team Sport Advanced Activity

[Change Photo](#) | [Remove Photo](#)



1. Programs house activities within them. For example, create a program called Yoga to house the activities: Beginner Yoga, Intermediate Yoga, and Advanced Yoga.
2. You can also provide a brief description and add a Program photo.
3. To create a Standard Activity, make sure the Standard Activity is toggled.

Step two: Adding notes and Program level settings



The screenshot shows the 'Program Info' page in the MyRec.com system. At the top, there are tabs for 'Program Info', 'Fee Adjustments', and 'Expense Groups'. Below these is a search bar for activities with 'Start Date' (10/23/2017) and 'End Date' (10/23/2018) fields, and buttons for 'Add Activity' and 'Edit All Activities'. The main content area is titled 'Activity Training Program' and includes a description: 'This Program will train you how to enter an activity'. There is a photo of a woman smiling. Below the photo is a section for 'Add New Notes' with a 'Show Inactive Notes' checkbox. At the bottom, there is a 'General Information' section with a list of instructions: 'Adding an activity is easy', 'Start by clicking Add Activity', 'You can edit all activities by clicking Edit All Activities', 'Apply fee adjustments to all activities in the program by click the tab at the top of the page', and 'You can apply Expense groups to all activities by click the tab to the right of that'. A footer link 'Add/Edit Links And Forms' is also visible.

1. You can apply Program level adjustments, and expenses from this page.
 - a. Fee Adjustments – You can apply adjustments on the Program level that will affect all activities that fall under the Program.
 - b. Expense Groups – You can also apply expense groups that will take effect on all activities within the Program.
2. Adding Notes is a good way to help display additional info about the Program.
3. Edit all Activities allows you to make changes to all activities within the program efficiently.
4. When you are ready to add an activity, click the Add Activity button to the top right.

Step three: Basic Activity Info

Add New Activity - Basic Activity Info

Basic Info

Activity Name **Activity Code** **Order #**
 Training Activity 1.00

Category **Alt Category**
 test test2

[Add Category](#)

Instructor
[View/Add Coaches & Instructors](#) | [Coach/Instructor Permissions](#)

Activity Notes [Copy to Receipt Notes](#)
 This is a test activity

Receipt Notes
 This is a test activity

Maintenance Notes
 Post notes for you maintenance staff here

Date to Show on Public Site:
 11/01/2017

Hide This Activity From Public
 Hide This Activity From Management

Special Settings

Make this Activity a Sponsorship/Donation **Promo Type:** None **Required Membership:** -- Select Required Membership --

Ask Public For Donation

Scholarship Fund: -- Select a Fund (Optional) --

Show Advanced Required Membership Options

Show Promotional Activities **Show Required Activities**

Cancel
Next Step >>

1. At this step you assign the basic info about the activity including: title, how it is categorized, notes specific to the activity, etc.
2. Special Settings – These are settings that are not as common, or required.
 - a. Sponsorship/Donation – This allows you to create an activity that gives customers the ability to donate directly to your department.
 - b. Required Membership – This makes it so that to register you will need to have a specified membership.
 - c. Promo Activities – Activities that are to be promoted on registration.
 - d. Required Activities – Activities that you need to have already been registered for.

Step four: Scheduling

Add New Activity - Scheduling

Your Dates have been entered

To add additional dates: make the appropriate changes below and then click the Add More Dates button.

Click here to View Dates Added

Type	Location	Date(s)	Times
Weekly	Easton Township Administration Building - Community Room A	01/01/2018 - 05/28/2018	02:00 PM - 03:00 PM

Schedule Dates

Start Date 01/01/2018	Start Time 02:00 PM	End Time 03:00 PM	Start Buffer 0	End Buffer 0
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Location
Easton Township Administration Building - Community Room A

Recurring [View Availability](#) **Show Exclusion Dates**

Exclusion Dates

Add Exclusion Dates	End Date (Optional Date Range)	Add

Facility Exclusion Date

- Monday November 20, 2017
- Tuesday November 21, 2017
- Wednesday November 22, 2017
- Thursday November 23, 2017
- Friday November 24, 2017

Activity Exclusion Dates

- Monday, February 12, 2018
- Tuesday, February 13, 2018
- Wednesday, February 14, 2018
- Thursday, February 15, 2018

Remove Selected

Select Recurrence Patterns

Daily
 Weekly
 Monthly
 Yearly

Recur every week(s) on:

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Ending

End after occurrences
 End By

Create More Event Dates
Delete All Dates

<< Previous Step

Cancel

Next Step >>

1. Enter in your scheduling info including: dates, times, exclusion dates and recurring patterns.
 - a. You can uncheck Recurring if your activity only lasts a single day.
 - b. To add exclusion dates, check Show Exclusion Dates.
2. Once all dates have been added you click Create Event Dates. You can continue to add as many dates and times as needed.

Step five: Financial Info

Add New Activity - Financial Info

Finance Info

Use Res Fee
 Use Non-Res Fee
 Tax Deductible
 Allow Member Discounts ?

Allow Deposits ?
 Adjustable Deposits

Min Res Deposit
Min Non-Res Deposit

Deposit Starts
Deposit Ends

Budget Groups Disbursed by: Percent of Fee Fixed Dollar Amounts

Budget Group	Res Amt.	Non-Res Amt.	Priority #	Remove
Test ▼	<input type="text" value="75.00"/>	<input type="text" value="75.00"/>	<input type="text" value="1.00"/>	New
Test - test ▼	<input type="text" value="25.00"/>	<input type="text" value="25.00"/>	<input type="text" value="2.00"/>	New
-- Select Budget Group -- ▼	<input type="text"/>	<input type="text"/>	<input type="text" value="3.00"/>	New
-- Select Budget Group -- ▼	<input type="text"/>	<input type="text"/>	<input type="text" value="4.00"/>	New
-- Select Budget Group -- ▼	<input type="text"/>	<input type="text"/>	<input type="text" value="5.00"/>	New

Add New Fee Adjustment

Adjustment Type	Display Name	For	Adjustment Amount	Fee Adjusted	Options
Additional Member Discount	Additional Member Discount	Res/Non-Res	-\$25.00	Base Fee	Min Regs Required: 2

Add New Expense Group

Expense Group	Type	Amount	Projected Amount	
test	Per Registration	10.00%	\$0.00	Edit Delete

Notes: This is a test expense

- **Projected Amount:** The Projected Amount is based on the number of active registrations for this activity.

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Cancel

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1. Fees – You can choose to add fees or not.
 - a. If there is no fee and you'd like people to be able to register online, assign the fee as \$0.00
 - b. You may also uncheck Res or Non-Res if one or both are not available for registration.
2. Budget Groups – If you do not have Advanced Budget Groups you will only be able to disburse to a single group.
3. Fee Adjustments – Adding adjustments here will only affect this activity.
4. Expense Groups – Adding expenses here will only affect this activity.

Step six: Demographic/Seating Info

Add New Activity - Demographic/Seating Info

Demographics/Seating Info

Age Range
5 0 - 11
yy | mm yy | mm

Enforce Age as of This Date
 Activity Start Date
 Activity End Date
 Custom Date

Grade Range
None - None

Gender
Any

Min. Req. Seats **Max Seats** 20 **Max Non-Res Seats**

Allow Overbooking **Waiting List** Free **WL Max Seats** **WL Max Non-Res Seats**

Force Waitlist on Start Date **Waiting List Starts** **Waiting List Ends**

Registration Info

Registration Type
 No Registration Required
 Printable Form
 Online Payment
 Printable Form & Online Payment

Allow Quantity **Mgmt Qty Only** **Min Quantity** **Max Quantity**

Allow Multiple Regs **High Demand**

Use Registration Start and End Dates -- Select from Global Registration Dates --

Res Start Date 10/01/2017 **Res End Date** 01/01/2018

Non-Res Start Date 10/01/2017 **Non-Res End Date** 01/01/2018

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Cancel
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1. Demographic/Seating Info – Set your basic Demo/Seating restrictions here.
 - a. Want to leave the age range open (x and up, or x and under), leave one of the ages open.
 - b. If having a max seat count you only need to fill in the max and leave the rest blank.
2. Registration Info – Set your basic Registration restrictions here.
 - a. Registration Type – Controls how people can register for this activity.
 - b. Quantity – You have control over how many people a registrant can sign up under a single registration.
 - c. Multiple Reg – If checked a registrant can sign up multiple times.
 - d. Reg Start/End Dates – This controls the period in which customers can register for the activity.

Step seven: Questions

Add New Activity - Questions

-- All Questions -- ▾

Question ⓘ	Required	Hide Public	End Date
<input type="checkbox"/> A question	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> Another Question	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/> test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/> test 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> This is a new question	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/> What is your insurance number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Disclaimer

New test disclaimer

test3

Hold Harmless

Disclaimer 1

Test

test

Note: The checkbox will be grayed out if there are registrations associated to that Disclaimer/Requirement.

Dynamic Forms

Archery Information

Ice Skating Information

Insurance Information

Question

Questionless

Registration Contacts

Summer Camp form

Swimming form

Required Documents

hasdoc

Medical Document

no doc

Ski Waiver

<< Previous Step
Cancel
Next Step >>

1. Questions – Assign the questions that can/need to be answered to register.
2. Disclaimer – Assign the disclaimers that need to be agreed to for registration.
3. Dynamic Forms – Assign any forms to be completed before registration.
4. Required Documents – Assign any forms needed for registration.
5. These can be created under the Program tab in the Navigation Bar.

Step eight: Confirm & Complete

Add New Activity- Confirm & Complete			
Basic Info			
Activity Name Training Activity	Activity Code	View Dates/Times	
Category test	Order # 1.00	Hide From Public: No	
Additional Notes This is a test activity			
Finance Info			
Res Fee \$150.00	Non-Res Fee \$175.00	Activity is Tax Deductible No	
Allow Deposits Yes	Adjustable Deposits No	Min Res Deposit \$50.00	Min Non-Res Deposit \$75.00
Demographic/Seating Info			
Age Range 5.00 - Any	Grade Range Any	Gender Any	Allow Overbooking Yes
Max Seats 20	Max Non-Resident Seats N/A	Min. Req. Seats N/A	Waiting List Free
Registration Info			
Reg Age Cutoff Date			
Allow Quantity No	Min Quantity Limit N/A	Max Quantity Limit N/A	
Allow Multiple Registrations No		High Demand No	
Registration Type: Printable Form & Online Payment			
Registration Start and End Dates: Online Payments & Printable Forms			
Res Start Date 10/01/2017	Res End Date 01/01/2018	Non-Res Start Date 10/01/2017	Non-Res End Date 01/01/2018
Res Start Time 12:00 AM	Res End Time 12:00 AM	Non-Res Start Time 12:00 AM	Non-Res End Time 12:00 AM

[Complete](#)

[Add Another Activity](#)

1. Review and complete.
2. You may also add a new activity.
 - a. This option saves time by bringing over all fields pre-filled with the data you had just entered. All you need to do is change the info where needed.

If you have any questions or need assistance, contact MyRec.com Staff for help.