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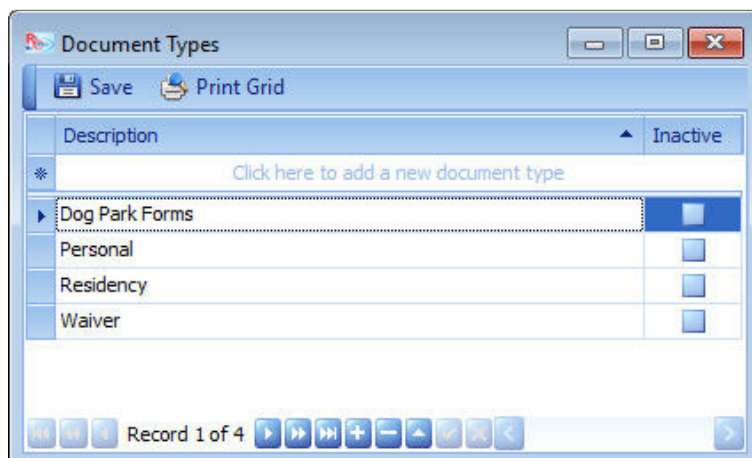
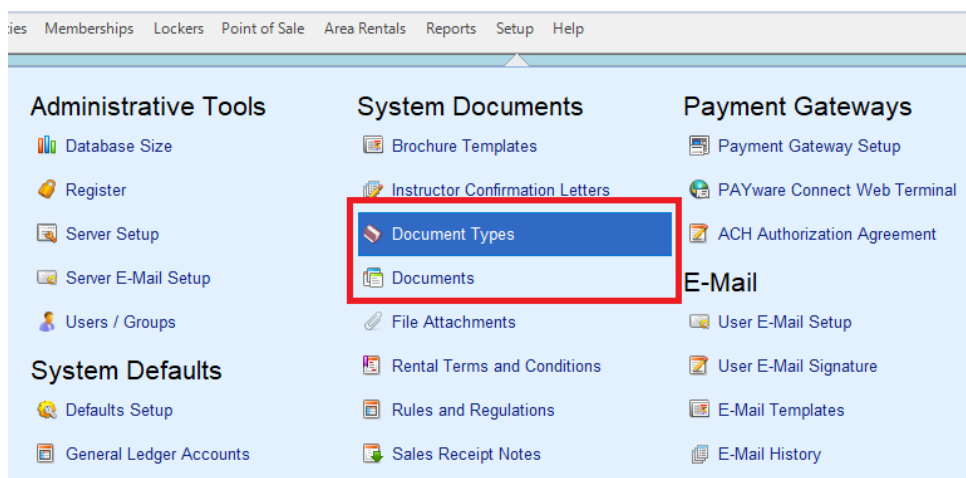
Document Management System

Documents will provide options for managing all of the forms and documents you need to collect for registrations and membership sales. Choices include the ability to upload external documents, set expiration dates for agreements and forms and allow multiple agreements or waivers per activity or membership.

Document Types

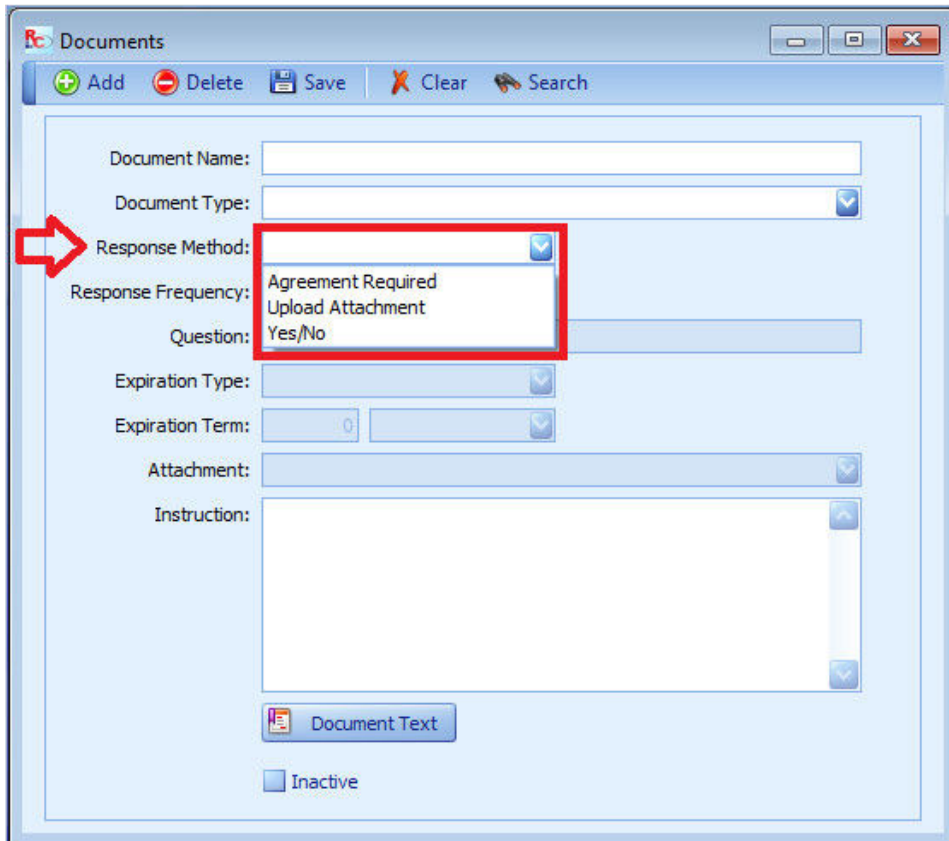
With the **Document Types** grid, the user will be able to create a list of types that will be used as filters throughout ReCPro's document management system.

From the main menu, go to **Setup > Systems Document > Document Types**



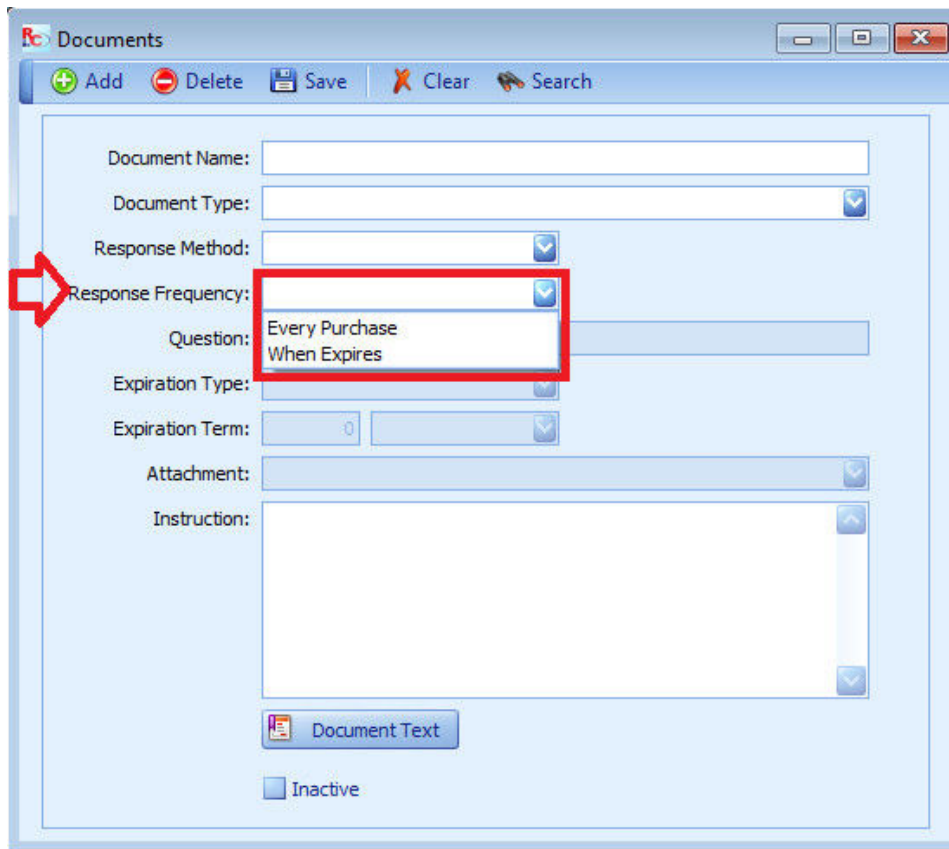
Documents

From the main menu, go to **Setup > Systems Document > Documents**



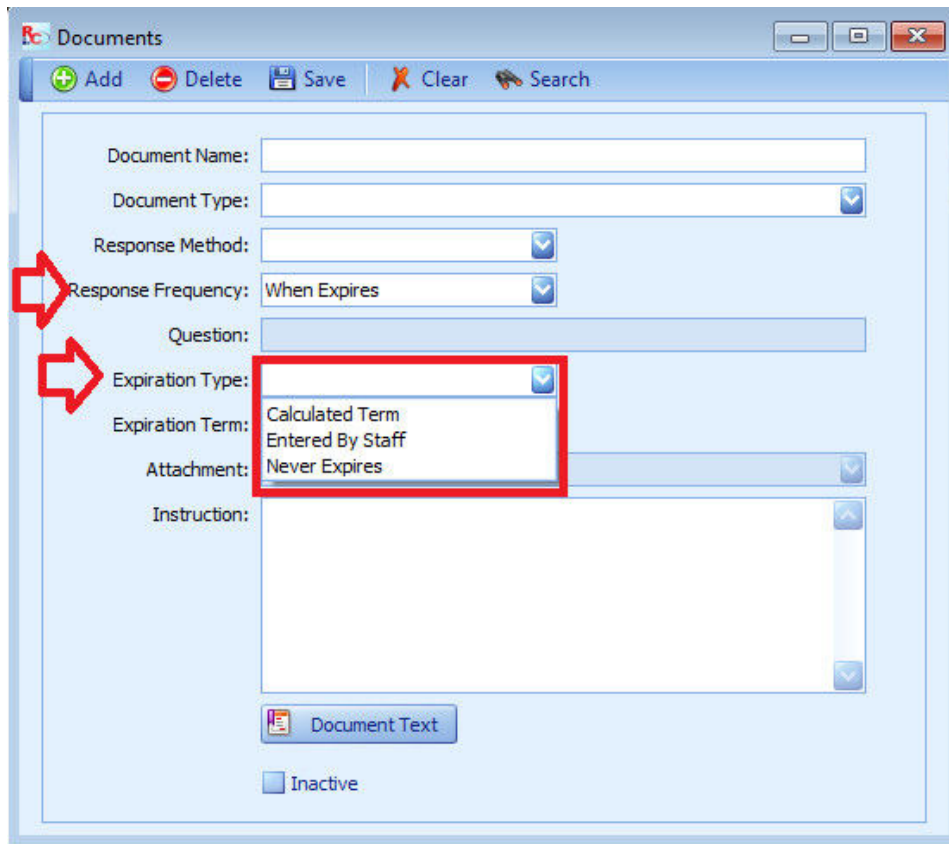
Under **Response Method**, the user will select one of the following:

- **Agreement Required** – this replaces the previous “WAIVERS” where your customer MUST agree in order to continue with their registration or purchase.
- **Upload Attachment** – This option will allow your customer to upload an external document that you are requiring (ex: Birth Certificate, Concussion Form, etc.). You will notice that if Upload Attachment is selected, the program allows the user to attach a FORM for the customer to download and print during the purchase process.
- **Yes/No** – this is similar to the Agreement Required option, but it allows the user to DECLINE and still proceed with their registration or purchase. You will also notice that if Yes/No is selected, the program allows the user to type in a **(YES/NO) QUESTION** that will be asked at the time of purchase. For example: ***Do we have permission to use photos of your child for future marketing of our programs and events?***



Under **Response Frequency**, the user will select one of the following:

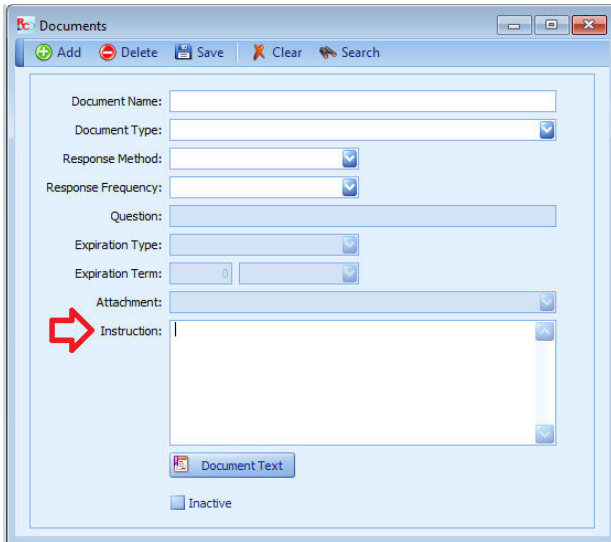
- **Every Purchase** – this would be in replacement of our previous method of requiring the customer to agree to the same waiver for every purchase. If your organization requires agreement with every purchase, then you have the ability to continue to use this method.
- **When Expires** – This option would only require the customer to provide a response when the previous agreement or document has expired. For example, if a customer agreed to the general liability waiver that is good for 12 months, they would not need to agree to that waiver again for another 12 months.



If the user has selected the **Response Frequency “When Expires”**, then the **Expiration Type** will also need to be selected from the following choices:

- **Calculated Term** – An example of this would be the system setting the expiration date to be 12 months after the customer has provided a response. If the user chooses this option, we provide an area for the term to be set.
- **Entered by Staff** – Typically applies to ‘Upload Attachment’. Let’s say someone has uploaded a sports physical that expires in 3 months. Staff can then manually enter the expiration date so the system knows when to ask for this document again in the future.
- **Never Expires** – A couple of examples of this would be an Uploaded Birth Certificate or maybe if your department only requires customers to sign a waiver one time and then it is good forever.

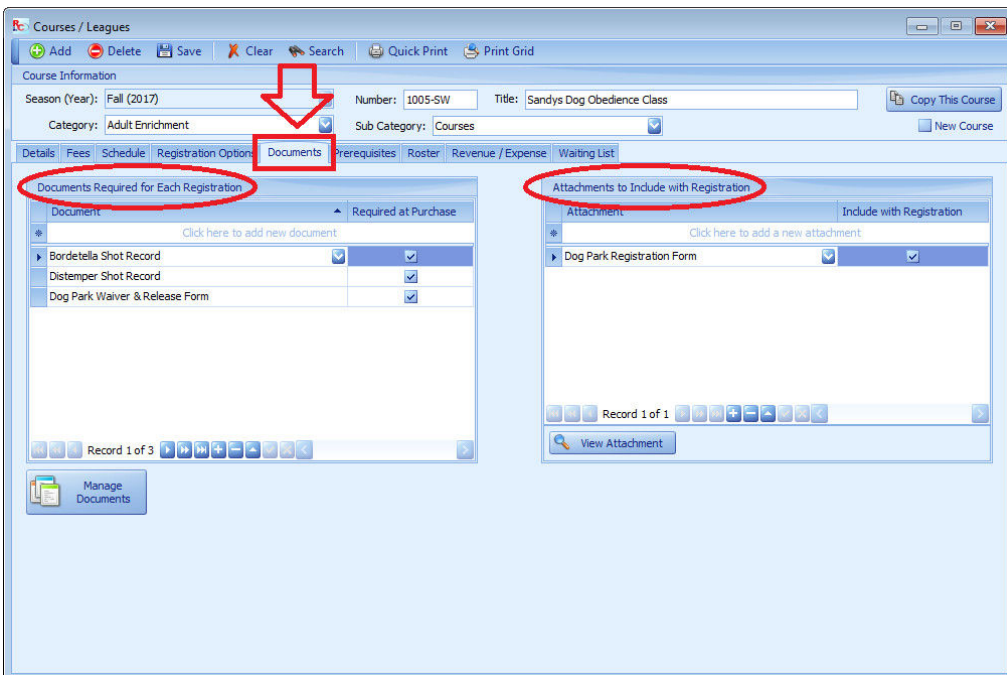
The **instruction text box** is an area for the user to provide the customer (online) with some instructions as to what is required with a specific document. This is NOT required, but available if applicable.



The 'Documents' form contains the following fields:

- Document Name: [Text Box]
- Document Type: [Dropdown Menu]
- Response Method: [Dropdown Menu]
- Response Frequency: [Dropdown Menu]
- Question: [Text Box]
- Expiration Type: [Dropdown Menu]
- Expiration Term: [Text Box]
- Attachment: [Dropdown Menu]
- Instruction: [Text Box] (highlighted with a red arrow)
- Document Text: [Text Box]
- Inactive: [Checkbox]

Entry Screen for Courses, Child Care and Memberships



The 'Courses / Leagues' entry screen shows the following information:

- Course Information:**
 - Season (Year): Fall (2017)
 - Number: 1005-SW
 - Title: Sandys Dog Obedience Class
 - Category: Adult Enrichment
 - Sub Category: Courses
- Documents Tab:**
 - Documents Required for Each Registration:**

Document	Required at Purchase
Bordetella Shot Record	☒
Distemper Shot Record	☒
Dog Park Waiver & Release Form	☒
 - Attachments to Include with Registration:**

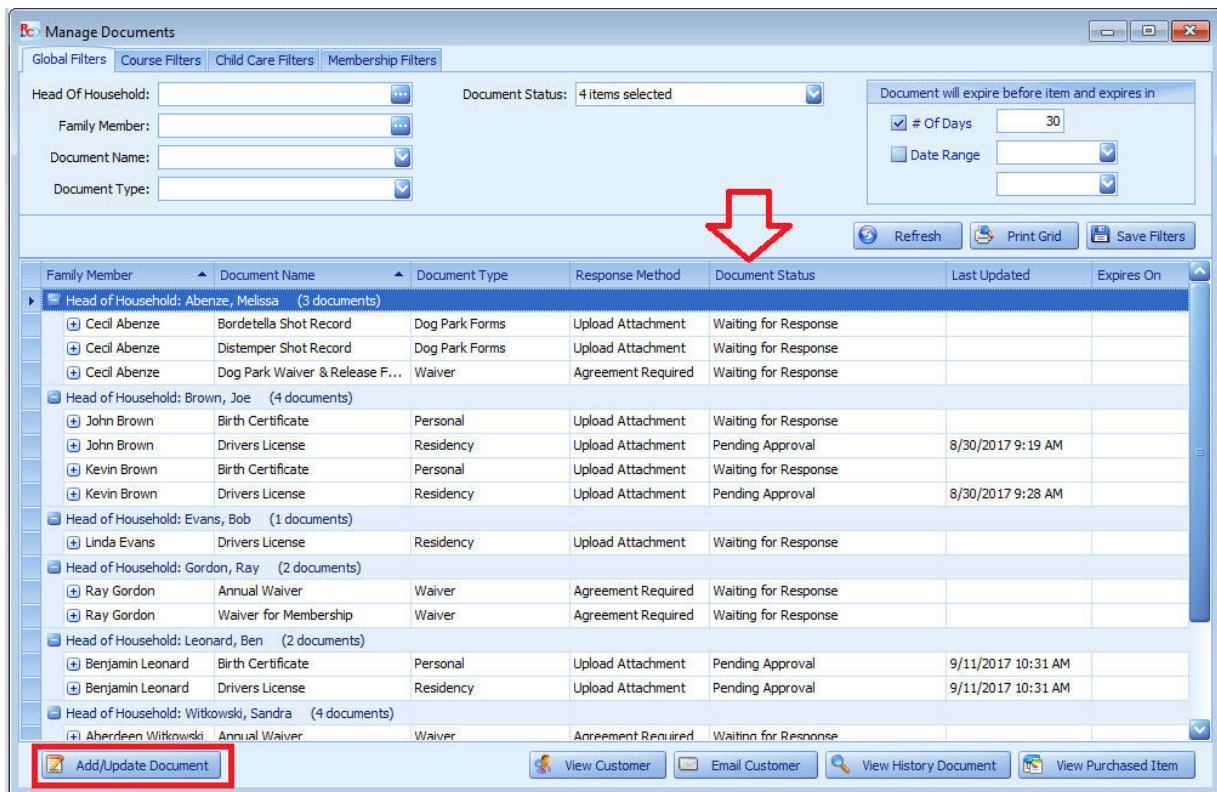
Attachment	Include with Registration
Dog Park Registration Form	☒

In the entry screens for **Courses, Child Care & Membership**, there is a **Documents** tab page that allows users to select documents and check the box if it's **"Require at Purchase"** for each item and select **Attachments** to **"Include with Registration"**. There is also a **Manage Document** button that maps to the Manage Document grid automatically filters by activity or membership.

Manage Documents

Manage Documents is a program for staff to manage all documents that are in the system. By default, this grid will list all of the documents that need attention.

From the main menu, go to **Customer > Manage Documents**



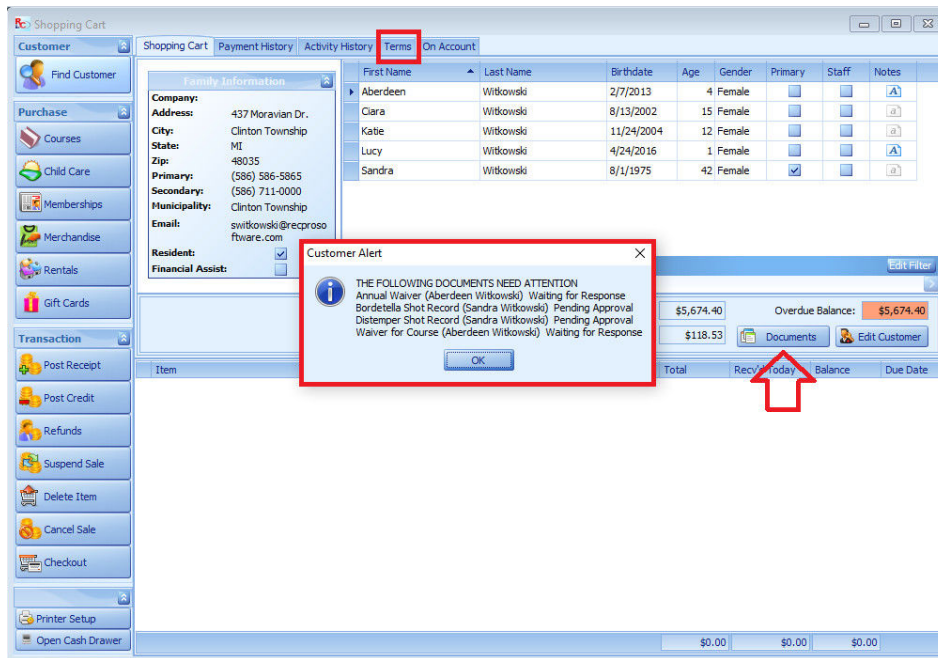
Family Member	Document Name	Document Type	Response Method	Document Status	Last Updated	Expires On
Head of Household: Abenze, Melissa (3 documents)						
Cecil Abenze	Bordetella Shot Record	Dog Park Forms	Upload Attachment	Waiting for Response		
Cecil Abenze	Distemper Shot Record	Dog Park Forms	Upload Attachment	Waiting for Response		
Cecil Abenze	Dog Park Waiver & Release F...	Waiver	Agreement Required	Waiting for Response		
Head of Household: Brown, Joe (4 documents)						
John Brown	Birth Certificate	Personal	Upload Attachment	Waiting for Response		
John Brown	Drivers License	Residency	Upload Attachment	Pending Approval	8/30/2017 9:19 AM	
Kevin Brown	Birth Certificate	Personal	Upload Attachment	Waiting for Response		
Kevin Brown	Drivers License	Residency	Upload Attachment	Pending Approval	8/30/2017 9:28 AM	
Head of Household: Evans, Bob (1 documents)						
Linda Evans	Drivers License	Residency	Upload Attachment	Waiting for Response		
Head of Household: Gordon, Ray (2 documents)						
Ray Gordon	Annual Waiver	Waiver	Agreement Required	Waiting for Response		
Ray Gordon	Waiver for Membership	Waiver	Agreement Required	Waiting for Response		
Head of Household: Leonard, Ben (2 documents)						
Benjamin Leonard	Birth Certificate	Personal	Upload Attachment	Pending Approval	9/11/2017 10:31 AM	
Benjamin Leonard	Drivers License	Residency	Upload Attachment	Pending Approval	9/11/2017 10:31 AM	
Head of Household: Witkowski, Sandra (4 documents)						
Aberdeen Witkowski	Annual Waiver	Waiver	Agreement Required	Waiting for Response		

Under the **Document Status** column you will see **why** the document is listed here. The document may still be waiting for a response from the customer or maybe the customer uploaded a form that needs staff approval. There could also be documents that EXPIRED even though the course or the membership is still ongoing. Finally, there could be a document that is about to expire prior to the course or membership ending.

All of these documents can be reviewed and updated by staff by highlighting the row and clicking **Add/Update Document** button.

Shopping Cart – Customer Alert Message

We improved the **Customer Alert** message in the shopping cart when you select a customer record. It will show more detail about memberships and also include details about any documents needing response. We replaced the Waivers tab with a button for **Documents** which will map to the Manage Document grid automatically filtered by customer record. We did keep a **Terms** tab page for Terms & Conditions related to Rentals as the Rental Terms & Conditions is not part of the Documents feature.



Default Setup

We added a field to the default setup program on the General tab page for ‘# of Days to Keep Customer Documents Once Inactive.’ This will allow the system to automatically purge documents that are no longer active in an effort to minimize the size of your database.

