

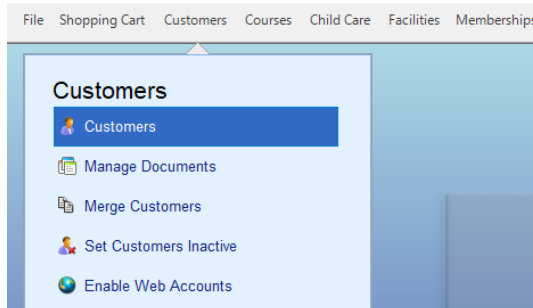


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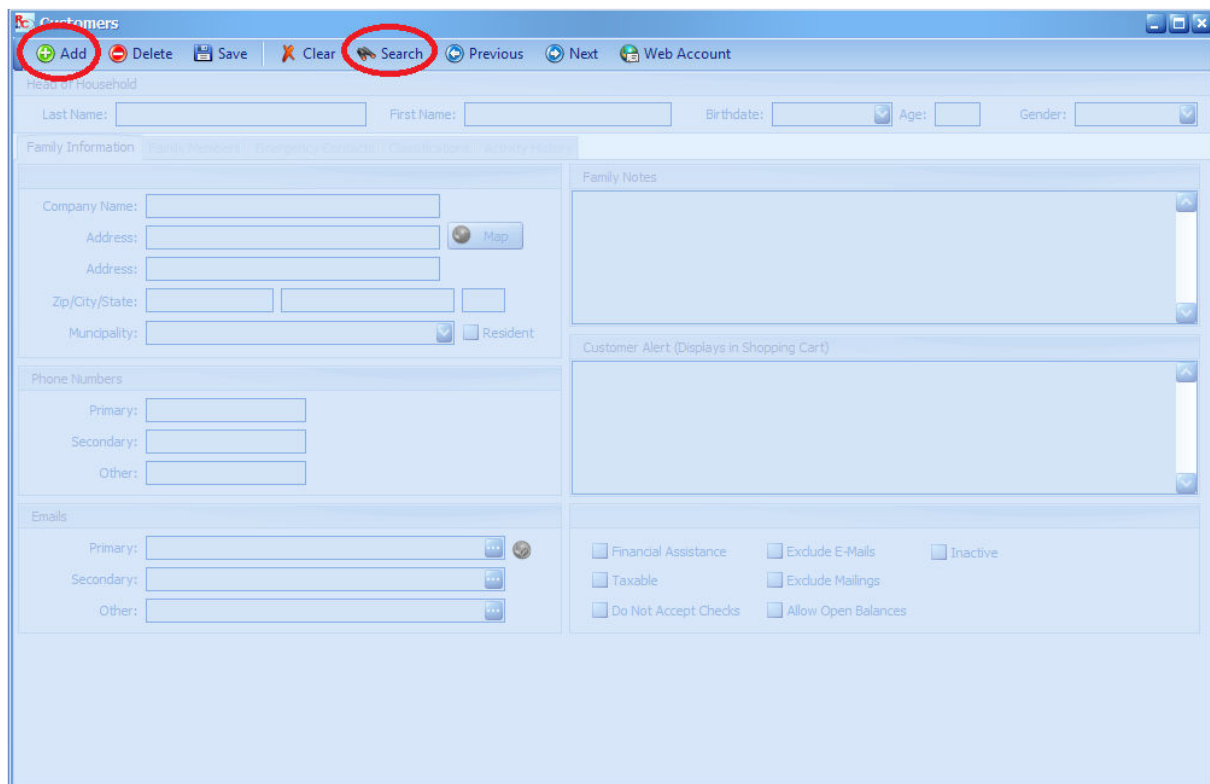
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Customers Module

From the main menu, select **Customers > Customers**

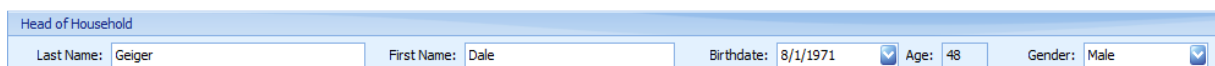


The **Customers** screen will display; select the **Add** button which enables the screen so that a new customer can be added to the database or select the **Search** button to locate a record.



The screenshot shows the 'Customers' screen with a toolbar at the top containing buttons: Add (circled in red), Delete, Save, Clear, Search (circled in red), Previous, Next, and Web Account. Below the toolbar is the 'Head of Household' section with fields for Last Name, First Name, Birthdate, Age, and Gender. The main area is divided into 'Family Information' (Company Name, Address, Zip/City/State, Municipality, Resident checkbox) and 'Family Notes'. There are also sections for 'Phone Numbers' (Primary, Secondary, Other) and 'Emails' (Primary, Secondary, Other). At the bottom right, there are checkboxes for Financial Assistance, Taxable, Do Not Accept Checks, Exclude E-Mails, Exclude Mailings, Allow Open Balances, and Inactive.

Head of Household



The screenshot shows the 'Head of Household' form with the following data: Last Name: Geiger, First Name: Dale, Birthdate: 8/1/1971, Age: 48, Gender: Male.

Enter data in the fields **Last Name**, **First Name**, **Birthdate** (**ReCPro™** will automatically calculate the **Age** field) and select the **Gender** from the pick list menu.



Search Screen

Using the **Find Customer** search screen, user can type data by filters and click **Search**.

Find Customer

Last Name: First Name: Phone: Company:

Address: Email:

Last Name	First Name	Primary Phone	Address	City	Zip	Municipality
Geiger	Dale	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Jacob	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	John	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Kara	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Luke	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Susie	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township

☒ [Inactive] = 'Unchecked'

INACTIVE

Or without using the filters, user can click **search** button in the upper right corner of the screen and all records will display.

Find Customer

Last Name: First Name: Phone: Company:

Address: Email:

Last Name	First Name	Primary Phone	Address	City	Zip	Municipality
Fryman	Stephen	(586) 333-2212	1422 North Pole Dr	Macomb	48044	Mount Clemens
Fuentes	Kara	(219) 322-1330	1033 Kentwood Drive	Dyer	46311	Other
Geiger	Dale	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Jacob	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	John	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Kara	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Luke	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Geiger	Susie	(586) 469-4200	12345 My Street	Mount Clemens	48043	Clinton Township
Gordon	Cheri	(586) 456-4566	345 Orange Dr.	Clinton Township	48035	Clinton Township
Gordon	Ray	(586) 456-4566	345 Orange Dr.	Clinton Township	48035	Clinton Township
Gordon	Susan	(586) 456-4566	345 Orange Dr.	Clinton Township	48035	Clinton Township
Gordon	Toby	(586) 456-4566	345 Orange Dr.	Clinton Township	48035	Clinton Township
Greene	Beth	(586) 458-6552	123 Main St.	Clinton Township	48035	Clinton Township
Greene	Doug	(586) 458-6552	123 Main St.	Clinton Township	48035	Clinton Township
Greene	Iris	(111) 222-3333	555 Street Rd	Clinton Township	48035	Clinton Township
Greene	Jill	(586) 458-6552	123 Main St.	Clinton Township	48035	Clinton Township
Greene	Jonah	(586) 458-6552	123 Main St.	Clinton Township	48035	Clinton Township
Griffin	Sally	(586) 222-3333	8823 Rosa Drive	Clinton Township	48035	Clinton Township
Griffin	Sam	(586) 222-3333	8823 Rosa Drive	Clinton Township	48035	Clinton Township

☒ [Inactive] = 'Unchecked'

INACTIVE



Family Information tab

Customers

Head of Household

Last Name: Geiger First Name: Dale Birthdate: 8/1/1971 Age: 48 Gender: Male

Family Information Family Members Emergency Contacts Classifications Vehicles Activity History

Company Name: R.C. Systems, Inc. Address: 12345 My Street Map Address: My Second Address Zip/City/State: 48043 Mount Clemens MI Municipality: Clinton Township ☒ Resident

Phone Numbers

Primary: (586) 469-4200 Secondary: (586) 469-4444 Other: (586) 469-5555

Emails

Primary: dgeiger@recprosoftware.com Secondary: Other:

Family Notes

Dale works @ R.C. Systems, Inc.

Customer Alert (Displays in Shopping Cart)

☒ Financial Assistance ☐ Exclude E-Mails ☐ Inactive ☐ Taxable ☐ Exclude Mailings ☐ Do Not Accept Checks ☒ Allow Open Balances

Enter data in the fields **Company Name** (if applicable), **Address**, **Zip Code** (ReCPro™ will automatically populate the **City** and **State** in the fields), **Municipality** (**Resident** box will check automatically based on the setup options on the Municipality table), **E-Mail**, **Primary Phone**, **Secondary Phone** and **Other Phone**. Type **Family Notes** if applicable which is not viewable on the customers online account. Use the **Customer Alert** field which is a popup note that will display in shopping cart and rentals.

Check box that is appropriate if the customer receives **Financial Assistance** and discounts apply. Utilize the **Taxable** box when charging tax is applicable to customer. Select **Inactive** to make customer record inoperative without losing historical value. Check **Exclude E-Mail** to leave out customer from mass email. Check **Exclude Mailings** to leave out customer from mailing labels. Check **Do Not Accept Checks** to block from accepting checks during shopping cart checkout. **Allow Open Balances** is set as a default; unchecked means Credit Hold.

Important Note: it is critical to obtain the customers **email address** if the online registration product has been purchased. The **Primary email address** will serve as the user login for all family member online activity.



Family Member Information tab

First Name	Last Name	Grade	Last Physical	Birth Certificate	Notes	School	Image	Primary Phone	Secondary Phone
Dale	Geiger							(586) 469-4200	(586) 469-4444
Jacob	Geiger	11	2/2/2009	☒		McMurray Middle School		(586) 469-4200	(586) 469-4444
John	Geiger	9		☒		JFK Elementary School		(586) 469-4200	(586) 469-4444
Kara	Geiger			☒		Anchor Bay High School		(586) 469-4200	(586) 469-4444
Luke	Geiger	8		☐		McMurray Middle School		(586) 469-4200	(586) 469-4444
Susie	Geiger			☐				(586) 469-4200	(586) 469-4444

Type the **First Name**, **Last Name**, **Birth date** (*RePro™* will automatically calculate the **Age** field) and select the **Gender** from the picklist menu. Enter the year **Expected Graduation** (*RePro™* will automatically calculate the **Grade** field). Optional is date of **Last Physical**; **Birth Certificate**. Type **Notes** such as bee sting allergy, asthma, peanut allergy, etc. if applicable. Select the **School** from the drop down menu. Add Image (*right mouse click, select load, browse network for image to add*). Type the email address if different from the family email address.

Continue scrolling to the right.

First Name	Last Name	Other Phone	Primary E-Mail	Secondary E-Mail	Other E-Mail	Staff	Primary
Dale	Geiger	(586) 469-5555	dgeiger@recprosoftware.com			☒	☒
Jacob	Geiger	(586) 469-5555	jacob@rcsystemsinc.com			☐	☐
John	Geiger	(586) 469-5555	dgeiger@recprosoftware.com			☐	☐
Kara	Geiger	(586) 469-5555	kgeiger@yahoo.com			☐	☐
Luke	Geiger	(586) 469-5555	dgeiger@recprosoftware.com			☐	☐
Susie	Geiger	(586) 469-5555	dgeiger@recprosoftware.com			☐	☐



Enter **Primary Phone**, **Secondary Phone**, and **Other Phone** if different from the family record. Check the box **Staff** if the person is a staff member and check the box **Primary** if this is the **Head of Household**. (There can only be one primary). **Inactive** will make customer inoperative without losing historical value.

Additional Navigational Toolbar Tips

Gender	Expected Graduation	Grade	Last Physical	Birth Certificate
Click here to add a new family member				
Female				☐
Female	2021	K	6/1/2009	☒
Male		Estimated Graduation Years		☐
		Grade: K -- Year: 2021		☐
Male		Grade: 1 -- Year: 2020		☐
Female		Grade: 2 -- Year: 2019		☐
Female		Grade: 3 -- Year: 2018		☐
Female		Grade: 4 -- Year: 2017		☐
		Grade: 5 -- Year: 2016		☐
		Grade: 6 -- Year: 2015		☐
		Grade: 7 -- Year: 2014		☐
		Grade: 8 -- Year: 2013		☐
		Grade: 9 -- Year: 2012		☐
		Grade: 10 -- Year: 2011		☐
		Grade: 11 -- Year: 2010		☐
		Grade: 12 -- Year: 2009		☐

Important Note: The **Expected Graduation** field has a “cheat sheet” of **Estimated Graduation Years** by selecting the field first and then using the mouse to hover over the field.

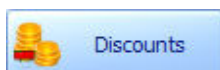
In the following navigation toolbar, **ReCPro™** can incorporate photo images of all family members, discounts and documents.



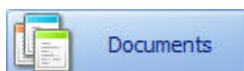
This feature works with membership cards or key tags and photos will display on the facilities entry way monitor when the card or key tag is scanned. Ask your **R.C. Systems, Inc.** sales rep for details.



Click **Acquire Image** button to **Acquire Image** using a web camera



Click **Discounts** button to Edit Custom **Discounts**



Click **Documents** to manage the customers **Documents**



Emergency Contacts Tab

First Name	Last Name	Relationship	Primary	Primary Phone	Secondary Phone	Other Phone	Notes
Ray	Geiger	Grandfather	☐	(989) 999-9999			
Patricia	Geiger	Grandmother	☐	(989) 999-9999			

Type **First Name**, **Last Name**, **Relationship**, check box **Primary** if this is the primary contact (can only have one primary contact on course rosters), **Primary Phone**, **Secondary Phone**, **Other Phone** and type **Notes** if applicable.

Important Note: *Emergency Contacts and Primary Phone will map over to the Course Roster report (see **Reports > Course > Roster** and view **Roster Template** for details).*

Customer Classifications

The purpose of this tab is to categorize customers that have a business or commercial status charging an additional rate to the base facility rental rates.

Classification

Business

Classifications need to be setup first. From the main menu, go to **Customers > Classifications**



Activity History Tab

End Date	Begin Date	Year	Season	Number	Title	Location	Days	Beg Time
8/9/2019	5/6/2019	2019	Winter	2001	Basketball (Team and Player) - Team: Team ReCPro			
6/5/2020	3/1/2020	2020	Spring	700-TH	Basket Weaving Thursday	Eisenhower High School - 12	Thu	4:30 PM

Click on **Activity History** and a variety of module tabs display. **ReCPro™** automatically maps data from the **Shopping Cart** module to this screen to quickly view data related to the customer selected.

Details of **Family Member** activities will display.

Assign Different Family Member to the Course

Click **Assign Different Family Member to the Course** button if a family member was registered incorrectly.

First Name	Last Name	Birthdate	Age	Gender	Primary	Notes	Image
Dale	Geiger	8/1/1971	48	Male	☒		
Jacob	Geiger	8/28/2002	17	Male	☐		
John	Geiger	5/1/2004	15	Male	☐		
Luke	Geiger	6/15/2002	17	Male	☐		
Susie	Geiger	7/12/2012	7	Female	☐		

Select the **Family Member to Replace** the original registered customer to the course.



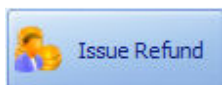
End Date	Begin Date	Year	Season	Number	Title	Location	Days	Beg Time
Family Member: Dale Geiger								
8/9/2019	5/6/2019	2019	Winter	2001	Basketball (Team and Player) - Team: Team ReCPro			
Family Member: Susie Geiger								
6/5/2020	3/1/2020	2020	Spring	700-TH	Basket Weaving Thursday	Eisenhower High School - 12	Thu	4:30 PM

In this example the course **Basket Weaving Thursday** moved from Kara to Susie.

Issue Refund

End Date	Begin Date	Year	Season	Number	Title	Location	Days	Beg Time
Family Member: Dale Geiger								
8/9/2019	5/6/2019	2019	Winter	2001	Basketball (Team and Player) - Te...			
Family Member: Susie Geiger								
6/5/2020	3/1/2020	2020	Spring	700-TH	Basket Weaving Thursday	Eisenhower High School - 12	Thu	4:30 PM

Highlight the **Course** that is being requested to refund.



Click **Issue Refund** button at the lower left side of screen.

Would you like to remove Susie Geiger from the Course Roster for Course# 700-TH?

Roster validation screen displays; select **Yes** or **No**.

Would you like to charge the \$5.00 refund fee for Basket Weaving Thursday (Spring 2020, #700-TH) - Susie Geiger?

If the **Admin Refund Fee** was setup in the course fee tab, then user will get a validation screen asking if you would like to charge the refund fee; selecting No, **ReCPro™** will take you to **Shopping Cart** to process the refund.



Selecting **Yes**, **RePro™** takes you to **Shopping Cart** to process course refund and admin refund fee.

Shopping Cart

Customer: Dale Geiger

Family Information:

- Company: R.C. Systems, Inc.
- Address: 12345 My Street
- City: Mount Clemens
- State: MI
- Zip: 48043
- Primary: (586) 469-4200
- Secondary: (586) 469-4444
- Municipality: Clinton Township
- Email: dgeiger@recprosoftw are.com
- Resident: ☒
- Financial Assist: ☒

Open Balance: \$490.50
Overdue Balance: \$490.50
Open Credits: \$0.00

Item	Qty	Price	Tax	Total	Rec'd Today	Balance	Due Date
Admin Refund Fee	1	\$5.00	\$0.00	\$5.00	\$5.00	\$0.00	
Basket Weaving Thursday (Spring 2020, #700-TH) - Susie Geiger	1	-\$25.00	\$0.00	-\$25.00	-\$25.00		

Checkout

Notice the **Issue Refund** screen shows the full dollar amount but the **Check** field is less \$5.00 held in **Credit On Account** for the **Admin Refund Fee**.

Issue Refund - Previous Day Receipt

Refund Total: Amount: **-\$25.00** Receipt Date: 3/31/2020

Step 1 - Apply Amount to Refund

Payment Rec'd	Previously Refunded	Amount To Refund
Cash: \$0.00	\$0.00	
Check: \$0.00	\$0.00	-\$20.00
Credit Card 1: \$0.00	\$0.00	\$0.00
Credit Card 2: \$0.00	\$0.00	\$0.00
Other: \$0.00	\$0.00	\$0.00
Credit On Acct: \$0.00	\$0.00	-\$5.00

Total Refunded: **-\$25.00** ☒ Print Check Request

Step 2 - Enter Refund Information

Payee Information:

- Payee Name: Dale Geiger
- Address: 12345 My Street
- Address: My Second Address
- Zip/City/State: 48043 Mount Clemens MI
- Phone: (586) 469-4200
- E-Mail: dgeiger@recprosoftware.com

Reason Type: Customer Request
Check Dist: Mail to Payee
Refund Notes: scheduling conflict

Step 3 - Choose Receipt Output and Complete Refund

Preview Print Email Print & Email No Receipt



Notice the **Refund Receipt** shows both **Pay Method** for **Check** and **Account Credit** – this is temporary.

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R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Customer
R.C. Systems, Inc.
Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Refund Receipt
Receipt #: 12795
Receipt Date: 03/31/2020
Receipt Total: (\$25.00)
Paid By: Dale Geiger
Registrar: SW
Pay Method: Check# (\$20.00)
Acct Credit (\$5.00)
Primary Phone: (586) 469-4200

Item Description	Quantity	Price Ea	Total
Basket Weaving Thursday (Spring 2020, #700-TH) Date Registered: 3/30/2020 Amount Paid: \$25.00 Participant: Susie Geiger DOB: 7/12/2012 scheduling conflict	1	-\$25.00	-\$25.00

The **Check Request** is for the **Check Amount**

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R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Payee
Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Phone: (586) 469-4200
E-Mail: dgeiger@recprosoftware.com

**Check Request**
Request ID: 583
Request Date: 03/31/2020
Check Type: Customer Refund
Check Amount: \$20.00
Distribution: Mail to Payee
Request By: Sandra Witkowski
Reason Type: Customer Request
Reason Note: scheduling conflict

Revenue Account Distribution		
Account#	Description	Amount
700	Greene Art School Revenue	-\$20.00



The **Sales Receipt** is for the **Admin Refund Fee** that used the **Account Credit**.

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R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Customer
R.C. Systems, Inc.
Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Sales Receipt
Receipt #: 12796
Receipt Date: 03/31/2020
Receipt Total: \$5.00
Paid By: Dale Geiger
Registrar: SW
Pay Method: Acct Credit \$5.00
Primary Phone: (586) 469-4200

Item Description	Quantity	Price Ea	Total
Admin Refund Fee - Registered: Susie Geiger For: Spring 2020 700-TH Basket Weaving Thursday	1	\$5.00	\$5.00

Transfer Courses

Highlight the **Family Member** to transfer registration from current course to a different course.

Customers

Head of Household

Last Name: Geiger First Name: Dale Birthdate: 8/1/1971 Age: 48 Gender: Male

Family Information Family Members Emergency Contacts Classifications Vehicles Activity History

Courses Child Care Memberships Facility Rentals Dock Rentals Locker Rentals

End Date	Begin Date	Year	Season	Number	Title	Location	Days	Beg Time
Family Member: Dale Geiger								
8/9/2019	5/6/2019	2019	Winter	2001	Basketball (Team and Player) - Team: Team ReCPro			
Family Member: Kara Geiger								
7/5/2020	4/1/2020	2020	Spring	A3	Learn to Sketch	Cousino High School - 101	Thu	4:00 PM

(Within the last 12 months)

Options

Assign a Different Family Member to the Course Issue Refund **Transfer Courses** Remove From Roster Edit Registration Options

CURRENT

Click **Transfer Course** button located on the bottom of screen.



Course Lookup screen will display for the current season. Use the filters located at the top of the screen to refine search and then click **Refresh** button. Select the course the customer would like to transfer to and click **OK** button.

The Course Lookup screen includes filters for Year (2020), Season (Spring), Category, Sub-Category, Facility, Age, Grade, Gender, and Keyword. It also has checkboxes for 'New Courses Only', 'Exclude Courses', 'Registration Closed', 'Full', 'Course Ended', and 'Canceled'. A 'Refresh' button and 'Save Filters'/'Reset Filters' buttons are present.

Number	Title	Category	Sub-Category	Ages	Grades	Begin Date	End Date	Curr	Open	Wait
101C	Canasta	Senior Programs	Social	All	All	3/1/2020	6/5/2020	1	19	0
2001	Movie Night - Feb 21, 2020	Adult Enrichment	Courses	All	All	2/21/2020	2/21/2020	1	49	0
2002	Movie Night - Feb 28, 2020	Adult Enrichment	Courses	All	All	2/28/2020	2/28/2020	0	50	0
2003	Movie Night - Mar 6, 2020	Adult Enrichment	Courses	All	All	3/6/2020	3/6/2020	0	50	0
700-TH	Basket Weaving Thursday	Adult Enrichment	Craft	16+ yrs	All	3/1/2020	6/5/2020	0	20	0
700-TU	Basket Weaving Tuesday	Adult Enrichment	Craft	16+ yrs	All	3/1/2020	6/5/2020	0	20	0
700-W	Basket Weaving Wednesday	Adult Enrichment	Craft	16+ yrs	All	3/1/2020	6/5/2020	0	20	0
A1	Learn to Sketch	Adult Enrichment	Craft	All	All	4/1/2020	7/5/2020	6	9	0
A2	Learn to Sketch	Adult Enrichment	Craft	5-18 yrs	All	3/1/2020	6/5/2020	0	25	0
A3	Learn to Sketch	Adult Enrichment	Craft	All	All	4/1/2020	7/5/2020	4	11	0
A4	Learn to Sketch	Adult Enrichment	Craft	All	All	4/1/2020	7/5/2020	0	15	0
ART-102	Art - Beginners Painting 2	Adult Enrichment	Courses	All	All	3/1/2020	6/5/2020	1	29	0
B3	Learn to Draw - Both	Adult Enrichment	Courses	All	All	3/1/2020	6/5/2020	Varies	Varies	N/A
B4	Learn to Draw - Both	Adult Enrichment	Courses	All	All	3/1/2020	6/5/2020	Varies	Varies	N/A
DOC-CRASH	Document Crash Testing	Test	Test	All	All	3/1/2020	6/5/2020	0	50	0
DOC-CRASH2	Testing Document Crash - Waiver...	Test	Test	All	All	3/1/2020	6/5/2020	0	10	0
DOC-CRASH3	Document Crash Test Everytime Waiver 2	Test	Test	All	All	3/1/2020	6/5/2020	0	10	0
GYG4009	Home Alone Safety Tips	Youth Enrichment	Courses	All	All	6/6/2020	6/6/2020	2	18	0

Buttons: OK, Cancel, ENDED, FULL, CANCELED

Notice the number of **Open** enrollments can be viewed at a glance as well as the number of participants that are currently registered or waiting. Courses that are **Ended**, **Full** or **Canceled** are color coded for quick review.

The Transfer Participant screen shows Member Name: Kara Geiger. It has sections for 'Transfer FROM' and 'Transfer TO'. Both sections show Course#: A3, Season: Spring (2020), and Title: Learn to Sketch. Buttons for OK and Cancel are at the bottom.

Transfer Participant screen will display with **Transfer FROM** on top and **Transfer TO** on bottom. If the information is correct, click **OK** button or **Cancel** button to stop.

If the transfer to course is the same amount there is no further action needed. If it is a different amount **ReCPro™** will automatically take you to shopping cart to process the difference.

Important note: if the course has a registration option, then the course that they are being transferred to must have identical registration options, otherwise user cannot use transfer course feature. User will have to first refund the course, putting the money temporarily as in-house credit, then registering the customer to the new course.



In the following example, the customer originally registered for a course that cost \$100, and is now transferring to a course that cost less.

Shopping Cart

Customer: Find Customer

Purchase

- Courses
- Drop Ins
- Child Care
- Memberships
- Merchandise
- Rentals
- Gift Cards

Transaction

- Post Receipt
- Post Credit
- Refunds
- Suspend Sale
- Delete Item
- Cancel Sale
- Checkout**
- Device
 - Printer Setup
 - Open Cash Drawer

Family Information

Company: R.C. Systems, Inc.
Address: 12345 My Street
City: Mount Clemens
State: MI
Zip: 48043
Primary: (586) 469-4200
Secondary: (586) 469-4444
Municipality: Clinton Township
Email: dgeiger@recprosoftw are.com
Resident: ☒
Financial Assist: ☒

First Name	Last Name	Birthdate	Age	Gender	Primary	Staff	Notes
Dale	Geiger	8/1/1971	48	Male	☒	☒	[a]
Jacob	Geiger	8/28/2002	17	Male	☐	☐	[A]
John	Geiger	5/1/2004	15	Male	☐	☐	[a]
Kara	Geiger	9/15/1998	21	Female	☐	☐	[A]
Luke	Geiger	6/15/2002	17	Male	☐	☐	[A]
Susie	Geiger	7/12/2012	7	Female	☐	☐	[a]

[X] [Inactive] = 'Unchecked' [Edit Filter]

Dale works @ R.C. Systems, Inc.

Open Balance: \$490.50 Overdue Balance: \$490.50
Open Credits: \$0.00 [Documents] [Edit Customer]

Item	Qty	Price	Tax	Total	Rec'd Today	Balance	Due Date
Wallpaper Made Fun (Morning Session) (Spring 2020, #44-1-AM) - Kara Geiger	1	\$40.00	\$0.00	\$40.00	\$40.00	\$0.00	3/31/2020
Redecorating Your Home (Morning Session) (Spring 2020, #43-1-AM) - Kara Geiger	1	-\$100.00	\$0.00	-\$100.00	-\$100.00		

(\$50.00) (\$50.00) \$0.00

Shopping Cart screen displays with a line item for the new course and a line item for the refund course. **RePro™** will first go through the steps for refund and then register for new course.

Click **Checkout** button to continue process. **RePro™** will prompt user with the following message.

Checkout

i You will be prompted for both the REFUND and PURCHASE during the checkout process.

OK



Issue Refund Amount totals the **Check** refund amount and the **Credit On Account** being held to pay for new course.

Issue Refund - Previous Day Receipt

Refund Total
Amount: **-\$100.00** Receipt Date: 3/31/2020

Step 1 - Apply Amount to Refund

Payment Recv'd	Previously Refunded	Amount To Refund
Cash: \$0.00	\$0.00	
Check: \$0.00	\$0.00	-\$60.00
Credit Card 1: \$0.00	\$0.00	\$0.00
Credit Card 2: \$0.00	\$0.00	\$0.00
Other: \$0.00	\$0.00	\$0.00
Credit On Acct: \$0.00	\$0.00	-\$40.00

Total Refunded: **\$100.00** ☒ Print Check Request

Step 2 - Enter Refund Information

Reason Type: Customer Request
Check Dist: Mail to Payee
Refund Notes:

Step 3 - Choose Receipt Output and Complete Refund

Preview Print Email Print & Email No Receipt Cancel

Select **Reason Type** and click **OK** button. **Refund Receipts** and **Check Request** are generated for print or email.

Refund Receipt Page: 1 of 1

R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Customer
R.C. Systems, Inc.
Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Refund Receipt Details

Receipt #: 12799
Receipt Date: 03/31/2020
Receipt Total: (\$100.00)
Paid By: Dale Geiger
Registrar: SW
Pay Method: Check# (\$60.00)
Acct Credit (\$40.00)
Primary Phone: (586) 469-4200

Item Description	Quantity	Price Ea	Total
Redecorating Your Home (Morning Session) (Spring 2020, #43-1-AM) Date Registered: 3/30/2020 Amount Paid: \$100.00 Participant: Kara Geiger DOB: 9/15/1998	1	-\$100.00	-\$100.00



Page: 1 of 1



R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Check Request	
Request ID:	584
Request Date:	03/31/2020
Check Type:	Customer Refund
Check Amount:	\$60.00
Distribution:	Mail to Payee
Request By:	Sandra Witkowski
Reason Type:	Customer Request
Reason Note:	

Payee Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Phone: (586) 469-4200
E-Mail: dgeiger@recprosoftware.com

Revenue Account Distribution		
Account#	Description	Amount
10011	Adult Course Revenue	-\$60.00

Checkout screen has the credit amount pre-filled.

Checkout

Receipt Total: **\$40.00**

1 Step 1 - Apply Payment to Sale / Receipt

Amount

Cash: \$0.00 Change Due: \$0.00

Check#

Check 1: \$0.00

Check 2: \$0.00

CC# Transaction ID Auth Code

Credit Card 1: \$0.00

Credit Card 2: \$0.00

Acct Credit: **\$40.00** Credit Balance: **\$40.00**

Other: \$0.00

Total Applied: **\$40.00** Remaining to Apply: **\$0.00**

2 Step 2 - Review Sale / Receipt Information

Receipt Date: 3/31/2020

Paid By: Dale Geiger

Payment Note:

3 Step 3 - Choose Receipt Output and Complete Checkout



Sales Receipt indicates the new course was paid for by **Account Credit**.

Page: 1 of 1



R.C. Systems, Inc.
35807 Moravian Dr.
Clinton Township, MI 48035
Ph: (586) 469-4200
Fax: (586) 469-4867

Customer

R.C. Systems, Inc.
Dale Geiger
12345 My Street
My Second Address
Mount Clemens, MI 48043

Sales Receipt

Receipt #: 12800
Receipt Date: 03/31/2020
Receipt Total: \$40.00
Paid By: Dale Geiger
Registrar: SW
Pay Method: Acct Credit \$40.00
Primary Phone: (586) 469-4200

Item Description	Quantity	Price Ea	Total
Wallpaper Made Fun (Morning Session) (Spring 2020, #44-1-AM) Start / End: 4/2/2020 - 4/30/2020 Wed 9:00 AM - 10:00 AM - Arts & Crafts @ Anchor Bay High School Participant: Kara Geiger DOB: 9/15/1998	1	\$40.00	\$40.00

Child Care Tab

User may charge the customer a late pickup fee from this screen, by clicking **Charge Late Pickup Fee** button, entering in the Time of Pickup or Minutes Late. **ReCPro™** will calculate the cost and add the charge to the customers open balance.

Customers

Head of Household: Last Name: Geiger

Family Information: Family Members: Emergency Contact: Courses: Child Care: Memberships: Facility Rentals: D

End Date: Begin Date: Session: Participant: Susie Geiger

Registered Billing Period: 6/12/2020 9/9/2019 School Year 2019-2020

Billing Rate: Activity Date: 03/31/2020 - Tuesday
Activity Date: 04/07/2020 - Tuesday
Activity Date: 04/14/2020 - Tuesday
Activity Date: 04/21/2020 - Tuesday
Activity Date: 04/28/2020 - Tuesday
Activity Date: 05/05/2020 - Tuesday
Activity Date: 05/12/2020 - Tuesday
Activity Date: 05/19/2020 - Tuesday
Activity Date: 05/26/2020 - Tuesday
Activity Date: 06/02/2020 - Tuesday
Activity Date: 06/09/2020 - Tuesday

Charge Late Pickup Fee

Activity Information: Session: School Year 2019-2020
Title: Anchor Bay After School Care
Late After: 6:00 PM Fee: \$1.00 Per Minute

Customer Information: Participant Name: Susie Geiger
Primary Contact: Dale Geiger
Primary Phone: (586) 469-4200

Step 1 - Enter Pickup Date & Time
Date of Pickup: 3/31/2020
Time of Pickup: 6:00 PM -OR- Minutes Late: 15

Step 2 - Set Payment Due Date & Verify Late Fee
Payment Due Date: 3/31/2020
Late Fee: \$15.00

Step 3 - Add Fee to Customer Account
Charge Late Pickup Fee Cancel

Options: Charge Late Pickup Fee

CURRENT



Memberships Tab

Memberships Tab is only available if the **Memberships Module** has been purchased.

Family Information		Family Members		Emergency Contacts		Classifications		Vehicles		Activity History	
Courses		Child Care		Memberships		Facility Rentals		Dock Rentals		Locker Rentals	
Membership						Plan	Term	# of	Visits Remain	Effective Date	Expire Date ▾ Status ▴ Status Reason
ReCPro Employee Fitness Membership						Individual	12 Months	0	3/31/2020	3/30/2021	Active 
Family Members		Transaction History		Membership Usage							
🔍 Name	▴ Birth Date	Age	Gender	Picture	Status	Status Reason	Card#	Card Picked Up By			
▶ Dale Geiger	8/1/1971	48			Active		77382	Dale Geiger			

Membership tab list the history of the memberships the family has purchased. Click the plus sign next to the membership and you will see 3 additional tabs. **Family Members** lists family names that have membership. **Transaction History** lists transaction date type, effective date and expired date. **Membership Usage** logs each time a member scans their membership using the Member Check-in screen when entering a facility. Each tab maps over from various modules in **ReCPro™** in order to quickly view data related to the customer selected.

Facility Rentals Tab

Facility Rentals Tab is only available if the **Facility Rentals Module** has been purchased.

Customers

Add

Delete

Save

Clear

Search

Previous

Next

Web Account

Head of Household

Last Name: Geiger

First Name: Dale

Birthdate: 8/1/1971

Age: 48

Gender: Male

Family Information

Family Members

Emergency Contacts

Classifications

Vehicles

Activity History

Courses

Child Care

Memberships

Facility Rentals

Dock Rentals

Locker Rentals

Permit#	Contract Date	Use Type	Description	Rental Fees	Security Deposit	Tax	Rental Total	Amount Billed	Paid To Date	Balance Due
+ 11-00014	2/1/2011	Facility Rental	Geiger Family Reunion	\$25.00	\$0.00	\$0.00	\$25.00	\$25.00	\$25.00	\$0.00
+ 14-00005	2/10/2014	Facility Rental	Family Reunion	\$25.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00
+ 15-00048	2/3/2015	Hall Rental	Graduation party	\$16.00	\$100.00	\$0.00	\$16.00	\$16.00	\$16.00	\$0.00
+ 15-00176	7/14/2015	Camping	camp weekend	\$50.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00
+ 20-00015	3/31/2020	Facility Rental	Family Reunion	\$600.00	\$100.00	\$0.00	\$600.00	\$600.00	\$600.00	\$0.00

Locations

Invoices

Description	Rental Fees	Sec Dep	Tax	Rental Total	Amt Billed	Amt Paid	Balance Due	Amt Unbilled	Totals Hrs
+ Algonac Park - Shelter 1	\$600.00	\$100.00	\$0.00	\$600.00	\$600.00	\$600.00	\$0.00	\$0.00	12.00
	\$600.00	\$100.00	\$0.00	\$600.00	\$600.00	\$600.00	\$0.00	\$0.00	12.00

Facility Rentals displays the details of the permit. Click button to drill down for further details. See the Facility Rental User Manual for details on how this module works.

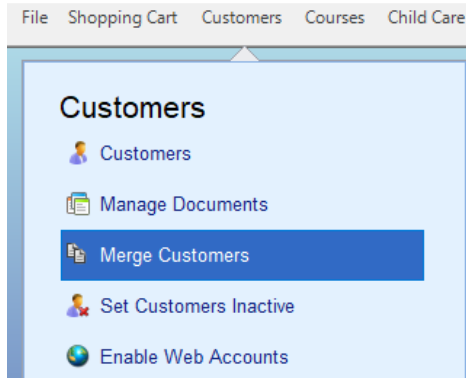
See User Manuals for **Dock Rentals** and **Locker Rentals** if you've purchased those modules.

Manage Documents

This feature allows you to manage all customer documents that need review. Please see our user manual for Document Management System or go to www.ReCProSoftware.com/videos to watch a short presentation on this.

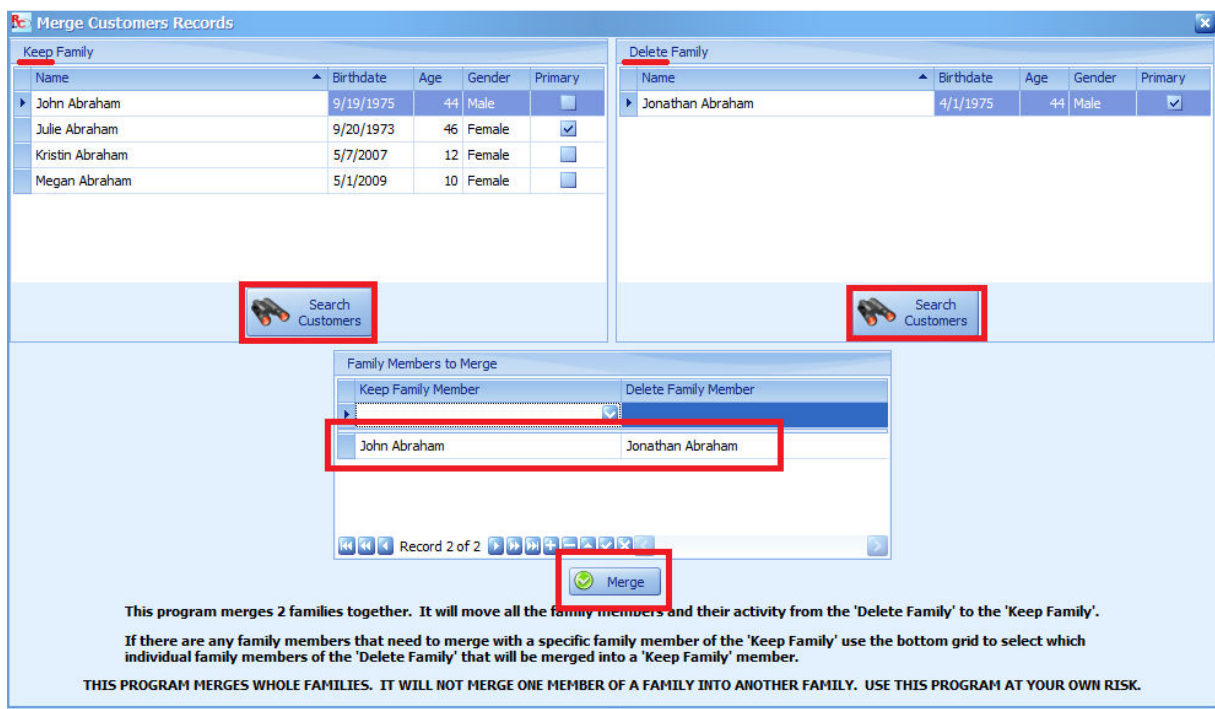
Merge Customers Records

From the main menu, select **Customers > Merge Customers**



Merge Customers Records screen will display. The purpose of this functionality was designed in the event the customer database has duplicate records and user needs to delete the duplicate but merge all activity and dollars with the original record.

Important Note: This program merges **WHOLE** families. It will not merge **ONLY** one member of a family into another family record.

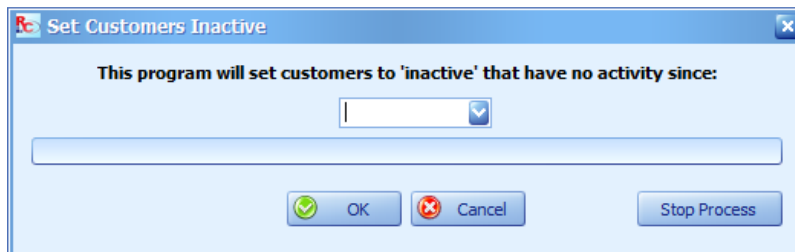


Find Customer search screen will display. Repeat the **Search Customer** steps for the **Delete Family** side. At this point user may click **Merge** button or continue on to replace a specific family member record. In the following example, John Abraham is the same person as Jonathan Abraham. So the user would want to specifically delete Jonathan and keep John.

Since this feature cannot be undone, we recommend you watch our **Merge Customer** video on our website, go to www.ReCProSoftware.com/videos or contact our support department for assistance.

Set Customers Inactive

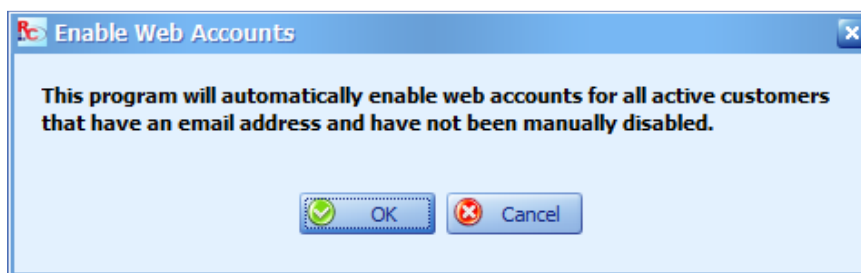
From the main menu, select **Customers > Set Customers Inactive**. The **Set Customers Inactive** screen will display.



The purpose of this functionality is to archive records that have been inactive since a specific calendar date (user selects). The customer record is hidden from the **Customer Lookup** search screen but kept in the background for historical value.

Enable Web Accounts

From the main menu, select **Customers > Enable Web Accounts**. The **Enable Web Accounts** screen will display.



The purpose of this functionality is to give access for online registration to all customers who have an email address in one simple step. This saves time from having to open each customer record and enabling web access.