

CALENDAR & EVENTS

Withdrawal Confirmation - Online

- This brings the withdrawal confirmation functionality to the online portal so that an online user can receive a withdrawal confirmation when they withdraw online, or regenerate a past withdrawal confirmation document.

Withdrawal Confirmation Document

- A new merge document object that can be used to send a document confirming the withdrawal of an attendee from an activity.
- An admin processing a withdrawal from an activity can then use the merge document to generate a withdrawal confirmation at the completion of the withdrawal, or regenerate it at a later time.

Event Outcome Prerequisites

- When this feature is enabled under the Calendar settings, staff may select events as prerequisites on the Booking tab. A registrant's eligibility can now depend not only on whether they have attended any of the selected activities, but also on whether they have achieved specified outcomes when they completed those activities.

ONLINE EXPERIENCE

Online Checkout to Trigger Workflows

- Online Checkout 2.0 is now able to trigger custom workflows based on the processing of a transaction, such as modifying the name of ticket when nearly sold out.

Membership Widget Questionnaires

- Membership widgets now support questionnaires, also known as prompts. Whether customers signing up for a membership need to complete a waiver, provide emergency contact information or indicate special requirements, this information may now be collected while selling a membership via an online widget.

Embedded Membership Widgets

- In their first phase, online membership widgets supported links to the PerfectMind domain. Now you can embed widgets directly on your organization website like Online Registration widgets, so your online customers can browse the memberships available without leaving your site.

Responsible Party for Invoice

- Transaction customer and invoice payer who is responsible for the invoice may not be the same person, and may not be members of the same account. This is the case with split payments and subsidy depending on your business case. The system now provides a payer field online to show the payer of the invoice, who is responsible for that invoice. The invoice listing will consider the payer when choosing which invoices to show to online members for their account, based on the settings for Online Portal.

Online Payment Plans for Memberships

- Customers enabled with membership widgets and Checkout 2.0 may now sell memberships online with payment plans. Set up your memberships with payment plans as usual, add them to one or more membership widgets, and deploy your widgets on your organization website for enable your customers to buy online.

ACCOUNTING & BILLING

Customer and Account Statement - User Experience Improvements

- To simplify the viewing of a customer or account statement, the number of cart items is grouped according to whether there are childcare/custom bookings or facility contract purchases. All reservations or bookings belonging to the same activity or contract will group as one line item for each date of transaction. For example, if you purchase multiple bookings on June 1st, they will all show as one line item. If you amend your bookings on June 5th, June 1st appear as one line item and June 5th will appear as another line item showing the summary of what was added on that date.
- Each transaction will follow a logical grouping rather than being based on when the transaction was completed. All purchased items within a transaction, per day, will appear before any invoice-related information. This will be followed by payments made. Any account credit or debit will follow the associated payment record. Credit or debit that is not associated with a specific payment record will appear below other items. All these changes make the transaction activities easier to read.

Custom GLs Per Location

- Memberships for all locations can also be configured to use custom GL extensions to determine which location's revenue GL the system should use, depending on the location that the membership was sold at.

Configuring GL Extensions

- GL Extensions are prefixes or suffixes that may be appended to a GL number when GL journal entries are created. These make the number location-specific so that it is not necessary to create multiple location-specific GL numbers. On the "GL Number Extensions" page, set the details for your GL number extensions.

GL Location Extension - Membership & Product

- PerfectMind now supports both product and membership for all locations. When the product or membership is set to all location, user should be able to select the GL Account Type to use GL extension that can be configured by Global Admin in the Extension setting in Accounting Setting. When the product or membership is being sold, the extension will be appended to the GL Account assigned based on the location the membership or product was sold at. Product or membership sold as extra for an event will continue to have the ability to use event GL for the revenue of the extra.

Account Credit Cash Out to Credit Card

- When enabled, this feature allows staff to refund account credit to a credit card that is on file. Configure which user profile can use this feature, as well as the refund limit (per transaction) that can be refunded to the credit card. If a credit card is not on file, the customer can either enter credit card information through their online profile or by visiting the location and speaking to a staff member.

NOTE: Only Moneris Canada and WorldPay support this feature in this release. Other gateway such as Tender Retail (Chase) and Elavon will be available in later release.

GLOBAL SETTINGS

Default Document Templates for Online

- Admin can now set the default merge document template for online users so that online users are not limited to the system templates provided by PerfectMind.

FACILITY MANAGEMENT

Fees and Prices Per Booking

- Wherever possible, a facility booking will respect the fees and/or prices for all bookings on an individual basis. Only when changes are made to the actual booking will the system affect the fees or prices. The View Sessions popup will show the current read-only fees and prices before any changes, as additional fields. The system will show the changes to fees and prices, which will take effect when changes are saved. This allows you to review the fee and price impact of your changes before confirming those changes.

Skylogix Improvements

- Working with the Skylogix team, we have simplified the settings and the data that is sent to Skylogix, which can be found in Settings, Lights & Locks. Further, for the integration to work, there is no need to setup additional extras for the lights or washrooms. You may still setup these extras if you would like to charge on a per session or per hour basis, or have a business need to itemize those extras on a contract document. Additionally, enhancements have been made to the processes of automatic and manual file creation, upload and auditing.

Advanced Reservation - Remember Date Filter

- When managing your contracts between advanced reservation and the contract page, the system will now remember the start date you have set in advanced reservation. This allows you to add new reservations to a contract more quickly and easily.

REPORTS & ANALYTICS

Activity Attendance Sheet - Daily - Privacy Improvements

- The attendance sheet now allows you to hide the client ID, enrollment status, and the enrollee's last name, for privacy purposes.

Attendance Sheet - Privacy Improvements

- For privacy purposes, the attendee's last names can be masked in Attendance Sheets, and the reports Event Roster by Series, and Event Roster with Attendance Sheet.

Activity Registration Summary - Show Day of Week

- The report now includes a column which shows the days of the week in which each course runs.

A/R Summary report - Filter Improvements

- The A/R Summary can now be filtered by the cost center of the revenue GL of that item. Currently, in order to pay for one item in an invoice, the entire invoice must be paid for. For example, if an invoice includes a swim class, goggles, and a bottle of water, you cannot pay for the goggles alone. you must pay for all three items. This is why the entire invoice is shown in the A/R report, even if some of the items in an invoice do not pertain to the selected cost center.
- You can also view A/R by the amount due date or the posting date. Viewing by the amount due is used for billing and collection where the amounts and aging are based on the invoice due date, and will show customers who have outstanding amounts. Viewing by posting date allows for financial analysis where the amounts are aged by the GL posting date. This will match the overall A/R balance on the General Ledger report for the same time period.

Event Roster by Series - Sorting Enhancement

- You can now sort the roster list on the Event Roster by Series, and Event Roster with Attendance reports, by gender, then name. This helps staff to see the attendees of the same gender listed together.

CONTACTS & ACCOUNTS

PM Scan - Select membership

- New settings have been added to control whether you would like one event selected at a time, or multiple events. Memberships can only be selected for scanning when “Allow multiple events with one scan” is disabled. PM Scan will also sort events in a logical order, and settings have been added to control whether you would like the system to wait for staff input or not.

POINT OF SALE

Prorated Memberships

- Memberships limited by date range have fixed activation and expiration dates. When purchased in the middle of that range, only a portion of the membership’s duration will be left. By enabling prorating for memberships limited by date range, fees will be automatically prorated proportionately to the remaining duration, or else will provide an authorized user to apply prorating, depending on your configuration. This feature may be enabled on a per-membership basis.

Transaction Notes

- When a transaction has reached the POS 2.0 payment page, staff may record a note that will be saved with the transaction. For example, during a ticket sale, staff could record the ticket numbers for future reference when verifying the sale.