

## ACCOUNTING & BILLING

### Deferred GL - Membership per location

[PM-I-5784 | Ability to setup different GLs per location \(deferred GLs for memberships\)](#)

#### Feature Overview

- Users may now select custom GLs per location when configuring the deferred revenue GLs for memberships for all locations.

#### Getting Started

- N/A

#### Take a tour

- The tool for configuring custom GLs per locations is available on all membership templates and “Use custom GLs per location” is selected for the deferred revenue GL.

#### User guides

- With the ability to configure location-specific deferred revenue GLs for memberships for all locations, your membership setup is maximally flexible.

#### Reports & Analytics

- N/A

### Deferred Revenue - Facility Booking

[PM-I-4862 | Ability to Recognize Revenue for the Occurrence Prior to Payment is Due \(Facility Booking\)](#)

#### Feature Overview

- The system will now defer revenue to the day of booking for processing and terminating facility booking contracts, where in past the earliest date the system would recognize is the invoice date
- This includes the current amendment process when a new transaction is created, and previous transaction is terminated
- This improvement applies to both bookings and equipment extras

#### Getting Started

- There are settings in the backend custom.setup that need to be enabled called EnableAccrualAccountingforFacilityBooking and EnableDeferEquipmentExtra
- We suggest enabling this on your live test and process some of your specific business cases before requesting enabling on live
- This feature will respect the accounting deferral settings, and will only defer if facility booking is set accordingly

#### Take a tour

- When processing a facility contract, the GL service will generate deferred revenue records to the day of booking for bookings and extras

#### User guides

- Your steps to create, amend and process a contract remain the same as current, and the backend change is what ensures proper deferral and revenue recognition

### Reports & Analytics

- Your facility booking report with GL assignments, will now match your revenue postings for all bookings and equipment extras that are added or amendment for dates in the future
- As expected, any additions or amendments to bookings or equipment extras to dates in the past, will have the revenue changes recognized on the day of amendment processing, to ensure the system does not make postings in the past

## **Deferred revenue - Facility Booking Amendment 1.5**

[PM-I-5564 | Update Amendment 1.5 to Support New Deferral Logic for Facility Booking](#)

### Feature Overview

- The system will now defer revenue to the day of booking for the amendment 1.5 logic, where in past the earliest date the system would recognize is the invoice date
- This improvement applies to both bookings and equipment extras

### Getting Started

- There are settings in the backend custom.setup that need to be enabled called UseGLServiceForAmendFacilityBooking and EnableAccrualAccountingforFacilityBooking and EnableDeferEquipmentExtra
- Once UAT testing is completed for Amendment 1.5 on Beta for your business cases, we can enable amendment 1.5 inclusive of this improvement for you
- This feature will respect the accounting deferral settings, and will only defer if facility booking is set accordingly

### Take a tour

- When processing an amendment for a facility contract, the GL service will generate deferred revenue records to the day of booking for bookings and extras

### User guides

- Your steps to amend and process a contract remain the same as current, and the backend change is what ensures proper deferral and revenue recognition

### Reports & Analytics

- Your facility booking report with GL assignments, will now match your revenue postings for all bookings and equipment extras that are added or amendment for dates in the future
- As expected, any additions or amendments to bookings or equipment extras to dates in the past, will have the revenue changes recognized on the day of amendment processing, to ensure the system does not make postings in the past

## **General ledger report - GL extensions**

[PM-I-5583 | Update GL Report to show GL Extension](#)

### Feature Overview

- To enable General Ledger Report to show GL balance for each GL Account with its extension

### Getting Started

- User to check "Show GL Extension" on General Ledger Report if user wants to group the GL balance by the GL Account and its extension.

### Take a tour

- To locate the General Ledger report, user should navigate to menu More -> Reports -> View Reports, General Ledger report should be found under Accounting folder

### User guides

- Many organizations tend to keep the GL Account number standard across locations but still wants the ability to differentiate the revenue by having a different suffix or prefix.
- Using GL Extension would meet that requirement as user can configure the extension (up to 15 characters) and append to the GL Account either as suffix or prefix.
- The GL extension would be stored in the journal record when the transaction was created and any refund transaction would reverse the revenue account with the same extension.
- This enhancement to the General Ledger Report would allow staff to review the balance for each GL Account with its extension and allow them to drill down to detail on which transactions made up the balance.

### Reports & Analytics

- When the extension was enabled on General Ledger report, printing and export of the report would continue to show the extension.

## **Manual journal entry - System GL**

[PM-I-5588 | Ability to Select System GL Account for Manual Journal Entry](#)

### Feature Overview

- This enhancement is to allow user to make manual journal entry with system GL account including Payment GL, and Accounts Receivable with given permission

### Getting Started

- This feature is permission based and user must be given the permission to be able to choose the system GL account from the Journal Entry function
- The permission can be found in smart client. Go to Security -> Profiles -> Select the profile -> Permission tab -> Modules picklist -> User Service. Global Admin should find the permission setting "AllowSystemGLAccountforJournalEntry"
- Once permission is given for the user profile, the user can now see and select any system GL account when making manual journal entry.
- User can locate the Journal Entry function by navigating to More -> Bookkeeping -> Journal Entry

### Take a tour

- This functionality provides the ability to select any system GL account for manual journal entry.

### User guides

- Once permission is given, user can go to Journal Entry to perform manual journal entry with any system GL account

### Reports & Analytics

- Since the journal entry were created manually by user, system GL account like Payment GL or Accounts Receivable should be used in care due reconciliation purpose.

## **Withdrawal fee GL account option**

[PM-I-5684 | \(Facility Contract\) Withdrawal fee to use the same revenue GL Account of withdrawn item](#)

### Feature Overview

- To allow withdrawal fee that applied to facility booking to use same revenue gl account as withdrawn items

### Getting Started

- User should go to the withdrawal fee setting to configure the GL account option for withdrawal to use "Same GL Account for All Locations", "Custom GL Account per Location" or "Same GL Account as Withdrawn Item". The option for "Same GL Account as Withdrawn Item" should be hidden for withdrawal fee that applied other than Facility Booking (Note: course withdrawal fee will be supported in later)

### Take a tour

- To locate the withdrawal fee setting, user should navigate to Settings -> Billing -> Withdrawal Fees.

### User guides

- This feature should be used for organization that wants its withdrawal fee to be posted with the same revenue GL account as the items withdrawn from.
- When a facility booking was terminated/amended, any withdrawal fee that applied for the reservation or the extras should go back to the same revenue GL account as the reservations/extras.
- If the extra was setup to use event GL, then the withdrawal fee applied for the extra items should also be posted to the same revenue GL account used for the reservation of the extra items.

### Reports & Analytics

- With this feature configured, the revenue of the reservation/extra would share the same GL Account thus user should expect the revenue balance might increase overall. To differentiate a revenue for sales and withdrawal fee, the reference description for the journal record for withdrawal fee should have the name of the withdrawal fee.

## CALENDARS & EVENTS

### **Amend activity registrations**

[PM-I-1678 | Ability to amend or modify a registration without withdrawing and re-registering](#)

### Feature Overview

- Until now, the only way to change a registration was to withdraw and re-register, at the risk of losing the original spot.
- Now, you can change certain details of a registration, such as fees, extras, discounts and more, for the same attendee while the original spot is securely held.

### **Custom booking – Holds**

[PM-I-5466 | Custom Bookings: Hold the spot when session selected until transaction is completed / abandoned](#)

### Feature Overview

- Days selected in the registration and amendment process for custom booking, will now be held until they are processed on POS/Checkout or abandoned/released

### Getting Started

- To enable holds for custom booking, you can go to Settings, Online Booking, Booking Restrictions section

### Take a tour

- When holds are enabled, you will see the hold tracker in the upper right as you select and de-select days
- The days that have holds currently will be identified with a hold icon
- For admin staff, to view the hold details on a specific day, you can hover on the day with the icon
- The holds information shown to admin staff is the same as what we display in the event header for single booking and course holds currently, breaking this down into admin and online holds versus booked spots
- The capacity and spots left information considers holds
- For online customers, the registration screen will simply show the icon for days they have chosen and held, as detailed holds information is not made available for customers

### User guides

- If you have holds enabled, and you make a new registration and choose 10 days, you will see 10 spots held in the upper right
- If you choose to de-select a day, the hold tracker will update as it does currently with other events/programs
- When selecting a day, the system will do another check to ensure it accounts for any holds that may have been initiated or released since the registration or amendment screen was loaded

### Reports & Analytics

- The holds feature has a cleanup service that removes any orphaned holds due to network failures, power outages or any other sudden disconnection from the system
- This feature is a pre-requisite for our upcoming waitlist feature, and will make online custom booking registrations quicker and easier with less staff involvement

## **Custom bookings - Amendment view**

[PM-I-4030](#) | [In Custom Booking, when withdrawing a child from a day, a receipt for the amendment should be produced](#)

### Feature Overview

- Staff and customers will now be able to see any amendments made to their custom booking registrations for any amendment made along with the dollar value impact to their registration
- This will assist in reviewing the changes made to custom booking transactions over time, and in addition add supplemental detail for the registration confirmation

### Getting Started

- No settings or permissions are required for this feature

### Take a tour

- From the schedule list view, on contact profile or online customer portal page, you can choose to see the summary or detail of the amendments made
- You can choose the amendment cycle you want to view, which provides the information based on the changes made for that specific set of changes

### User guides

- When a customer calls in to add and remove days from a custom booking transaction, the system stores and tracks all these amendments
- With this new feature, after the amendments have been processed, staff can view the changes made to answer questions their customers may have
- In addition, the customer can go to their online portal and review their changes as well, which will also indicate the dollar value impact

### Reports & Analytics

- Future phases will provide the ability to see the entire transaction at that point in time, including amendments
- Future phases will also provide the ability to print and email this detail in PDF form, and allow accessing this information on Complete and Thank you pages for admin and online custom booking

### **Event prerequisites – Services**

[PM-I-3997 | Service as Prerequisite for Course Registration](#)

### Feature Overview

- Often, the prerequisites for a course can be satisfied by any course associated with a particular service.
- Now admins can save time when setting up courses by simply selecting one or more services as a prerequisite, not a series of individual courses.
- Service prerequisites can be selected together with a required outcome as well, such as “Pass”.

### Getting Started

- Make sure that prerequisites are enabled under Settings > Calendar > Advanced Settings > Event Settings > Allow Events as Prerequisites.
- Any admin with permission to configure events may also select services as prerequisites.
- Permission is required to override prerequisites during the registration process.

### Take a tour

- To access this feature, first create or edit a course, then navigate to the Booking tab and the Prerequisites section.

### User guides

- This feature is designed to save admins time when configuring events whose prerequisites would be satisfied by any event under one or more services.

### Reports & Analytics

- N/A

### **PM Scan - Drop-in events**

[PM-I-5426 | PM Scan configuration and settings – Drop-ins](#)

### Feature Overview

- We have improved the handling of drop-in events with custom settings and logic enhancements
- Drop-in events will utilize existing and new settings and interpret them differently from other events like registered courses

### Getting Started

- This feature will respect the access and attendance setting on the scanner
- This feature is enabled when enterprise workflow is enabled AND enforce facility access check is also enabled
- Enterprise workflow is enabled by default for all enterprise clients, and can be enabled by request for all other clients
- To access the settings, go to Settings, Automations, Attendance settings, Attendance setting
- Alternatively, you can go to Activities, Check-in, Settings
- Allow additional scan is the key difference,

- When "after" is selected, the system will only show that event again until the time specified and passed, and then subsequent scan will only grant access
- When "and attend after" is selected, the system will always show the event and only grant access when it is selected before the time specified has passed. Once the time has passed, the system will both grant access and attendance
- If customize settings is not enabled, the general settings will still be interpreted the same was this feature for drop-in events

#### Take a tour

- When PM scan is launched and a customer scans in, any applicable drop-in events as per settings will show for selection
- Once selected, based on settings, the staff member may have a choice of membership and to confirm the selections

#### User guides

- Using a combination of settings, you can now setup an all day repeat event for your "Open Swim" or "Weight Room" drop- in events
- You can setup your additional scan time to be 120 minutes using the "and attend after"
- When a customer scans in the first time, an attendance record is created
- Any scan after that and up to 120 minutes from the first scan will simply grant access, which can accommodate if the customer forgot something in the car for example
- After the 120 minutes, an additional attendance record will be created which can capture the fitness enthusiasts that may be swimming or working out multiple times per day

#### Reports & Analytics

- Creating drop-in events with the new settings and logic, will capture the accurate unique visit statistics that many parks and recreation find valuable
- The system will record all access and attendance logs as per current PM Scan functionality
- The system will also record all new audit trail records introduced in 5.2.1, logging all actions and changes made by system or staff to a scan record

#### **Waitlist & holds improvement**

[PM-I-5510 | Waitlist gets priority on holds released before new attendees can hold any spots](#)

#### Feature Overview

- When a spot held for an event is released, the system will now take the next person on the waitlist and move them into pending confirmation, providing automatic waitlist settings are enabled

#### Getting Started

- When holds are enabled this feature will be operating in the background.
- To enable holds, go to Settings, Online Booking under the Booking Restrictions section
- This improvement will respect all existing waitlist settings as per Settings, Calendar, Waitlist Settings, General Settings
- This improvement will also respect the enable/disable settings for Automatic Waitlist on Calendar and Service

#### Take a tour

- This functionality is present in the background and will initiate when holds are released, provided automatic waitlist is enabled globally or at the calendar or service level

#### User guides

- During registration days when demand is high for events and programs, this feature improvement will ensure all customers have a fair chance at obtaining the spots that come available in the order in which they were waitlisted for

#### Reports & Analytics

- All attendees that move from waitlist to pending when a hold is released, will follow all the current attendance record flow
- The attendance records will all show in the proper status and be reflected on all current roster reports accordingly
- The activity logs for waitlist will be created for the transition from waitlist to pending when a hold is released

## CONTACTS & ACCOUNTS

### **Document - Required signature**

[PM-I-3036 | Can select submit on a send to sign document without having a signature](#)

#### Feature Overview

- Any “send to sign” or “save and send” document will now require a signature in order to be submitted

#### Getting Started

- No settings for this feature

#### Take a tour

- When sending a document for signature using send to sign or save and send, the system will not allow the document to be submitted or signature box to be completed without a signature being added
- If the user clicks on the submit or done buttons, which are disabled by default, they will receive a message indicating they need to add their signature

#### User guides

- A customer may receive a document, and after reviewing they click submit without signing
- This feature enhancement now enforces the required signature so this issue no longer will occur for documents sent out for signature

#### Reports & Analytics

- No additional information for this feature

### **Schedule view - Add to calendar**

[PM-I-5623 | Online Portal - Schedule View - Add to calendar](#)

#### Feature Overview

- Customers can now add their events to their calendar, or additional calendars, after they have completed their registrations

#### Getting Started

- No settings are required for this feature
- Take a tour
- In the schedule list view, on the customers portal, we have provided an Add to calendar action

- This functions the same way as the add to calendar option at the end of the initial registration process

#### User guides

- Customers may have forgotten to add their events to their calendar, want to add to additional calendars, or were not logged into the proper device when making the initial registration
- Customers can now add these events to their calendars at their convenience using the Add to calendar action

#### Reports & Analytics

- No additional information available for this feature

### **Schedule view - Event details**

[PM-I-5622 | Online Portal - Schedule View - Event Details](#)

#### Feature Overview

- When hovering over the event name in list view, you can now see additional information like location, dates and instructor
- This feature is available on the contact schedule view for admin staff, as well for customers through their online portal to help improve usability for the online experience

#### Getting Started

- No settings are required for this feature

#### Take a tour

- The event name in the schedule list view is now shown in blue and underlined to indicate more information
- Hover is automatic when your mouse is rolled over the event name

#### User guides

- Often the same event can be occurring at multiple locations
- Addition of showing more information helps staff and customers know the exact event they are looking at for further action or to simply gain that additional information

#### Reports & Analytics

- Future phases of this feature will add additional information to this hover, and potential actions that can be taken as well

## FACILITY MANAGEMENT

### **Facility agreement – Payments**

[PM-I-2692 | Include Payment Type on Facility Agreement](#)

#### Feature Overview

- Show payment details such as payment type on the Facility Contract Agreement document

#### Getting Started

- User has access to edit merge documents (for editing), or the ability to generate a facility agreement document to see the information on the document.

#### Take a tour

- Go to Manage Document and edit an existing Facility Contract Agreement document or create a new one.

#### User guides

- In the drop down for merge fields, find the Payment section to see all the merge fields with the payment details.
- Add a section for payments, and the fields you would like to show, and save the document
- Once added, open a contract that has payments and generate a Facility Contract Agreement document to see the payment details.
- The payment details need to go into a loop to display all the records and therefore in the HTML code of the document, the merge fields for payments need to be wrapped around <!--loop:Payments--> before the merge fields, and <!--loop--> after.
- Since payments are tied to invoices, the payments field can be within the <!--loop:Invoices--> tag so the payments show right after the invoices, or independently in its own section. However, when displayed independently, the <!--loop:Payments--> tag should still be added before the payments tag, and the end loop afterwards <!--loop-->
- EXAMPLE A: Payments shown together with the invoice  
    <!--loop:Invoices--> invoice merge fields here  
    <!--loop:Payments--> payment merge fields here <!--loop-->  
    <!--loop-->
- EXAMPLE B: Payments in a separate section
  - Invoice section: <!--loop:Invoices--> invoice merge fields here <!--loop-->
  - Payment section: <!--loop:Invoices--> <!--loop:Payments--> payment merge fields here <!--loop-->  
    <!--loop-->

#### Reports & Analytics

- We currently show all payments, including the amendment process payments
  - **Recommendation is to show payments on their own, and not looped within invoice**
- Future phase will exclude the amendment payments

### **PM Scan - Facility booking events**

[PM-I-5429](#) | [PM Scan access and attendance - Facility Rental](#)

#### Feature Overview

- We have added the handling of facility booking events with custom settings and logic enhancements
- Facility booking events will utilize existing and new settings and interpret them differently from other events like registered courses

#### Getting Started

- This feature will respect the access and attendance setting on the scanner
- This feature is enabled when enterprise workflow is enabled AND enforce facility access check is also enabled
- Enterprise workflow is enabled by default for all enterprise clients, and can be enabled by request for all other clients
- To access the settings, go to Settings, Automations, Attendance settings, Attendance setting
- Alternatively, you can go to Activities, Check-in, Settings
- Allow additional scan is the key difference,

- When "after" is selected, the system will only show that event again until the time specified and passed, and then subsequent scan will only grant access
- When "and attend after" is selected, the system will always show the event and only grant access when it is selected before the time specified has passed. Once the time has passed, the system will both grant access and attendance
- If customize settings is not enabled, the general settings will still be interpreted the same was this feature for facility booking events

#### Take a tour

- When PM scan is launched and a customer scans in, any applicable facility booking events as per settings will show for selection
- Applicable facility booking events are any bookings for events attached to a contract that have the scanning contact attached
- There is no membership selection option for facility booking events

#### User guides

- Using a single scan card, or multiple cards for the contact attached to the contract, you can track exact attendance for the booking if desired
- You can setup your additional scan time to be 0 seconds using the "and attend after"
- When a customer scans in the first time, an attendance record is created
- Any additional scan will create an additional attendance record which can capture the exact attendance for the booking, and be compared with the expected attendance

#### Reports & Analytics

- Creating facility booking events with the new settings and logic, will capture the accurate unique visit statistics that many parks and recreation find valuable
- The system will create multiple attendance records for the same contact for the event, similar to how we create multiple drop in attendance records for walk-ins
- The system will record all access and attendance logs as per current PM Scan functionality
- The system will also record all new audit trail records introduced in 5.2.1, logging all actions and changes made by system or staff to a scan record

## GLOBAL SETTINGS

### **Fee rollover - Fee names**

[PM-I-5662 | Effective Dates for Fees - Bulk update enhancements - Fee names](#)

#### Feature Overview

- The fee rollover process has been improved to provide placeholder names and ability to find/replace, as well as add a prefix or suffix to the fee names

#### Getting Started

- No settings for this feature

#### Take a tour

- Navigate to Settings, Billing, Fees and select the fees you want to rollover and click update prices
- Once in the fee selection screen, choose the fees you want to rollover and update your price, duration and other flags as desired
- Clicking rollover fees will now pre-populate the existing fee names, and provide a find/replace option and ability to add a prefix and/or suffix

- Also provided is the ability to reset to the default for a single fee or all fees, in case there was a mistake made and it is easier to begin again

#### User guides

- When using the fee rollover feature initially, you may just want to add a prefix or suffix for the year of the fee
- This feature now gives you the ability to make the change to annual fees more easily
- Additionally, when rolling over those fees in future years using the convenience of the find/replace, you can update the new fee names with the same ease

#### Reports & Analytics

- Future phases will continue to improve the usability of the rollover fees feature

### **Fee update - Object views**

[PM-I-5663 | Effective Dates for Fees - Bulk update enhancements - Update functionality on object](#)

#### Feature Overview

- We have provided the update fee prices button on the object view for fees to make use of the existing view, filter and grouping functionality
- Using object views, with filters and adding groupings, makes the initial fee selection process easier and overall fee management, update and rollover process more streamlined

#### Getting Started

- No settings required for this feature

#### Take a tour

- To navigate to the price type object, add the following after your domain name in your web browser /clients/pricetype
- You will now be able to use the views you setup to quickly and more easily select the fees you would like to change using the button provided
- All downstream flow is the same as existing feature
- Clicking the back button however from the fee update/rollover page, will return you to the object view if that is the page you started from

#### User guides

- Many clients have a lot of fees, and over time a growing list with annual fees that get rolled over with new names
- The object views allow you to create specific views to isolate your fees for certain business areas, or to exclude fees from prior years
- Creating these views with filters and adding groupings, makes the initial fee selection process easier and overall fee update and rollover process more streamlined
- The Settings, Billing, Fees initial implementation only supports a single view, and may still be enough for some clients use

#### Reports & Analytics

- Future phases will continue to improve the usability of the fee update/rollover functionality

## ONLINE EXPERIENCE

### Appointment booking - Mobile responsive

[PM-I-5634 | Appointment Booking Online - Mobile Responsive](#)

#### Feature Overview

- Customers online can now make appointment bookings more easily on their mobile devices
- Getting Started
- No settings for this feature

#### Take a tour

- The appointment booking landing page will now show an appropriate amount of days on a mobile device
- To access this page, you can copy the widget link or access preview mode, and select the appointment booking calendar
- Navigating through the steps to the dates and times selection, will initiate the responsiveness on mobile
- 

#### User guides

- Customers can see all the information they need when making their appointment bookings for your organization to ensure they are selecting the correct date and time

#### Reports & Analytics

- Future phase will see additional UI enhancements to the online appointment booking process

### Custom booking - Online usability

[PM-I-5780 | Online Custom Booking - Paying for Booking Online - Usability](#)

#### Feature Overview

- We have made some improvements to the usability and flow for the customers online custom booking experience
- Customers can now checkout fully with their selections for the initial registration

#### Getting Started

- The system will respect the current widget settings
- Events need to be enabled for online, with at least 1 online fee
- Additionally, the calendar and service for the custom booking event you want to show registration online, will need to be selected in the widget setup

#### Take a tour

- As you navigate through the online custom booking experience, admin side functionality and options are no longer shown
- In addition, we have removed some unnecessary steps if aspects like questionnaires are not present
- A thank you page is now generated during the custom booking flow for the customers online registration

#### User guides

- The booking process steps have not changed, but have been cleaned up and streamlined

### Reports & Analytics

- Future phases will see continued improvements to this process for additional streamlining and usability

### **Online sales - Available quantity**

[PMEN-I-657 | Should not be able to sell products when zero quantities left](#)

### Feature Overview

- When enabled, this feature ensures that items with limited available quantities such as inventory products and tickets cannot be oversold online.
- Items with no remaining units will not disappear or simply be disabled, but be clearly marked as sold out.
- Inventory control extends to grouped items with multiple combinations of attributes, such as clothing with colors and sizes and tickets with dates and times. Sold out combinations will also be clearly marked while remaining combinations will remain available for selection.

### Getting Started

- Enforcing inventory levels is a global database setting.
- When inventory enforcement is enabled, any product with a defined available quantity will respect its inventory levels.

### Take a tour

- This feature may be seen in action on public- and member-facing product views and on Checkout 2.0.

### User guides

- N/A

### Reports & Analytics

- N/A

## REPORTS & ANALYTICS

### **Activity roster form**

[PM-I-4252 | Report - Head count sheet which is similar to Attendance Report](#)

### Feature Overview

- A new report called Activity Roster Form - Daily
- A daily roster sheet with blank columns users can add to use for writing in any required information or using as a headcount check-box.

### Getting Started

- User has access to the Scheduling and Activity report folder

### Take a tour

- Find a course using the filters and date range.
- Report shows attendees for each session.
- Number of blank columns can be selected from 0 to 15

- Can show attendee details or mask it for privacy reasons.
- Or have blank rows where names can be written in.

#### User guides

- Can search for events through the event ID, dates, and event attributes.
- Filter options to show or hide columns and add blank columns.
- Filter options to mask or completely hide attendee names either to have it written in such as for break-out sessions or turn it into a self-sign/write in sheet.

### **Consolidated attendance report**

[PMEN-I-1237 | Consolidated Attendance Report](#)

#### Feature Overview

- A new report called Consolidated Attendance report
- Estimate the number of people within a given location

#### Getting Started

- User has access to the Scheduling and Activity report folder

#### Take a tour

- Run the report for a date range
- Focus on a specific type of attendance, course, membership, or facility rental.
- Drill down to a details page to see the specific course, membership, or rental is being attended in a given location.

#### User guides

- Filter for dates, attendance type, and locations

### **Detailed deferred revenue**

[PM-I-5448 | Detailed Deferred Revenue - report by date range, cost center](#)

#### Feature Overview

- A new start date filter to give the ability to retrieve deferred revenue GL postings on a date range, rather than up to a point in time
- Ability to filter by revenue GL cost center

#### Getting Started

- New filter settings on the report itself

#### Take a tour

- Load the report to see the new options

#### User guides

- The Start Date is a new filter option and is optional. Leaving it blank will retrieve all deferred revenue GLs with a posting date on or before the "To Date".
- A new filter for cost centers if the database is using cost centers for revenue GLs.

### **Event roster report**

[PM-I-5601 | Event Roster - sort by age, filter by gender](#)

### Feature Overview

- Sort the attendee list by age
- Filter the attendee list by gender

### Getting Started

- New filter settings on the report itself

### Take a tour

- A new option in the "sort" filter on the report
- A new filter control for filtering by gender

### User guides

- Load the report to see the new filter options and change the options as needed

## **Registration comparison report**

[PM-I-3743 | Registration Comparison Report](#)

### Feature Overview

- A new report called Registration Comparison report
- A way to count registrations online or through the front desk, on a per minute, per hour, or daily basis.

### Getting Started

- User has access to the Scheduling and Activity report folder

### Take a tour

- Run the report using event attributes and locations.
- Group the data per minute, per hour, or per day to see trends.

### User guides

- Filter for dates, event attributes, and locations
- Use the Registration Analysis to see the data per minute, per hour, or per day.

## **Staff payment estimate**

[PM-I-4256 | Report - Staff Payment Estimate - show original cost of course and the % to be paid to instructor](#)

### Feature Overview

- Show the fees for the course on the summary page
- Show information about the instructor pay rate on the detail page
- Show/hide options for more columns on the summary page

### Getting Started

- New filter settings on the report itself

### Take a tour

- High level details of where you go to access the feature in the system

### User guides

- Running the report and getting to the detail page is unchanged.