POS AND ONLINE CHECKOUT

Apply subsidies owned by the individuals who are assigned to activities and memberships, even if the payer is someone else

- In general, subsidies are meant to be used for items that are "owned" by the subsidy owner. A customer should not use her own subsidy to pay for items for someone else
- Now any eligible allocation owned by an activity registrant or a membership assignee may be applied on the POS Payment page, regardless of who the payers are

Create age-specific subsidy item rules

- You can create rules at the item level that apply only to subsidy owners who fall within a specified age range
- Use this feature to create different item-type-specific rules for various age ranges, such as Youth, Adult and Senior

Set expiry dates for subsidies on a per allocation basis

- Now you can set expiry dates for subsidies relative to the activation dates of individual subsidy allocations
- For example, you can set a subsidy allocation to expire 365 days from the date it was allocated
- You may also back-date or future-date an individual allocation's activation date

Cap the maximum total amount of subsidy that can be spent from an allocation toward specific item types

- Previously, a subsidy allocation could be used to purchase eligible items of any type until the allocation was used up
- Now you can set a rule that limits how much of an allocation can be spent towards items of a specific type, even if funds remain available to be spent on other item types

Set the minimum amount a subsidy owner must pay for specific item type as a percentage

- In the past, the only option was to set the minimum amount a subsidy owner had to pay out of pocket for events, memberships or products as a fixed dollar amount
- Now, you can configure the required minimum as a percentage

Ensure residents are charged the appropriate fee

- When dealing with residents, staff will now only be offered the resident fee to make sure residents get the best fee for them

ACTIVITIES

Look at all activities happening at a certain time

- Sometimes enquirers are looking for any course at a certain time rather than having a specific course in mind
- Staff can now filter for a certain day, location, instructor or age range before searching for a course name to see what is available
- Activities can now also be edited from the results displayed

See the items purchased with an activity

- You may wish to see the uptake of products or memberships offered when booking an activity
- The new Activity Extras Report allows you to view details of additional items that were sold with classes, courses or appointments

View details of subsidized purchases

- You may wish to audit which of your services were paid for by subsidy
- You can now see details of subsidy allocations used to purchase activities and memberships

View revenue expected for each service

- It can aid planning to know how much future revenue to expect for each service
- The new Monthly Service Revenue Report allows you to view the revenue expected for each service each month, and view details of where the revenue is coming from

CRM

See outstanding balance for client or account

- You may wish to quickly check if a particular client has a balance owing
- Balances past due now show at-a-glance for each client and account

Issue unique replacement access card number

- When a client loses their access card, the replacement must be created with a new access code to ensure the previous one can no longer be used
- A dedicated replacement access code can now be generated without manual entry to ensure it is unique

FACILITY BOOKING

Track each amendment cycle with a specific reason

- Each amendment cycle is now tracked with a start and end date for each amendment period
- The amendment cycle is the foundation for current and future amendment audit capabilities
- A specific amendment reason is now applied for each amendment cycle
- When you process a contract after completing an amendment cycle a reason is saved, and a new reason will apply to the next amendment cycle

View overviews of amendments to facility contracts

- You may want to see the net changes done by staff during an amendment cycle and provide the information to your customer for review
- Items changed are now summarized and exportable to PDF
- Each session or extra changed shows the original and current state

View details of amendments to facility contracts

- You may wish to review all changes done by staff during an amendment cycle
- You can now clearly see which items have been added, changed or removed
- Every change is tracked to aid with internal audits of changes

See amendment account credits applied

- Rather than a new transaction being created for every amendment, the original transaction is now reused
- Previously paid amounts are reapplied automatically on POS from account credit without the need to manually apply them
- The payment records for both return to account credit and reapply for previously paid amounts are flagged as amendments
- Credit history records have a note indicating that the account credit return and reapply is for a contract amendment

Update fees for multiple sessions at once

- You may wish to change a number of fees for sessions across reservations, without wanting to change all the sessions
- You can now apply a bulk update to the fees of a group of sessions
- Save time by not having to update each session individually

View bookings made by a particular account

- You may wish to view all facility bookings from a certain organization
- You can now filter the Facility Booking Report by your choice of account

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View complete release notes online at http://blog.perfectmind.com/new-features-release-v5-1-4