

## POS AND ONLINE CHECKOUT

### **Avoid refunds to certain payment methods**

- There may be certain payment methods that your organization never wants to refund to for accounting reasons, such as cash or cheque
- You can now set certain payment methods to be unavailable for refunds, avoiding any refunds made to those payment methods by mistake
- Refunds can be made to credit instead

## ACTIVITIES

### **Notify waitlist customers and staff of spot openings**

- You can now choose to email the customer and staff concerned when a spot opens up and is filled, making sure everyone is kept current on waitlist changes

### **Customers can view their activities more easily**

- For better visibility, customers can now see past activities and more activities per day when looking at their calendar schedule
- It's now also possible to select a specific family member's activities in a list view

### **Display overnight events on both days**

- You may wish to display events that stretch past midnight on each individual day, for example 6pm-12am on the first day and 12am-2am on the second day
- Activities can now be retrieved in a split format via API for daily displays on Scala screens or on paper

### **Customer can view payer names on registration confirmation**

- The Payment Schedule now includes who is due to be making each payment for clarity when there is more than one payer

### **View Staff Payment Estimates ordered by activity**

- The Staff Payment Estimate report is now ordered by activity date and name, making it easier to find the information needed

### **View the average percentage of residents registered for courses**

- The Course Revenue report Totals section now shows the average percentage of residents and members registered

## CRM

### **Apply specific formats for phone numbers**

- You value being able to reach your customers when you need to, and a missed digit from a phone number can leave you out of touch
- Now you have the option to specify the common valid phone number format so you can avoid mistypes and store more phone numbers correctly

- International phone numbers can also be accommodated

#### **Ensure all customers are genuine**

- To make sure that every new sign up is indeed a person, a CAPTCHA can be added to sign up forms for customers to confirm

## FACILITY BOOKING

#### **Adjust the cancellation fee when a contract is terminated**

- Sometimes you may wish to adjust the cancellation fee being charged depending on the unique circumstances of the situation
- You can now edit the cancellation fee being applied when a particular contract is terminated

#### **Update extras for a number of sessions at once**

- When amending a contract, you may need to change a range of session extras at the same time and not want to spend time doing each individually
- You can now select a range of sessions to apply bulk changes to time and extra inclusion

#### **Apply contract name changes to reservations too**

- When changing a contract name, you now have the option to update all the reservation names within without having to update each reservation individually

#### **Update amendment reason before processing amendment**

- When processing an amendment, you can now review the inclusion details for any payment plan specified
- You can add or adjust an amendment reason before processing an amendment

#### **Export contract amendment history to a spreadsheet**

- You can now export the summary and details of contract amendments to CSV as well PDF for internal audit purposes

#### **Open Advanced Reservation more quickly**

- The performance of Advanced Reservation has been improved so that over a hundred facilities will load in a few seconds

#### **Apply explicit available hours during holidays**

- On a holiday, there may be select hours that you wish a facility show as available online
- Now when you enter specific operational hours on a holiday date, the facility concerned will be available for booking during the time specified and not outside that time

#### **View Facility Contract Extras**

- You may wish to see which extras are included in which contracts
- The new Facility Contract Extras report shows the extras included in each contract

#### **View tentative facility usage**

- You may wish to view the usage details of facility contracts that are in a tentative state before they are confirmed
- The Facility Usage report has been enhanced to allow inclusion of contracts in a tentative state

---

View complete release notes online at <http://blog.perfectmind.com/new-features-release-v5-1-5>