

 NEW FEATURES**Billing:** Automatic Charges for Late Payments

Simplifying the collection of late fees on outstanding payments, late fees can be automatically charged on overdue payments based on customizable rules. Fees can be pre-set dollar amounts or a percentage of the overdue amount. Administrators can also set up tiered late fees; for example, a one-time fee can be charged a certain number of days after an invoice becomes overdue, followed by recurring fees on a different pattern.

Events: Enrolled Event Prerequisite

Program Admins have the option to identify prerequisite events on courses, where an attendee must have enrolled in at least one of the related prerequisite events before an in-person enrollment will be allowed for the attendee. For example, before a parent can enroll their child in before and/or after Art Camp activities such as child care, the child must also be enrolled in Art Camp.

If a potential attendee does not meet prerequisite event requirements, staff with override permissions will be able to allow the enrollment, and staff without override permissions will be prevented from enrolling the customer in the event.

Future phases of this feature include online enrollment prerequisite event restriction enforcement, defining prerequisite event outcome status (completed/not completed), and multiple event prerequisites (for example, a child must have taken “Preschool 1 Swimmer” and “Preschool 2 Swimmer” before enrolling in “Preschool 3 Swimmer”).

Fees: Bulk Update Fees Option

We have added the ability to update multiple fees at once. Simply choose which fees to update and change the dollar amounts of the selected fees from one screen. The system will immediately apply the update, but will not modify the effective dates of the updated fees. This is useful for year-end bulk fee updates – for example, if 2019 fees are higher than 2018 fees, the 2018 fees will continue to be applied until the updated fee’s effective date of January 1, 2019.

Store: Ability to Sell Flexible Amount Items

Flexible amount items can be created with no set price. Staff enter the price of the item when the item is added to the cart. This is useful for items such as receiving donations, selling Gift Cards for variable amounts, or accepting revenues from vending machines, lockers, etc. Flexible amount items are not governed by the permission to adjust the price of other POS items, so they can be added by any staff member whose profile includes POS permissions.

IMPROVEMENTS

Accounting: Global Setting Enhancements

GL Accounts and Withdrawal Fees can be created for all locations (globally) instead of individually per location, reducing configuration time and preventing errors.

Advanced Reservation: Display Location with Facility

For clients with multiple locations, the location name is displayed within the facility rental process with the facility name. This helps to differentiate between facilities with similar names at different locations, for example, "Large Gymnasium – Rec Center" and "Large Gymnasium – Athletic Center".

Advanced Reservation: Optional Items Enhancement

Previously, optional items for facility reservations were included in the reservation by default, requiring staff and customers to remove optional items that were not wanted with the reservation. Now, the optional items will show as available and must be selected to be included in the contract.

Advanced Reservation: Reduced Loading Times

We have decreased loading times for contracts, the reservation cart, and the contract page. Pulling up an existing reservation to make amendments or print will be faster, resulting in lower wait times for customers.

Calendar: Cancellation Reasons for Services

Previously, cancellation reasons were global and could be selected for any type of cancellation. Now, Admins can define specific cancellation reasons for Courses, Memberships, and Facility Rentals so they more closely match the business reasons for canceling each item. This allows for more detailed reporting on cancellations.

Contracts: Added Service Name Merge Field

Service Name has been added as an available merge field on facility contracts. This means when a facility is rented, the contract can reflect the service it has been rented for. For example, a Gym reservation contract can show that it is for Basketball, Tennis, or any other service available for that Gym.

Custom Booking: Amend Past Days

Administrators are now able to amend past Custom Booking dates. This allows staff to take manual records of missed sessions and make changes to charged sessions retroactively.

Membership: Inherit Access Rights for New Family Members

When adding a new member to a family membership, the membership's access rights are now automatically applied to the new family member. This will save time and reduce potential errors from adding access manually after adding the family member.

Membership: Flat Rate with Multiple Fees

Previously, a membership could apply either a flat rate (tax included) or multiple fees. Now, we support multiple flat rate fees, simplifying the membership purchase process. The fee applied to the membership purchase transaction will be based on the customer that will be using the membership.

Online Portal: Complete Waivers Online

Clients can now direct their customers to fill out waivers online through the "My Info" page in the online portal.

Online Portal: Deactivate Facebook Login

We have added the option to deactivate the ability for customers to sign up or log in with their Facebook accounts.

Online Portal: New Account Notification

A pop-up window appears when a customer creates a new account online to notify them that their account has been created and their temporary password will need to be reset.

Questionnaire: Allow Admins to Bypass Questionnaire

When registering customers in person, staff are now able to bypass any customer questionnaires that are required for online registration. This makes the in-person enrollment process more efficient and will eliminate staff answering questions on behalf of customers.

Reports: Staff Payment Estimate – Show Course Registrants

Administrators are now able to amend past Custom Booking dates. This allows staff to take manual records of missed sessions and make changes to charged sessions retroactively.

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