

Accounting and Billing

Over/Short Accounting

Feature Overview

* Till adjustments (i.e. over / short cash drawer adjustments) are now represented in the GL journals configured for this feature in the settings.

Account credit purchases, payments and returns tracked with FIFO

Feature Overview

When payout to credit card is enabled for account credit, PerfectMind will use the FinanceInfo history, where applicable, to track how much value from a particular credit card has become account credit through refunding or purchasing of credit, and how much has been paid out back to that credit card so far.

The balance is displayed so the user can choose to limit the payout amount up to this balance.

Take a Tour

This feature is automatically enabled when payout to credit card is enabled. Follow the usual process to pay out account credit and on the pay out credit screen, you will see the information presented. As long as the customer or account the payout is being processed for has the following:

- * A saved credit card in Finance Info.
- * Amounts from that saved credit card has been put into account credit through purchase of credit or refund to account credit.
- * Any amount from the credit card into account credit hasn't been fully paid out back to that credit card.

Calendars and Events

Staff Payment Estimate - calculate payment by attendee

Feature Overview

A new option for Staff Payment Estimate, where payment by percentage is calculated on the amount per attendee, instead of the sum of all attendees. This resolves an issue when there could be rounding issues based on applying the percentage per attendee vs. applying it to the total revenue of the course.

Take a Tour

There is a new filter option on the Staff Payment Estimate report under the Revenue filter called "Actual - by attendee".

On the detailed view of the report, the calculation is also shown per attendee.

Ability to Edit broken occurrences of series easily

Feature Overview

* Before 5.2.5, changes made to a series would not carry over to unique sessions (i.e. broken occurrences) automatically. It was necessary to update broken occurrences individually.

* Now when editing attributes like conditions of use or setup/takedown instructions (especially useful for facility bookings), capacity (especially useful for single booking series and custom bookings), registration notes and certain others, the system will ask the user whether they want the changes to carry over to all occurrences.

* Users may select specifically which updated fields they want to carry over.

* Users may choose to update all occurrences, only all future occurrences, or only occurrences that fall within a specified date range.

+*Take a Tour*+

* The system will prompt you for your preferences when you edit and save one of the eligible attributes of an event series with broken occurrences.

Custom Booking - Waitlist - Functionality

Feature Overview

* As of 5.2.5 the waitlist feature has arrived for Custom Booking.

* Admins may add registrants to the waitlist from the admin side while members may add themselves online.

* Admins may add registrants to waitlists via amendments as well.

* Registrants qualifying for a spot may be confirmed or declined on the admin side or online.

* Automatic notifications are supported for pending confirmations and bookings.

* You can enable or disable the automatic movement of waitlisted registrants into spots as they open.

* The automatic

Getting Started

View complete release notes online at <https://blog.perfectmind.com/new-features-release-v5-2-5>

- * Access global waitlist settings via Settings > Calendar > Waitlist Settings.
- * Settings that are now live have no Under construction - view only label.

Contacts & Accounts

Improvement to CASL Email System - Further Control over specifying what is Transaction vs Marketing

Feature Overview:

- * Canadian clients that are required to be compliant with CASL (Canadian Anti-Spam Legislation) will now be able to choose if the email they are sending is for marketing purposes or based on a business relationship.

Take a Tour:

- * There will be a new "Marketing" checkbox located on the page when sending an email. Marketing > Send Emails > Marketing Checkbox

User Guide:

- * System users will now be able to send email notifications or other business relationship emails such as Send to Sing Documents, Facility Contracts, or Program notifications that are not considered marketing emails by simply deselecting the marketing checkbox. Note that the checkbox is defaulted to marketing to avoid unintentional violations of the legislation.

Pay multiple invoices at once member portal & admin

Feature Overview:

- * System users and members will now have the ability to process multiple invoices at the same time under the contact or account level. Users will also be able to filter these records by their status, date range, invoice number or facility contact number.

Getting Started:

- * Users that have permissions to process invoices should already have the ability to select multiple invoices. System Administrators will need to define the member permissions within the settings area under the Make Payments section of Online Portal. Settings > Parks and Rec > Online Portal

Take a Tour:

- * When navigating to either a client or account record you will note that there is a new "Go to Invoices" button located on the left side bar above the related tabs. When selected the user will be navigated to the invoice tool that now has the ability to select multiple invoices at the same time.

User Guide:

- * When a client or member wishes to pay one or multiple invoices they can navigate to the invoice tool and
 - o Select multiple invoices and make a payment
 - o Filter all invoices by their status (Scheduled, Active, Terminated, Completed)
 - o Filter all invoices by their due dates
 - o Select only Overdue or due soon invoices
 - o Search for invoices of a specific invoice number or invoices related to a facility contract number

Facility Management

Checkout 2.0 gap - support complex fees - Online Store side

Feature Overview

Facility booking fees can sometimes be conditional on the time of day, such as prime and non-prime fees, and sometimes a booking can straddle blocks of different fees. The result is "complex fees".

The online store now properly supports facility bookings that straddle prime and non-prime fees.

Checkout 2.0 gap - support Request to Book facility bookings

Feature Overview

Online customers may now reserve facilities with a "request to book" that holds the space with a tentative contract, with payment to be collected later when the contract is firm.

Facility Booking - Permissions - Calendar and Location - Advanced Res and Client page

Feature Overview

* As of 5.2.5, the filter options and calendars available in the Advanced Reservation module will respect a users location and calendar permissions.

* The latest updates will also restrict a users ability to navigate to contracts depending on their permission to view calendars and their ability to access all the associated locations.

View complete release notes online at <https://blog.perfectmind.com/new-features-release-v5-2-5>

Take a tour

* Explore the Advanced Reservation module as a user with limited location access, or without permission to view calendars. Affected elements include search results, the location filter, the calendar filter and the facility types and amenities filters.

* The ability to navigate to contracts may be launched from the Contact page, Planner Event and Advanced Reservation popups and searches, and directly from the Facility Contract object.

Advanced Reservation - Improve loading time - Filters

Feature Overview

* The Advanced Reservation module has been updated on several fronts to reduce loading times and improve performance.

Global Settings

Setting for enabling inventory level enforcement

Feature Overview

PerfectMind can ensure that items with limited available quantities such as inventory products and tickets cannot be oversold online.

If no units remain, or if only certain combinations of color/size, time/date, etc. are no longer available while other combinations are, they will be clearly marked as sold out.

Take a Tour

This new setting for this feature may be found under Settings > Other Features > Enforcing Available Quantities Online.

Override permission - Attendee page

Feature Overview

* Pre-5.2.5, if user was performing an operation without the required permission to proceed, they were forced to log out and have another user with the required permission complete the operation for them.

* Now, a user with the right permissions can enter their password on the screen with the blocked step and perform an override to unblock the step, without losing any work in progress.

* As of 5.2.5, this feature is supported on the Attendee page and will be expanded to additional pages in future releases.

Take a Tour

* Navigate to the Attendee page as a user with limited permissions in this area, such as the inability to book over capacity, override a restriction, edit an event, withdraw/cancel/remove an attendee, or any other permission enforced on this page.

* Click the Override Permissions button to log in as a user with sufficient permissions and complete the attempted operation.

Questionnaires: supporting styling on a per question basis

Feature Overview

- * When creating or editing a questionnaire, you can now add formatting to the elements with rich text editors, such as font size and color, backgrounds, bullets and tables.
- * Elements that support formatting include the title, description, individual questions and help notes.
- * By switching to HTML view, you can add custom HTML or CSS styling.

Take a Tour

- * All free text editing fields for questionnaires support new formatting options.

Point of Sale

Ability to block adding new finance info via POS

Feature Overview

Admins may now restrict the ability of certain profiles to add new credit card information (i.e. finance info) when processing a payment on a new sale or a scheduled invoice. Admins may also independently restrict the ability to select existing finance info for payments.

A system administrator may adjust these permissions in Smart Client per profile. These permissions will default initially to enabled to prevent unexpected changes to existing privileges.

Getting Started

The permission for *adding* new finance info may be found in Smart Client under Setup > Security > Profiles > Permissions Tab > Object Service > Finance Info.

The permission for selecting *existing* finance info may be found in Smart Client under Setup > Security > Profiles > Permissions Tab > Billing Service > Do Not Allow the Use of Credit Card Finance Information for Processing Payments.

PM Pay - Payment Methods Limited by Station

Feature Overview

Not every payment station in an organization processes all forms of business. A concession stand or skate shop may not process the same business as a front desk, for example, and so not every payment method set up in the system may be applicable to those stations.

View complete release notes online at <https://blog.perfectmind.com/new-features-release-v5-2-5>

With this feature an organization may restrict the available payment methods on a per-station basis.

Take a Tour

The settings for this feature may be found under Settings > Station. The effect of these settings may be seen on the POS Payment page when a station is already set in memory or dictated by an initialized terminal.

Permissions - Prevent Staff from Changing Services on Cart Item/Sold Memberships

Feature Overview

System Administrators may now set a permission to control whether certain profiles can change the services on memberships, either when sold or when edited on a client record. Users without permission may still see any membership's services, but may not edit them.

This new permission will default initially to enabled for all profiles so that no user will experience an unexpected change in their privileges.

Getting Started

This new permission may be found in Smart Client under Setup > Security > Profiles > Permissions Tab > Membership > Adjust Membership Service.

Take a Tour

This permission will affect the Access and Assignees tab on the Membership popup when selling a membership on the POS, as well as the Manage Membership Access popup launched from membership tiles.

Add "Pay Now" button on membership popup in POS 2.0

Feature Overview

This enhancement is aimed mainly at smaller businesses who most often sell single memberships directly to the payer with no modifications.

The original POS module supported this with a minimum of steps, while POS 2.0 has introduced extra steps so it can support a variety of different business cases. The POS now supports a "Charge" shortcut button on the first panel of the membership popup that lets the user skip directly to the POS Payment page, where the membership owner will already be selected by default as the payer. Fewer steps means less time wasted.

Take a Tour

You may find the new Pay Now shortcut button on the Membership Properties tab of the membership popup on the POS.

Explanation field for price overrides

Feature Overview

System Users will now be able to provide a required reason when the price of a cart item is adjusted, and the reason is enabled in settings. Users will be able to report on adjustments to price and audit when and why they occurred. This feature enhancement can be disabled in settings if organization does not need to capture this information.

Getting Started

The new setting may be found under Settings > Other Features > Price Override Reason.