

POS AND ONLINE CHECKOUT

Offer payment plans with membership widgets and Checkout 2.0

- With this upgrade, customers may buy memberships online with a selection of payment plans

Offer memberships for sale online to members

- The first phase of membership widgets enabled your customers to buy memberships online in guest mode
- Now, logged in members can buy memberships for themselves or their family members with one click

Schedule payment on the same day as purchase

- Payment plan setup now allows you to enter 0 days from today for future invoices
- For example, if someone purchases a membership on March 15th, their monthly payments can be scheduled for the 15th of each month

Customize down payment amounts for activities on a payment plan

- Authorized users can customize the amount of a down payment on the fly when selling activities on a payment plan

Add notes to individual payments

- Add a note field to any payment method for a variety of purposes, such as coupon or Groupon codes
- Customize the field's label and make it optional or required as needed

Create a membership template that can be sold at any location

- Create POS buttons for multiple locations that link to the same membership, similarly to products for all locations

Make items eligible for specific subsidies

- Until now, an activity, membership or product could be eligible for either all subsidies or none
- Now, you can make an item eligible for one or more specific subsidies

CRM

See a richer profile of information when a member checks in using PMScan

- Allow front desk to give a personable greeting and quickly flag any account issues when a member checks in
- Busy staff can now review recent entrants and follow-up as needed

ACTIVITIES

Amend activity registrations without losing the original spots

- 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 any detail of a registration, such as fees, extras, attendees, discounts and more, while the original spot is securely held

Record outcomes of activities per attendee

- Many activities have results that need to be recorded for each attendee, such as Pass/Fail, or a grade
- You can now record these outcomes on the attendance page individually or in bulk, and see a history of outcomes on each attendee's contact page
- This is a step toward prerequisites based on outcomes, which will arrive in the following release

See all waitlist activity by staff and members

- Now all waitlist changes are recorded under the attendee's activity log for reference
- You can also add notes to the activity log to track the follow-up process

View individual class sessions in the new activity search

- When viewing a recurring class, you can expand the row to see the individual sessions available

Display your online widgets seamlessly on any site

- Widgets now display on a wider range of websites without customization, including WordPress sites

Include report header on every page

- Each filterable report now has the option of including the header with the report name on every page, which can be useful for identification when printing large batches of reports

View the roster for event groups more clearly

- When grouping the Event Group Roster report by location, each location now appears on its own page
- You can also control display of address, age, birth date and registration date

Use Cost Center in Event Master Report

- Cost Center is now included as a filterable option in the Event Master Report

FACILITY BOOKING

Update the total or session price for a range of sessions quickly and easily

- You can now update the total price for your chosen group of sessions
- You can also update the individual price per session for your selected sessions

Update session information quickly and easily

- Filter by either a session date range, custom days, or use the predefined filters
- Quickly and easily update start time, duration, instructor or facility for your chosen group of sessions

View the conditions of use on the Maintenance Report

- There may be particular conditions that apply to certain facilities or services
- The conditions can now be shown on the report given to maintenance staff to ensure they are aware of any specifics that may affect their preparation

See all invoices associated with facility bookings

- You may want to view certain groups of invoices, for example all overdue invoices, or the invoice history for a particular account
- You can now use the Facility Booking Invoices report to see a full set of invoices for certain specifications

FINANCE

Group by card type used in Cash Balance report

- The Cash Balance report now organizes card-present and card-not-present payments, along with different credit card types
- Also, station location is now included to show the physical location where the payment was made

See items sold for zero dollars on Sales Information report

- Any items charged at zero dollars in the POS are now counted in Sales Information for reporting purposes

See ages in Subsidized Services Status report

- You can now audit subsidy usage by age with the Subsidized Services Status report

Assign custom GLs per location to all-location memberships and products

- Ensure that the right GL account is used depending on the location from which an all-location membership or product is sold

View complete release notes online at <http://blog.perfectmind.com/new-features-release-v5-2-1>