NEW FEATURES

Activities: Events can be prerequisites for members enrolling online

- Encourage members to take courses that match their abilities
- Set whether prerequisites are required for members enrolling online
- When enabled, members enrolling online must have previously enrolled in one of the prerequisite events, or have one of them in the shopping cart

Payment: Allow members to pay invoices online

- You can now give members the option to pay their invoices online using their credit card
- Making payments from wherever they like will be convenient for your members and reduce the workload of your staff

Payment: Smart payment plans for memberships

- When selling a membership, you can now choose any payment plan setup for weekly, monthly, annual or custom installments
- New down-payment options like "Percentage" and "Same as First Scheduled Payment" can also be use in payment plans for memberships, avoiding manual calculations
- Eliminates the need to set up memberships differentiated by payment schedule, creating a cleaner experience for staff and more payment options for members

IMPROVEMENTS

Activities: See prerequisite events during enrollment

- Staff may receive questions around which events are prerequisites during an enrollment
- Each event's prerequisites are now displayed on the Attendee page for reference

Activities: Check prerequisite events during Admin enrollment

- Even when payment is not required for enrollment, it is still best to confirm that the member has booked the prerequisite events so that they get the most out of the course
- Admins will now be notified of missing prerequisite events during enrollment

Activities: Members can enroll in multiple courses at once

- Summer School and Child Care programs are often designed as a package of courses intended to be booked together, for example it is more practical for both parents and staff to have child care arranged for a full week

- Parents can now choose or be required to enroll in all courses in a program at once online

Activities: A missed attendee with be flagged during online enrollment

- When an eligible attendee has not been selected during online enrollment, the omission will be flagged to the user if they try to proceed
- Members will proceed through enrollment clearly and quickly

Activities: Notice of at-capacity sessions when making bookings

- Staff with permission are already able to choose to book members into sessions that have reached capacity at their discretion
- Staff should over-book knowingly, so a confirmation prompt has been added to avoid inadvertent over-bookings

Activities: Edit details of events with attendees

- You can now edit certain details of custom booking events even after they have attendees
- Allows event details to be kept current date when changes apply

Activities: View the roster for an entire event group

- See the full list of participants attending an event group
- Participants are shown once for the entire event group, whether they are attending one session of one event, or the entire series of all events
- Filter participants depending on the date they registered to the event group
- Saves the time that would be spent checking the roster of every session in an event group

Activities: Export calendar month of activities

- You can now export an easy-to-read PDF version of activities in a specific calendar month
- Allows you to print the activities happening in a given month

Activities: Option to refund extras when withdrawing from an event

- Staff have the option to refund any purchased extras associated with an event when withdrawing an attendee
- Choose which extras to keep and which to refund during the withdrawal.
- Makes the withdrawal process more efficient and ensures the refund includes all appropriate fees and extras

Activities: Have contacts specify their reason for withdrawing from an event online

- It is now possible to require members to enter a reason when they are withdrawing from an event online
- Members must choose a reason from the options you define, and can add their own additional comments
- The additional data around event cancellation can help you understand the behavior of your members and inform future programming decisions

Activities: Online members can return directly to their search after viewing course details

- Rather than always returning to the Event page, when online members choose Back they will now return to the page they came from
- Online members should feel more comfortable browsing around the courses available, and be more likely to enroll in a course that appeals to them

Payment: Choose not to display future invoices online

- To help keep steady revenue coming in regularly, you may prefer to restrict distant invoices from showing to members online
- You now have the option to control how far out invoices should show to a set number of days, so can ensure that only invoices with a confirmed rate are shown to members
- If you are aware of upcoming potential for a fee change that has not been confirmed yet, you can make sure invoices that could be affected do not appear yet

Payment: Find the item you want faster in PoS search

- The search in PoS is now smarter
- Time should be saved by seeing the desired result right away rather than having to browse for it

CRM: Check attendance using membership

- Staff gain easy access to view a member's usage of their membership and the programs entitled to them
- Provides a quick check of the member's engagement

Finance: Items due tax credits can display on tax receipts

- Items can be flagged as eligible for tax credits for inclusion on tax receipts
- Allows members to claim the full amount of credits available to them

Finance: Access report of unearned revenue

- View outstanding deferred revenue amounts per customer, per transaction at the given date that is supplied to the report by the user
- Covers courses, facility contracts and products where the recognition of income is predetermined (such as the date of the occurrence of the event). Does not cover items with usage in the future is at an undetermined date, such as gift cards and punch passes
- Allows Finance to easily track pending amounts

Facility Booking: Set a minimum charge for a booking of a facility

- A minimum charge can be applied to cover costs, for example swimming pool staff must be booked for at least 3 hours, so a 2-hour birthday party pool booking is charged at 3 hours
- Bookings can still be entered for the actual duration to maximize facility usage, for example a 2-hour booking can reserve the facility for 2 hours but charge for 3 hours

Facility Booking: Limit the number of reservations per calendar year

- Online reservations can now be limited to a chosen number of active sessions per calendar year.
- Restriction applies for regular or overnight reservations such as camping
- Customers are clear whether their booking is allowed right away, and staff save time manually reviewing and amending bookings over the upper limit

Facility Booking: View the number of guests for each reservation

- See how many guests are due at each reservation within a contract to help you plan accordingly

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