New Features Release Version 4.10.8

13 December 2017

NEW FEATURES

Billing: Enhanced Payment Plans

Payment plans can now be configured based on usage, with the system automatically calculating which event and extra fees belong to which payments based on the usage period. In addition, you can configure both percentage-based and fixed-amount down payments. With several additional customization options, the need to complete manual changes during a booking or registration is reduced, saving time during the checkout process.

CRM: Add Alerts at Account Level

Alerts can now be added on Accounts, in addition to Contacts. When adding an alert on the Account level, staff can choose whether to show the alert for all customers linked to the account. This provides a central location for alerts that apply to all customers on one account, removing the need to add the alert to each customer individually. This feature is useful for alerts including account-shared financial information, shared account credits, facility rental restrictions, subsidy notifications, and more.

Custom Booking: Capacity Management

We have added color-coded indicators on Custom Booking events for staff to easily identify sessions that are under capacity, nearing capacity, or at/over capacity for current, future, and past sessions. The system will automatically prevent bookings into sessions that are over capacity, however staff members with appropriate permissions will be able to override this setting.

Facility Booking: Roll Over Contracts

We have added the ability to roll over facility contracts, which significantly reduces the time spent creating facility contracts of all sizes. Creating a contract with 100 repeat reservations across several facilities may take hours to create initially – with the new facility contract roll over feature, this contract can be reproduced within minutes. When rolling over a contract, existing dates automatically adjust to the new rental period. Staff can choose to resolve or ignore conflicts, keep or undo exclusion dates, and update fees based on current fee structures.

IMPROVEMENTS

Document: Registration Confirmation Enhancement

The Registration Confirmation document now supports drop-in and custom booking sessions. Registering to multiple sessions for the same course will show up as one entry in the document, with the start date and end date reflecting the earliest and latest session registered in the same transaction. This makes the information concise and eliminates multiple entries in the same document when registering to multiple sessions for the same course.

Report: Event Master Report

The Event Master Report has been enhanced to include additional course information. Staff can show and hide most report columns to customize the information shown to fit their target audience. This also allows the report to fit on one page for printing by hiding the columns not required in the print-out.

Report: Sales Information Report

We have introduced a new “By Date – Hourly” grouping to the Sales Information Report. This provides a similar view to the "By Date" grouping, but further splits the data into 1-hour blocks for an hour-by-hour analysis of sales. We have also added two location filters that allow staff to analyze sales by the location of the transaction (where the sale was made), and the location of the item (which location the item sold was for).

View complete release notes online at http://blog.perfectmind.com/new-features-release-v4-10-8