CALENDARS & EVENTS

Automatic Waitlist - Ability to Enable/Disable

- Enable/disable the automatic waitlist functionality at the global, calendar or service level
- Enable/disable the admin and customer emails at the same levels
- This allows you to configure programs to make use of some or all of the automatic waitlist, and/or communication functionality

Custom Booking - Days of week restriction

- We have separated the filter settings and restrictions settings on the calendar for custom booking
- This allows you to choose which quick filters to show. For example: filters for days, weeks and months, separate from the restriction of having to select all days in a week or month
- We have added the restriction of enforcing all the same day of the week for the program. For example, by enforcing day of week, if your customer or staff chooses one Tuesday the system will select all Tuesdays

Custom Booking - Online Registration

- We now provide the ability for your customers to make their initial registrations in any custom booking program online. Widgets will need to be setup to allow these calendars and events to be shown online, and are subject to all the online widget requirement such as show to = public, online fees etc. This will save your staff lots of time for the initial registrations for your custom booking programs like child care or summer camps.

CONTACTS & ACCOUNTS

Account Credit - Cash out to Credit Card

- We now provide the ability to cash out account credit to a credit card on file with the account, which can be added to the account through finance info. This process will create a transaction in the system and this enhancement will also create transactions for all past account credit payouts. This allows staff to return account credit to the original credit card when customers withdraw from a program, a program is cancelled, or a facility contract is terminated for example. Currently Tender Retail & Elevon are supported.
- Contact your PerfectMind representative to learn about training opportunities for this feature. Future release improvements will support simple and complex account credit cases.

NOTE: A request must be submitted to PerfectMind and the Merchant Processor for this feature to be turned on. Please speak to your Project Manager or Relation Manager for more details.

Discounts on Receipt, Transaction & Invoice

- We now show the discounts used on the receipt, transaction page and invoice page. We have created a separate section called Amount with Discount on transaction and invoice, so any customizations made to the current amount section could be respected. We have also ordered the information, on the Amount with Discount section in transaction and invoice, to follow the typical order of information for a transaction.

Memberships - Withdrawal fees

- Admins can setup and add the appropriate withdrawal fees to the membership, and those fees and conditions will be used by the system to choose the lowest qualified withdrawal fee. This benefits any organization that charges a penalty when a membership is cancelled under specified conditions can rely on the system to select the right penalty automatically, with authorized admins able to override that selection.

PM Scan - Facility Rental settings

- PM Scan settings for facility rentals can now be customized
- This allows you to configure the time range which controls when to show facility rental events for scanning, including whether to create additional attendance for scans or simply just grant access

PM Scan - Multiple scanners and gates per station

- Online Checkout 2.0 is now able to trigger custom workflows based on the processing of a transaction, such as modifying the name of ticket when nearly sold out.

Postal/Zip Code Formatting

- Based on a setting, the system will force the specified format for the postal or zip code
- This is enforced on the contact creation for staff and the member portal for online customers
- There is an option to allow staff and customers to override the formatting if, for example, a customer comes from a location that uses different formats

Related Tab - Export to CSV

- You can now export data from any system-related tab
- The export provides all fields and data from the selected view and allow you to do further analysis
- This is especially useful for related tabs with considerable records such as GLs, payments, credit history, invoices, purchases and more!

Schedule - View past events

- Now the staff and customer can view the schedule list and choose to show the past events using a new picklist. This functionality is available on the contact page for staff, and the member portal my info page for customers. This allows staff and customers to see their past events in the list, as well as generate registration confirmations for events that have occurred before the current date and time.

ONLINE EXPERIENCE

Online Booking - Customer Filtering

- When a widget includes multiple calendars, the widget start page includes new filtering and searching capabilities
- Filter using a picklist
- The keyword search filters the current page only, instead of navigating to the full search page
- These new filters can be enabled in the Online Booking settings.

Online Products - Quantity

- We have added the ability to specify the quantity of a product to the online sales process.
- The quantity will be unique for the attributes selected, so if you have a shirt colour and size, or ticket date and time, the quantity will be chosen for that unique set of attributes of a product.
- This is especially useful for ticket sales and any other item where you would like to allow multiple quantity to be sold in one purchase easily.

POINT OF SALE

Memberships - Prorating

- We now allow setup so the system will prorate memberships that are limited by time or duration. Staff members responsible for selling annual and seasonal memberships, can rely on the system to calculate pro-rated fees for memberships sold part way through their valid period so they don't have to calculate the fee manually. Prorating of memberships is also available to the online customer through membership widgets and the appropriate setup on the membership template.

REPORTS & ANALYTICS

Activity Registration Summary

- Staff and customers can see clearly the instructors and additional instructors for the overall program as well as the individual days of the program when different instructors are scheduled for those certain days. Staff can now also group by location and filter by age. Status of the program column has also been made available.

Customer account statement - Credit payout

- When a successful payout of account credit has been processed, we now show a line on the customer account statement. This ensures that when looking at the account credit on the contact page and reviewing the account credit on a customer account statement, that they are in sync with each other.

Event Roster by Series

- Staff can now choose to see the extra details for the attendees registered for the program, as well as the number of sessions for that program
- Staff can now see all applicable instructors for the program when days of the program are instructed by multiple or different instructors.

Sales Information Report - Credit payout

- We have modified the sales information report to exclude any credit payout items. These will not be shown and a current view and future credit payout report can be used instead to show these credit payout items.