PerfectMind

New Release Version 5.1.7

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POS AND ONLINE CHECKOUT

Offer memberships for sale online

- Sell more memberships by making them available online using widgets embedded directly on your own website or hosted on the PerfectMind domain
- Customers can search memberships by keyword and filter them by various attributes
- Whether buying for oneself or others, the simplified flow is quick and easy in both guest and member modes
- This first phase supports fixed-term memberships without payment plans

Sell Activities in the POS

- Save time at the front desk by taking payment for activities as quickly as possible
- Activities can now be found and sold directly in the POS, and assigned to buttons for even quicker selection

Move from purchase through to transaction record

- Right after completing a purchase staff may wish to perform further actions related to the transaction, such as making a payment on a subsequent invoice
- The POS payment confirmation screen now offers a direct link to the profile transaction record

Subsidy rules applied to online checkout

- Recent subsidy rules around item type, age range and percentage minimum now apply to online Checkout 2.0 as well as POS

MARKETING

Reach members by texting their phones

- To increase the chances of more members seeing important communications, you may wish to send them by text message in addition to email
- SMS communications can now be set up to keep your members in the loop

ACTIVITIES

Allow waitlist members to confirm their own spots

- Allowing the member at the top of an activity waitlist to accept a spot themselves when it becomes available offers more convenience for both the member and staff
- A friendly email can now be automatically sent to a waiting member when a spot opens up, allowing the member to confirm the spot or decline to give someone else a chance

Detail Extra costs on Registration Confirmation

- A range of additional merge fields now allow you to itemize the Extras charged when members register for programs

Choose how to advise an activity is closed online

- You now have the option of renaming the label for closed activities online so you can use your preferred messaging

Adjust the refund amount when cancelling a class

- Session lengths may vary for some courses and a straightforward pro-rata refund may not be applicable when you need to cancel a class
- It's now possible to amend the refund amount to one that is most appropriate for the particular situation

Use multiple facilities more precisely

- Facility usage can now be blocked-off more precisely for events that span multiple facilities in a given day

Option to track attendance via signing

- You may have programs where it is best to track attendance by signing-in and signing-out, such as childcare
- New weekly and monthly Activity Attendance Sheet reports provide signing sheets in the right format

Organize roster by Cost Center and see resident count

- You can now view the Event Roster by Series, Event Roster with Attendance Sheet and Attendance Sheet reports by a particular Cost Center
- The Event Roster with Attendance Sheet can now also be used to compare residents with non-residents in terms of numbers and fees

Organize Activity Registration Summary by Cost Center and Resident status

- To review registrations by the cost center they relate to, you can now include Cost Center in the Activity Registration Summary and choose to filter or group by Cost Center
- You can also see whether the registrations were from residents or non-residents and the total fees for each

Tie questionnaire responses to events or revenue

- For easy matching, you can now search the Prompts report by Event ID and see the associated GL

FACILITY BOOKING

Search for consecutive weeks of availability

- When choosing a suitable facility for a requested time-slot, you may wish to focus on the facilities that have that same time-slot available for several weeks consecutively
- It's now possible to specify your search requirements as consecutive in Advanced Reservation to help find the best fit
- You can also now export the availability options found or email them directly to interested clients

Choose Amendment Cycle to view

- When working on a facility contract, you may need to refer back to see which changes were made at a specific point in the past
- You can now choose which amendment cycle to look at when reviewing an amendment summary or details

See taxes on Facility Booking report

- For easy reference, taxes are now included as an additional column on the Facility Booking report

Review the GL Assignment of Facility Bookings

- To help with reconciliation, you may wish to see the expected revenue per account based on the day of booking
- You can use the new Facility Booking with GL Assignment report to see the GLs associated with each booking

View Contract Extras based on status

- You can now filter the Facility Contract Extra report by Contract Status to focus on certain items, for example, security deposits for completed contracts
- You can also now choose to exclude returned items, so for example, you can review deposits that have not been returned

View tentative facility usage

- You may wish to view the usage details of facility contracts that are in a tentative state before they are confirmed
- The Facility Usage report has been enhanced to allow inclusion of contracts in a tentative state

FINANCE

Allow your members to view their account statement online

- Rather than having members ask staff for confirmation of their transaction history, you may wish to save time and allow members to look up the information directly
- You can now choose to allow members to access their account statement from their online profile

Allow members to access their own tax receipts online

- It's now possible to allow members to access their tax receipt on their online profile, adding convenience and reducing enquiries

Specify Tax Credit Qualified default

- Depending on your region, items may usually be qualified for tax credits or not
- You can use Settings to specify the default tax credit status for each type of item created

Reverse a payment to account credit

- You may have payments made by parents that third parties later contribute to, for example when subsidy is granted
- Select staff can now have the ability to reverse a payment to account credit once a third party contribution has been confirmed. The account credit can then be used to pay a smaller portion of the invoice

Enhanced A/R Aging Summary report

- The A/R Aging Summary report can now show the account balance and shared credit along with financial notes that can be left on the member or account profile
- For more specific reporting, the A/R Aging Summary can now be filtered on the location of the item sold as well as the usual location of the purchaser
- To aid with reconciliation, Customer Adjustments are now included on the A/R Aging Summary Report

View debit on Payments With GL Assignment

- On the Payment With GL Assignment report Debit Payments and Transaction numbers are now listed explicitly for easier reconciliation

Organize revenue reports by Cost Center

- To review revenue by the cost center it relates to, you can now include Cost Center in the Detailed Deferred Revenue report and choose to filter or group by Cost Center
- You can also see Cost Center in the Sales Information Report and Course Revenue Report and filter by it
- You can now see Cost Center in the Monthly Revenue Forecast report too