



Summary Release Notes

ClarityLive Leisure Version 2.17.0

This Document includes the following:

- New Functionality
- Enhancements to Existing Functionality
- Issues Fixed

Please note that many items in this document need some configuration. If you're interested in using any of the features, or need more information, please contact Leisure Support.

New Functionality

Theatres – Print Patron Number on Gift Certificates

Functionality has been added to print a Patron Number on Gift Certificates. We have done this by allowing the sale process to include a search by Patron or Member. To use this functionality contact support to change your 'RECIEPT' and 'GIFTCERTIFICATE' layouts.

POS- Button foreground text colour

The background colour of POS buttons has always been able to be changed but the foreground text colour has always been fixed black, this release adds the ability to change the foreground text colour of the POS Buttons

POS –Can print the user details on a receipt

This release includes the ability to print the User Name on the printed receipts at basket level.

Web API- Additional charges apply

As part of improving your customer service, we have developed a way to provide end users with a much simpler and informative process for making and managing their online bookings for activities such as fitness classes.

In order to achieve this, a much deeper integration can be created between your existing corporate website and the ClarityLive Leisure Management System. This integration will allow your marketing team/web designers to include real-time and configured static data from ClarityLive within the corporate website. Examples of static data would be Centre Addresses / contact details and Activity / Class information. Examples of real-time data would be live timetables for a specific set of Activities / Classes.

Functionality

Product Classification

- Consistently and reliably identify specific sets of products for later queries.
- A generic classification function has been added to ClarityLive rather than using an existing field which is typically tightly coupled to external finance systems.

Centralised Classifications

- In order to support a more generic, adaptable product classification a new centralised classification subsystem has been added to ensure it is easy to classify, organise and relate products in the way that best suits the business.
- This new classification function allows the creation of any number of classifications. The objective here is to allow many smaller more specific classifications that can be used in

a combinatory fashion rather than a few potentially very large classifications that become unwieldy to manage.

Public Facing Information

- The existing public facing information function will be extended to allow the user to specify the following additional details per product for use within external applications
- Product URL
- Product Description
- Additional Data

Search Details Image Voucher Layout

Basic Information

Product ID BDM

Heading Badminton Moving

Sub Heading

Product URL http://example.com/Badminton

Description Formatted description

Kiosk Information

Paragraph 1

Paragraph 2

Paragraph 3

Ticket Information

Message Line 1

Message Line 2

Message Line 3

Additional Data

Key	Value	
Instructor	James Smith	X
BookingUrl	http://example.com/leisurebookings	X

Add NewKeyValue Add

Save Cancel

Summary

By having the WebAPI you will be able to:

1. Get your web designers to integrate live timetable information into your new website
2. Potentially integrate the timetables on the mobile app to the live timetables. (Costs to be identified/discussed)

This means that you would only have to update the schedules once on ClarityLive – and from there (with applicable integrations completed) both the website, and the mobile app would be automatically and always up to date.

AquaPassport Integration – Additional charges apply

AquaPassport integration gives ClarityLive the ability to export data to a format which can be used by the AquaPassport solution developed by Digital Marmalade.

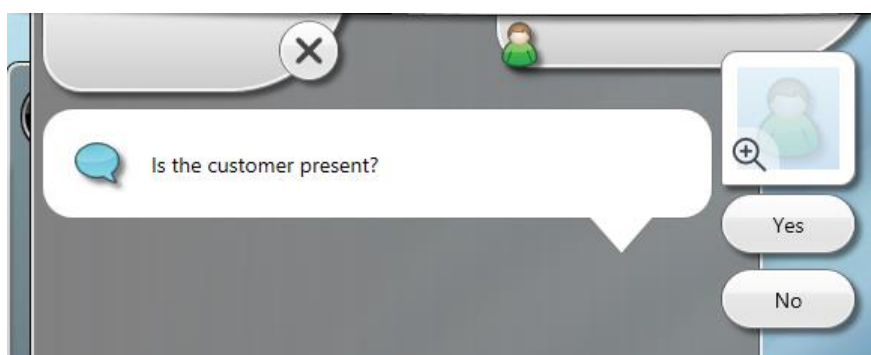
For the exports to contain the correct data, some extra data entry fields were required in the ClarityLive application. These are:

- Instructor Maintenance – Date of Birth and Email address fields added
- Courses Activities Configuration – Level drop down box added
- Course Master Maintenance – External Reference field added
- Session Maintenance – Location drop down box added

Customer Not Present (CNP) Receipts – Additional charges apply

Where the customer purchasing an item in POS is not present, this module allows you to send a receipt to the customer via email or a message service.

Within this distance selling module, when completing a transaction the POS will prompt whether or not the customer is present.



If it is selected that the customer is not present a new data capture form will appear, if the sale is against an existing member then this information will be pre-populated.

A screenshot of a data capture form titled "Customers seen in this transaction". The form has a light blue background and contains several input fields: "Email", "Title", "First Name", "Surname", "Address" (with three stacked input boxes), and "Postcode". To the right of the form are five buttons: "Email", "Post", "Print", and "Clear". There is also a magnifying glass icon next to the "Postcode" field.

You can then select whether you wish to email the customer via ClarityLive Message service, post a receipt (formatted using the Omnico formatting engine) or print the receipt as is the common behaviour. ClarityLive will also allow re-print of receipts for CNP purposes and for those occasions when the printer jams.

Enhancements to Existing Functionality

Kiosk – Book Next Week Button

In this release the 'Book Next Week' button can be disabled if desired.

Theatre Web – 'User Details Page'

The registration page within the Theatre web site contains a mix of fields that are either mandatory or optional. The lists of fields and whether they are mandatory was previously pre-defined.

It is now possible to define whether the field is mandatory and/or visible by changing a setting in the database.

For example, Patrons are now able to enter one phone number this can either be by leaving non mandatory fields blank or having the field changed to 'Contact Number'.

Web – Speed –Cache Activity Table

To improve the speed of the web application the activity information has been added to the cache to reduce the number of requests being sent to the application server and the load on the database server.

Ledger Transfer – Split Ledger Transfer and Ledger Export Operations

For those of you who run your Leisure Transfers regularly without always needing an export, this functionality can now be a separate action.

Email – Opt Out

In the new release there will be an optional 'Email Opt Out' functionality, this may be used for a person joining who may not have an email address or wish to provide one.

Courses Enrolments show unnecessary member messages

During Course Enrolment, the Member Messages box on the Enrolment tab shows details of expired memberships, even if there is a valid Membership available to price the Course.

The number of member messages has now been reduced in those circumstances:

1. If a valid Membership is found for the Course any other Membership Expiry messages are suppressed.
2. If there are no valid Memberships available the Membership Expiry Messages are shown in full, which was the pre-existing behaviour.

Also, an extra line has been added to the Enrolment Information to show the actual Membership Type used to calculate the Course Fee.

POS –Membership sales – Can they have the option of making postcode compulsory

This Functionality allows you to make the postcode field compulsory for new members.

Theatres – Booking Reference that appears on the Capita report is the internal ClarityLive Booking Reference

The Booking Reference that appears in the Capita payment report with respect to Theatre online bookings is the internal ClarityLive Booking Reference. This internal reference is not easily translatable back into a Patron Number when investigating payment issues.

The new Capita reference will look like this:

```
10001477 94341562-ee85-4960-93c6-7bc11c6703ef
```

i.e. PatronNumber space PaymentReference

POS – Paying Booking Cancellation Debts

This feature adds the ability to make debt payments on the Booking Enquiry screen for Members who have incurred debt due to either a “late cancellation fee”, or because a booking was cancelled and was not subsequently filled by another Member.

This is used in conjunction with the Process Debtors.

No Show Charge

In the new release you will be able to add a penalty fee when a ‘No Show’ or ‘late cancellation’ has been identified using Process Debtors. The penalty is configured in a new column on the Fees tab of Activity Configuration.

Marking bank details as invalid

In the new release there is an ‘Invalid bank details’ status - see below. The Bank details tab now contains an ‘Invalid bank details’ tick box, which will be ticked if the details are invalid. A Bacs run cannot be prepared if there are members that have invalid bank details – these members will show on the ‘Missing Bank Details’ report.

Support can configure which DD rejection types will mark the bank details as invalid for you.

When you sell a direct debit membership to someone who has no current direct debit memberships, the bank details will be marked as invalid to ensure that details are entered and sent to BACS before collection.

The invalid bank details flag is cleared during the finalisation process of the Auddis submission.

ClarityLive
 WW (Dev Testing and Changes) 415 Master User 08 July 2016, 13:17

456456456 - mr Owen England

Search Account Membership Types Bank Details Analysis Codes/Restrictions Messages Notes Sub Members PARQ

Centre WW Member ID 456456456 Web Barred

Usage Report
Take Photo

No main member or sub-members

Status
 Joined Date 01/07/2016
 Is DD Debitor Yes (overridable)
 Invalid Bank Details Yes

POS
 Membership
 mr Owen England

Title mr Surname England Forename Owen Gender Male Date of Birth 01 July 1975 Age 41

Address 1 Testing Lane
 Postcode DA5 8YU

Home Work Mobile Email
 Email Opt Out
 Next of kin Email
 Email Sales

Save Cancel

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Re-Capturing Bank Details Online

E-joining has been updated to allow a member to apply for an additional DD membership for a DD type that the customer previously had but has now lapsed (we do not allow DD renewals on POS or Web).

Additionally, when purchasing an additional DD membership online, if the customer has no current DD memberships, or their bank details have already been flagged as invalid (e.g. via a rejection), the customer is prompted to complete a new DD mandate.

If the customer opts for the Paperless DD route, the new bank details are written to the Bank Details fields and automatically flagged for AUDDIS.

If the user opts for a Paper DD, their existing bank details are invalidated and a member message is added to the account that a paper DD has been requested. This paper DD message is also applied to new customers signing up via the Paper DD mechanism.

Alternative Theatre Verification – Additional charges apply

A new verification mechanism can be applied customers. Instead of following a link for verification, they will need to enter the unique code emailed to them into the website as part of the registration process.

Enrolment Report

The enrolment report from the Course Enrolment screen now includes the mobile phone number.

Membership Centre Code Amendment

Since the last release, income has been at membership centre code rather than the Home centre for the member. In this release it is now possible to change the centre code associated with a specific Membership using the Membership Types tab within Member maintenance. A new box has been added which allows the user to change the Centre Code for a membership (as long as that membership type is configured at the other site).

The BACS submission report has been fixed in this release to show the income at the membership centre level.

Issues Fixed in this Release

Ledger Transfer – Kiosk Tickets have been missing from the Ledger Transfer

Since the introduction of 2.9.1 the sales made by the kiosk have haven't been picked up by the Ledger Transfer. This had a knock on effect to the Head count figures.

Activity Days – **Group Discount doesn't show decimal places in percentage**

The Edit Group Discount Detail box now allows the entry of the Discount percentage to include decimal places.

Activity Maintenance – Kitchen Print required flag value not carried over **when 'Add Effective Date' button clicked**

When making changes to activity fees which add a new Effective Date, the values of all the fields should be copied to the newly created Fee – the Kitchen Print Required Field wasn't copied but will be now.

Direct Debits – DD Income report and financial activity report **didn't** agree

The DD Income Report has been upgraded to use the centre associated with the individual Membership so that the two reports work from the same basis.

Theatres – Add Performance, remove invalid default values

The Add Performance dialog box now sets the End After radio button and the Time is empty rather than defaulting to 'midnight'

POS Tabs – the Save Tab Auto logged off, but the till transaction amount was still showing in the basket when you logged back in

Individual Tills can be configured to automatically logout after each sale transaction is completed. When using auto logout together with Tabs the totals associated with the saved Tab were redisplayed when the next User logged in to start the next transaction. This has been fixed.

Membership – change to improve the speed of loading the membership screen, and **solve 'reused member number' confusion**

We've resolved an issue with a procedure used by the Membership screen where the function was processing all member number changes and not just the changes specific to a single member.

Reprint Receipt failing for gift certificates

Fixed an issue where the Gift Certificates receipts weren't saved and so couldn't be reprinted.

Booking enquiry screen was very slow

Made changes to the index of the booking table to improve the speed.

PARQ Maintenance Screen

The PARQ maintenance screen now makes best use of the available screen space.

Theatres Event Configuration

On Event Configuration – when new performances were created which overlapped with existing performances, the resulting user message after ‘Save’ showed the time of the performance including seconds – the seconds have now been removed.

Bacs run rejection screen

On the Bacs run rejection screen a redundant error message has been removed which was misleading to users.

BACs rejection import screen

Line number notification on Bacs rejection file import has been fixed

Activity days session view

The dates and times are now aligned correctly

Finance Reports

The speed of some Finance Leisure Reports has been improved. Transaction report – takings, Transaction report – Income, Session by General Ledger Code, Manager Mop.

Membership

Fixed an issue where it was possible for a sub-member to retain the “Linked Address” flag after being disassociated from a main member.

Theatres

The concession selection page now renders valid JavaScript when an empty Card Validation Pattern mark is specified in the configuration.

Date & Resources Tab Disabled on Block Bookings

Fixed an issue where the Dates and resources tab was left disabled if there were no Trading Companies defined in the current centre.

Reports ‘Transaction Report – Takings’

The Takings report wasn’t showing takings in a till if it was for other sites when showing historic data.

eBookings – Debtors were not prevented from making bookings online

A bug allowed Direct Debit debtors, or debtors highlighted by the Debtors Process to book online and get their membership prices.

It is now possible to configure the application to allow/deny access to Booking Debtors and/or Direct Debit Debtors.

You’ll be able to request that past debts are added to the customer’s web basket and specify whether that debt can be removed before the customer progresses.

eBookings – Allow Expired Members access to renew.

You now have the option to give expired members access to eBookings for renewal purposes.

eJoining – Error on Bank Address

Fixed an issue where long bank addresses caused a page validation error.

eJoining DD Membership Bank Details not saved

Fixed an issue where the application would not save captured bank details if the customer followed a strange path through ebookings.

New Starter Report

Fixed an issue where the New Starter report did not report the member counts correctly if a member signed up for multiple memberships in the given date range.

Also added Home Centre.

Confusing POS Process Descriptions

Fixed an issue where the Activity Day and Class Booking POS process descriptions weren't clear.

Old POS Process Description	New POS Process Description
Activity Day Booking	Multi-Booking
Class Booking	Activity Day Booking
Class Booking Change	Activity Day Booking Change