



Links Modular Solutions

Release Notes

Version 2019.2 Release 16

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Classes Changes

Account Statement introduced for Family payments

A new report is created that will allow users to generate a payment summary of their classes. The summary can be used to get a rebate on payments made by government incentives.

To generate an Account Statement, go to the Family in question, click on **Print Account Statement** and select the desired reporting criteria.

Family Setup - RP Ph: N/A

Responsible Person: 100077660 RICHARD EVANS

Family Details | Debit Details | Accounts/Bookings | HP/Squads | Account History | Make Ups | Registrations

Current only
 History
 Include makeups

Name	Type	Day	Time	Level	Start	End	Std Fee...	Balanc...	St ...	Bk ...	Dis...	Pa...	Comment
TIMOTHY	L1T...	Tue	3:00 PM	Bluebot...	17/12/...	17/12/...	35.00	0.00	1	1	0	T	
TIMOTHY	L1P...	Sun	8:00 AM	Carnival...	15/12/...	15/12/...	50.00	0.00	1	1	0	P	
TIMOTHY	L1PT	Fri	1:00 AM	Bluebot...	13/12/...	20/12/...	50.00	0.00	1	1	0	TM	

Fees

Date	Reason	Amount, \$	Total \$:

Payments

Date	Reason	Amount, \$	Total \$:

Adjustments

Date	Reason	Amount, \$	Total \$:

Lessons Balance \$: 0.00
 Rego Balance \$: 0.00
 Total Balance \$: 0.00
 Family Credits \$: 0.00

Special Family Discount 10%
Extended discount of 0% applies

**Note: Right hand menu on the Fees/Payments/Adjustments lists will show the Charge/Payment details

Account Statement

From Date: D

To Date: D

Class Types to display

Description
<input type="checkbox"/> L1BANG
<input type="checkbox"/> L1DEV
<input type="checkbox"/> L1PER
<input type="checkbox"/> L1PT
<input type="checkbox"/> L1SCT2
<input type="checkbox"/> L1TERM
<input type="checkbox"/> L2ADU

Select All

Students to display

Description
<input type="checkbox"/> TIMOTHY

Select All

A loading screen appears whilst generating the report for you

Family Setup - RP Ph: N/A

Responsible Person: 100077660 | RICHARD EVANS

Family Details | Debit Details | Accounts/Bookings | HP/Squads | Account History | Make Ups | Registrations

Current only | History | Include makeups

Name	Type	Day	Time	Level	Start	End	Std Fee...	Balanc...	St...	Bk...	Dis...	Pa...	Comment
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TIMOTHY	L1P...	Sun	8:00 AM	Carnival...	15/12/...		50.00	0.00	1	1	0	P	
TIMOTHY	L1PT	Fri	1:00 AM	Bluebot...	13/12/...	20/12/...	50.00	0.00	1	1	0	TM	

Loading ...

Balance \$: 0.00
 Balance \$: 0.00
 Balance \$: 0.00
 ly Credits \$: 0.00

Special Family Discount 10%
Extended discount of 0% applies

**Note: Right hand menu on the Fees/Payments/Adjustments lists will show the Charge/Payment details

Reallocate Accounts | Save | Delete | Clear | Clone | Close


And your report is presented

Account Statement

PDF Viewer

Open | Save As | Print | Find | Previous | Next | of 2 | Zoom Out | Zoom In | Zoom | Send Email

File | Find | Navigation | Zoom | Custom ...

 **Student Account Statement Details**
 From 21 Mar 2017 to 16 Dec 2019

Site Details: Location1
 6 TRANSUNK DR
 ABBOTSFORD, VIC 2046
 CRN: 12345678901

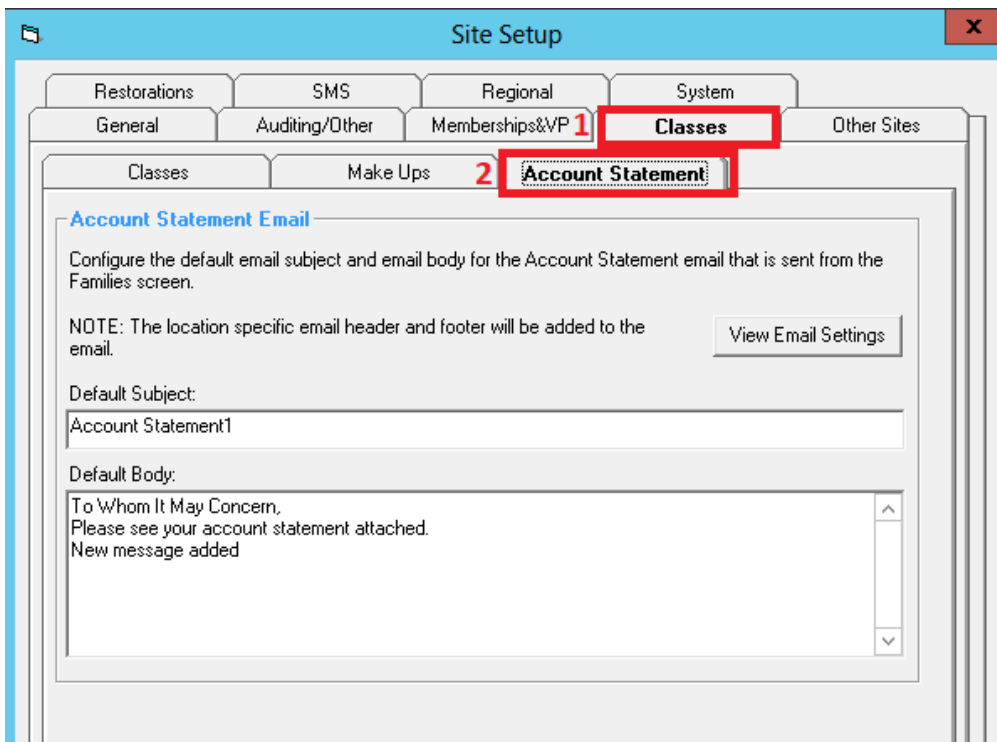
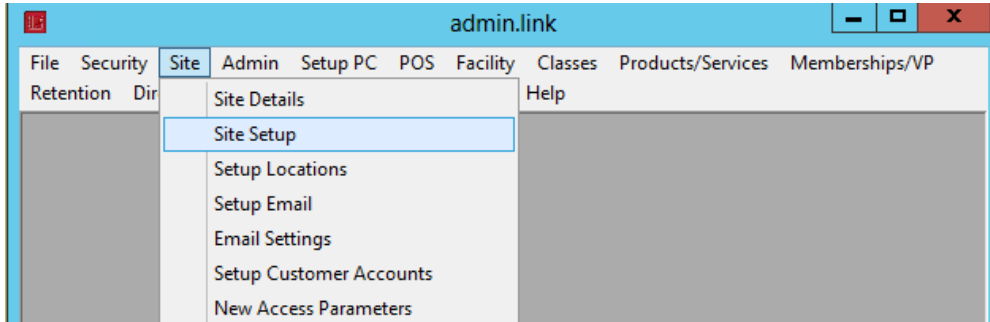
Responsible Person: CHARLIE EDISON (100077660)
 Family Address: 1357 SMITH STREET, COLLINGWOOD, 3066, VIC

Payment Date	Date	Class	Detail	Amount(\$)
Student: TIMOTHY EDISON (100077661)				
Class: ADULT LTS				
12/12/2019	04/10/2019	Friday 8:30am (Adults)	POS Payment	70.00
Sub Total (\$):				70.00
Class: DEVELOPMENT SQUAD				
12/12/2019	12/12/2019	Thursday 4:00pm (Dolphins)	Pro rata	140.00
Sub Total (\$):				140.00

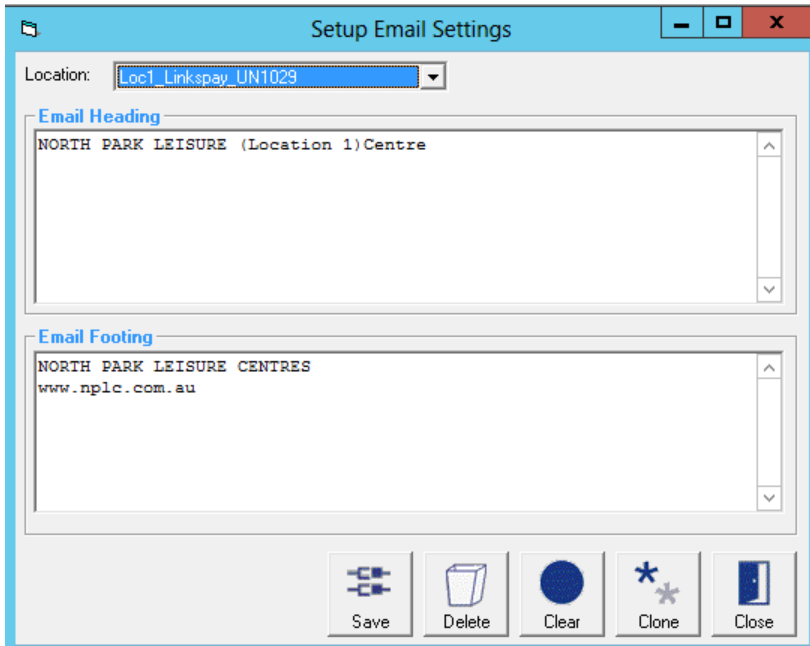
Admin Changes

Configure Account Statement default email subject and text

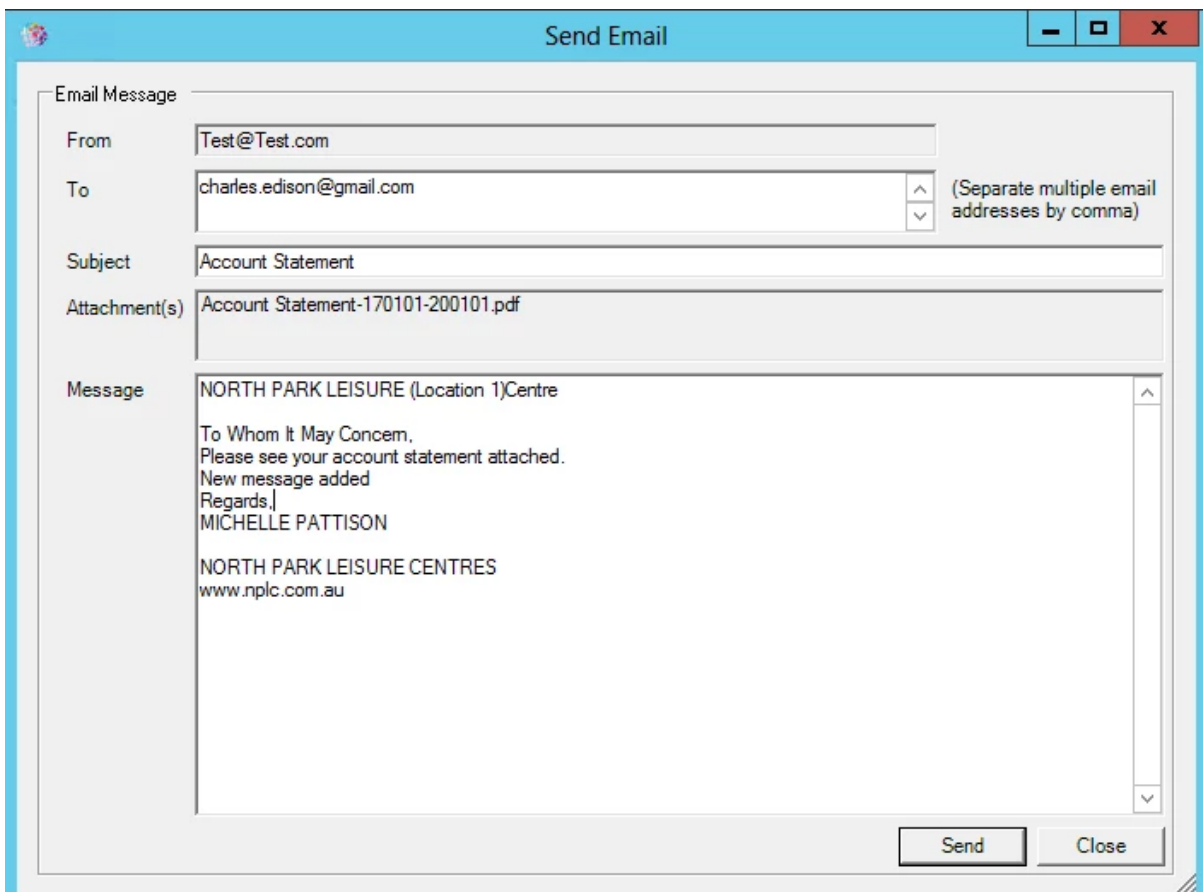
The subject and message body for Account Statement emailing is set for all locations. To customise the email message per body, please use the email headers and footers.



Upon emailing via the Account Statement preview window, you are able alter the message.



The 'Setup Email Settings' window shows a dropdown menu for 'Location' set to 'Loc1_Linkspay_UN1029'. Below this are two text areas: 'Email Heading' containing 'NORTH PARK LEISURE (Location 1)Centre' and 'Email Footing' containing 'NORTH PARK LEISURE CENTRES' and 'www.nplc.com.au'. At the bottom are five buttons: Save, Delete, Clear, Clone, and Close.



The 'Send Email' window displays an 'Email Message' form. The 'From' field is 'Test@Test.com', 'To' is 'charles.edison@gmail.com', 'Subject' is 'Account Statement', and 'Attachment(s)' is 'Account Statement-170101-200101.pdf'. The 'Message' field contains the following text: 'NORTH PARK LEISURE (Location 1)Centre', 'To Whom It May Concern,', 'Please see your account statement attached.', 'New message added', 'Regards,|', 'MICHELLE PATTISON', 'NORTH PARK LEISURE CENTRES', and 'www.nplc.com.au'. 'Send' and 'Close' buttons are at the bottom right.

Emails sent to Customers using this feature can also be tracked by going to the Customer Marketing screen.

Customer Setup // EDISON, CHARLIE

Customer ID: 100077660 View Invoice Account View Customer Account Home Location: Loc2_Linkspay_UN1030

Personal Emergency/Health Issues Others Notes Status Sales History

Personal Details

Last Name: EDISON

First Name: CHARLIE

Title: MR

Gender: Male

Age: 9:9

Date of Birth: 3 MAR 2010

Concession Date:

Partner Name:

Ref #:

Contact Details (default)

Address: 1357 SMITH STREET

Town: COLLINGWOOD

County: VIC Postal Code: 3066

Country:

Home Phone:

Work Phone:

Mobile Phone: 0404123456

Home Fax:

Work Fax:

E-mail: charles.edison@gmail.com

E-mail 1: family.edison@gmail.com

Active Carrot Enabled Test mode (IS) No current cards Cards >>

Setup Letter Letter Issue card **Marketing** Apply Save Delete Clear Clone Close

Customer Marketing Details // Customer ID - 100077660

Customer Id: 100077660 Name: EDISON CHARLIE G: M

Info Marketing Other Extras Appointments Guest Pass Referral **Tracking** Children

Contact Log

Date: 23/12/2019 13:46:00

Staff: PATTISON, MICHELLE

Reason: Print Account Statement

Method: Email

Comment: Account Statement generated for period of 21 Mar 2017 - 20 Dec 2019 for family 100077660.

Export / Print

From: To:

Prospect / Retention Programs

Program: Add New Program

Not Completed	Completed	Pending Appt	Missed Appt	Skip

Follow Up Enquiry Follow Ups

Follow Up Required

Priority: 0 Location: Loc1_Linkspay_ By Date:

Staff: Method: Reason:

Comment:

Contact Made

Customer Distance Graph Save Delete Clear Clone Close



Class Email Settings moved to Site Menu

The "Email Settings" from the Classes menu has now been moved into the Site menu.

The "Email Settings" affect other email templates in some other modules as well.

