



CLUBWARE 2.0 RELEASE NOTES (V 2.4.1.500)

Friday, 18 December 2009

GENERAL RELEASE NOTES

This release of Clubware 2.0 contains some new components that will improve the integrity of the information being captured and provide extended capabilities for searching and reviewing that information.

These components are:-

REPORT SCHEDULING SERVICES

This change consists of an Updated Scheduling form.

Key changes from previous feature behaviour:

1. Information displayed on grid no longer shows detail regarding the job:
 - a. Frequency, lifetime, last/next run times are available
 - b. Detailed schedule info is available by opening the appropriate job
2. When a job expires, it is automatically deleted by quartz, and cannot be re-visited
3. Significantly more powerful and flexible schedules are now available

QUICK LOGIN

Quick Login is a new feature that provides the ability to switch who is logged in without having to close and restart the application. Permissions for the user change accordingly.

NEW PRE-SALES INFORMATION

The Member Pre-Sales (Prospects) form has had two new lookup fields added to it. These fields are designed to provide better information about how the prospect came to the club and what level of initial commitment was shown.

The two lookups are:-

- Prospect Type
 - Outbound Call
 - Inbound Call
 - Walk In
 - Referral
 - Web Site Lead
 - Email program lead
- Pre-Sale Status
 - Hot
 - Warm
 - Cold



MANDATORY MEMBER FIELDS

There are a number of fields within the Member region that have been identified as being mandatory data for some facilities. To accommodate this requirement, new Security Policies have been put in place to allow for each facility to individually control whether these fields are mandatory.

The fields that have this requirement applied are:-

- Address
- Consultant
- Date of Birth
- Emergency Contact
- Phone Number (there must be at least one – other than the emergency contact)
- Salesperson
- Source

ACTIVITY TYPES MATCHED TO ACTIVITY RESULTS

The Activity Type lookup values have been linked to Activity Results. The related Activity Results lookups should filter appropriately based on the selected Activity Type.

When assigning an Activity Type, the user will now have a select set of Activity Results to choose from based on the selected Activity Type, rather than needing to scroll through all of the Activity Results.

ACTIVITIES GRID

Some changes have been made to the Activities grid to provide a “workbench” like behaviour where managers and other staff are able to view Activities in a Summary or Detailed manner.

These changes include the addition of some other fields to the grid and also the list of fields to be searched on. By adding fields to the grid, they can now be used to Group the data in the grid when dragged into the header portion of the grid.

The fields that have been added to the grid and the search list are:-

- Staff Position
- Activity Last Update

A new button has been added allowing the user to filter on Completed Activities.

To complete the changes in this form, Group summary information has been added to the summary headers to provide counters indicating Activities that are:-

- Overdue
- Due
- Pending

The overall effect of these changes is provide a better capability to summarise at a high level the workload of individuals and groups within the facility while still providing the ability to drill down to the detail of a given individual.



NEW SEARCH OPERATOR

A new “Between” search operator has been added to the Clubware product.

Driven from the requirement to search between dates, it is also capable of handling searches between two numbers or two sets of characters.

This search operator is available on all screens within the application that have a search capability. This change significantly increases the searching power available.

64 BIT SUPPORT FOR ACTIVE REPORTS

The Clubware Application has been upgraded to allow it to run in a 64 bit server environment. Previously this was not possible due to the reporting component the application uses. This component has now been upgraded.

LINKED PAYMENTS VIA GROUPS

Groups can now be used to facilitate the concept of linked payments. The functionality basically works as follows:-

- A member of the group is chosen as the one responsible for the billing of that group.
- Each member of the group must have an account linked to the group.
- On entry to the facility, a check is performed to confirm that the Billing Members account is not overdue.

A new setting has been introduced to allow this behaviour to be implemented. Those facilities who are using groups in a different fashion can continue to do so.

MINOR FIXES RELEASED

FRONT DESK

1234 Concession Balance Calculation

The save and display of the Concession Balance on entry is inconsistent. This consistency has been addressed to ensure each method of entry behaves in the same fashion.

1243 Concession Balance not Deducting if Arrival not Accepted

When an Arrival occurs, if the Green Flag on the form was not clicked, the concession balance would not be altered. Default behaviour previously allowed the clicking of the (X) to accept the arrival and adjust the Concession balance. This behaviour has been restored.

1244 Concession Balance not displaying correctly on Arrival

An incorrect balance occurred when an Expired Concession was used to enter the facility. The process now deducts a concession as well as creating an Arrival. Onus is on the staff members to deal with members whose accounts have gone beyond their limits.

**1330 Reciprocal Concession Visits in WAN not deducting**

When a reciprocal visit occurs in a WAN environment (where the facilities are not using the Comms Gateway to communicate the reciprocal visits back to the home facility), the Concession balance is not being calculated.

RETAIL MANAGEMENT**1341 Unable to Assign New Products to Hot Key**

Improved the functionality to allow assignment directly to a Hot Key.

1342 Barcode Required for Products to be assigned to a Hot Key

Removed the requirement for a barcode as this was counter intuitive. If it has a barcode, scan it, otherwise use a Hot Key.

1343 Raising Orders

Could not Add products to an order without saving, but then you get prompted suggesting you should add Products. This behaviour has been corrected.

ACCOUNTS**1333 Incorrect Branch Assigned to Account**

Head Office Branch Id is being assigned to a Members Account when the Head Office adds the Account. This occurs when a Branch is selected, but the Account belongs to Head Office. The selected Branch Id is now being assigned.

REPORTS**1113 Audit Trail Report.**

Changes have been made to the indexing behind the view that feeds this report.

1152 Visit Usage Report.

Errors would occur when running this report with the Branch selected. These reports can now be run.

1206 Visit Report numbers low.

Numbers for this report are low since the introduction of release 2.4.0.502. This report and other visit reports have been updated where necessary verified for accuracy in the data they return.

1242 Displaying Club Logos from Schedule Reports

Duplicate Club logos were previously being displayed in some Scheduled Reports.

1299 Scheduled Reports not running to completion

A memory leak was occurring during the running of multiple reports. The leak has been plugged.

**1311 Payment Z Off Report.**

The speed of this report has been prohibitive in some environments. Changes to this report have improved the performance significantly. During the investigation, it was found that the Product Z Off report would be improved in the same manner.

1315 Unable to Export Report.

Reports can now be exported.

1334 Retention Report.

Errors would occur when running this report with the Branch selected. These reports can now be run.

1340 Exclude deleted activities form Activity report.

Deleted activities are not longer displayed on this report.

CORRESPONDENCE**1263 Emailing from Clubware**

Different behaviours have been experienced depending on where in the application email has been sent from. This change consolidates the way in which email is sent from the application. Only the Synchronisation process is unaffected by the change.

BOOKINGS**1325 Specify Account for Bookings**

When Specify Account is selected for a Series of Bookings, only the first occurrence of the booking has the selected account allocated to it. The behaviour of the application is now to ensure that the specified account is assigned to all Bookings within a Series.

RECIPROCAL VISITS**1321 Reciprocal Visit Maintenance Upgrade**

Maintenance was upgraded to only broadcast those accounts where the details have changed.

MISCELLANEOUS**1183 Clubware Connect Upgrade**

Clubware Connect now uses the Cryptography module and no longer refers to the Registry for settings.



CLUBWARE SYNCHRONISATION

1336 Contact Information Not Pulling Through in the Sync

Contact details were not being loaded during the sync process. Changed the identifier in the code that initiates the Contact Load.

COMMS GATEWAY UPDATES

RECIPROCAL VISITS

1267 Stand Alone Schedulable Maintenance

A temporary component to allow maintenance of Reciprocal Accounts to be run overnight via a windows schedule.

This component will be removed when Maintenance is able to be scheduled within Clubware itself.

1303 Index out of Bounds Exception

The comparison of two hash values was causing this error. A change to the logic has resolved it.

1305 Reciprocal Account Details Entity Out Of Sync

The way Maintenance was working was causing Reciprocal Account Details not to be available to the Comms Gateway when a full set of details was requested. A change to the Maintenance Process has rectified this.

1306 Reciprocal Visit Exceptions and Behaviours

A series of exceptions from running Reciprocal Visits was found. These exceptions have been resolved by code modifications.

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