Camp & Class Manager

RELEASE NOTES 9.10

Tuesday, August 13, 2019

Contents

Report Concierge

Now, with the new **Report concierge** feature, agency users can schedule up to 100 active automated report deliveries, allowing recipients to receive the following reports on a regular basis, by email, without logging into the Admin site:

Financial reports

Location: Admin site > **Home** tab > **Finance** tab > **Reports** tab

- **Accounts receivable** report
- **Credit balance report**
- **Customer payments/refunds** report
- **Failed installment payment report**
- **Financial activity** report
- **Internal discount report**
- **Payment plan report**
- **Transactions report**

Season reports

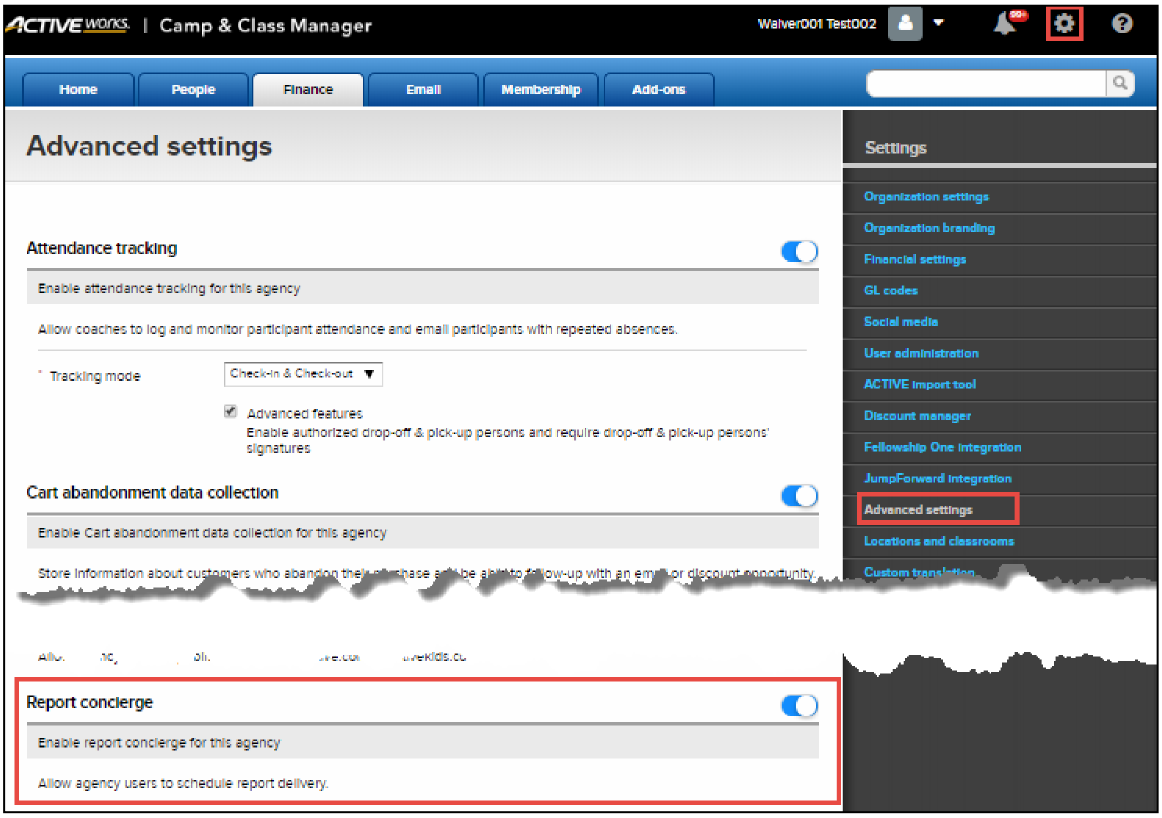
Location: Admin site > **Home** tab > a season > **Reports** link

- **Cart abandonment e-mail report**
- **Check-in report** (PDF)
- **Daily Attendance Report**
- **Merchandise purchase report**
- **Participant attendance report**
- **Session capacity report**
- **Waitlist and session registration history** report (PDF)
- **Waitlist report**
- Custom reports

Enable/disable the Report concierge feature

ACTIVE administrators can enable or disable the **Report concierge** feature at the agency level.

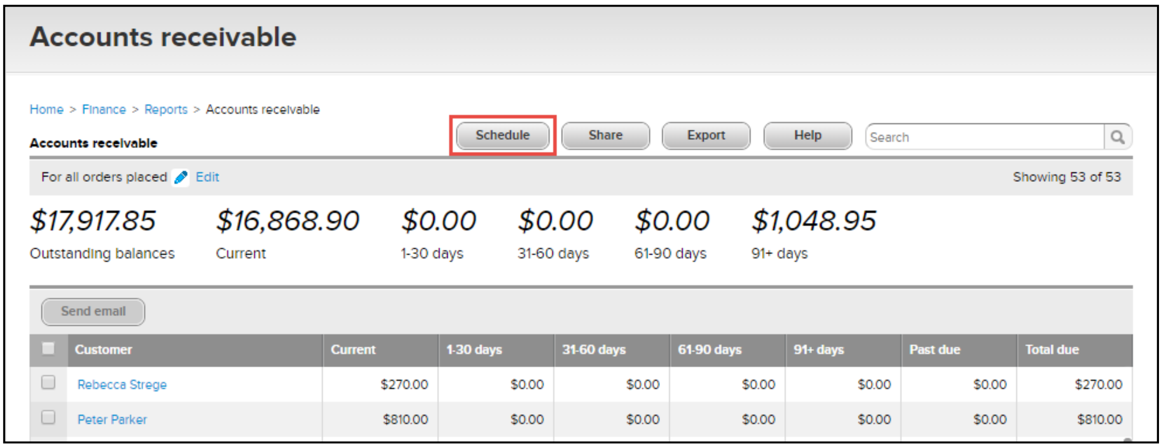
Location: Admin site > **Settings** (wheel icon on top) > **Advanced settings** > **Report concierge** switch (defaults to ON)



Schedule automated report delivery

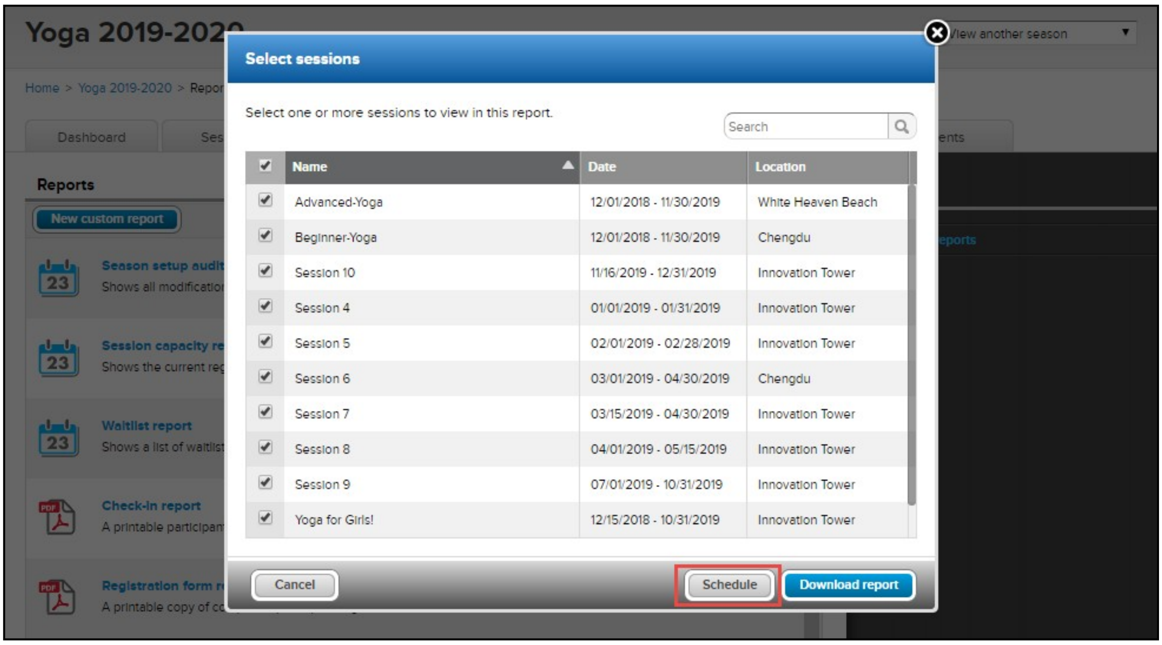
General workflow

In the Admin site, after the **Report concierge** feature is enabled, a **Schedule** button appears on a supported report page. For example, on the **Accounts receivable** report page:

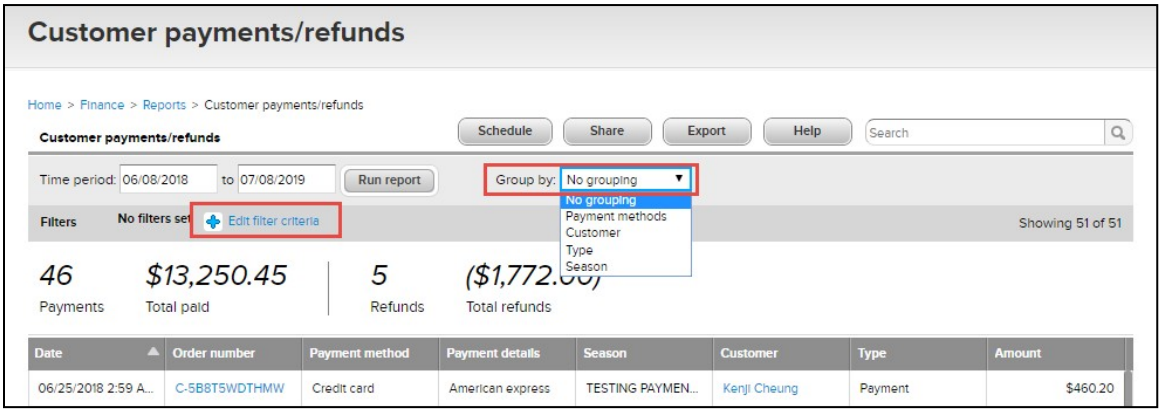


Exceptions:

- For the season **Check-in report** and the **Waitlist and session registration history** report, after clicking the report, the **Schedule** button is displayed on the **Select sessions** popup. The rest of the workflow is the same as below.



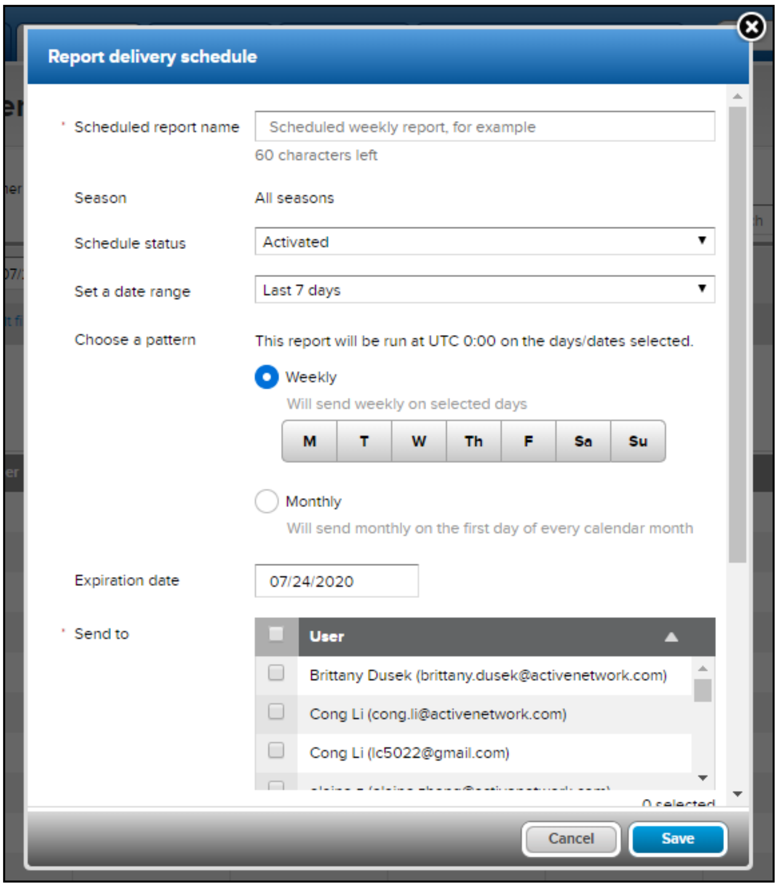
- Scheduled reports will inherit any filters or **Group by** configuration that are set up at the time of scheduling (see Example: schedule a report with additional filters and view-configuration for more information). For example, filters on the **Customer payments/refunds** report page:



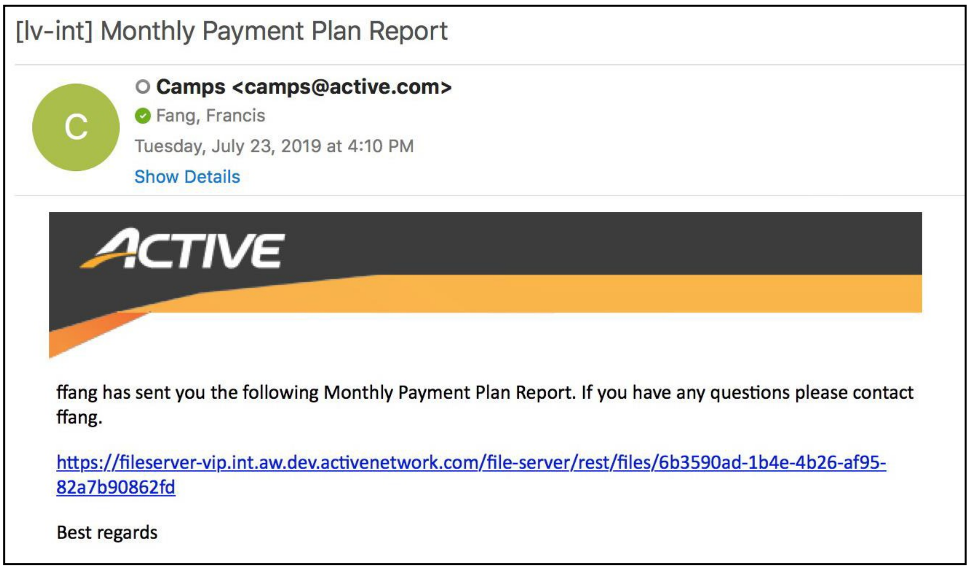
By clicking the **Schedule** button, a **Report delivery schedule** popup appears for agency users to enter or select the required schedule information:

- **Scheduled report name**: For example, “weekly check-in report” or “monthly financial activity report”.
- **Schedule status**: Whether the schedule is activated or paused (note: the 100-limit on scheduled reports only applies to active schedules, not expired or paused schedules).
- **Set a date range**: Choose to include data from a relative date range.
- **Choose a pattern**: Whether to send the report on a weekly (any selected day or days in a week) or monthly (first day of every calendar month) basis.
- **Expiration date**:
  - For financial reports, the maximum schedule expiration date is 365 days after the schedule is saved.
  - For season reports, the default schedule expiration date is 31 days after the season ends. Agency users can also select an expiration date up to a maximum of 365 days after the schedule is saved.
  - A season’s end date is defined by the latest session end date at time of scheduling.
- **Send to**: Recipients who will be automatically emailed the report.

- **Subject**: Email subject for the scheduled report.
- **Message**: Email message. Agency users can enter a custom message which will be appended to the default message.



Once a report is successfully scheduled, the report will be emailed on the scheduled days or dates as a hyperlink to the selected recipients, allowing them to download and view the report without logging into the AUI, for example:

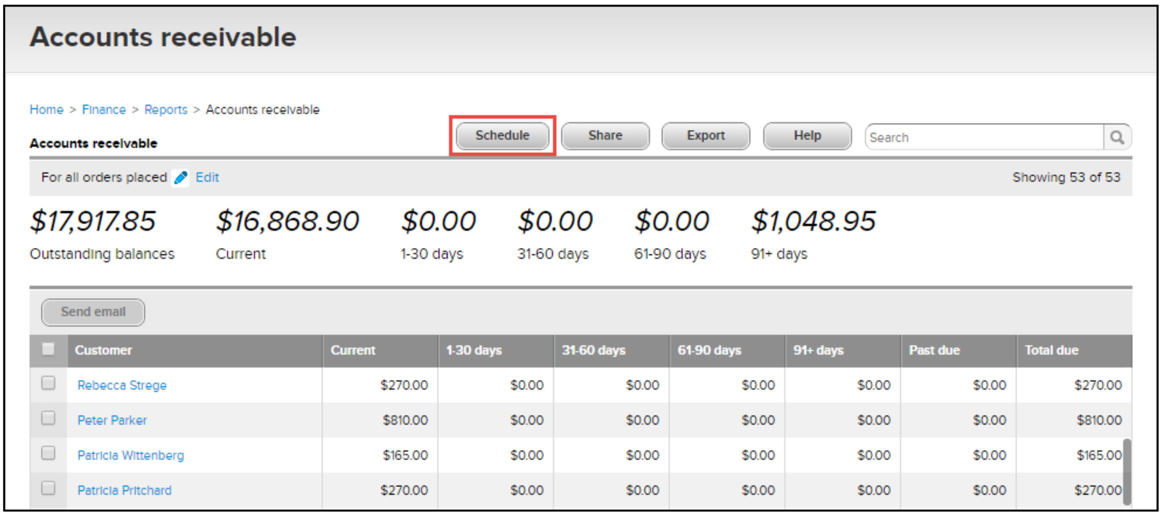


Example: schedule a financial report

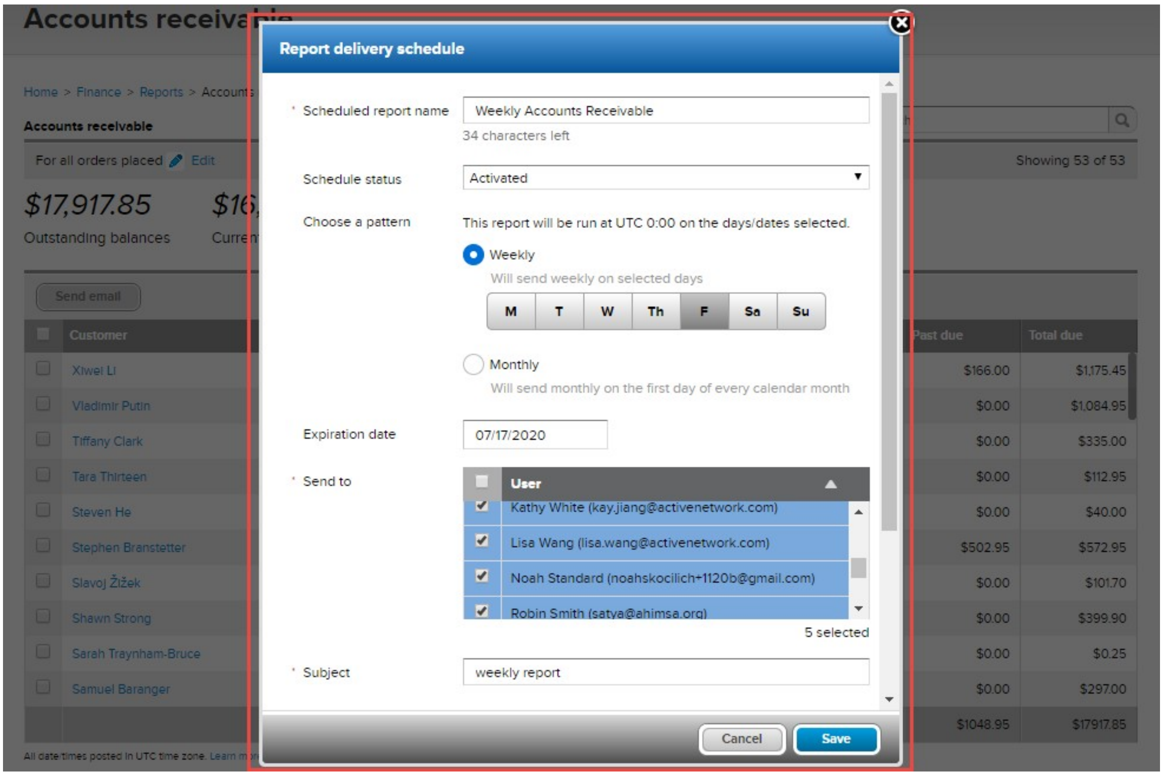
To schedule weekly email delivery of the **Accounts receivable** report on every Friday:

1. Under the Admin site > **Finance** tab > **Reports** tab, click **Accounts receivable**.

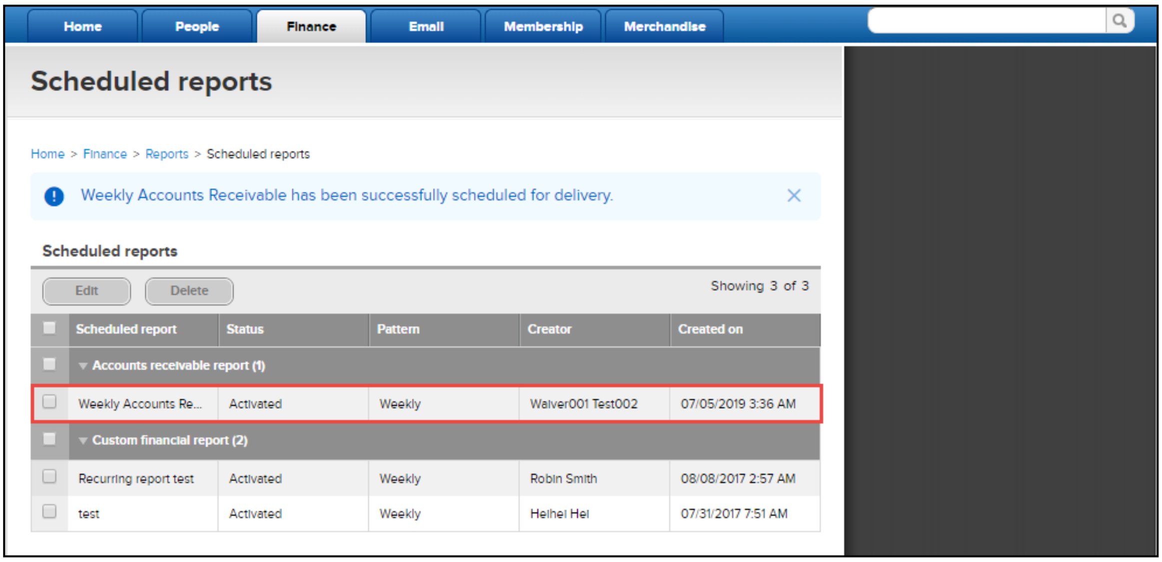
2. On the report page, click **Schedule**.



3. On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for delivery every Friday, so in the **Choose a pattern** field, select **Weekly** > **F**).



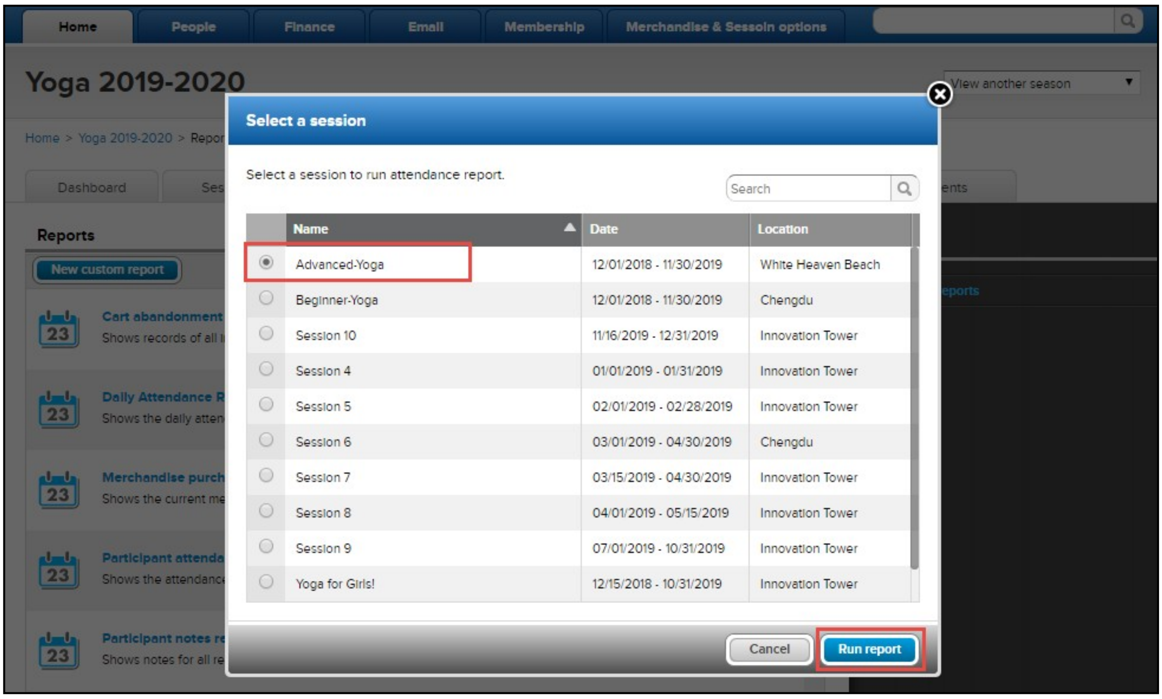
4. Click **Save**. The scheduled report is then listed on the **Scheduled reports** page (see Manage scheduled financial reports for more information).



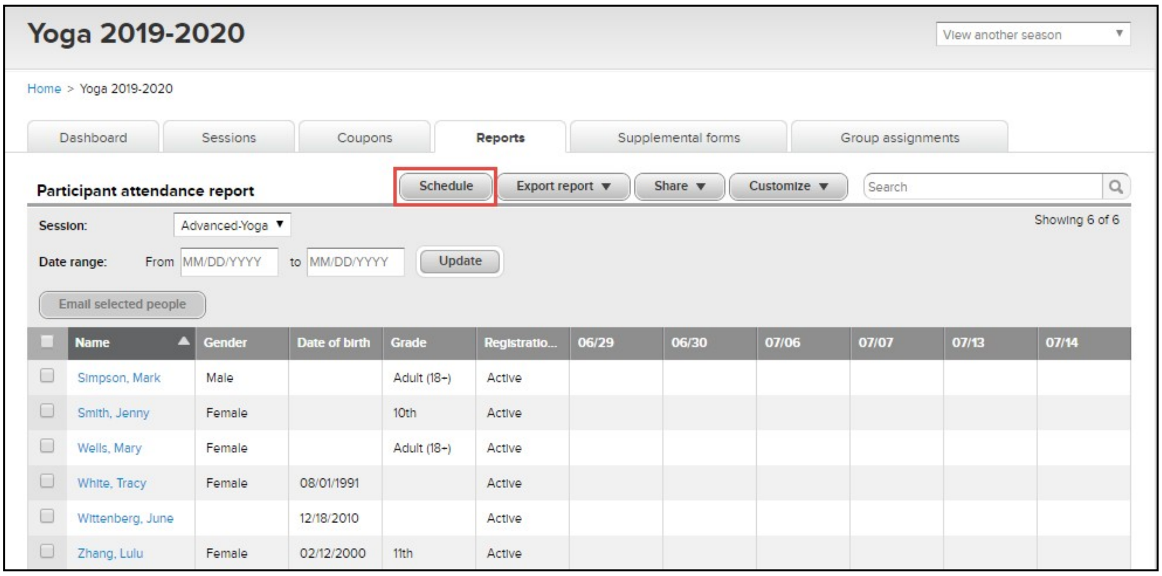
Example: schedule a season report

To schedule monthly email delivery of the **Participant attendance report** for the Yoga 2019-2020 season, Advanced-Yoga session:

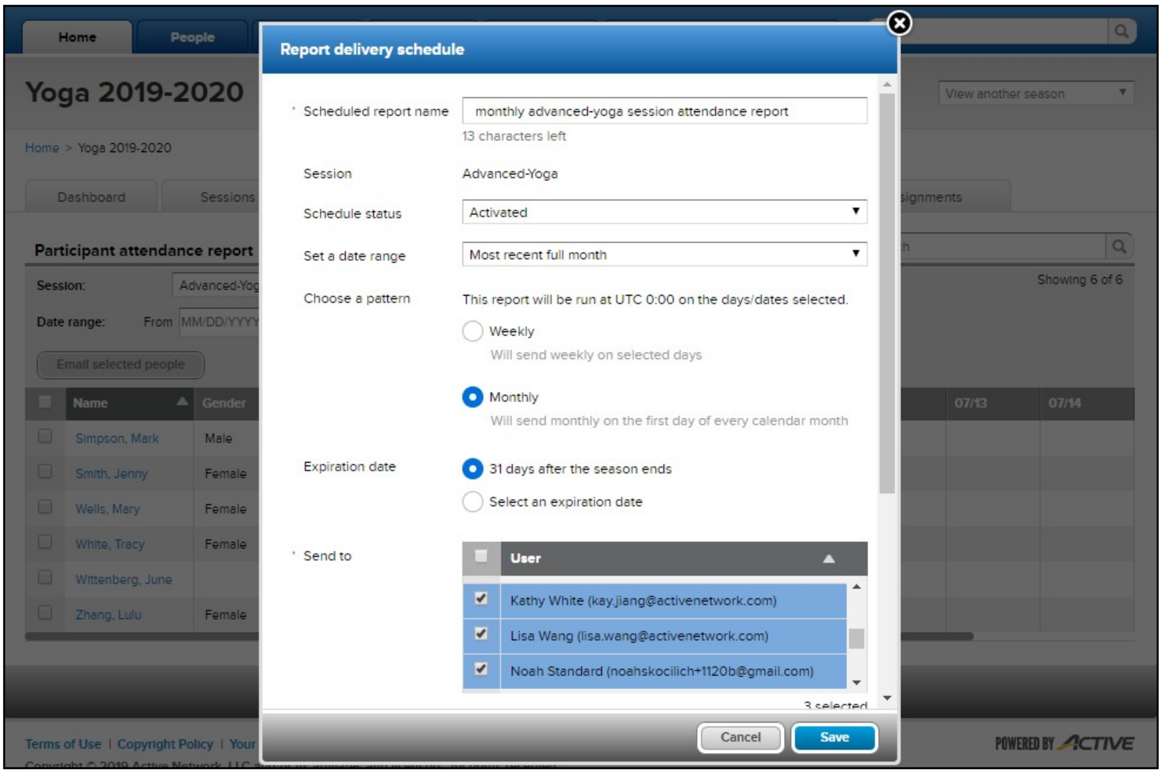
1. Under the Admin site > **Home** tab > **Yoga 2019-2020** season, click **Reports** > **Participant attendance report**.
2. On the **Select a session** popup, check **Advanced-Yoga**, and then click **Run Report**.



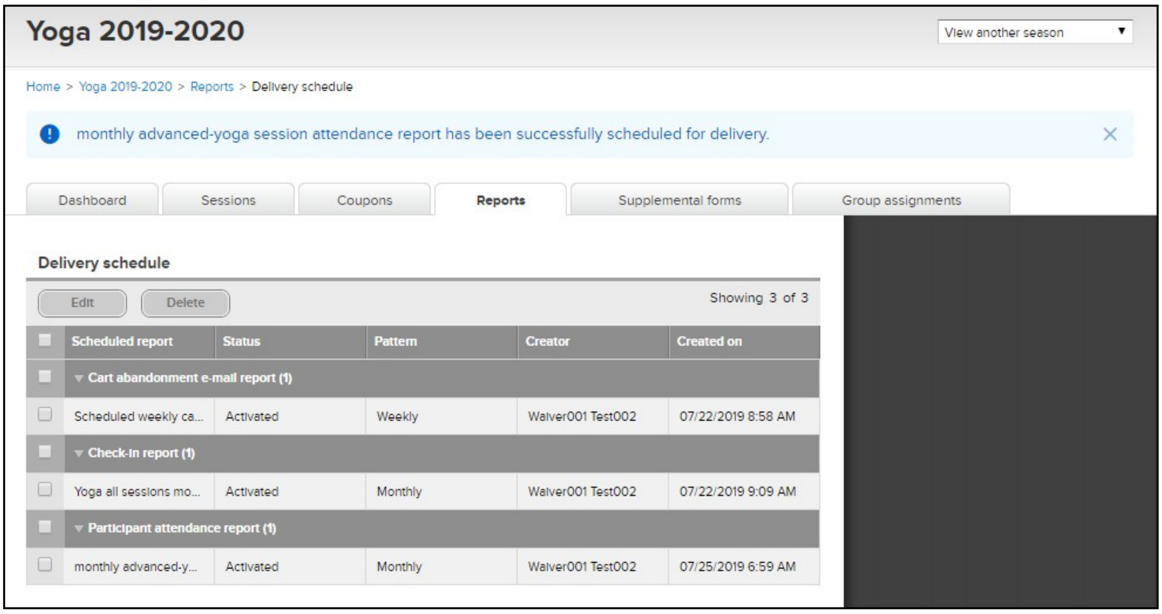
3. On the **Yoga 2019-2020 Participant attendance report** page, click **Schedule**.



4. On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for monthly delivery, so in the **Choose a pattern** field, select **Monthly**).



5. Click **Save**. The scheduled season report is then listed on the season's **Delivery schedule** page (see [Manage scheduled season reports](#) for more information).

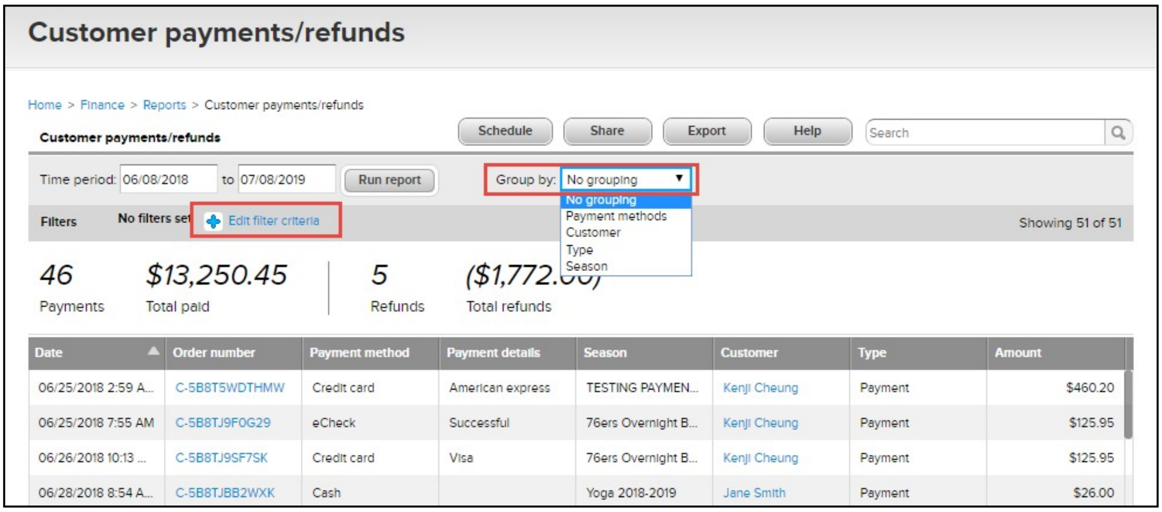


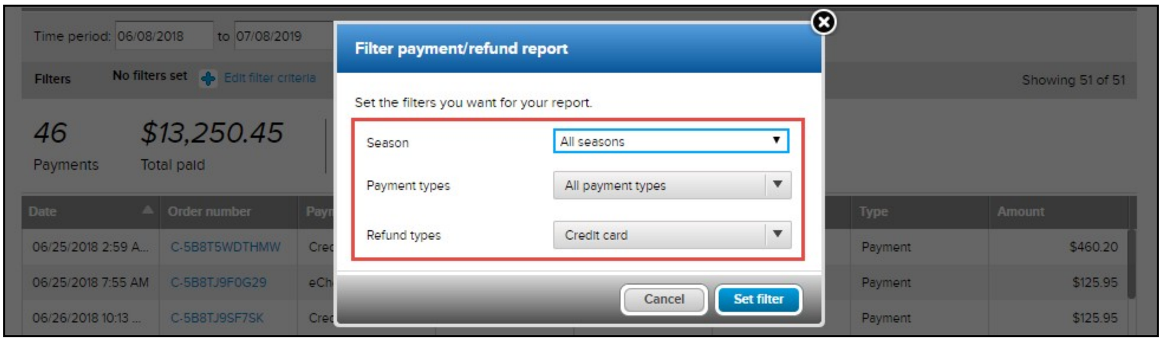
<u>Example: schedule a report with additional filters and view-configuration</u>

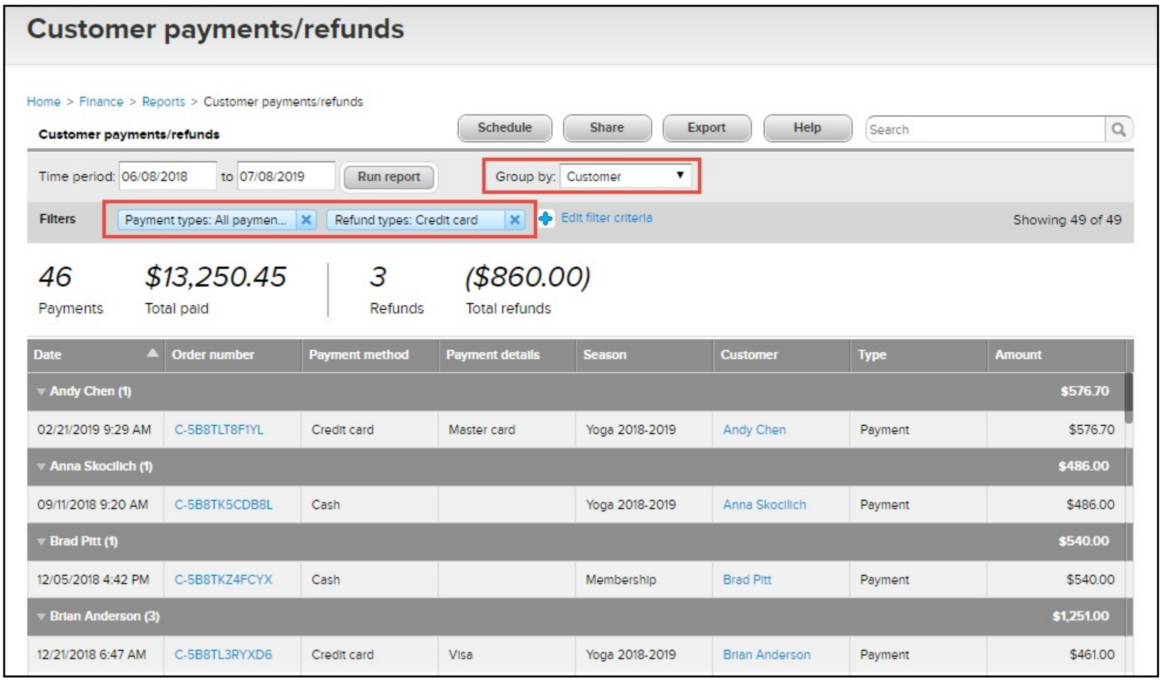
Scheduled reports will inherit any filters or **Group by** configuration that are set up at the time of scheduling. The selected criteria are displayed on the **Report delivery schedule** popup.

For example, to schedule monthly email delivery of the **Customer payments/refunds** report with additional settings:

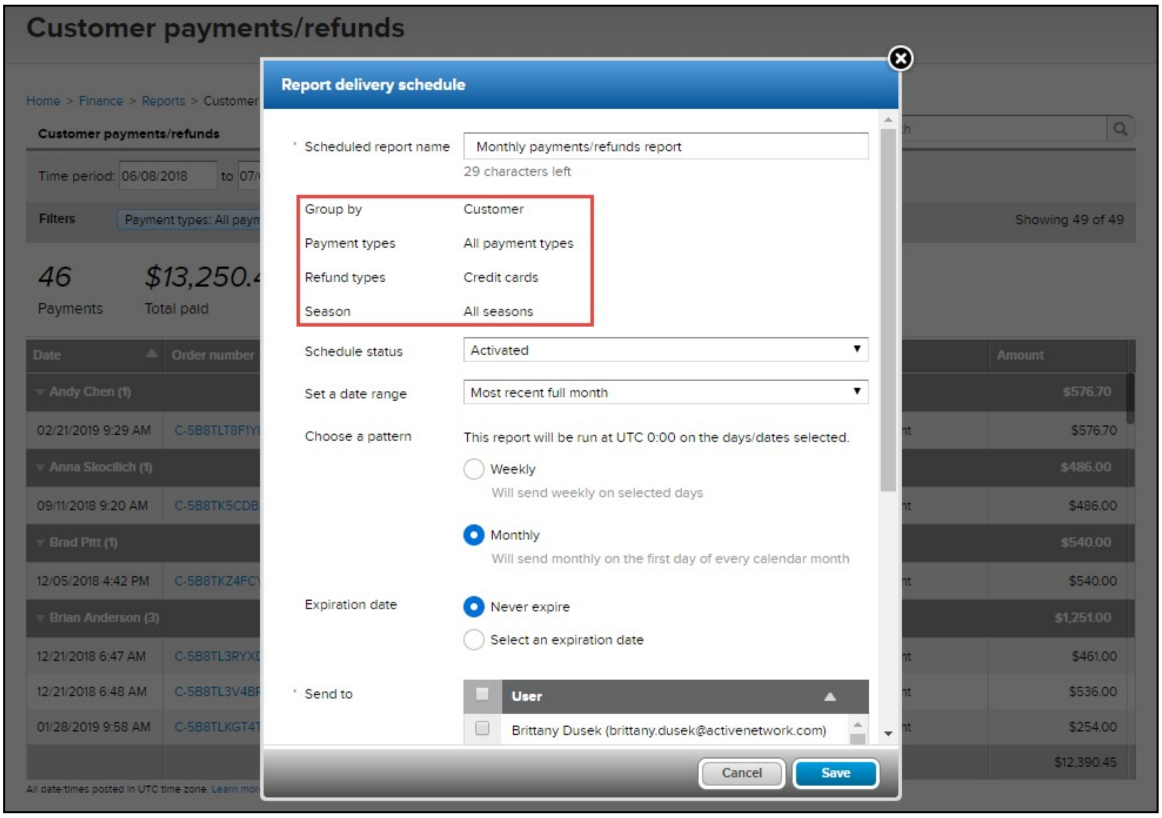
1. Under the Admin site > **Finance** tab > **Reports** tab, click **Customer payments/refunds**.
2. The **Customer payments/refunds** report has additional **Season**, **Payment types** and **Refund types** filters and **Group by** view-configuration. Click the **+ Edit filter criteria** link or the **Group by** dropdown list, and then select the required configuration.



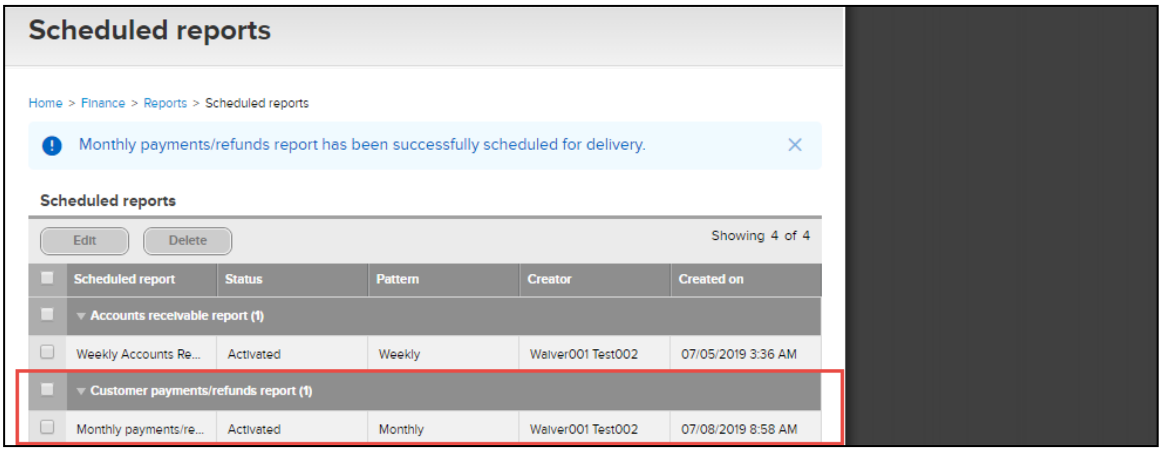




3. Click **Schedule**.
4. On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for monthly delivery, so in the **Choose a pattern** field, select **Monthly**).
   Note: The additional filter criteria set in Step 2 are displayed on the popup.



5. Click **Save**. The scheduled report is then listed on the **Scheduled reports** page (see Manage scheduled reports for more information).

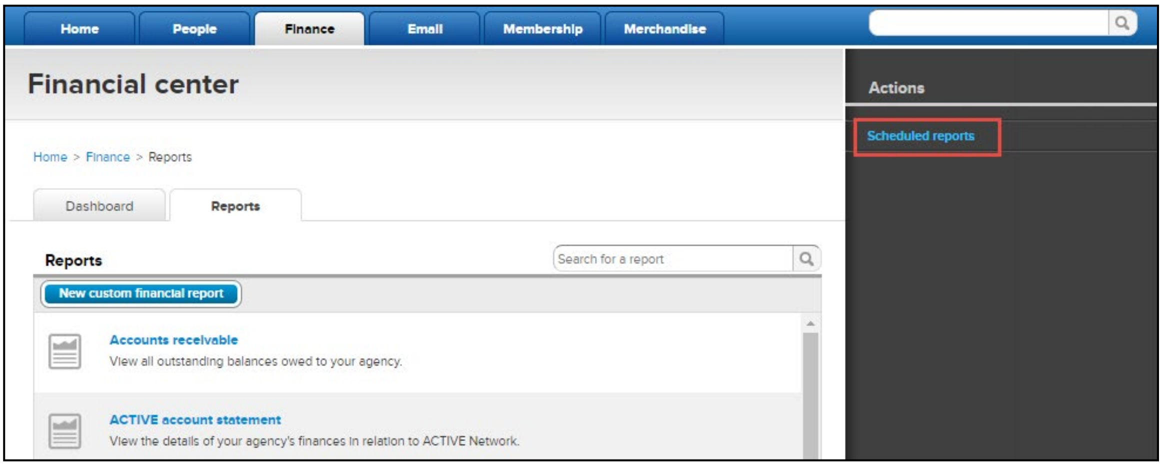


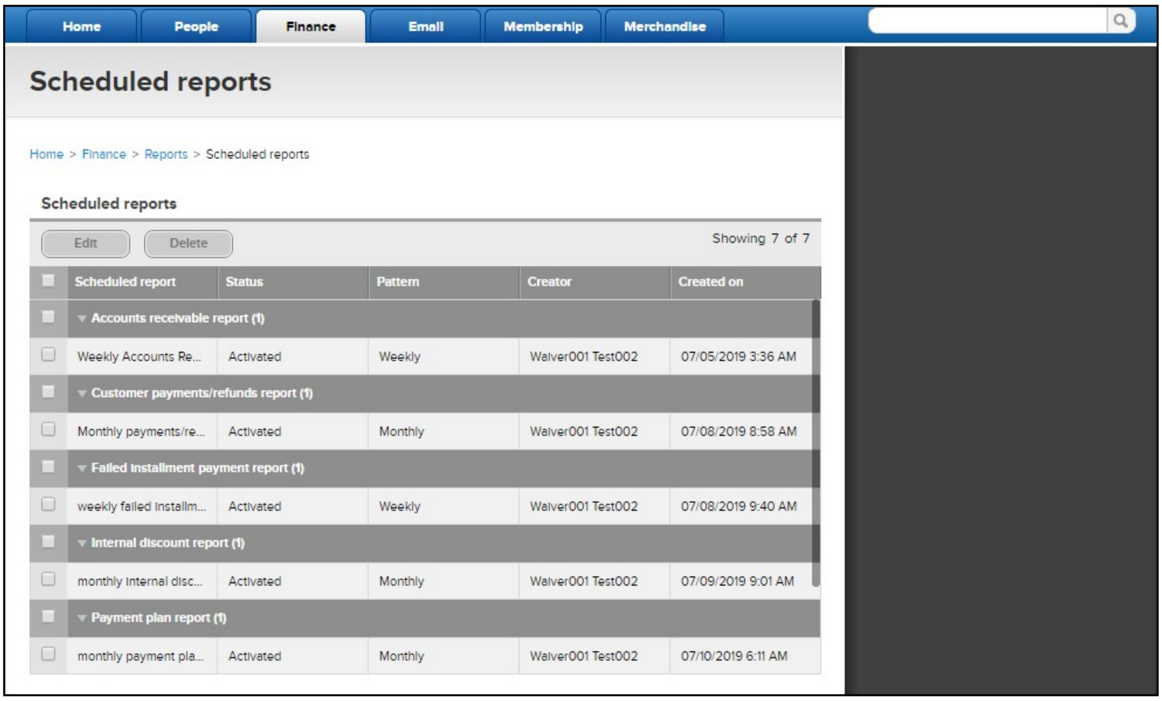
Manage scheduled reports

Administrators and report owners (agency users who scheduled the reports) can view schedule details, and edit or delete the scheduled reports:

Manage scheduled financial reports

Location: Admin site > **Finance** tab > **Reports** tab > **Actions** > **Scheduled reports** link

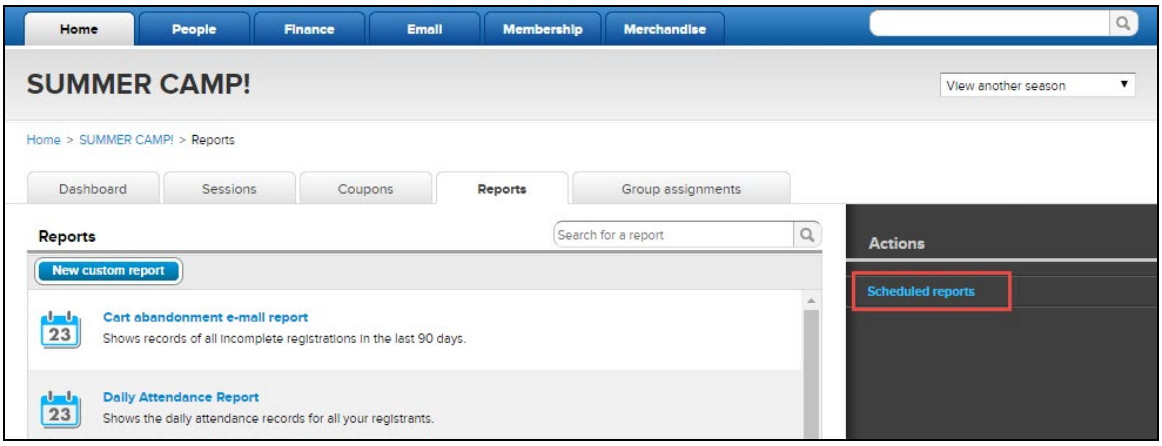


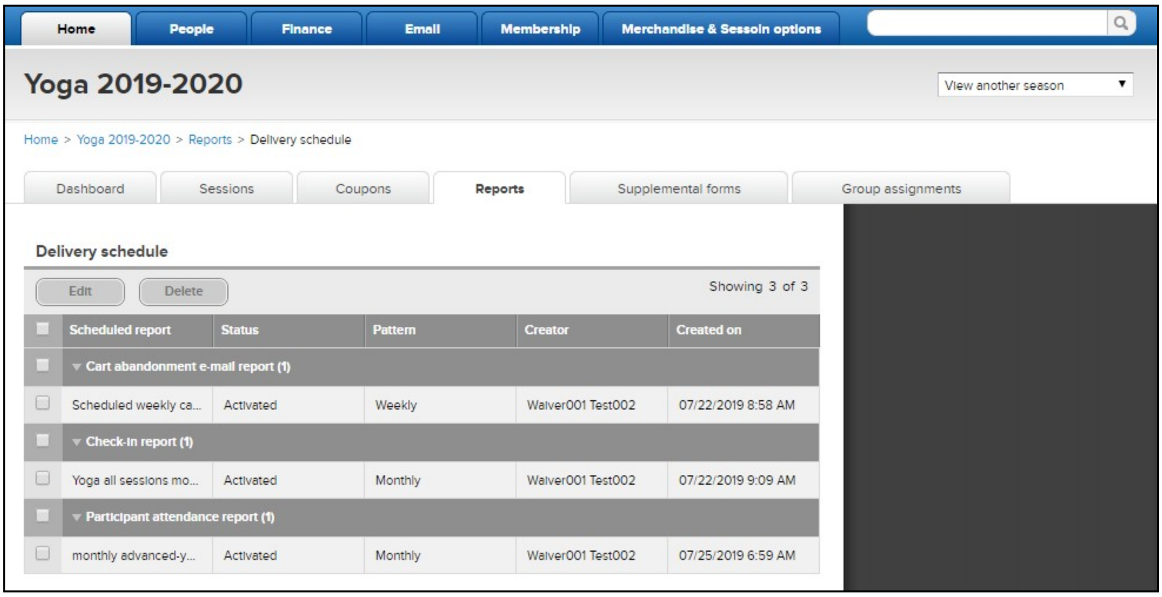


- To edit a scheduled financial report, select the required schedule and then click **Edit**.
- To delete one or more delivery schedules, select the unwanted schedules and then click **Delete**.

Manage scheduled season reports

Location: Admin site > **Home** tab > a season > **Reports** link > **Actions** > **Scheduled reports** link





- To edit a scheduled season report, select the schedule and then click **Edit**.
- To delete one or more delivery schedules, select the unwanted schedules and then click **Delete**.

Manage scheduled custom financial reports

The workflow and popup screen for scheduling a custom financial report is the same as before. After a custom financial report is scheduled, administrators and report owners can edit or delete the schedule from either the:

- Admin site > **Finance** tab > **Reports** tab > **Actions** > **Scheduled reports** link
- Admin site > **Finance** tab > **Reports** tab > required report

Note: Deleting a custom financial report on the **Scheduled reports** page only deletes the delivery schedule, NOT the actual report.

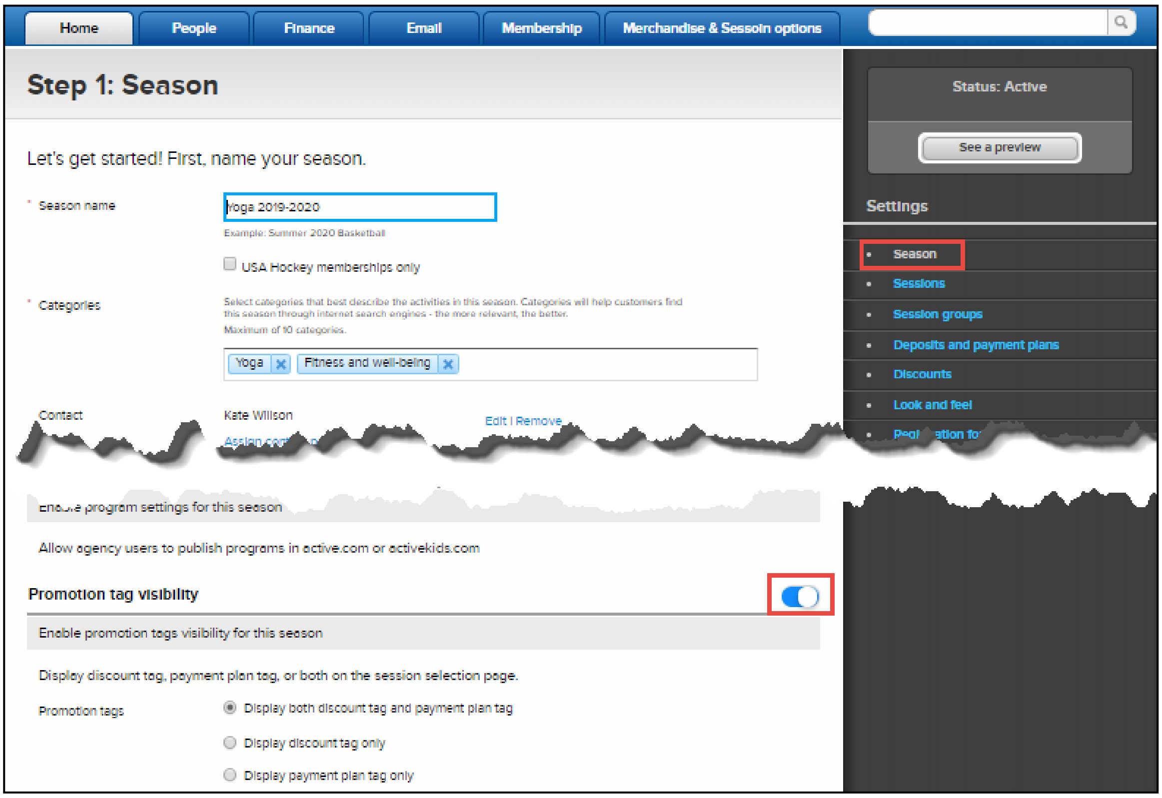
CCM Conversion Improvement

Promotion tag visibility switch

Now, in the Admin site, agency users can turn on or off the **Promotion tag visibility** feature to control the display of discount or payment-plan tags shown on the CUI.

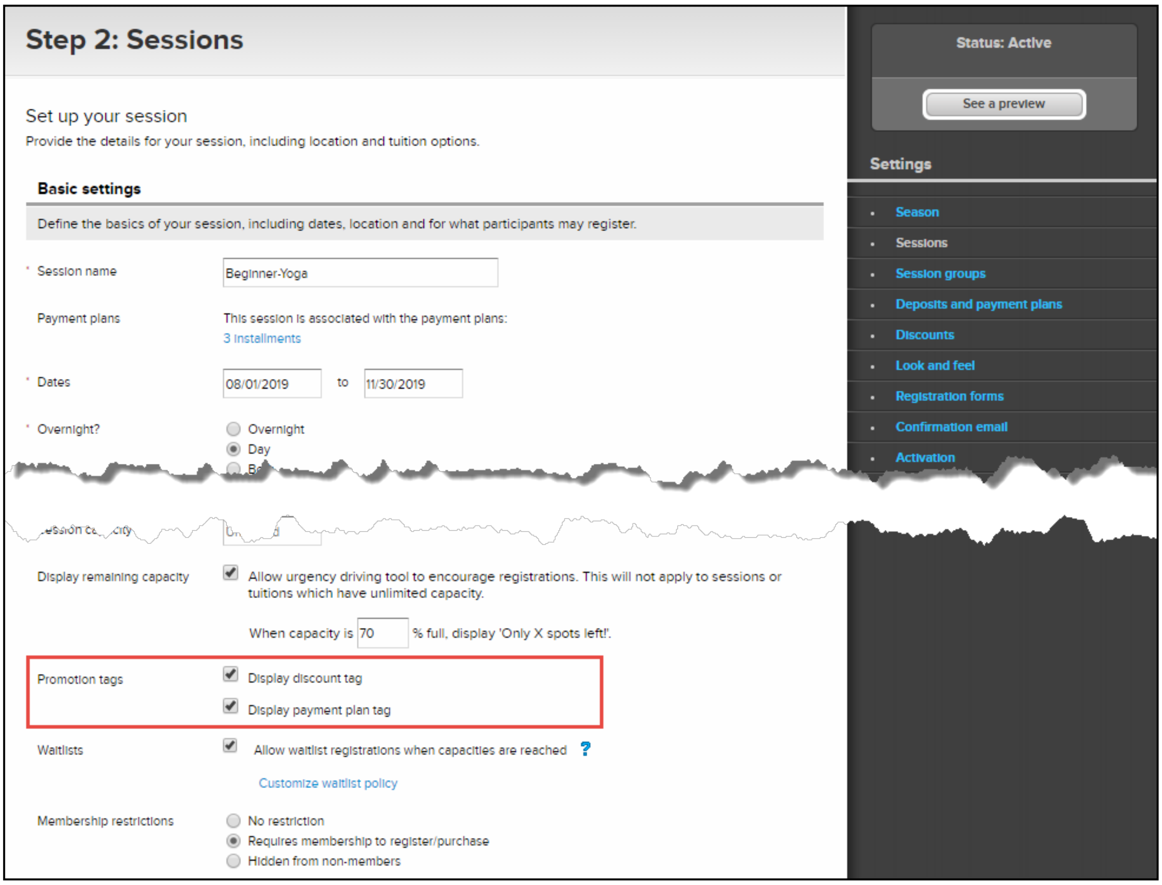
Season-level switch location:

Admin site > **Home** tab > a season > **Setup** link > **Settings** > **Season** link > **Promotion tag visibility** toggle switch



If the season-level switch is OFF, then no promotion tags or information popups are displayed on the CUI session selection page for that season.

If the season-level switch is ON, then on the session-level setup, a **Promotion tags** section appears: Admin site > **Home** tab > a season > **Setup** link > **Settings** > **Session** link > **Promotion tags** section.



Note:

The session-level checkbox options reflect the selection on the season level. For example, if the season-level switch is on and the **Display discount tag only** radio button is selected, then on the session level, only the **Display discount tag** checkbox is displayed.

Performance Enhancements

The time required to download the Active Account Statement report with one month's data has been reduced.