Release Notes

Enhancements to Appointments

General Overview

The purpose of this task is to improve the current implementation of the Appointments feature to address some settings and options that were not included in the initial release. These enhancements include (but are not limited to):

- Additional filters on the APPOINTMENTS page.
- Implementation of the "Assign Keywords" QuickTool on the APPOINTMENTS page.
- Ability to set Appointments as "Tax Exempt."
- Displaying warnings to staff when sending SMS notifications of cancellations/rescheduling.
- Updates to the Programs widget on the Dashboard to properly handle Appointments.
- Updates to the Family Total Annual Receipts Report (FIN-15) to properly report Appointments-related charges as a separate charge type.
- Addition and proper implementation of "Appointment Booking Request Approved" and "Appointment Booking Request Denied" email templates.

How will this benefit me?

These enhancements will make Appointments more user-friendly to staff and customers by allowing more options for configuring and filtering Appointments, as well as obtaining Appointment-related data for reporting.

Where will I see these changes?

These changes will affect the Office Portal and Customer Portal.

What is being changed/added?

Office Portal

1. Adding new filters for age, gender, keywords, and online settings to the APPOINTMENTS page.
2. Allow Appointments to be marked as "Tax exempt" individually or using the Appointments QuickEdit tool.
3. Added "Assign Keyword" QuickTool to the APPOINTMENTS page.
4. Appointment bookings added to the Customer Portal shopping cart are now displayed on the APPOINTMENTS page to help prevent overbooking
5. Appointments now properly display multiple warnings/conflicts at once.
6. Cancelling, rescheduling, or notifying a single Appointment timeslot now displays Appointment details in all contexts.

7. Cancelling, rescheduling, or sending Appointment notifications now displays a message to the staff member notifying them of the number of SMS credits that will be used to perform the action.
8. Addition and proper implementation of "Appointment Booking Request Approved" and "Appointment Booking Request Denied" email templates.
9. Updates to the Programs widget on the Dashboard to properly handle Appointments.
10. Updates to the Family Total Annual Receipts Report (FIN-15) to properly report Appointments-related charges as a separate charge type.
11. Added a new "information" icon to the right of the student name on the APPOINTMENTS page which will launch a window with basic family contact information, as will as links to the Family and Student details.

Customer Portal

Ability to resend a Group Appointment invitation with a single click without needing to cancel, re-enter details and send the invite again.

How does this work with existing settings?

This update introduces additional filter options and updates to properly handle and reflect Appointments. It does not change or remove any existing settings.

Relevant Knowledge Base Links

- Appointments-related documents
- Family Annual Total Receipts Report (FIN-15)
- Dashboard Widgets