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Using This Document

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Enhancements

General

Millennium EFT Recovery Service released

The new Millennium EFT Recovery Service sends details for clients who are past due on their membership dues or payment plan to Transworld. Transworld then uses this information to initiate collection proceedings and recover the money owed to your business.

Notes:

- You must open an account with Transworld before you can use the Millennium EFT Recovery Service. Contact Business Solutions for more information.
- Refer to the Millennium Services Setup Guide for instructions on how to set up the Millennium EFT Recovery Service.

Class Booking feature now available in more editions of Millennium

The Class Booking feature is now available in the following editions of Millennium:

- Millennium Bumble & bumble
- Millennium Education
- Millennium Paul Mitchell Salon
- Millennium Paul Mitchell School
- Millennium MedSpa
- Millennium SpaSalon

More Info: Refer to the Class Booking Guide for instructions on how to use the Class Booking feature.
Ability to add a surcharge for paying by credit card added

(Credit Card Processing Interface users only)

You can now add a surcharge to transactions where clients pay by credit card. To set up this feature, you need complete the following:

- Under Data > Business Information and Preferences > Preferences tab > Options tab > Register preferences, you need to select "YES" for the **Show Fee Field in Credit Card Authorization Screen** preference.
- Under Data > Credit Cards/Payment Types, you need to set a surcharge for each credit card payment type in the **Fee %** field.

When you have set up this feature, the **Fee** field displays on the Credit Card Authorization window when you select to process a credit card payment. The **Fee** field shows the percentage surcharge added to the transaction and you can exempt a client from the surcharge by deselecting the **Include Fee** check box.

**Note:** Under Management > Security Administration > REGISTER > PAYMENT TYPES, the new ALLOW EXCLUSION OF CREDIT CARD FEE setting allows you to control whether users can deselect the **Include Fee** check box on the Credit Card Authorization window.

Warning prompt now displays when Millennium cannot establish an Internet connection to Element

(Credit Card Processing Interface users only)

If you have the **Do Not Store Credit Card Numbers in Millennium** option selected and Millennium is unable to establish an Internet connection to Element, a warning prompt now displays when you attempt to enter credit card details into Millennium. The warning prompt provides instructions on how to rectify the issue along with contact details for the Business Support Department.

The warning prompt displays when you try to select the following:

- Data > Clients > Client Information > Cards button
- Data > Clients > Client Information > Membership button > CC/ACH Info button
- Data > Clients > Client Information > Account tab > Payment Plans tab > CC/ACH Info button
- Data > Business Information and Preferences > Preferences tab > Credit Card/EFT tab > Do Not Store Credit Cards in Millennium check box
- Data > Business Information and Preferences > Preferences tab > Credit Card/EFT tab > Purge Expired Credit Cards button
- Register > Ring-Up > Paying Client field > Credit Card icon
- Register > Ring-Up > Paying Client field > Right-click menu > Credit Cards
- Register > Ring-Up > Membership button > Step 2 - Primary Member tab > EFT/ACH tab > Credit Card option > Card # field
- Register > Ring-Up > Membership button > Step 2 - Primary Member tab > EFT/ACH tab > ACH option > Routing # field
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- Register > Ring-Up > Membership button > Step 2 - Primary Member tab > EFT/ACH tab > ACH option > Bank Account # field
- Register > Ring-Up > Membership button > Step 3 - Add-On Members tab > EFT/ACH tab > Credit Card option > Card # field
- Register > Ring-Up > Membership button > Step 3 - Add-On Members tab > EFT/ACH tab > ACH option > Routing # field
- Register > Ring-Up > Membership button > Step 3 - Add-On Members tab > EFT/ACH tab > ACH option > Bank Account # field
- Register > Ring-Up > Sale button > Payment Plan payment type > Card # field

Toolbox enhanced to show details for caper bag sales

(Paul Mitchell schools only)

Under Toolbox > Statistics tab > Sales Volume section, the new Caper and Caper % fields allow you to analyze caper bag sales. Following are descriptions of these fields:

- **Caper** = Total revenue from caper bag sales (minus refunds).
  
  **Important**: This total only includes items from the Caper product class that have the word "bag" in the product description.

- **Caper %** = Caper bag sales revenue as a percentage of total take home sales revenue.

Data

New renewal status for dues payments scheduled on or after the auto-renewal date for a membership

Under Data > Clients > Client Information > Membership button > Payments list, “Yes” will now display in the Renewal column next to a dues payment if the payment is scheduled on or after the auto-renewal date for the membership.

Membership payment totals now display in a darker font

Under Data > Clients > Client Information > Membership button > Pay EFT button, the payment totals now display in a darker font to make them easier to read when accessing Millennium through a remote connection.

Ability to ring up multiple installments for payment plans added

Under Data > Clients > Client Information > Account tab > Payment Plans tab, you can now select to ring up multiple installments for a payment plan at once. Previously, you could only ring up a single installment for a payment plan at once.
Ability to record the size of resources added

Under Data > Services > Service Resources > Maintenance tab, the new Square Feet field allows you to record the size of each resource in square feet.

*Note:* If you record the size of your resources, you can track the projected revenue per square foot for each resource on the AQ223: Resource Use by Service Class report. Refer to the *Reports User Guide* for more information on the AQ223 report.

New preference to add a surcharge for paying by credit card

(Credit Card Processing Interface users only)

Under Data > Business Information and Preferences > Preferences tab > Options tab > Register preferences, the new "Show Fee Field in Credit Card Authorization Screen" preference allows you to control whether you can add a surcharge to transactions where clients pay by credit card.

- If you select "YES" for this preference, you can add a surcharge to transactions where clients pay by credit card.

  *Important:* When you select this option, you need to set a surcharge for each credit card payment type in the Fee % field on the Credit Cards & Payment Types window (Data > Credit Cards/Payment Types). The Fee field will then display on the Credit Card Authorization window when you select to process a credit card payment, showing the percentage surcharge added to the transaction.

- If you select "NO" for this preference, you cannot add a surcharge to transactions where clients pay by credit card.

*Note:* The default selection for this preference is "NO".
Enhancements

Appointments

New Appointment Book filter added

Under Appointments > Appointment Book, you can now select the following option in the Filter field on the Appointment Book:

- **Last Changed By Me** = Select to highlight the appointments last changed by you.

# Appointments statistic no longer includes block time

Under Appointments > Appointment Book > Status bar, the **# Appointments** statistic no longer includes instances of block time.

Due In statistic no longer includes block time

Under Appointments > Appointment Book > Status bar, the **Due In** statistic no longer includes instances of block time.

Register

Ability to refund tips back onto a credit/debit card added

Under Register > Ring-Up > Sale button, you can now select to refund a tip back onto a credit/debit card when you are refunding a service. Previously, you had to process two separate transactions to refund a service and the tip for that service.

**More Info:** Refer to the *Millennium User Guide* for instructions on how to refund a service.

On Hold Transaction prompt enhanced

Under Register > Ring-Up, when you select a client in the **Paying Client** field who has a transaction on hold, the On Hold Transaction prompt that displays now shows the name of the employee who placed the transaction on hold.
Management

New security setting for the Auto-Freeze On field

Under Management > Security Administration > DATA > CLIENTS, the new MEMBERSHIP: AUTO-FREEZE FIELD security setting allows you to control whether users can select a date in the Auto-Freeze On field on the Membership Maintenance window (Data > Clients > Client Information > Edit button > Membership button).

*Note:* All users have access to this feature by default.

New security setting for the Include Fee check box

(Credit Card Processing Interface users only)

Under Management > Security Administration > REGISTER > PAYMENT TYPES, the new ALLOW EXCLUSION OF CREDIT CARD FEE setting allows you to control whether users can deselect the Include Fee check box on the Credit Card Authorization window (Register > Ring-Up > Sale button > Process Credit Card). If you deselect the Include Fee check box, you exempt the client from the surcharge for paying by credit card.

*Note:* All users have access to this feature by default.

New security settings for the Service Definitions window

Under Management > Security Administration > DATA > SERVICES, you can now use the following security settings to control whether users can edit information on each tab of the Service Definitions window (Data > Services > Service Definitions):

- EDIT APPOINTMENT TAB
- EDIT CATALOG TAB
- EDIT CHARGES TAB
- EDIT COMMISSION TAB
- EDIT DOC TAB
- EDIT PRICING TAB
- EDIT RESOURCE TAB
- EDIT SALES TAB
- EDIT SERVICE INFORMATION
- EDIT UPSELL TAB
- EDIT X-SELL TAB

*Note:* All users have access to these features by default.
Enhancements

Reports

New AQ223 report
The new AQ223: Resource Use by Service Class report analyzes the appointments booked during the specified date range and displays the projected utilization and revenue for each resource.

More Info: Refer to the Reports User Guide for more information on the AQ223 report.

New DCR12 report
The new DCR12: Client Accounts with Missing Credit Cards report displays the clients that purchased a membership or opened a payment plan during the report date range who have invalid credit card details on file.

More Info: Refer to the Reports User Guide for more information on the DCR12 report.

DE046 report enhanced
You can now run the DE046: Employees Hired/Terminated report for specific employees or employee classifications.

MR080 report enhanced
The new Credit Card Fees Collected field on the MR080: Register Summary report displays the amount of surcharges collected from transactions where clients paid by credit card.

Important: This field only displays if you have configured Millennium to add a surcharge to transactions where clients pay by credit card. Refer to the Configuring a Surcharge for Credit Card Payments topic in the Credit Card Processing Interface User Guide for instructions on how to set up this feature.

New option for the MR127 option
You can now select the Show Inactive Services option to include inactive services on the MR127: Unused Packages/Series report.

New PM007 report
(Paul Mitchell schools only)
The new PM007: Caper Reporting report displays details of caper product sales for future professionals and learning leaders.

**PM010 report enhanced**

(Paul Mitchell salons & schools only)

The new **# Guests** field on the PM010: Sales by Day report shows the number of unique guests serviced on each day during the report date range.

**PM020 report enhanced**

(Paul Mitchell schools only)

The new **Total Days Scheduled** field on the PM020: Zero Guest Summary report shows the number of days where the future professional was scheduled to work during the report date range.

**HA005 report enhanced**

(UK clients only)

You can now run the HA005: Performance Tracker report for any date range. Previously you could only run the report for a 28-day period.
Issues Addressed

Data

Under Data > Clients > Client Information, fixed issue that occurred when a client had multiple email addresses entered in the E-Mail field, where the email addresses exported as one address to your email application when you clicked the button.

Under Data > Clients > Client Information > Membership button, fixed issue that occurred after unfreezing a membership and waiving a dues payment, where the client lost their membership privileges.

Under Data > Clients > Client Information > Membership button > Refund EFT button, removed the ability to refund a membership dues payment that was paid more than 120 days before the current date, since Element only stores transactional data for 120 days before the current date.

Under Data > Clients > Client Points/Rewards, fixed issue with the "Points for pre-booking next service at time of ring-up" promotion where new clients were receiving points for prebooking their first appointment. Clients should only receive points under this promotion if they have more than one visit.

Under Data > Services > Mark Services on Sale, fixed issue that caused an error message to display when you clicked Ok without selecting a service class.

Appointments

Under Appointments > Appointment Book, fixed issue that occurred when you booked an appointment for a service requiring a specific piece of equipment, where you could still book an appointment for the service even if the required equipment was unavailable.

Under Appointments > Appointment Book > Right-Click menu > Ring-Up, fixed issue that occurred after you selected to ring up an appointment from the Appointment Book, placed the transaction on hold, tried to ring up the appointment again from the Appointment Book, and then returned the transaction from hold, where the wrong client was displaying next to the service(s) on the ticket.

Under Appointments > Appointment Book > Appointment Editor, fixed issue that occurred when you tried to book an appointment during block time, where the Employee Double Book window was displaying duplicate details for previous conflicts.

Under Appointments > Appointment Book > Scan button, fixed issue that occurred when you tried to book an appointment for a service that had an initial time and a finish time but no gap time, where you could only book an appointment for the initial time.

Under Appointments > Group Booking, fixed issue that occurred when you booked an itinerary but added specific clients to the itinerary after booking, where the clients in previous itineraries were being overwritten with the clients from the latest itinerary.
Under Appointments > Group Booking > Create New Itinerary button > Group Itinerary tab > Scan Now button, fixed issue that occurred intermittently causing an error message to display when you created an itinerary with more than one service.

Under Appointments > Daily Membership Statistics, fixed issue that occurred when you processed a manual dues payment for a membership on the same day that the member had an appointment, where the Prospect Count total was counting the member as a prospect.

Register

Under Register > Ring Up > Line Discount button, fixed issue where you could give a discount greater than 100% on products.

Under Register > Ring Up > Pkg/series button, fixed rounding issue that occurred when you sold a package that had a sale price greater than the value of the services in the package, where the Register was calculating the adjusted values of the services in the package incorrectly.

Under Register > Ring-Up > Refunds button, fixed two issues:

- Fixed rounding issue that occurred when you used a sales tax rate with three decimal places (e.g. 6.875%), where the Register was not calculating sales tax for product and service refunds correctly.

- Fixed issue that caused an error message to display when you right-clicked on an employee’s name and selected Edit/View This.

Under Register > Ring-Up > Sale button, fixed issue that occurred when you clicked the Open Cash Drawer link where the cash drawer would open but the screen would lose focus.

Fixed issue that occurred when processing a manual membership dues payment where you could change the payment amount on the Credit Card Authorization window.

Fixed issue that occurred when you had Enable P2P Devices and Enable Merchant Selector at Processing Time selected on the Business Information window, where you could not select a merchant account after swiping a card on an encrypted device.

Fixed issue that occurred occasionally when using the ID TECH SecureKey M130 encrypted keypad to process card payments, where the device was sending the wrong card details to Element.

Fixed issue that occurred when you opened a payment plan that required a down payment, where Millennium was not saving the client’s card details and an error message displayed when you tried to finalize the transaction.

(Non-US clients only) Fixed issue that occurred when you had the All Product and Service Prices Include Tax and Tax Price - not Value options selected on the Business Information window, where the Register was not calculating tax for package and series sales correctly.

(Non-US clients only) Fixed issue that occurred when you had PST and GST tax rates set up and the Tax Price - not Value option selected on the Business Information window, where the Register was not calculating tax for package and series sales correctly.
Issues Addressed

(Non-US clients only) Fixed issue that occurred when you had PST and GST tax rates set up on the Business Information window and a tax override set up for a service on the Service Definitions window, where the Register was not calculating tax for the service correctly when you sold the service as part of a package/series.

Inventory

Under Inventory > Inventory Wizards > Slow Moving Inventory Analysis, fixed issue that occurred when you did not select any products to analyze and clicked Update Model Quantity, Order Point and Sale Information, causing an error message to display.

Marketing

(Automated Marketing users only) Fixed issue that caused an error message to display when you sent a client list to Constant Contact that contained clients with an apostrophe in their last name.

Management

(Element Account Updater Service users only) Under Management > EFT Control Panel, fixed issue that occurred after Element declined a dues payment to suspend a client's membership and the Account Updater Service ran to update the client's payment details, where Millennium did not restore the client's membership privileges once you reprocessed the outstanding dues payment using the EFT Control Panel.

Utilities

(Millennium Education & Paul Mitchell schools only) Under Utilities > Freedom Interface > Transaction Export > Export button, fixed issue that occurred when you were not tracking student grades and rang up multiple students on the same transaction, where duplicates were displaying in the transaction export file.
Reports

Fixed issue that prevented you from being able to run the AQ156: Clients Within a Specific Class and AQ158: Classes by Class reports.

Fixed two issues with the DB020: Membership Prospects report:

- Fixed issue where the **New Clients** and **Repeat Clients** totals were counting clients once per ticket. Clients should count once per employee, per day in these totals.

- Fixed issue where the **Combined** totals were counting clients once during the report date range. Clients should count once per employee, per day in these totals.

Fixed issue with the DB041: EFT Totals by Month report where waived dues payments were counting as revenue in the monthly totals.

Fixed issue where the DB045: Suspended Memberships report was not including suspended Paid In Full (PIF) renewal memberships.

Fixed two issues with the DC020: Buying History report:

- Fixed issue where the report did not display a client's full history if you selected the **Include all history** option when running the report.

- Fixed issue where the report was including voided sales in the total amount spent by a client.

Fixed two issues with the DE050: Employee Commission Detail report:

- Fixed issue where the report was ignoring appointment type overrides for retail commissions.

- Fixed issue that occurred when some employees had **Apply Service Deductions: BEFORE commissions calculated** selected in their profile and some employees had **Apply Service Deductions: AFTER commissions calculated** selected in their profile, where the report was not calculating commissions correctly if you ran the report for all employees.

Fixed issue with the DS012: Service Listing with Employee Specific Pricing report where the **Code** field was only showing the first 8 characters of service codes.

Fixed issue with the MA060: Employee Productivity report that occurred when you selected "NO" for the **Include Block Time in Productivity and % Booked preference** on the Business Information window, where the report was not calculating productivity percentages correctly.

Fixed issue with the MA200: Growth Indicators Analysis report that occurred when you selected "NO" for the **Include Block Time in Productivity and % Booked preference** on the Business Information window, where the report was not calculating productivity percentages correctly.

Fixed issue where the MR070: Product Sales by Manufacturer/Class report was not displaying the wholesale value and correct profit totals for multi-product packages.
Fixed issue with the MR075: Refunds Given report that occurred when you refunded a product and entered a refund note then refunded a package/series without entering a refund note, where the report was displaying the refund note under both the product and package/series refund.

Fixed issue with the MR085: Sales Summary report that occurred when you refunded a membership dues payment, where the incorrect quantity was displaying in the # Sold field for *Membership Refund*.

Fixed issue with the MR200: Employee Summary report where refunds were not displaying correctly.