ITNRides 2.0

Updates and Improvements

General Ledger Accounts

When we converted to ITNRide 2.0, several General Ledger accounts were streamlined or changed, with the intent of making it easier to roll these accounts up to one parent account. After speaking with several affiliates and their bookkeepers, we have made the following changes or revisions to the GL Accounts:

- The Road Scholarship Pre-paid Fares accounts (2400.15 and 2400.20) were consolidated to GL Account 2400.15. We have changed that to 2400.20 to be consistent with the Pre-paid Fares (Credits) account in ITNRides 1.5
- Ride Revenue Account 4010.00 (Paid Driver Fares) was previously changed to 4010.05. We have changed it back to 4010.00
- Ride Revenue Account 4020.00 (Volunteer Driver Fares) was previously changed to 4010.15. We have changed it back to 4020.00.
- The intent of these changes was to put the ride revenue accounts into child accounts of a single rollup account so ride revenues could be rolled up to the one parent account (4010). But after feedback from sites, we have reverted these back to their accounts as they were in ITNRides 1.5.

Recent Fixes

- Monthly statements were including riders who signed up after month end of the statement period. That has been fixed.
- Issues processing Healthy Miles and Ride & Shop rides were fixed.
- The quick action buttons on the Contact Records were reordered to move the more frequently used buttons closer to the top.

iTNAmerica®
Dignified transportation for seniors

September 9th, 2022

Recent Fixes
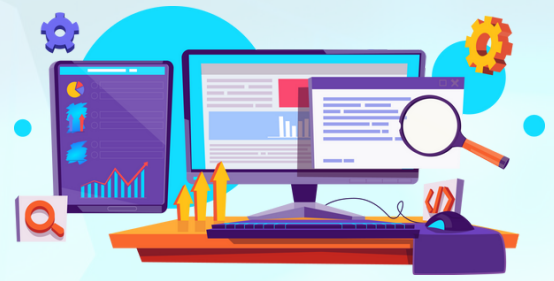
Common Error Message

One common error message people have been seeing is "Opportunity: Set Site ID"- process failed.

The problem is usually that the account had no primary contact. Any account in a transaction must have a primary contact who has a primary affiliation to your site. This is pretty much always what this error means.

Tips

- When submitting a case about an individual, please be sure to provide the name that is on the contact record. For example, we get a case request for an issue on an account for "Mary Jones" when her name on the contact record is actually "Margaret Jones".
- If you are unable to assign a driver to a ride, check to see if the rider has 'Full-sized vehicle' under 'Customer Preferences – Service Needs' on the Book a Ride page.

New Reports

- Phone Nos for Active Riders and Drivers (Contact Management)

- Driver Reimbursement Options (Contact Management) STRONGLY recommend everyone review this report to confirm and fix your volunteer driver reimbursement options. You can edit their options directly in the report.

- Create GL Export (Prior Month) - It's on Site's account which gives them the capability to create July's GL Report.

Upcoming Trainings

Wednesdays at 1pm Eastern, email Morgan.Jameson@itnamerica.org to register

September 21st- Troubleshooting the Generate Routes Process and Sending Manifests

September 28th- Finances- Entering Payments, Donations, and Making Adjustments