



ITNRides 2.0



Updates and Improvements

Alan, Susan and Pooja have spent the week working on the financial back-end of ITNRides 2.0. Thanks to their hard work we now have 5 different membership types we can use, working automated emails for accepted or declined rides, and the ability to process credit card payments for customers.

Please Don't Delete Opportunity Batches

We introduced the Batch Check Entry process to make it easier to enter groups of checks or other payments. We have now seen several people delete a Batch Check Entry batch in hopes of deleting all the information and starting over to re-enter. This does not work! The Batch Entry is just a tracking device that sits on top of the actual entries, which are not deleted when you try to delete the batch. This creates a big mess that takes staff time to clean up, meaning we can't focus on other things that need fixing. If you make a mistake and have saved the payment already, use a reverse or debit transaction to fix it. Let us know if you need help with your particular situation and we will walk you through it.

Automated Emails for Accepted or Declined Rides

Automated emails are working and being sent! When you accept or decline a ride that a rider has requested through the portal, the rider will be sent an email to let them know whether or not you can accommodate their request. You may still want to follow-up with a phone call if you think that is best, or if you think the rider may not see the email.



Recent Fixes

Membership Types

There are now 5 different membership types to choose from in ITNRides 2.0.

- Individual
- Family
- Ride Services Rider
- Business Membership
- Scholarship Membership

The business membership will be used for Healthy Miles, Ride & Shop, and Ride Services. The Scholarship Memberships allows you to charge a discounted rate for low-income members.

The membership will default to Family or Individual based on what was put on the application. To change to a different membership type, adjust the Membership Type field on the contact before you set the new member to Active. **Setting the status to active will trigger the membership charge so it is important to do before you set the member to active.**

New Reports

Susan creates multiple new reports each week, to help our sites track information in their systems and to make tasks easier to complete by matching information together in one place. Below is a list of new reports she created this week.

- Contacts with Emergency Contacts
- Statement Info – Paper & Mail to
- Added Contact ID to Accounts Receivable Report
- Cancelled Rides with TAIs

Also available now-

- GL Posting Report- run via the site account page
- Member Statements- run via the site account page

The member statements generates a Word document, so you can make adjustments like changing the margins or adding notes to individual statements. We'll let you know when July is closed and you can run these reports.

