



ITNRides 2.0



Updates and Improvements

Account Adjustments

Sometimes we need to make financial adjustments to a rider's account- maybe we forgot to cancel a ride that wasn't taken, or the mileage was off.

We do this using the Account Adjustment button, located under the arrow at the top right hand of the rider's Contact Record. The options for an account adjustment (listed under transaction type) are as follows-

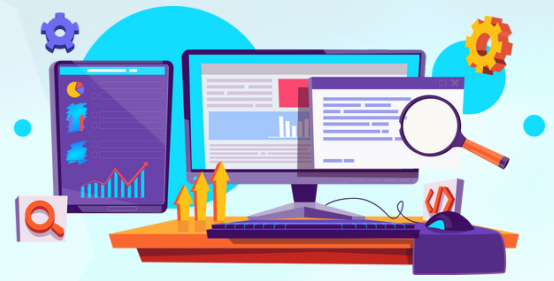
- Administrative Charge- use this to add a charge for a service like reprinting bills
- Credit Adjustment- add a credit to an account
- Debit Adjustment- make a debit to an account
- Happy Birthday- apply a Birthday Credit (usually happens automatically)
- Occupied Mileage Reimbursement- use when reimbursing for mileage (volunteers)
- Referral Thank You- Give a credit for a referral of a rider or driver
- Refund of Customer Account Balance- Use when closing an account and issuing a refund
- Returned Payment from Customer PTA- Use when a check from a rider is returned
- Returned Payment from a Non-Customer- Use when a check for a donation is returned
- Transfer Funds from Non-Refundable to Refundable
- Transfer Funds from Refundable to Non-Refundable

Birthday Credits

If you have chosen to give Birthday Credits to your riders, those credits are now showing on statements with a Happy Birthday message!



Recent Fixes



Where's the ITNRides 2.0 Manual?

Those of you who previously worked with ITNRides 1.5 have been asking for a manual similar to the one we had for that system. We've been working on it, and had been posting articles in ITNRides 2.0 for users to refer to. Unfortunately, we found out there was no way to categorize them, or for users to download or print for their reference. We have a new solution, and will be moving the articles that make up the manual (and the manual as 1 compiled document as soon its finished) to the Online Learning Center. Just like with the videos, you will be able to click directly over to the articles, and you will now be able to download and print those step-by-step instructions with screenshots. We anticipate it will take 2 weeks to complete this move.

New Training Options

In an effort to help all of the staff at our sites keep up with changes in ITNRides and become more comfortable with the new processes that are being established, we requesting your feedback on some new training ideas. You'll get a survey early next week to complete, but here's a preview of the ideas to get you thinking about it.

- Live virtual training in- Booking Rides, Working with Drivers, Troubleshooting the Batch Process, Rider and Driver Portals, Payments and Donations, Campaigns, Reports
- Weekly Meetings with ITNA Staff to ask questions
- Case Studies in using ITNRides to make examples more easily understood

