ITNRides 2.0

Updates and Improvements

Statements

Did you know that the statements in ITNRides 2.0 are generated as a Word document, so you can make changes as needed? That means you can change the margins to work best on your printer or to fit your envelopes, make notes on indiviudal statements, and fix any errors that show up on statements.

Statements have been fixed, so Address 2 line is now showing on the statements. We also changed the line for donations at the bottom to customize with your site's name. The statements will now be generated in alphabetical order by last name.

Payments

How to determine if a Credit Card transaction was completed?

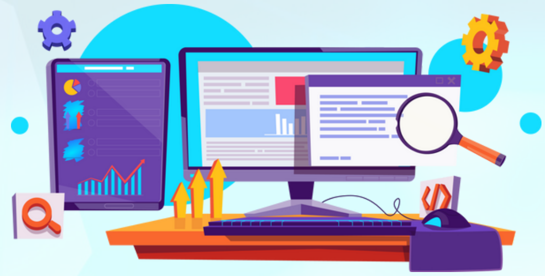
- Go to the Opportunity
- Look at the Chargent Order
- Look at the Chargent transaction. That will have the details of whether the transaction was completed or failed. If there is no Chargent transaction then it did not go through.

When a customer makes a payment by check through the portal, it creates the Opportunity, with Stage = Pledged, and a promise to mail a check. You should leave the Stage as Pledged until you receive the check. Then you should update the Stage to Posted.

ITNAmerica
Dignified transportation for seniors

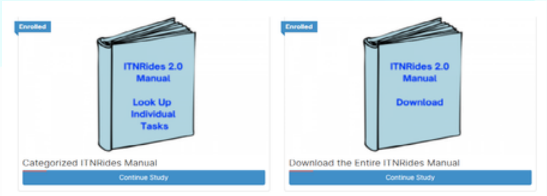
August 19th, 2022

Recent Fixes



Training Survey Responses

Thank you to the 18 people who responded to our training survey. We appreciate you taking the time to give us your feedback. By far, the most requested thing is a comprehensive manual for ITNRides 2.0. And the good news is that it is on the way. It will be available before the end of the month, and will be accessed just like the videos by clicking over from ITNRides 2.0.



You will have the option to either view the complete manual or look at the categories for a specific task. You will also be able to download and print the entire manual or a specific task instruction. The manual will be continually added to and updated as needed.

Respondents also noted a need for additional training on troubleshooting the batch process, financial transactions, and using the community outreach tools. We'll set up training sessions for these topics and send out dates soon.

We also had some respondents request regular weekly meetings with a support staff, and we are happy to set those up. Please email Morgan to set a time/pick a staff.

New Reports

- Account Balances - All Riders
- Accounts Receivable - Riders
- Account Balances - Drivers
- Birthdays for Riders
- New Volunteers Report
- New Customers Report

Memberships

A new membership type- Volunteer has been created for sites that give a free membership to their volunteers.