ITNRides 2.0
Updates and Improvements

Statements

We've added descriptors for Hourly Charges and Multi-Segment rides to the monthly statements, so that these things are easier for riders to understand.

Membership Types

There is now an automatic process in place to charge the membership fee (if applicable) when a rider's status is changed from Admin Inactive to Active. This means that the membership type needs to be adjusted to be a Scholarship or Volunteer or other type, that adjustment needs to be made before activating the member. The box for Membership Type is right in the same section as the Status, and should be adjusted before you save the member as Active.

Family memberships will be charged 50% to one rider, and 50% to the other rider who is part of the Family Membership. This process is done automatically.

Portal Links

Here are the links for the Portal Pages, for easy reference:

- Staff: https://itnrides.force.com/sitestaff/s/login/
- Riders: https://itnrides.force.com/rider/s/login/
- Drivers: https://itnrides.force.com/driver/s/login/

Duplicates

If you notice any duplicate accounts in the system, please let us know the details so we can clean them up.

iTNAmerica®
Dignified transportation for seniors

August 23rd, 2022

Recent Fixes
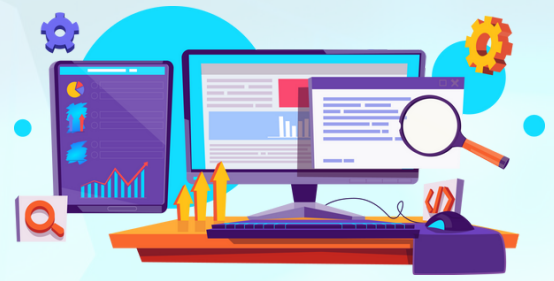
Quick Action Buttons

At the top right hand corner of contact or account record pages, you will find Quick Action Buttons. These buttons allow you to do things like make account adjustments, adjust driver availability, send manifests, and transfer credits. Using the quick action buttons will save you time because you will have less information to enter, and will save you mistakes that could occur when you have to link a transaction to a contact record if you go through Opportunities. You should always use the Account Adjustment Quick Action Button for account adjustments (which were called Non-Cash Transactions in ITNRides 1.5).
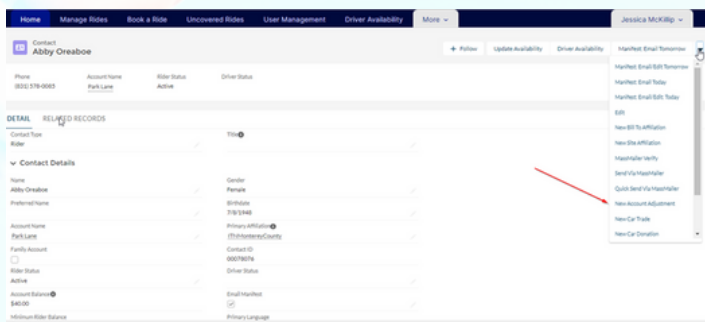
Business Accounts

Any Account for a business or organization MUST have a primary contact who has a Primary Affiliation set to your site (e.g., ITNPortland). This is how the Account gets associated with your site. If you are trying to process a transaction, for example, a donation, and you get an error in which you see **"Opportunity: Set ID" process failed**, that is most likely the cause of the problem.

New Reports

- Cancelled Rides Report with TAIs
- Rides by Rider with TAIs

What's a TAI?
TAI stands for Transportation Account Item. These are charges that hit a rider's account, like ride charges and membership charges. You may also see Transaction Line Items, or TLIs, which are things like donations that don't need to be associated with a personal transportation account.