



# ITNRides 2.0



## Updates and Improvements

### Enhancements

- Support Cases are now viewable from the portal. Go to the More menu and select Cases from the drop-down list. All of the open cases for your site are visible.
- On the Rider's Account page layout, Chargent Orders were added as a related list. This is really useful if you are trying to look at the history or status of an online payment. You can go to the Chargent Order, and from there go to the Related List for Chargent Transactions. Here you will see the specific outcome of the transaction (Approved, Declined, etc.)
- Next week we will be creating a mock rider and driver in each database, with a log-in for the portals. This will allow staff at each location to log into the rider and driver portals and see what their users see and assist those who call the office.

### Reports

- Account Balance was added to the report Riders with Closed Accounts (Contact Management)

### Upcoming Trainings

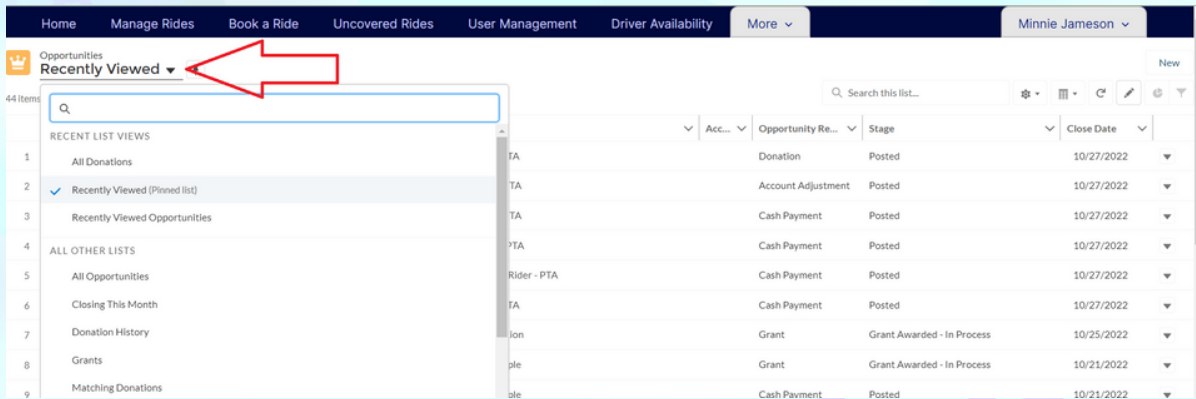
- **Wednesday, Nov. 2nd, 2022- 2pm Eastern: Driver Selected Rides Functionality-** This training will cover how to release rides to the driver portal, and how drivers can select them.
- **Wednesday, Nov. 9th, 2022- 1pm Eastern: Customizing List Views and Reports-** This training will cover how to customize list views and reports.

To sign up for one or both of these trainings, please email [Morgan.Jameson@ITNAmerica.org](mailto:Morgan.Jameson@ITNAmerica.org)

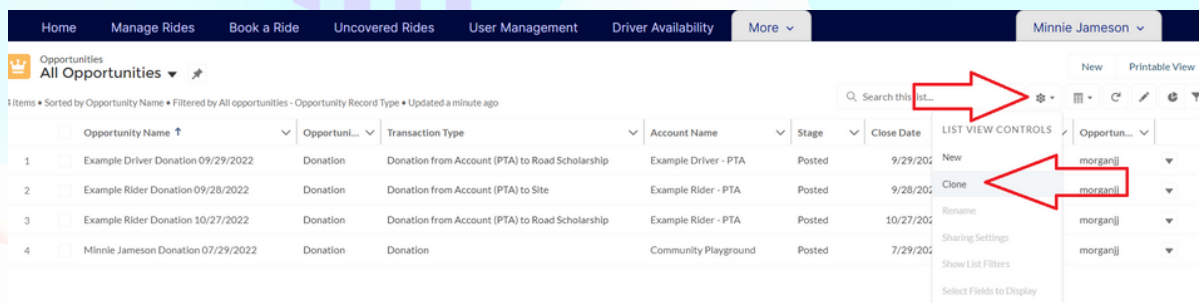


# List Views

When you click on the items in the More menu to access things like Opportunities or Rides, the page that opens is called a list view. It usually defaults to recently viewed items, but can be changed by clicking on the arrow next to the name of the list view.



If the list you would like is not in this list, or the lists here don't contain the information you are looking for, you can set up your own list view. Open any list besides the pinned list, and then click on the little gear icon near the top of the page. Select Clone to make a copy of the list that you can alter.



Make sure to name the list something that describes the contents. Choose "Only I can see this list view", and Save. The filter options will open on the right side of the screen, choose the ones to customize the list to your needs. This is similar to customizing reports. Click Save and your new list will display.

