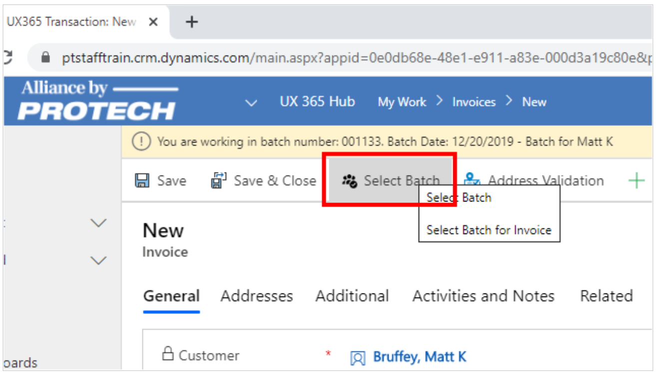
UX 365 Learning Portal

1. Accounting

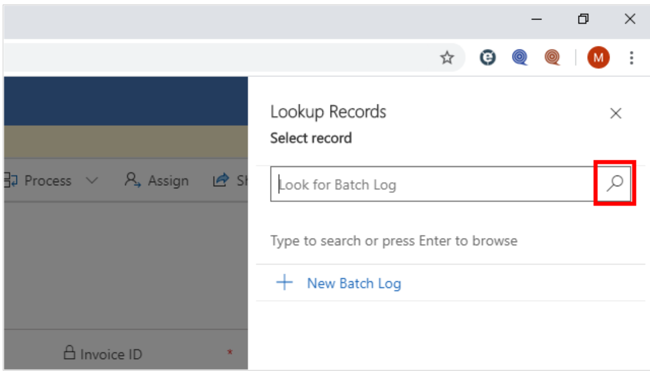
1.1. Applying a Cash or Check Payment

Typically, there is a designated Cash payments batch for the day. Confirm with the Accounting department which batch to use before proceeding

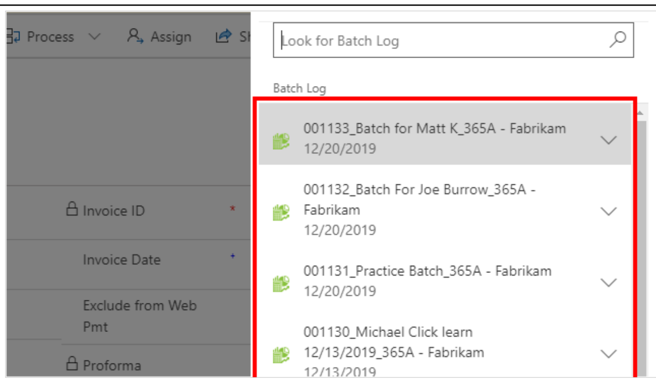
Click on the menu item **Select Batch**



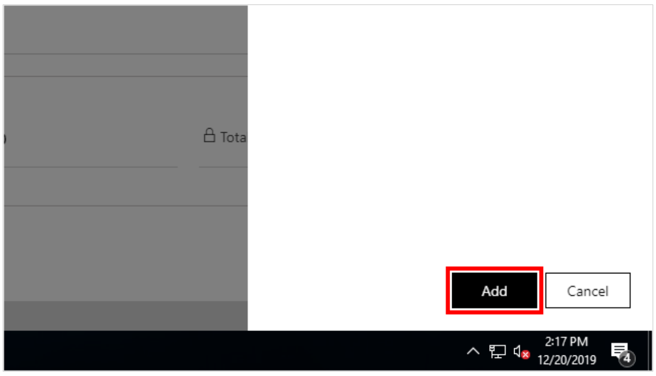
Click on, Batch Log look up



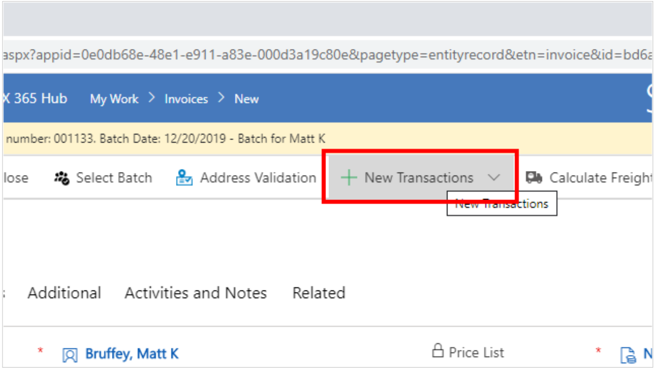
Click on an option from the list



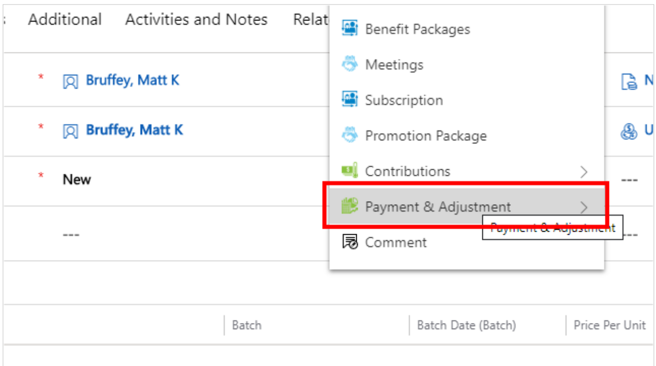
Click on the button **Add**



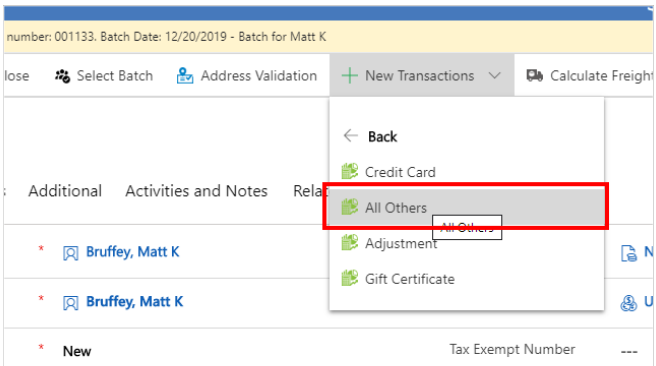
Click on the menu item **New Transactions**



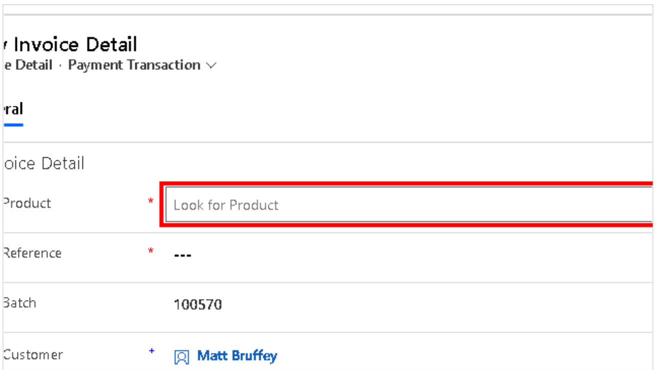
Click on the menu item **Payment & Adjustment**



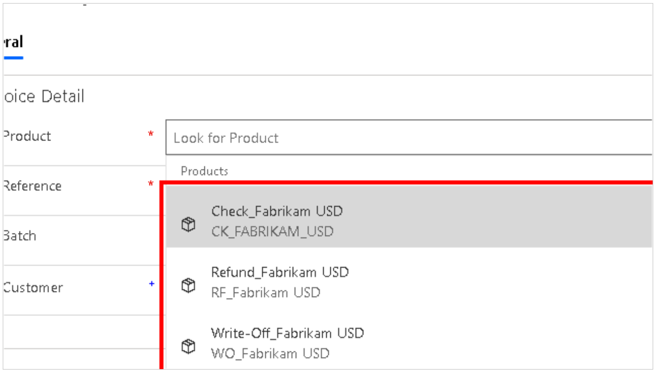
Click on the menu item **All Others**



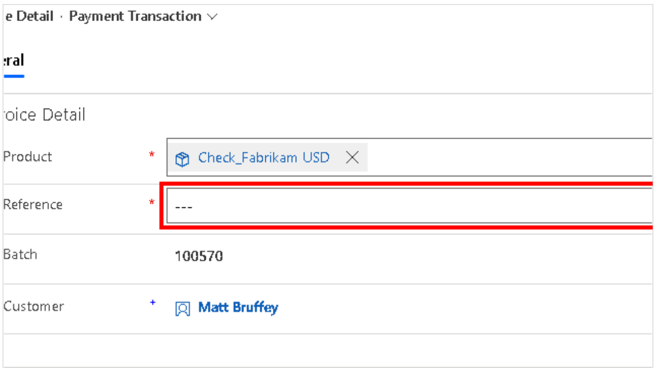
Click on the lookup field **Product**



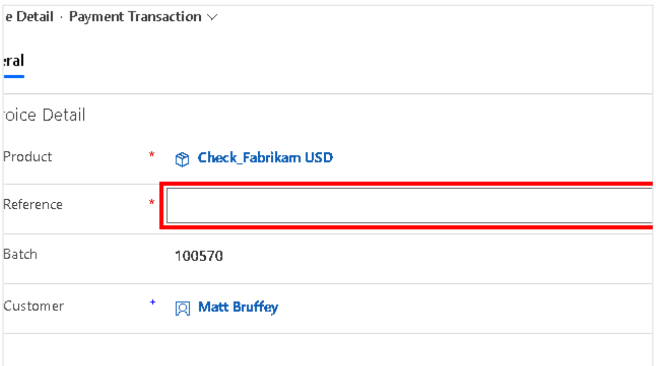
Select check payment



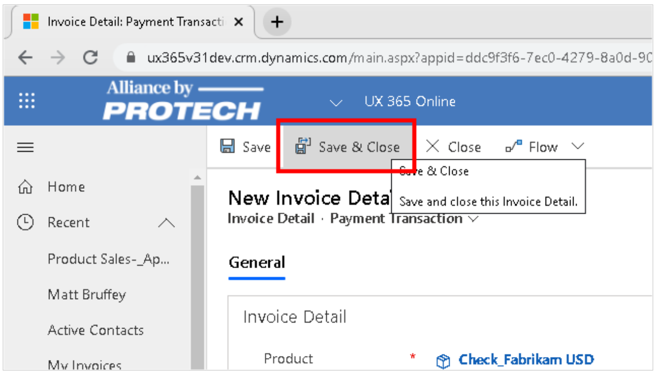
Click on the text field **Reference**



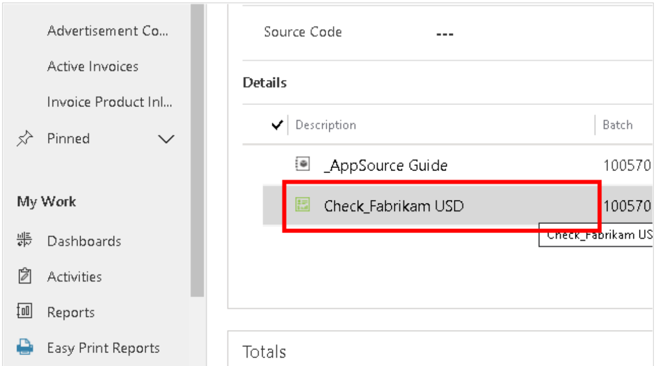
Enter check number



Click on the menu item **Save & Close**

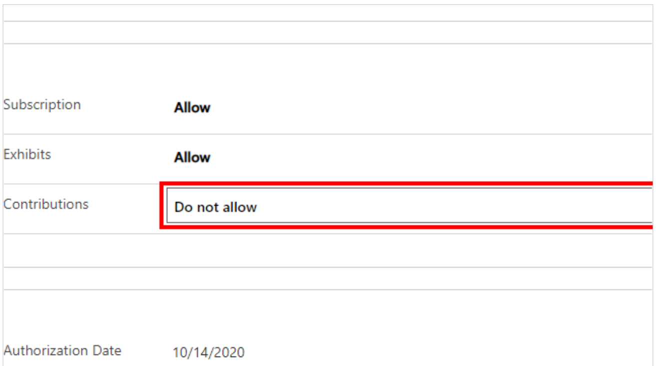


Check payment has been successfully applied against the the invoice

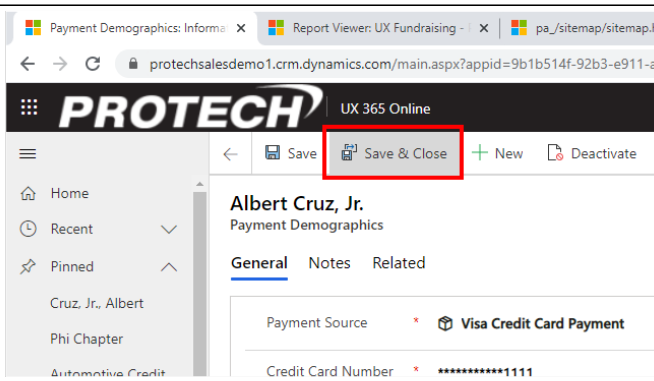


1.2. AutoPay Recurring Gift Installments

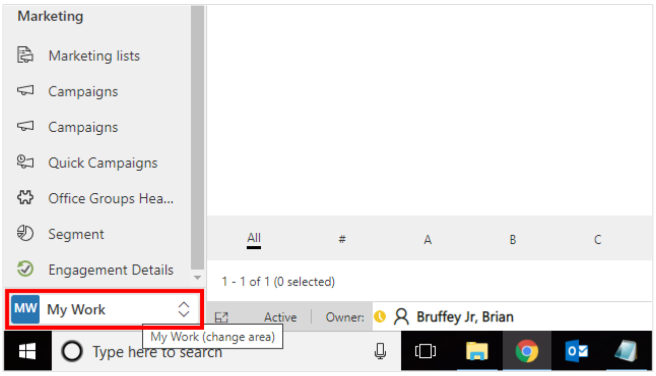
To process payments using AutoPay, the contact must have a payment demographics record. This is an authorized credit card saved to their contact record in the AMS. Members can allow or restrict payments by module. For contributions, simply change contributions to Allow. Members can also manage these preferences online.



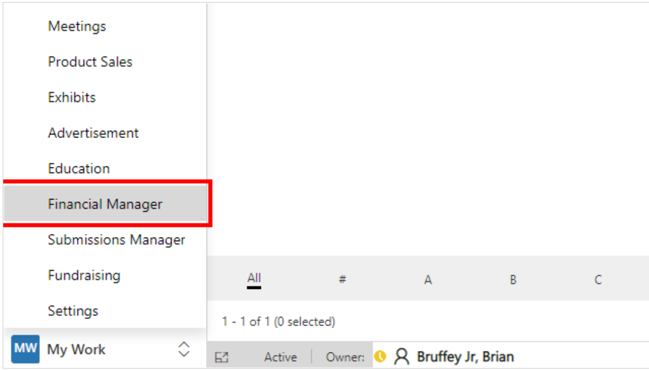
When you are done modifying the payment demographics record. Select save to finalize the changes.



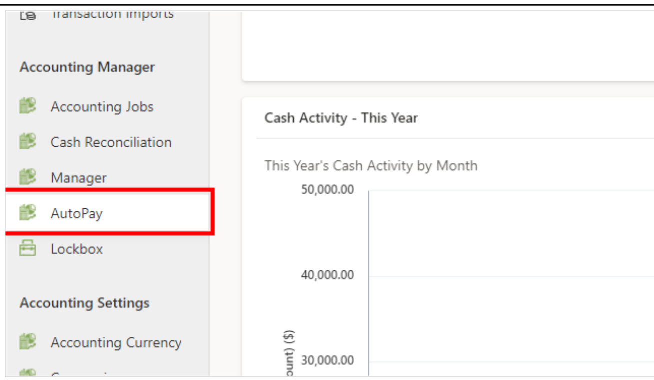
Click on the button **My Work (change area)**



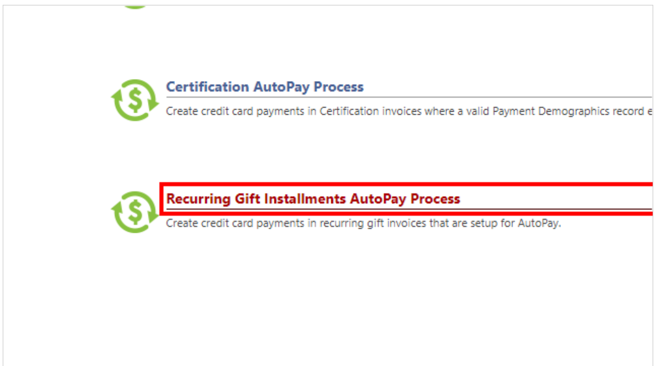
Click on the item **Financial Manager**



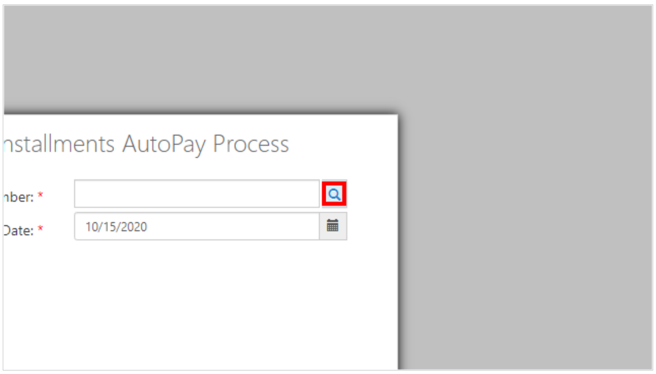
Click on the item **AutoPay**



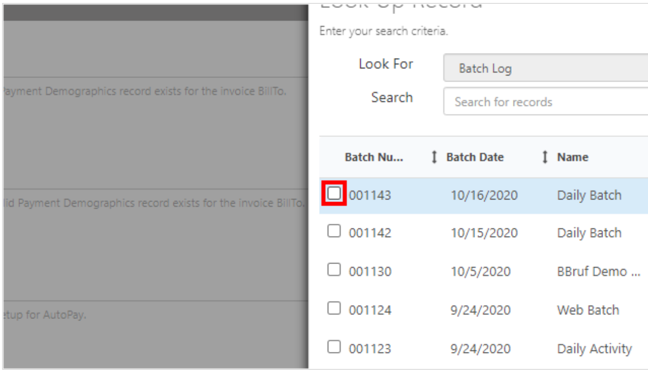
Click on **Recurring Gift Installments AutoPay Process**



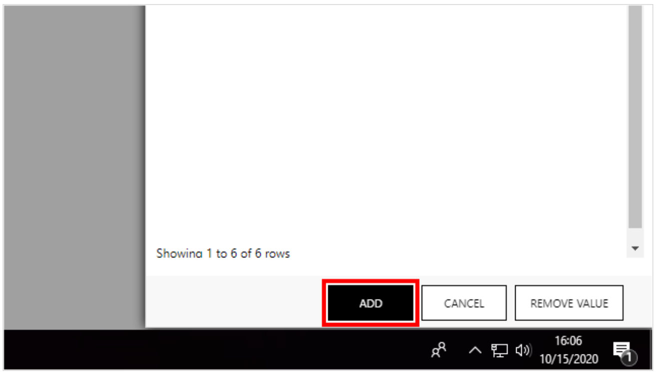
When the autopay process is open. Select the lookup to select a batch.



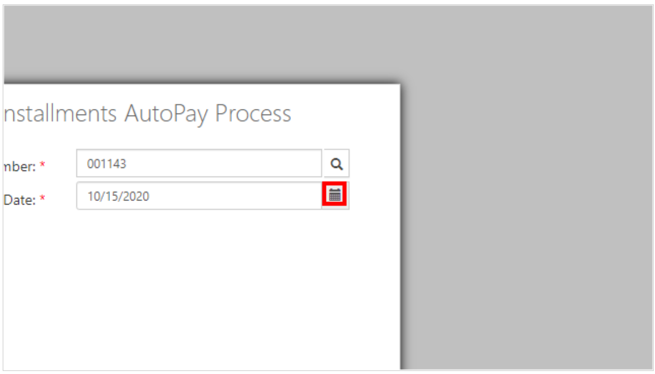
Select a batch to process the payment.



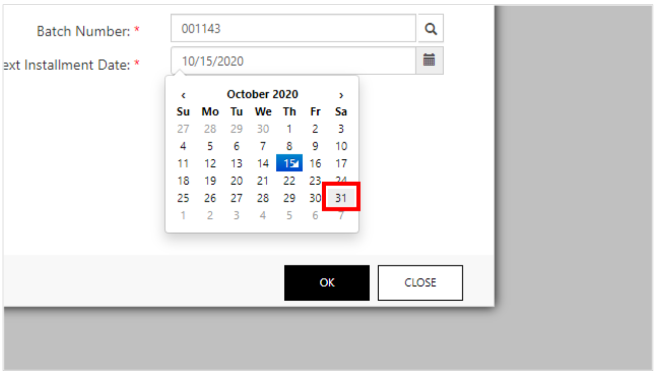
Add the batch.



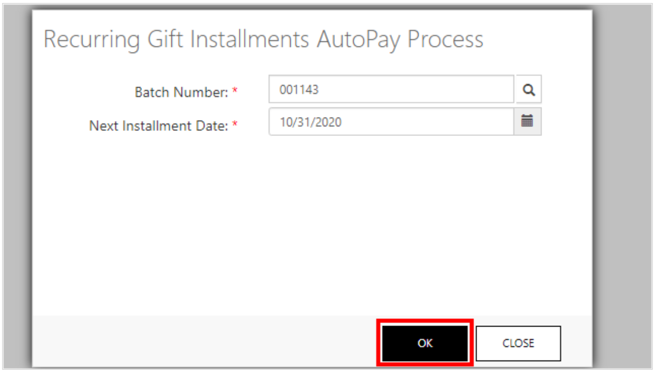
Select the calendar to identify the due date for the autopay installments.



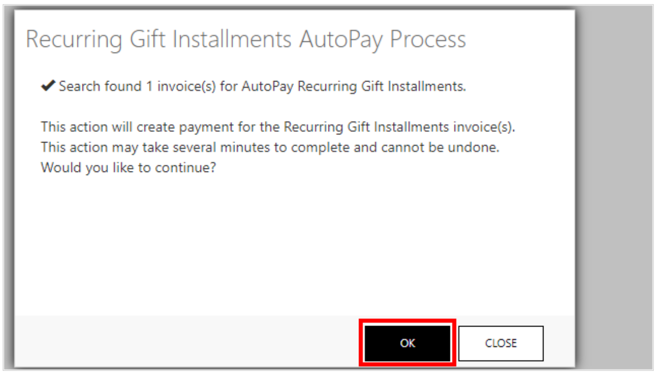
Enter the due date.



Click on the button **OK**



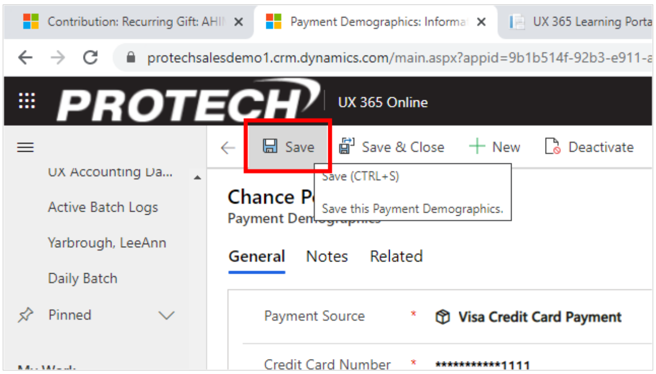
The next screen will show the number of payments applied. Select OK to finalize the autopay process.



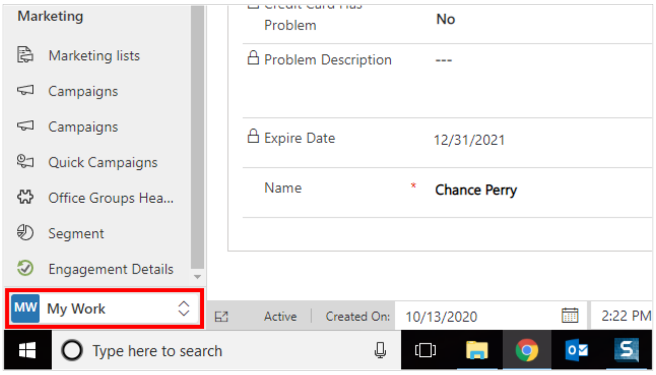
1.3. Autopay renewal invoices

To process payments using AutoPay, the contact must have a payment demographics record. This is an authorized credit card saved to their contact record in the AMS. Members can allow or restrict payments by module. For membership, simply change membership to Allow. Members can also manage these preferences online.

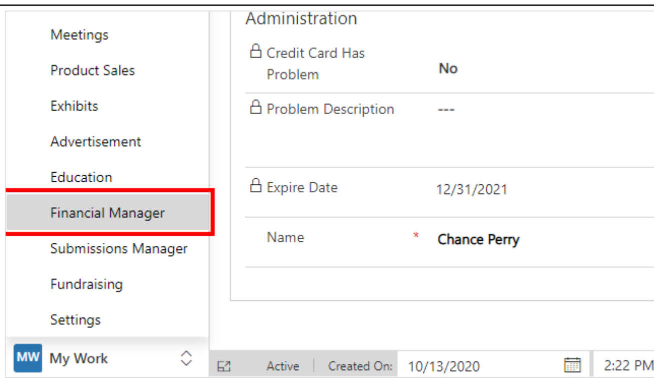
When you are done modifying the payment demographics record. Select save to finalize the changes.



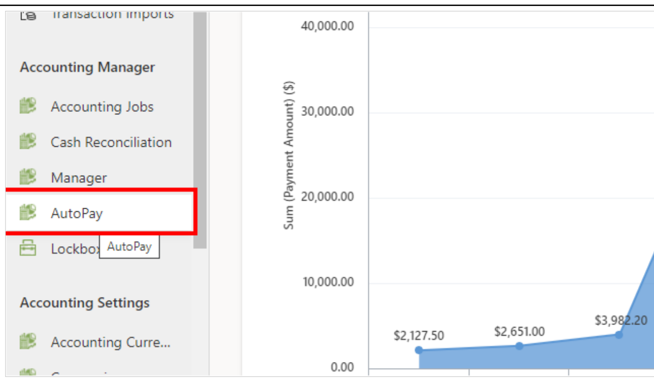
Click on the button **My Work (change area)**



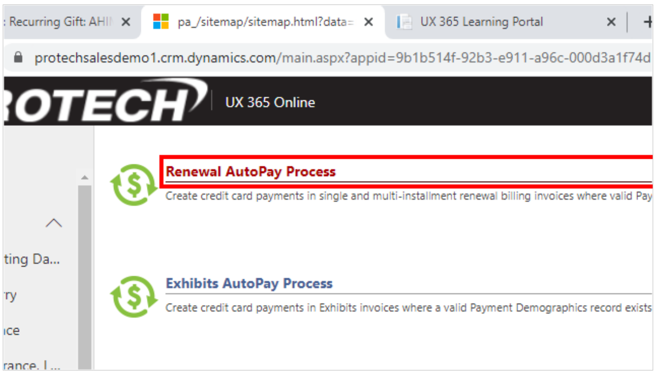
Click on the item **Financial Manager**



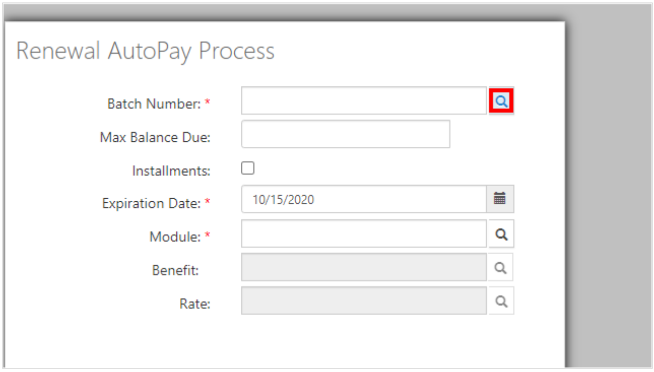
Click on the item **AutoPay**



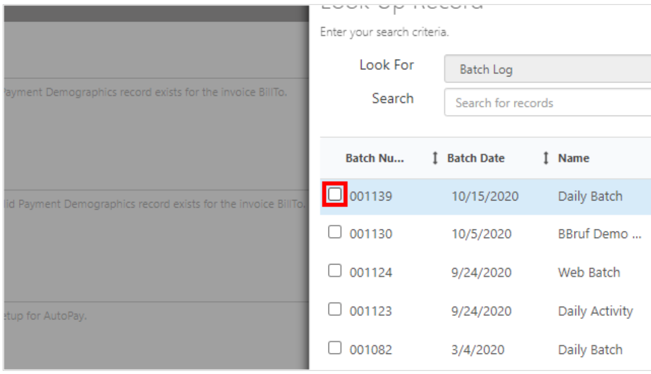
Click on **Renewal AutoPay Process**



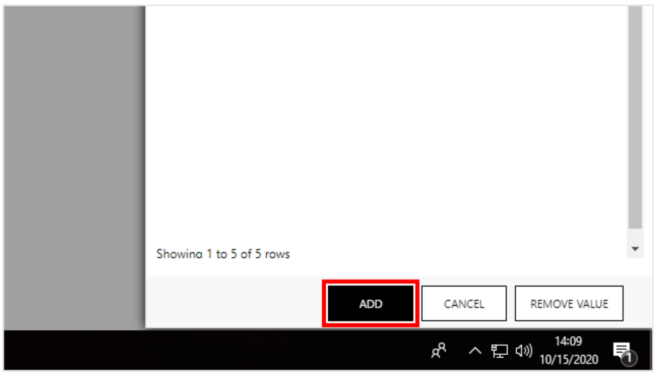
When the autopay process is open. Select the lookup to select a batch.



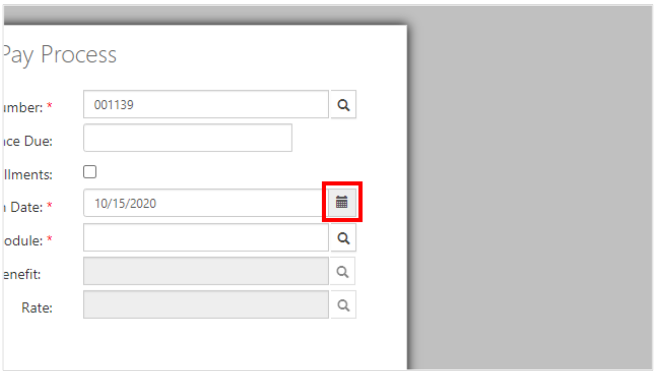
Select a batch to process the payment.



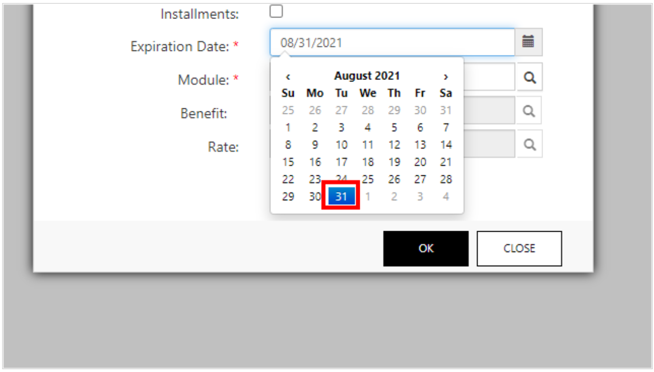
Add the batch.



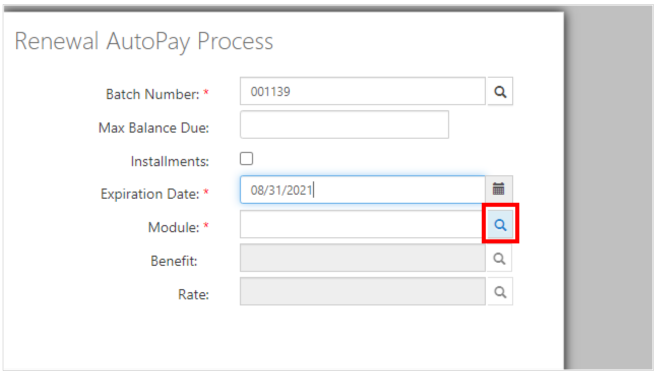
Select the calendar to identify the expiration date for the autopay renewals.



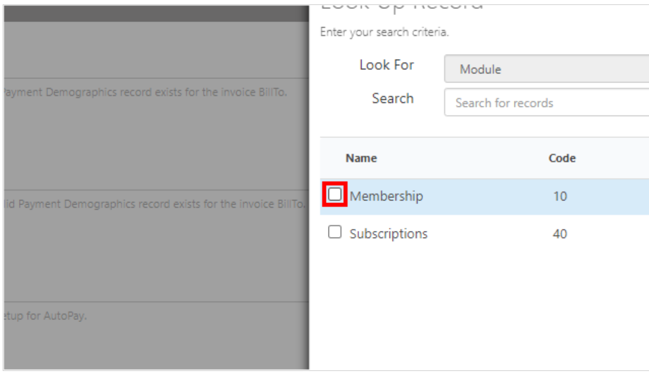
Enter the expiration date.

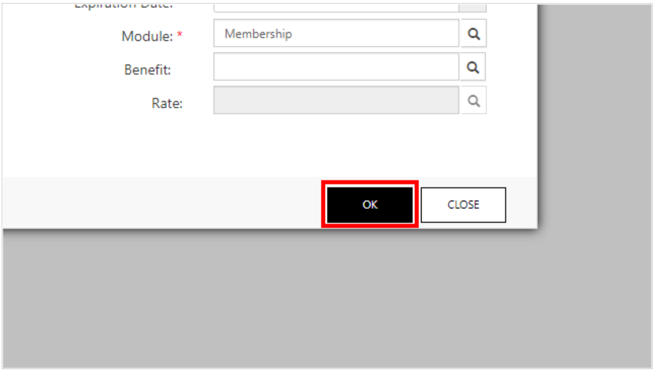
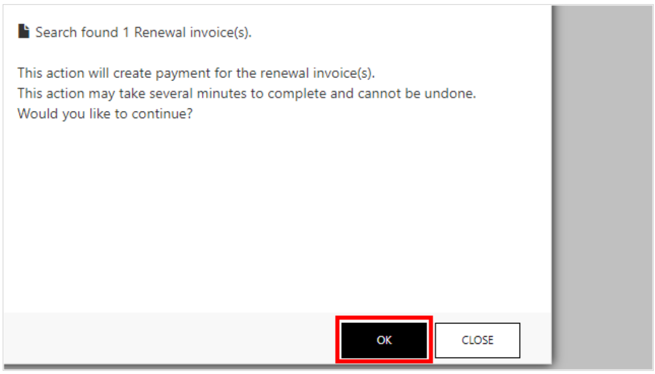


Select the lookup to identify which module. Membership or Subscriptions.



Select Membership



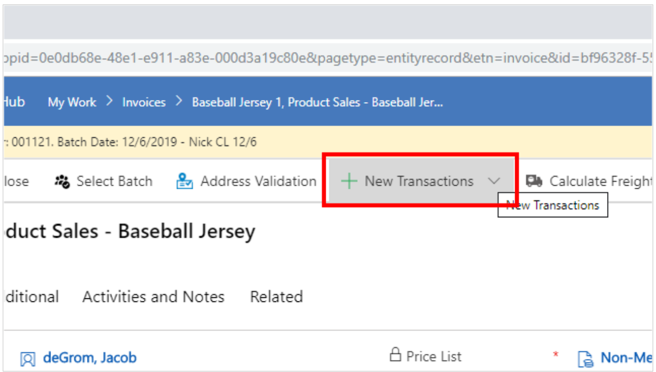
Select Add	
Select OK to run the AutoPay process.	
The process will show how many payments will be processed. If this total matches your expected number, select OK to finalize the AutoPay process.	

1.4. Canceling Invoice Check and Credit Card Payments

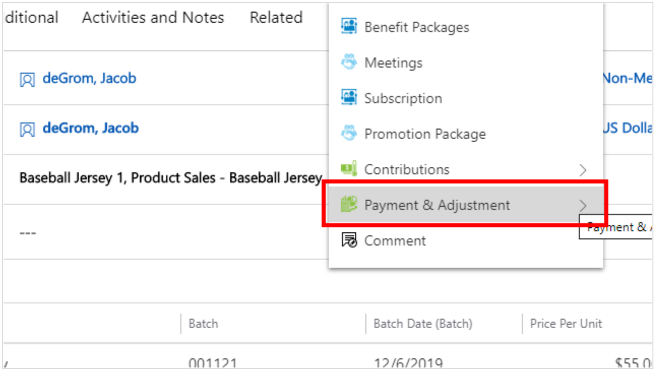
1.4.1. Canceling a Cash or Check Payment

Overview: At times, you may need to cancel a check or cash payment entered on an invoice. For example, a check might be returned for Non-Sufficient Funds (NSF) from the bank, entered for the wrong amount, or the payment was applied to the wrong invoice. Regardless of the reason for canceling a check or cash payment, the process for canceling it is the same: you must enter a reversing transaction.

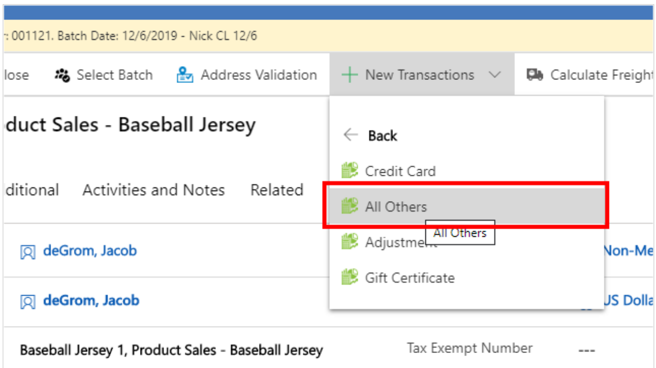
Open the Invoice and Click on the menu item New Transactions



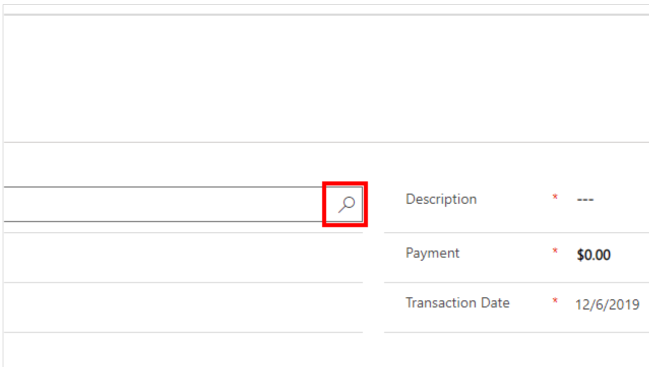
Click on the menu item **Payment & Adjustment**



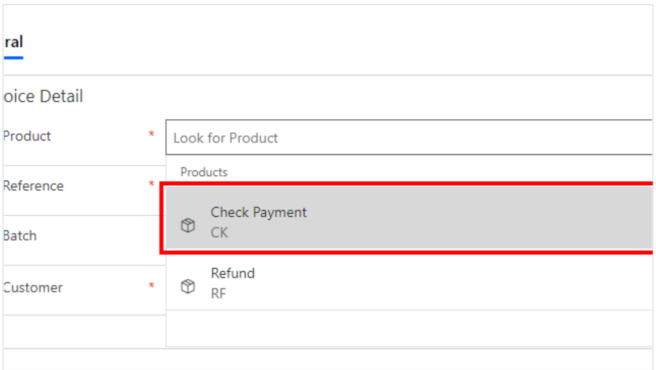
Click on the menu item **All Others**



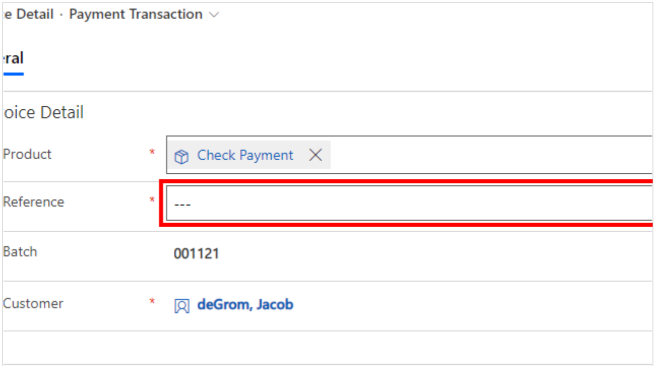
Click on the Product field look up



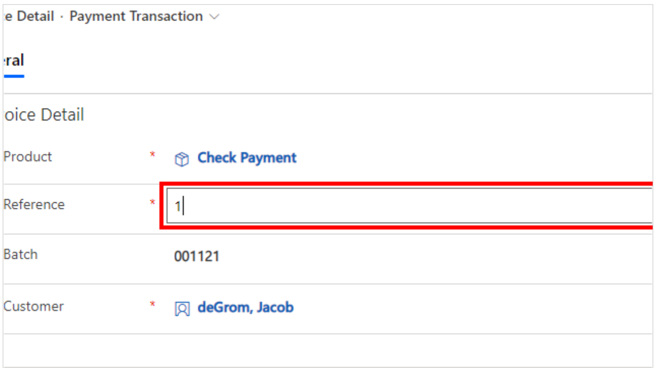
Click on the item Check Payment



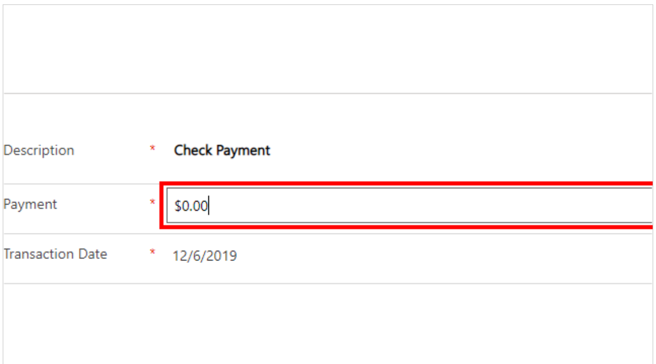
Click on the text field **Reference**



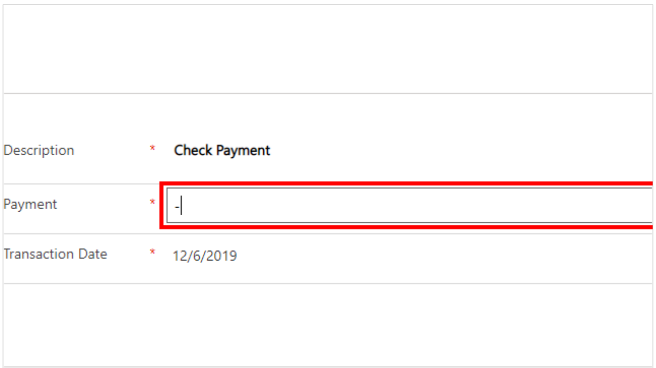
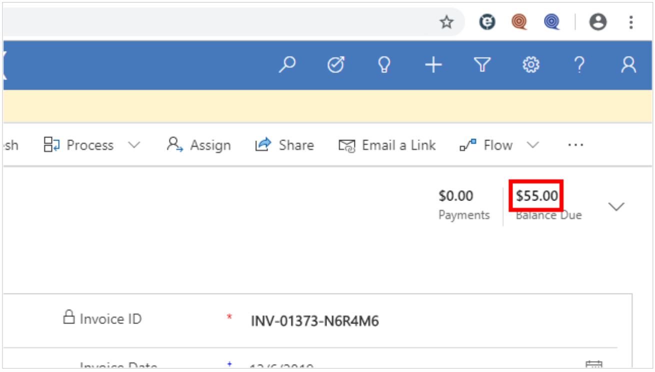
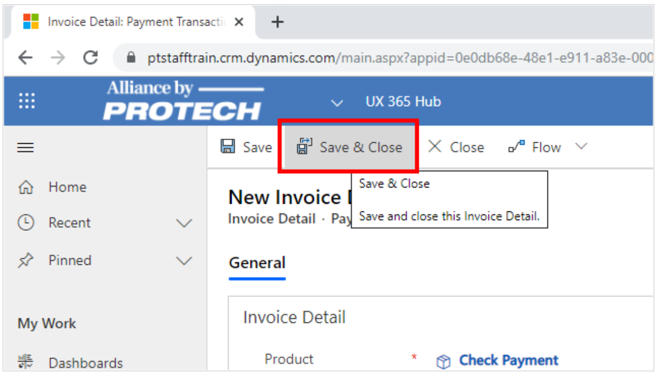
Enter reference number used on the original check payment



Click on the text field **Payment**



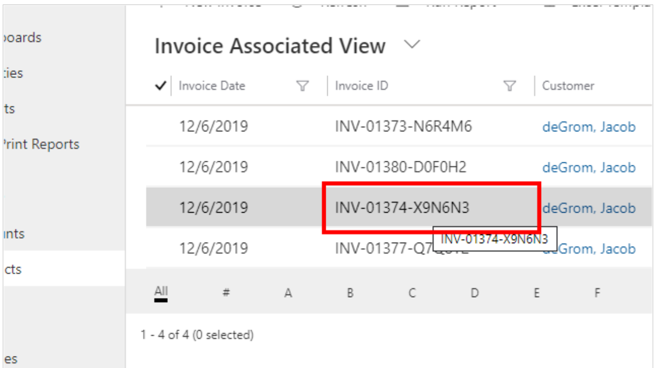
Change the amount displayed to the amount of the check payment you are reversing, entered as a negative amount.

Enter the negative amount	
The balance due field will be updated based on the negative amount	
Click on the menu item **Save & Close**	

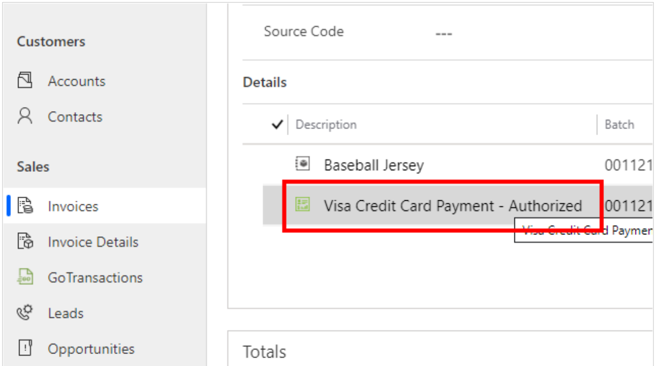
1.4.2. Voiding a credit card payment

Overview: If there is an error on an invoice or a credit card payment transaction, you can void the payment transaction if the payment has not been processed for delayed capture. (If the payment has been processed for delayed capture, you must issue a credit. For more information, see Issuing a credit card refund.) When you void a credit card payment, the system will automatically create entries that reverse the original transaction. You cannot partially void a credit card payment; the entire authorized transaction amount will be reversed. If your system is configured for multiple accounting companies, when selecting the Void Payment button, UX will first validate that the accounting company of the user's working batch matches the batch accounting company of the original credit card payment transaction. If the batch accounting companies do not match, UX will return an alert message directing you to select a different batch. If the batch accounting companies match, UX will continue with the Void Payment process described below.

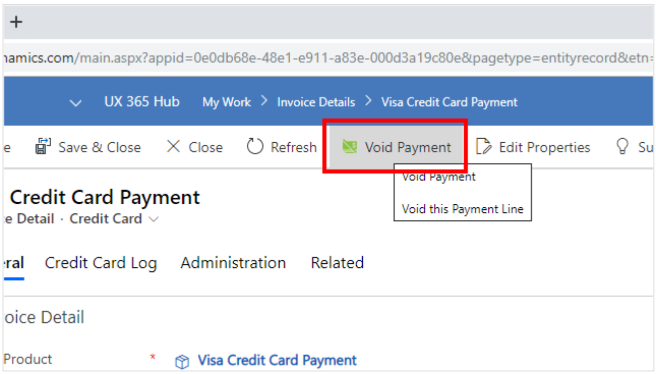
In order to cancel an invoice paid by credit card that was not processed by delayed capture, first, open the invoice



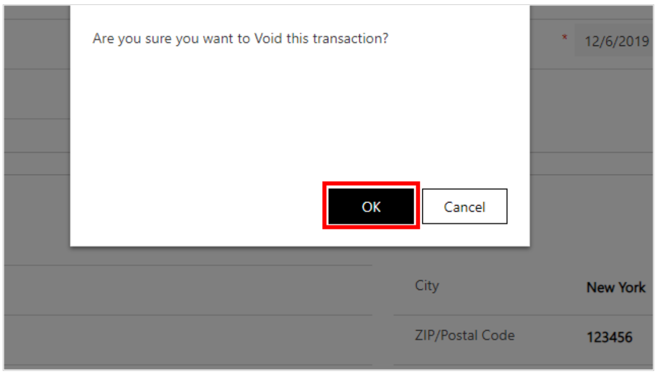
Click on the Credit Card payment detail record



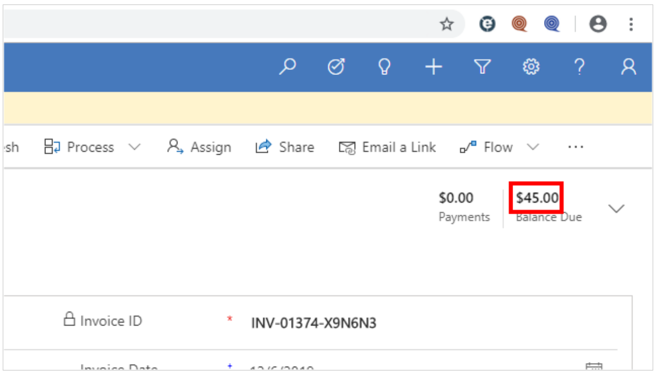
Click on the menu option, Void Payment



Click on the button OK to process the voided payment

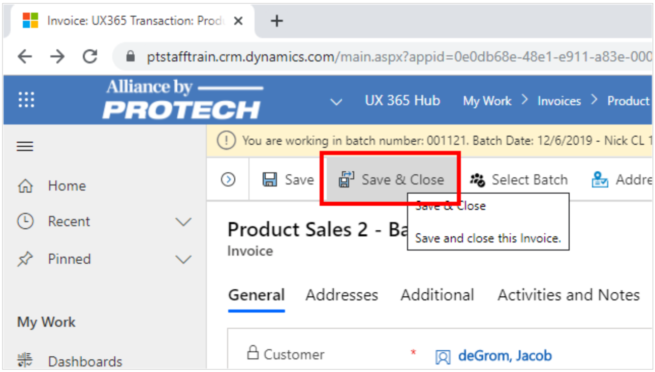


The balance due field will be updated based on the voided amount



Because you cannot partially void a credit card payment, you cannot void a credit card payment where the authorized payment amount is distributed to multiple invoices. This includes RapidPay credit card payment distributions. It also includes credit card payments processed online that are distributed to more than one invoice. If Delayed Capture has not been run on the original batch, the Void Payment button will appear but selecting this option will return an alert that you cannot void a distributed credit card payment.

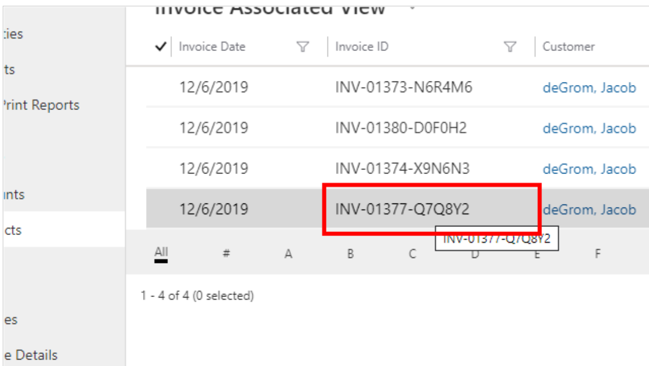
Click on the menu item **Save & Close**



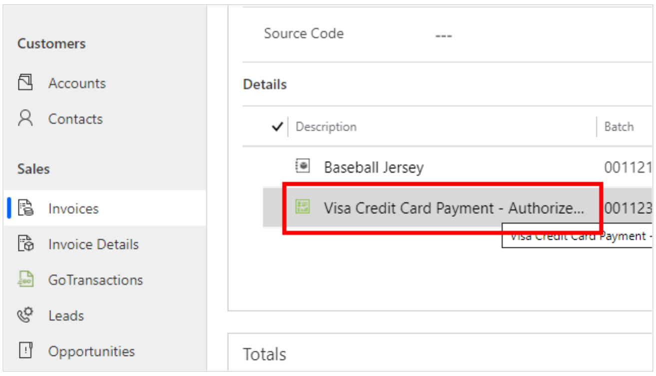
1.4.3. Issuing a credit card refund

Overview: You can issue a refund to a customer by crediting their credit card account if the payment was made by credit card and the payment has been processed for delayed capture. For example, if you make a change to an invoice such as a meeting cancellation that results in a credit balance on the invoice, you can credit the customer's card if they request it, rather than issue a refund check. If your system is configured for multiple accounting companies, when selecting the Credit Payment button, UX will first validate that the accounting company of the user's working batch matches the batch accounting company of the original credit card payment transaction. If the batch accounting companies do not match, UX will return an alert message directing you to select a different batch. If the batch accounting companies match, UX will continue with the Credit Payment process described below

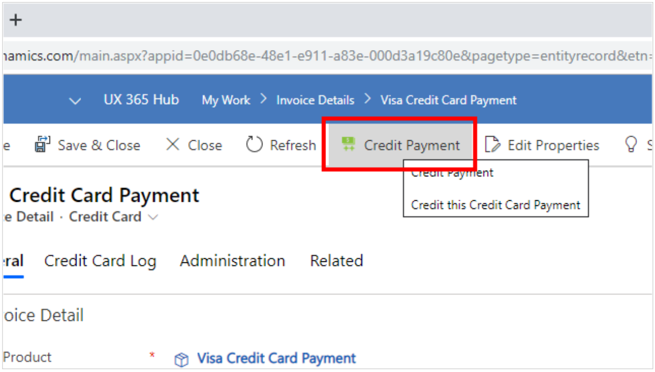
Open the Invoice



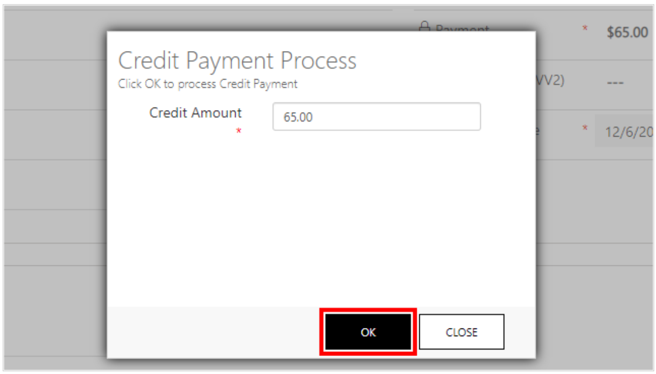
Click on the Credit Card payment line item



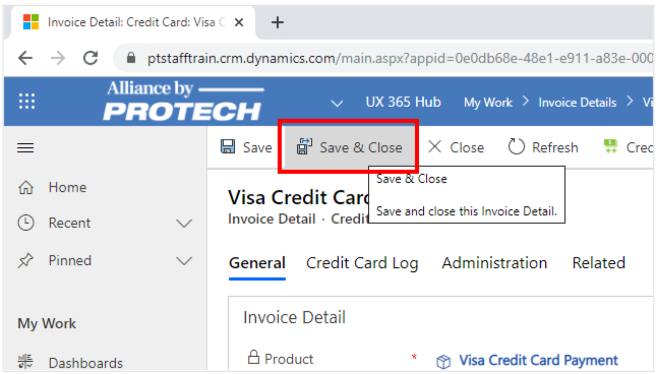
Click on the menu option, Credit Payment



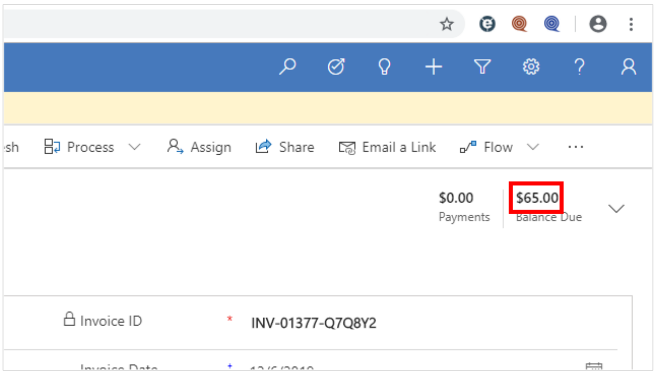
The credit amount will default to the original payment amount. You can change the amount to be credited here, or simply select OK, to complete the refund to the Credit Card



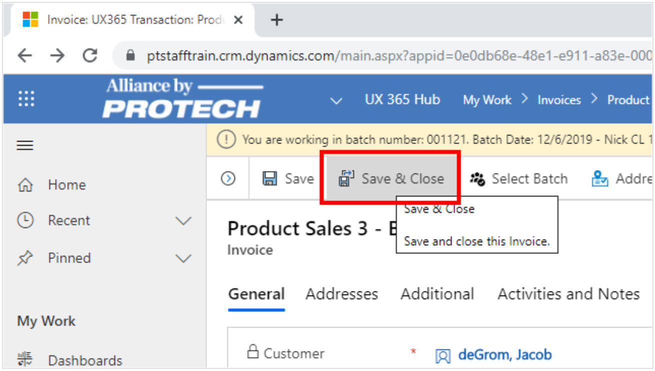
Click on the menu item **Save & Close**



The balance due field will be updated based on the credited amount



Click on the menu item **Save & Close**

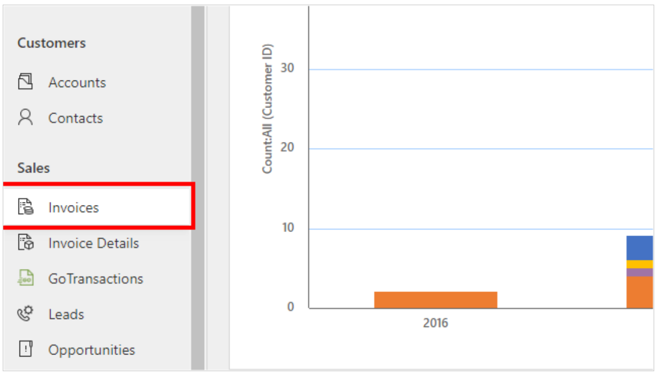


1.5. Cancelling a Payment Transfer

If you cancel a payment transfer when the original transfer transaction is still open, UX 365 will delete the transfer invoice detail transactions in both the source and target invoices. If the batch is closed, the transfer invoice detail transactions will be canceled in both the source and target invoices.

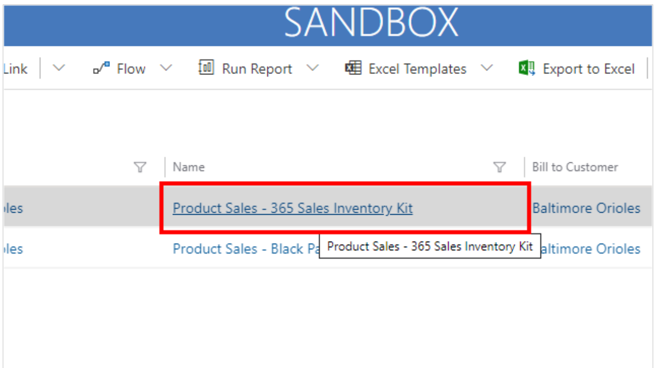
From any of the UX work areas on the left Nav pane, click Invoices to display a list of invoices

Click on the item **Invoices**



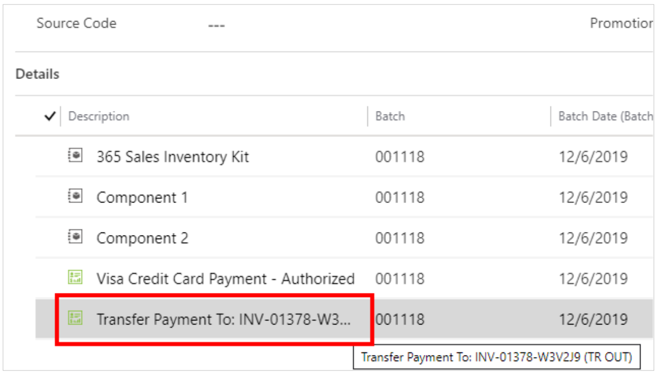
Locate and open the invoice that includes the transfer you want to cancel (either the source or the target invoice).

Click on the invoice name containing the payment transfer you would like to cancel.

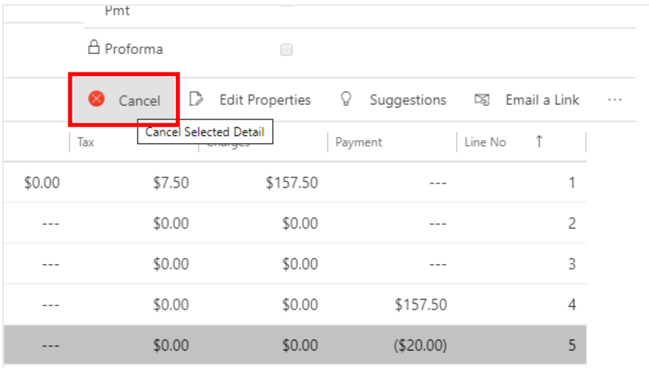


Click to highlight the invoice detail line item for the payment transfer you want to cancel.

Click on the transfer payment transaction.

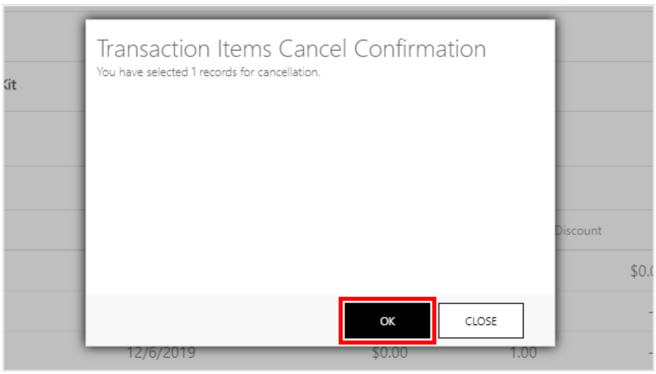


Click on the menu item **Cancel**

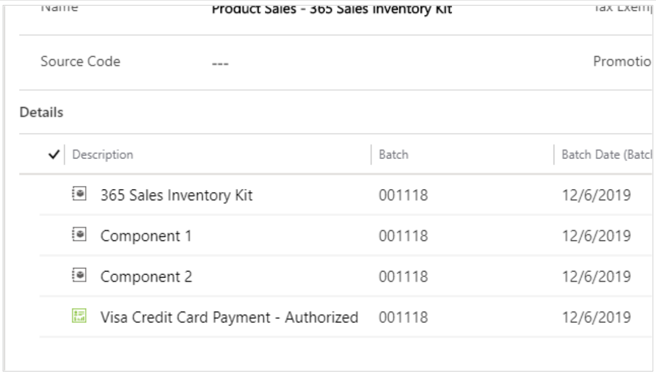


If the original batch for the payment transfer transaction is still open, the transfer detail line item will be deleted from both the source and target invoices. If the batch is closed, the transaction will be canceled.

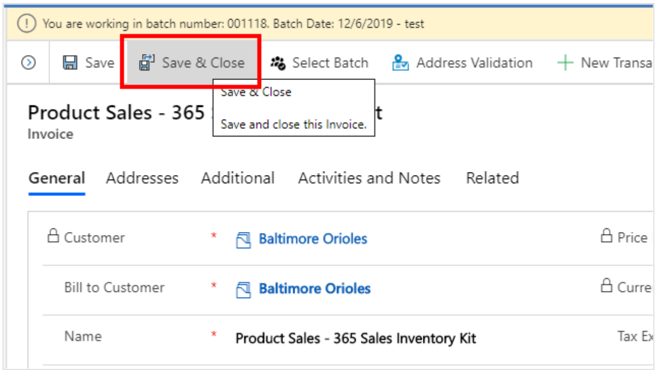
Click on the button **OK**



Confirm the transfer payment transaction has been removed.

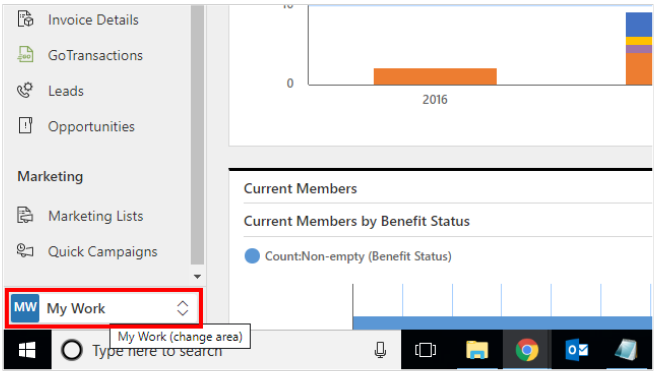


Click on the menu item **Save & Close**

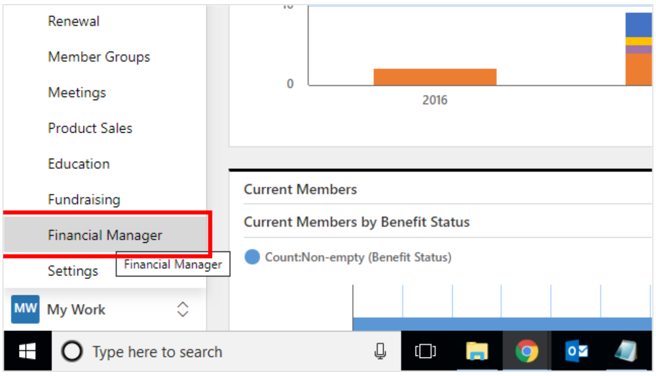


1.6. Closing a Batch

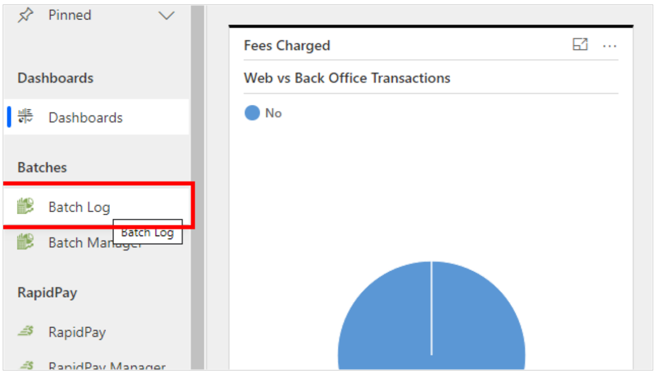
Click on the button **My Work (change area)**



Click on the item **Financial Manager**

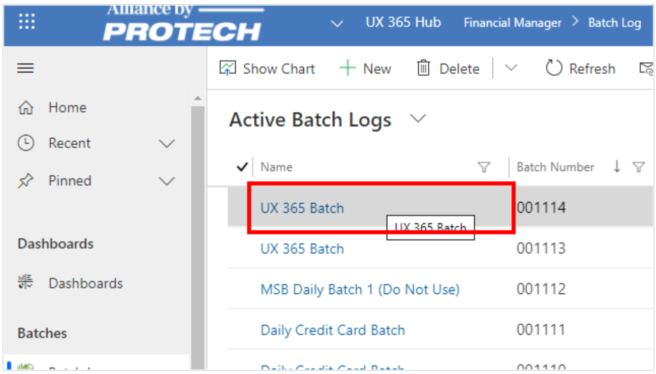


Click on the item **Batch Log**

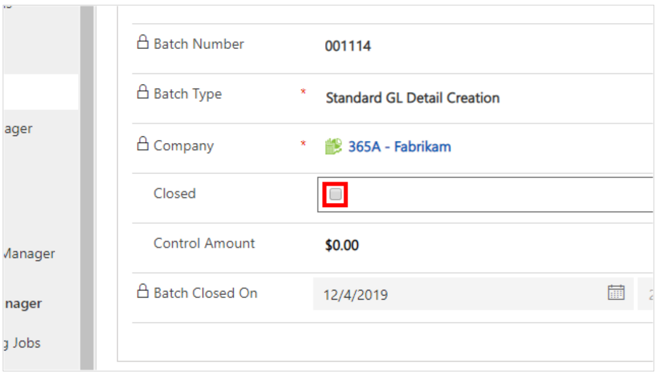


In the Batch Log list, locate and open the batch you want to close.

Click on the cell **Name**

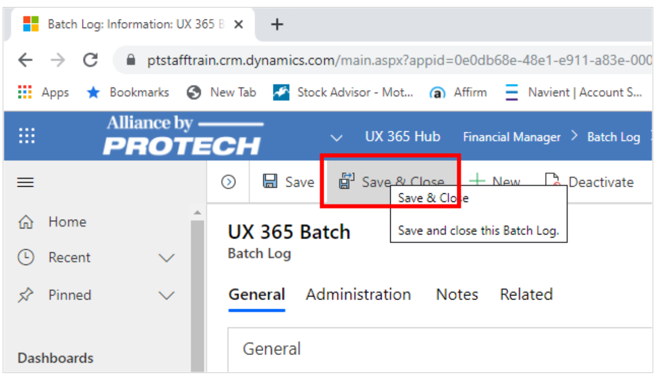


Click on the checkbox **Closed**



If your system is configured to validate batch payment control, you may receive a Business Process message indicating that the batch control amount does not equal the net amount of transactions in this batch. You must correct the control amount before you can close the batch.If the batch includes pending RapidPay entries, you will not be able to close it. You must run the process to create the payment transactions. For more information, see Creating RapidPay payment transactions.

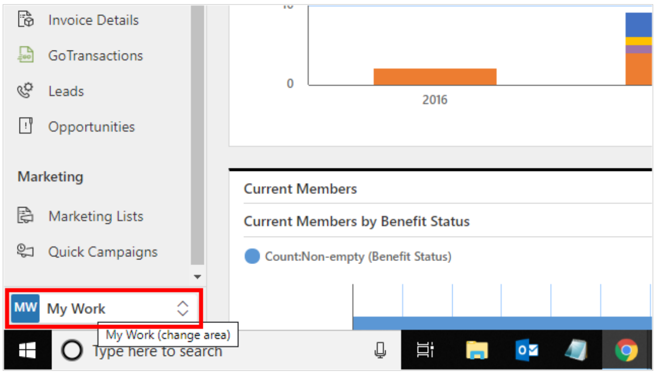
Click on the menu item **Save & Close**



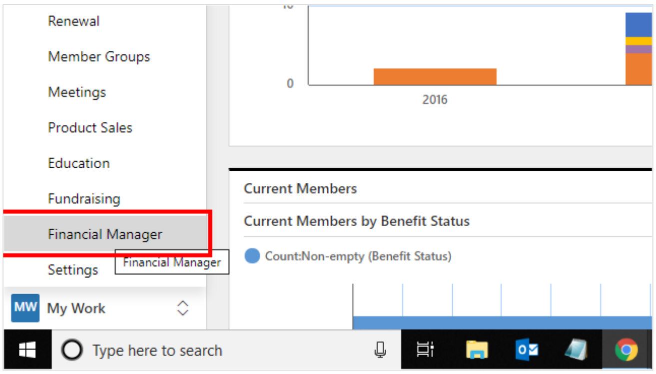
1.7. Creating a Batch

Before you can enter transactions in UX 365, you must create batches. A batch is a control mechanism that assigns an ID and date to every invoice transaction entered into the system. In most organizations, each batch is closed at the end of the business day so no other transactions can be entered into it and the accounting department can reconcile the money entered into that batch with the daily bank deposit. Once the batch is reconciled, the batch is then posted to the accounting system (either Microsoft Dynamics GP or Microsoft Dynamics SL). You must create separate batches for each company. You should create batches that meet the requirements of your organization's policies and procedures regarding the entry of cash, check, and credit card payments, and adjustment transactions. Protech recommends that your organization use separate daily batches for credit card charges and for cash and checks payments in order to reflect this activity accurately on the General Ledger and the Bank Statement.

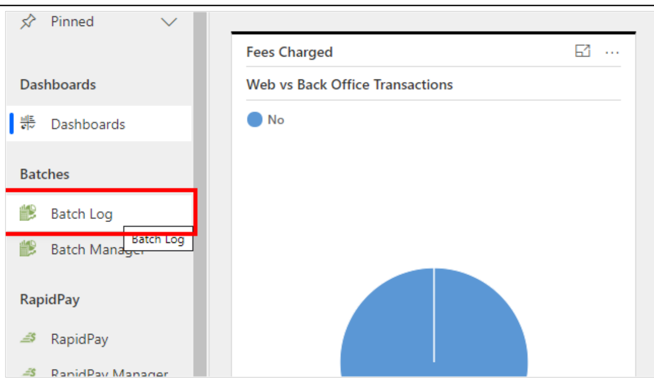
Click on the button **My Work (change area)**



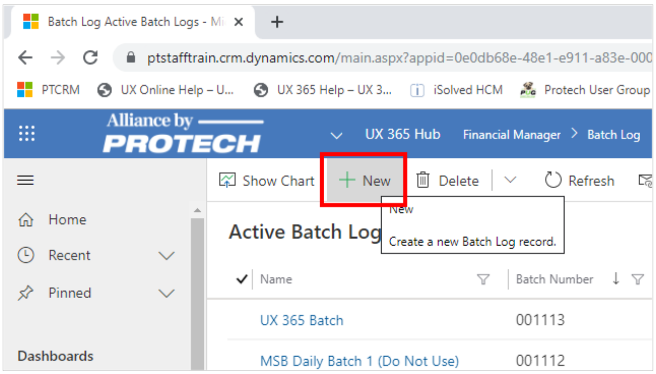
Click on the item **Financial Manager**



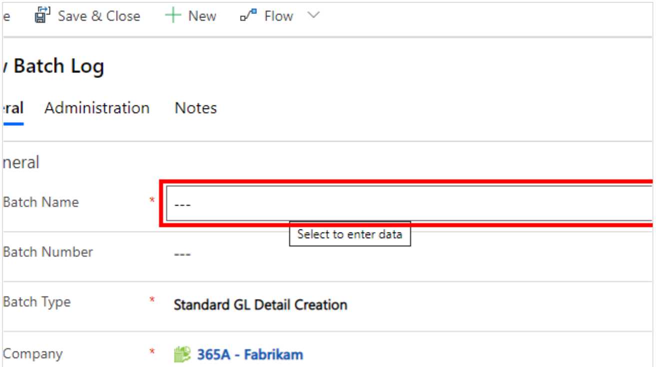
Click on the item **Batch Log**



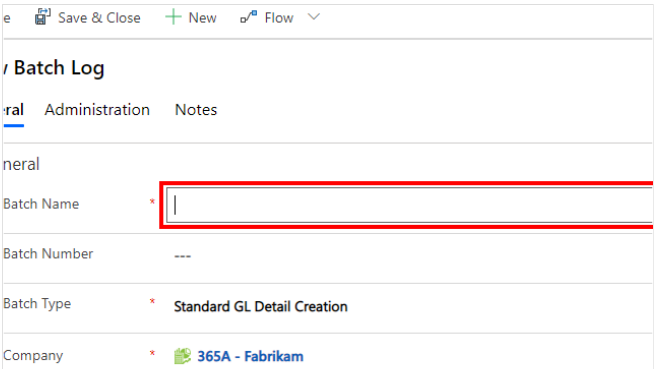
Click on the menu item **New**



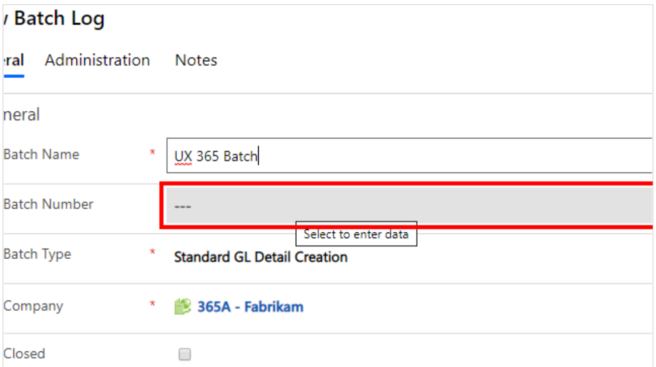
Click on the text field **Batch Name**



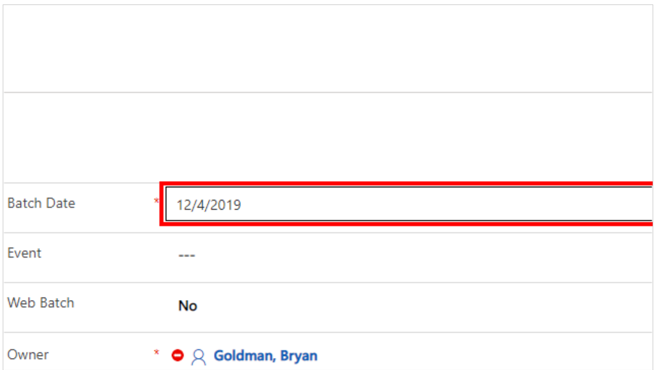
Enter Batch Name



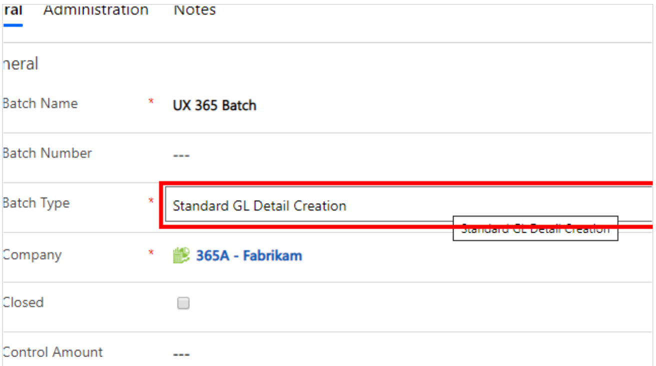
Batch Number
Displays an automatically generated number. The number increases by one each time you Save a new batch. This number will appear in the batch ID field in the accounting system's general ledger transaction entry window.



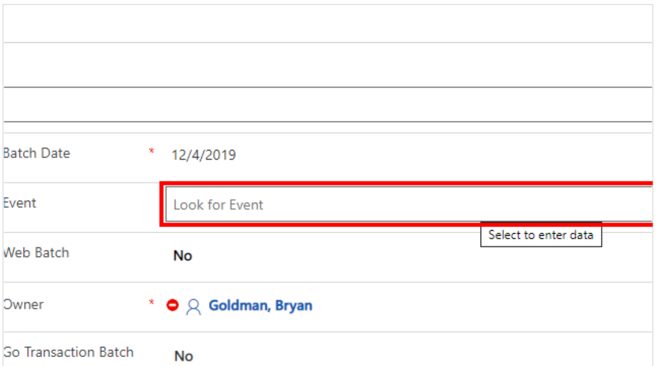
Batch Date
This field defaults to the system date. This will be the transaction date when this batch is posted to the accounting system, and will appear in the transaction date field in the accounting system's general ledger transaction entry window. If this is not correct, edit the date as required. Because the batch date is the date the journal entry posts into the accounting system, be sure you enter the correct date.



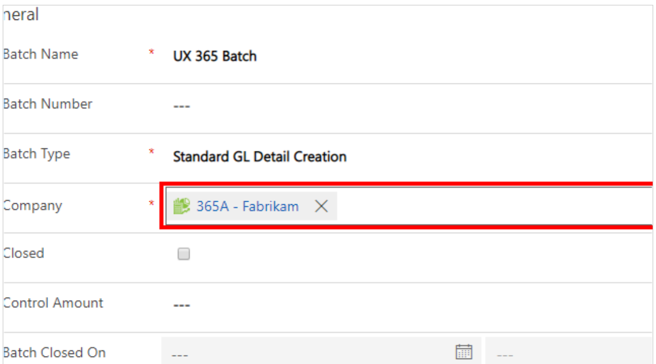
Batch Type
Select the type for this batch, based on the type of transactions you are creating this batch for. Please refer to the User's Guide for the different Batch Types and their descriptions.



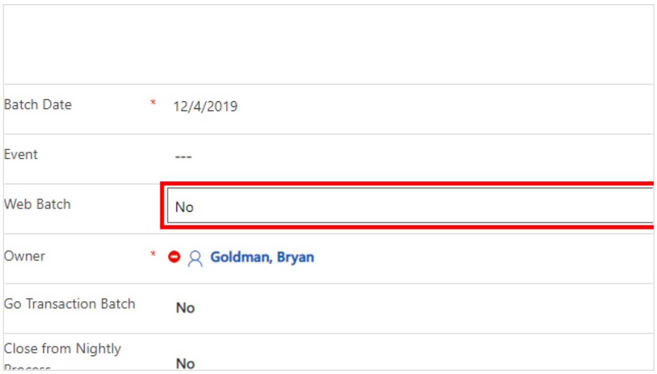
Event
If this batch will be used for revenue recognition for a specific event (that is, if you selected Revenue Recognition by Event as the batch type), click the Lookup button to select the event. Otherwise, leave this field blank.



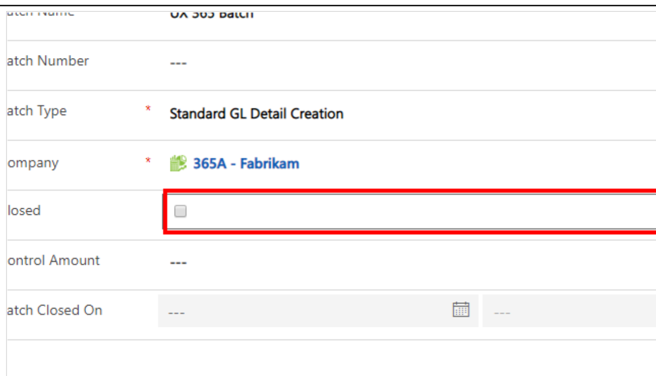
Company
Click the Lookup button to select the company in the accounting system where you want this batch posted.



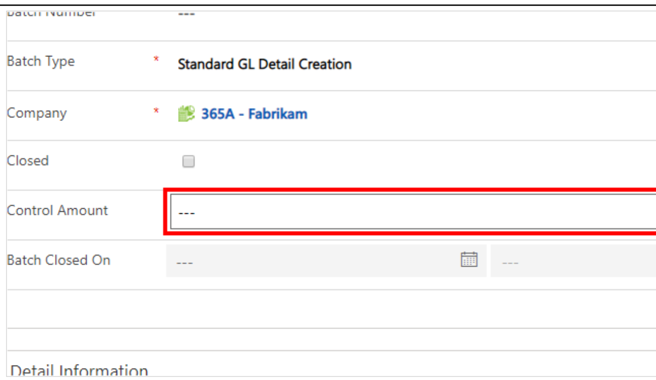
Web Batch
If this batch was created from MX Online, Yes will be marked. Do not change this field.



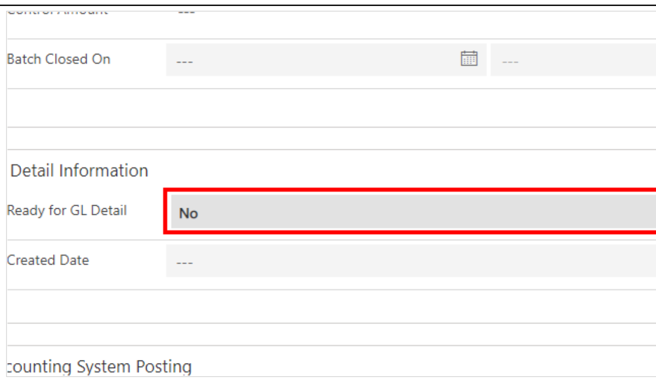
Closed
Leave this unchecked. Only mark this checkbox if you want to close the batch to prevent any more transactions from being added and you are ready to post. If the batch type is one of the system process types, do not change this checkbox. It is automatically marked to prevent users from inadvertently using a system process batch for standard transactions.



Control Amount
Enter a dollar amount to use as a control for this batch. If you are using batch control amount validation, the net payment transaction total for the batch must match this amount before you can close the batch.



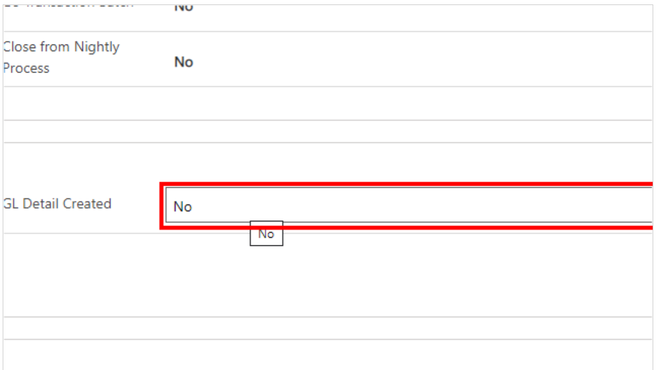
Ready for GL Detail
Do not mark or unmark this checkbox from within the batch log record. You must manage this field in either the Standard GL Detail grid or the Special GL detail grid. If checked and enabled, this field indicates that this batch has been marked in the GL Detail grid for creating GL detail the next time the Create GL Detail-Post to Accounting Process is run.



PROTECH

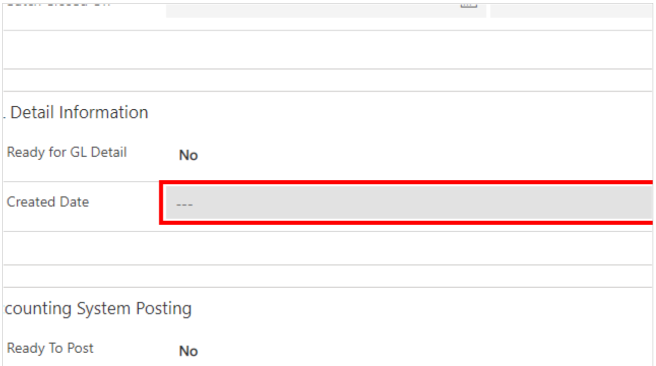
GL Detail Created

Indicates whether GL detail was created. The system manages this field and it cannot be edited.



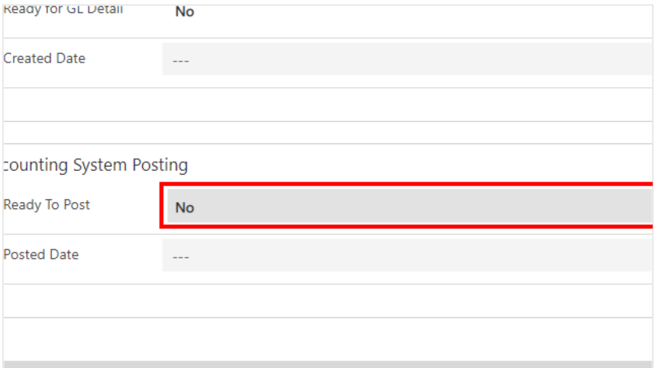
Created Date

Displays the date that GL detail was created. The system manages this field and it cannot be edited.



Ready To Post

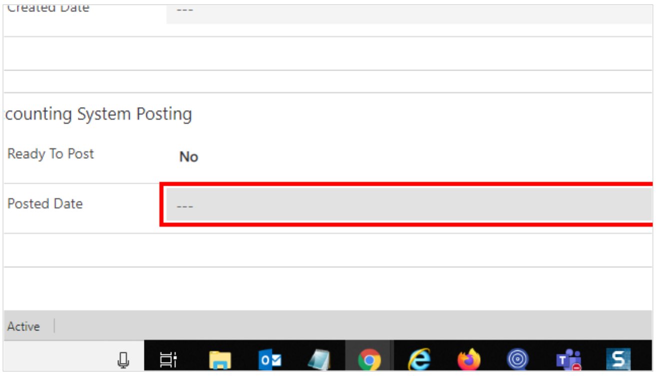
Do not mark or unmark this checkbox from within the batch log record. You must manage this field in either the Standard GL Detail grid or the Special GL detail grid. If checked and enabled, this field indicates that the batch has been marked in the GL Detail grid for posting the next time the Create GL Detail-Post to Accounting Process is run.



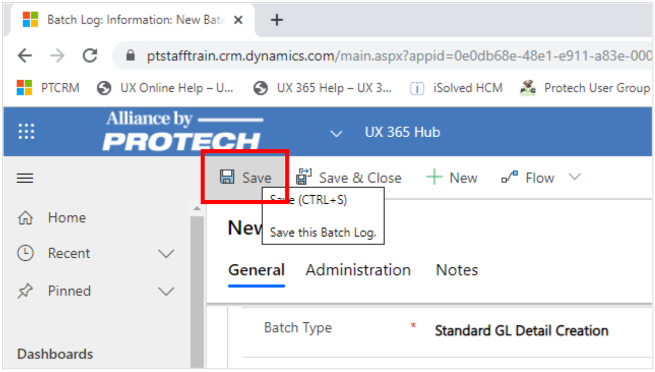
Posted

Indicates whether the batch has been posted. The system manages this field and it cannot be edited.

Posted Date
Displays the date that this batch was posted. The system manages this field and it cannot be edited. The date the transactions will post in your accounting system will be the batch date, even if you post the batch on a later date.



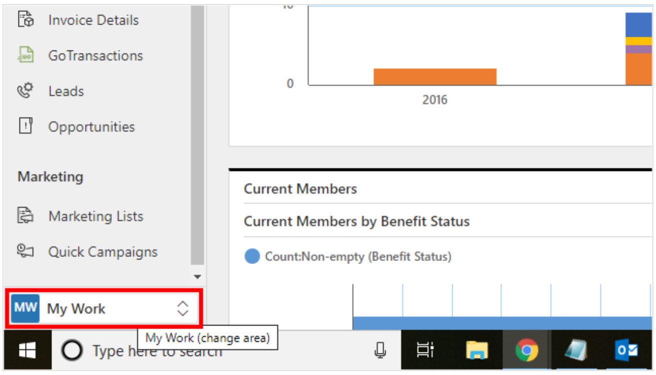
Click on the menu item Save



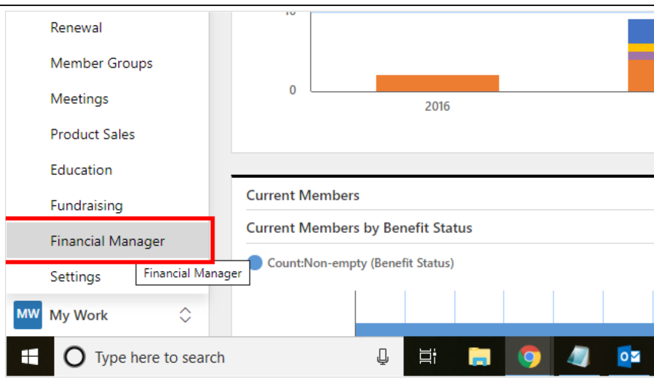
1.8. Creating GL Detail for a Batch

Before a batch can be posted, you need to create the detailed journal entries of the debits and credits associated with the transactions in the batch, otherwise known as General Ledger Detail records or GL Detail records.

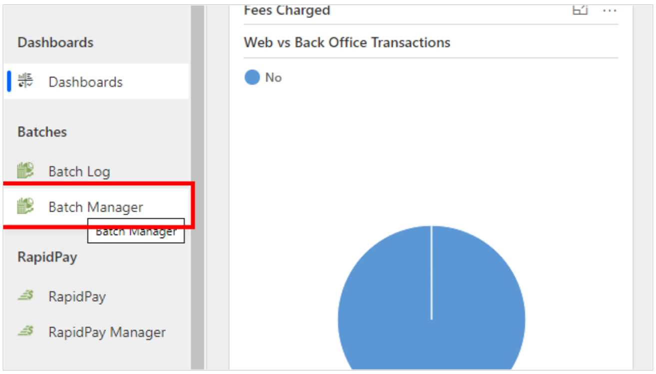
Click on the button **My Work (change area)**



Click on the item **Financial Manager**



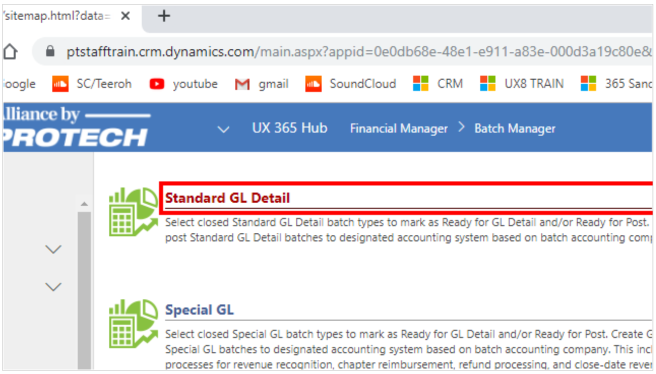
Click on the item **Batch Manager**



Selecting "Standard GL Detail" will open the Standard GL Detail grid dialog.

Selecting "Special GL" will open the Special GL Detail grid dialog.

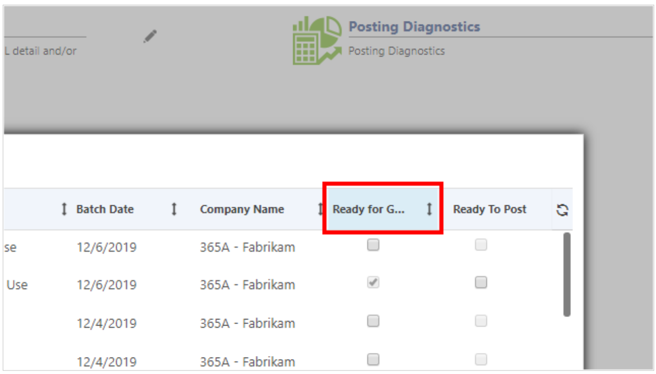
Click on **Standard GL Detail**



You can mark one or more batches as Ready for GL Detail, with or without marking them Ready for Post. By selecting only the Ready for GL Detail checkbox, you can create GL Detail for marked batches without posting. If you select both the Ready for GL Detail and the Ready to Post checkboxes, you can run both processes – all based on your selections. The only restriction is that you cannot mark a batch Ready to Post if it is not marked Ready for GL Detail.

If the Ready for GL Detail checkbox is checked and disabled on the grid, this indicates that you have already created GL detail for that batch. That batch is ready for posting.

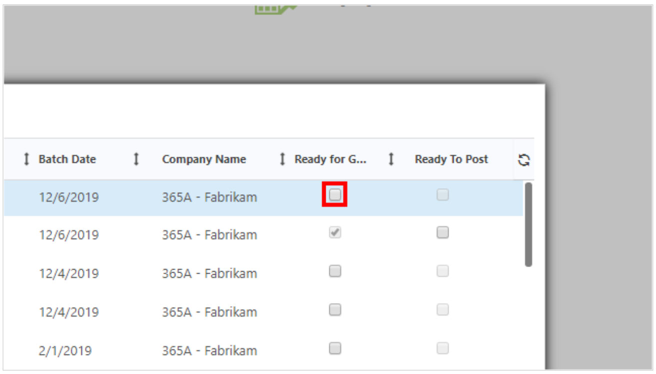
'Ready For GL Detail' column



Using the checkboxes, select one or more batches to Create GL Detail. Select OK to initiate the process. After the process is complete, select Close to close the processing window.

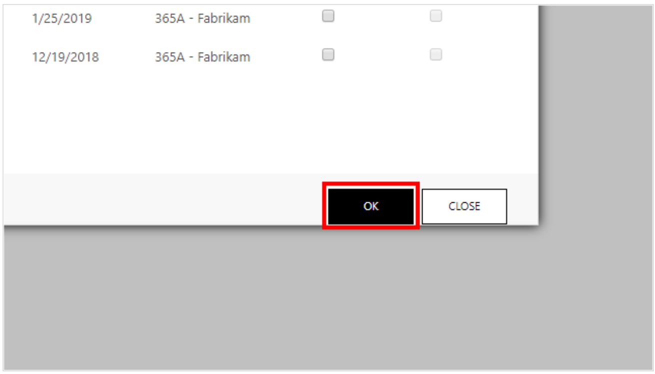
Important Note: You can mark both the Ready for GL Detail and the Ready to Post checkboxes at the same time, but you cannot mark the Ready to Post checkbox if the Ready for GL Detail has not been marked.

Click on the checkbox under 'Ready For GL Detail'



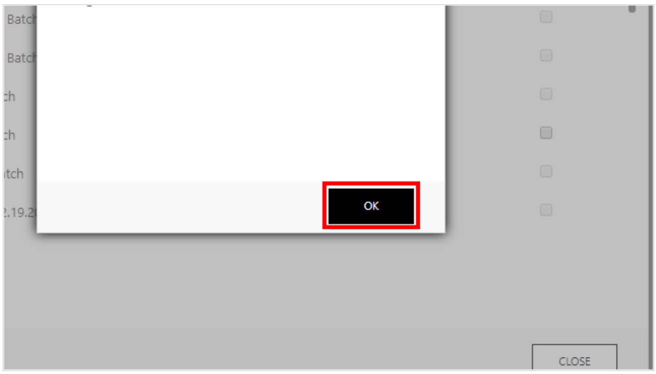
Select OK to initiate the process. The process will run based on the marked checkboxes.

Click the button OK, to initiate the process



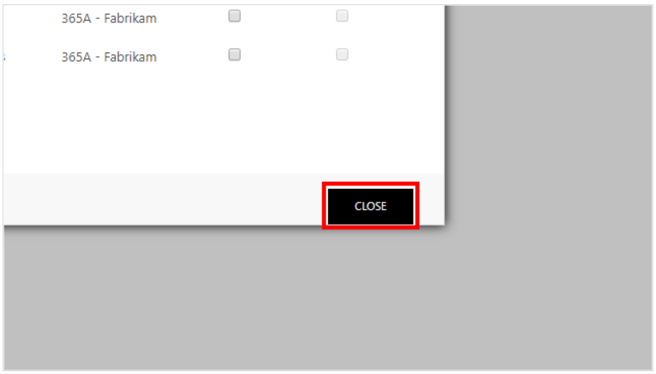
Upon completion of the Create GL Detail process, the system will update the batch log record fields GL Detail Created = Yes and Created Date = [system date]. If there is no GL detail created for a batch when the Create GL Detail – Post to Accounting process is run, in addition to updating the batch GL Detail Created = Yes and Created Date = [system date] fields, the system will automatically update the batch Posted = Yes and the Posted Date = [system date] because there is no GL detail in the batch to post to the accounting system.

Click on the button **OK**



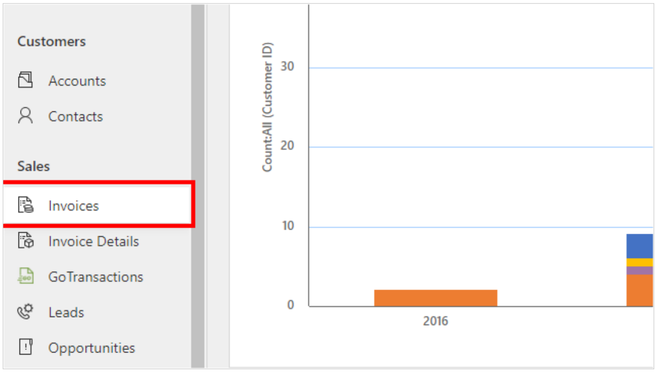
If you discover a mistake in a transaction after creating GL detail or after posting, you can reset the batch and correct the error.

Click on the button **CLOSE**



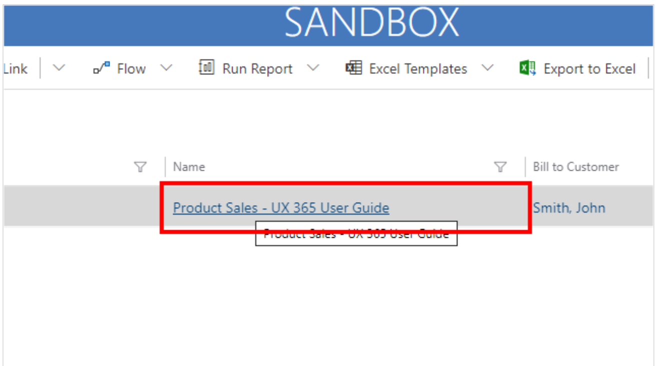
1.9. Issuing a Credit Card Refund

Click on the item **Invoices**

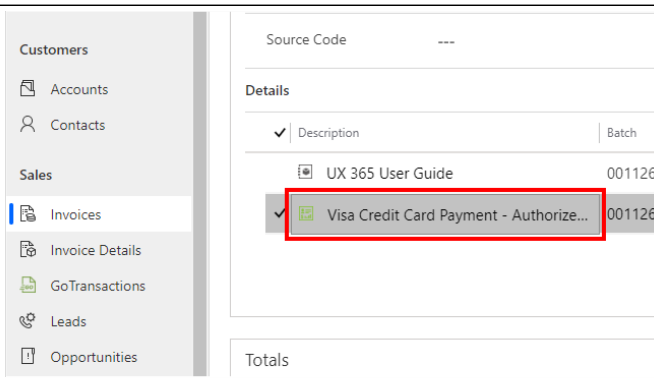


To access Invoices, you can select Invoices from the My Work section. You can also navigate to Accounts or Contacts from any of the UX work areas on the Navigation Tile Bar. Open the account or contact where you want to enter a cash or check payment. In the Navigation Pane of the account or contact record, click Invoices to display a list of invoices.

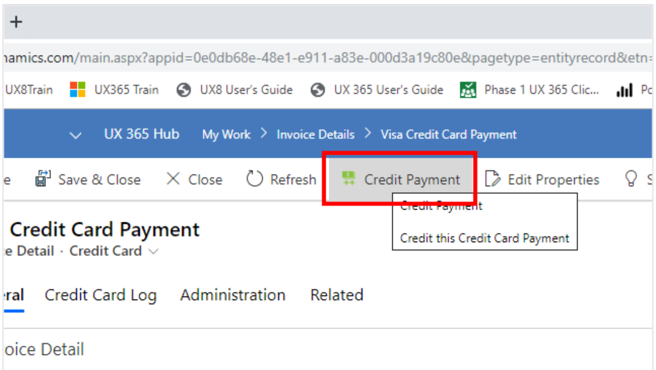
Select the desired Invoice



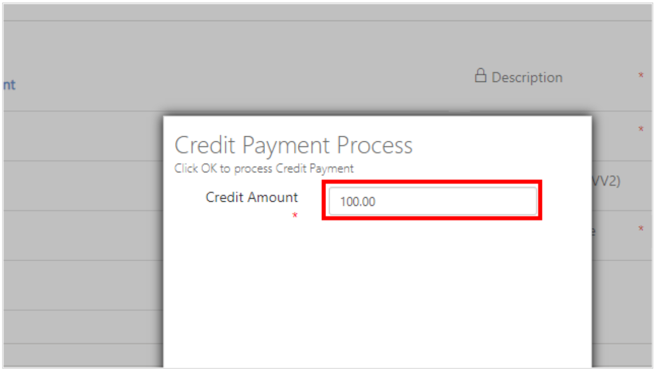
Select the Credit Card payment line item



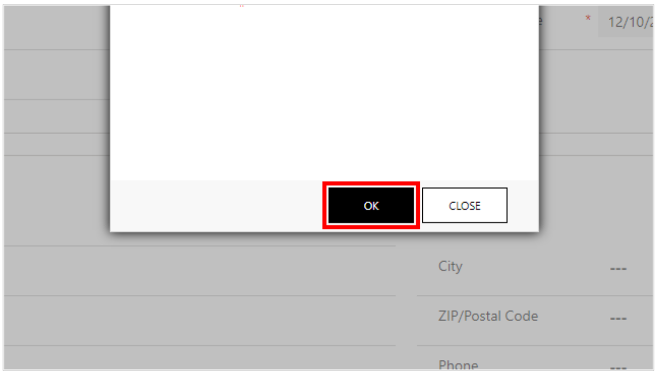
Click on the menu item **Credit Payment**



Enter the amount to be credited

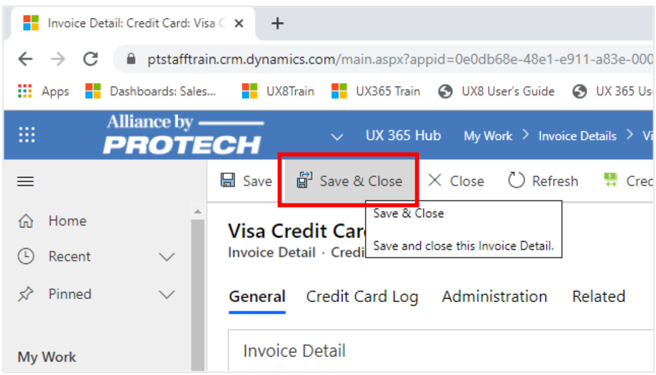


Click on the button **OK**



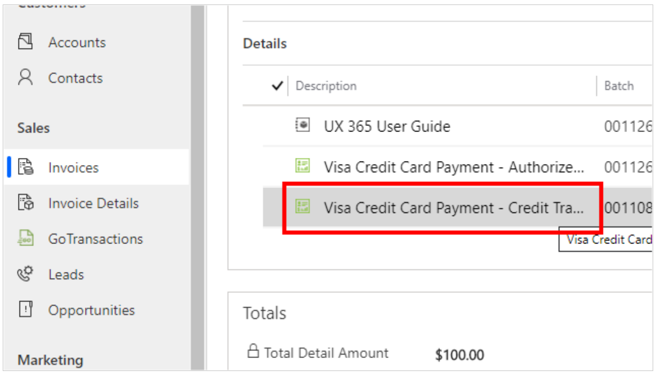
Click OK to process the refund and immediately credit the amount indicated to the customer's credit card. (There is no delayed capture process required for credits.) The original charge and the subsequent credit will appear on the customer's credit card statement. The system also creates a credit transaction entry in the credit card log, which you can view by clicking Credit Card Log in the Navigation Pane of the invoice.

Click on the menu item **Save & Close**



The invoice detail record appears, where you can view the original credit card payment transaction detail line and a new payment transaction detail line for the credit transaction with a negative amount.

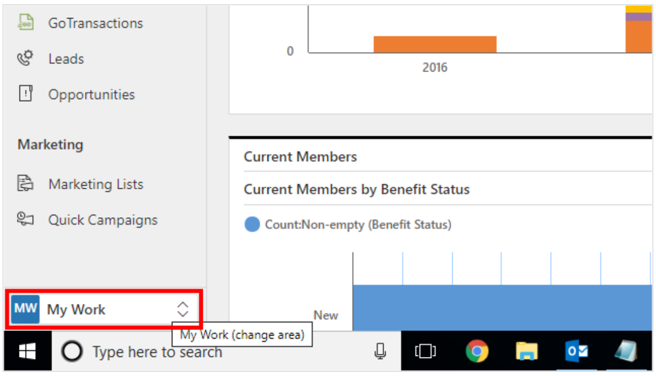
Note the new Invoice line item for the Credit Card refund



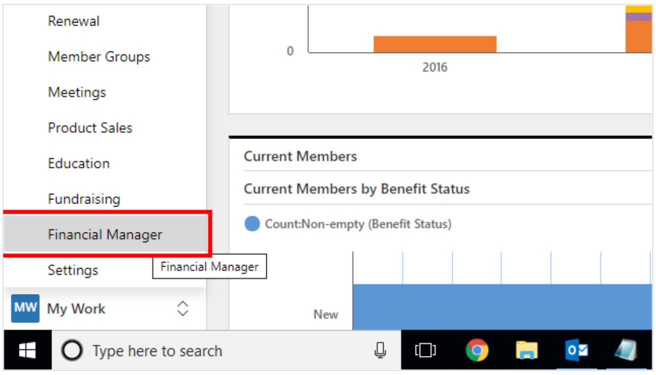
1.10. Issuing a Gift Certificate

1.10.1. Issuing a Gift Certificate to a contact through Financial Manager

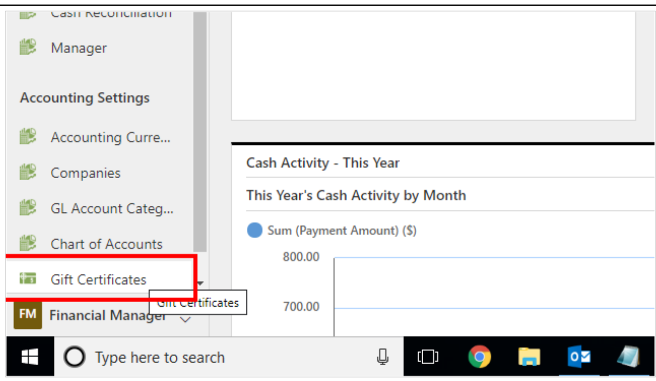
Click on the button My Work



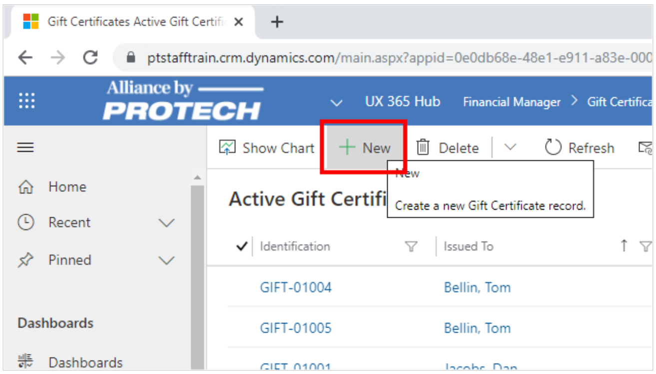
Click on the item **Financial Manager**



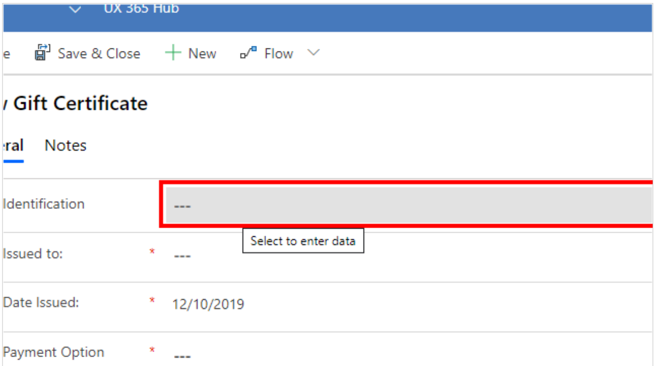
Click on the item **Gift Certificates**



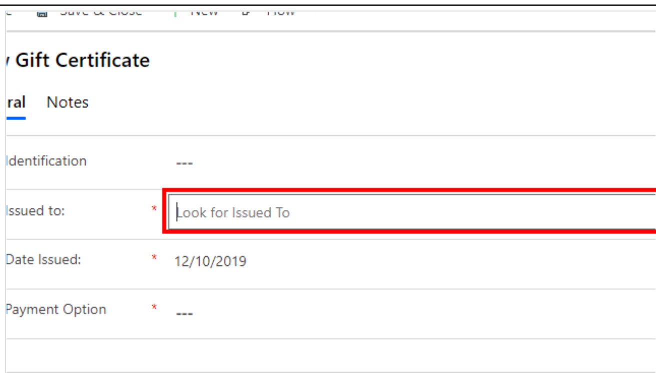
Click on the menu item **New**



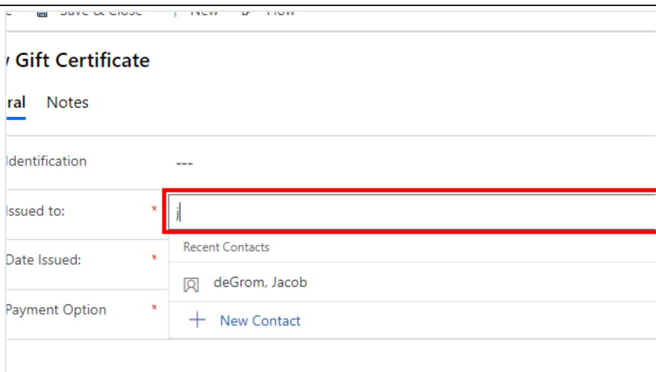
This is the Identification Field, If your system is set up for manually numbered gift certificates, enter an alphanumeric ID for this gift certificate. If your system is set up to automatically number gift certificates; this field is disabled and an ID number will appear when you save this record

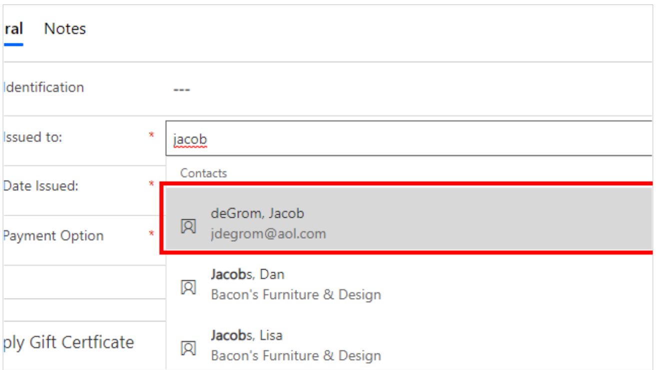
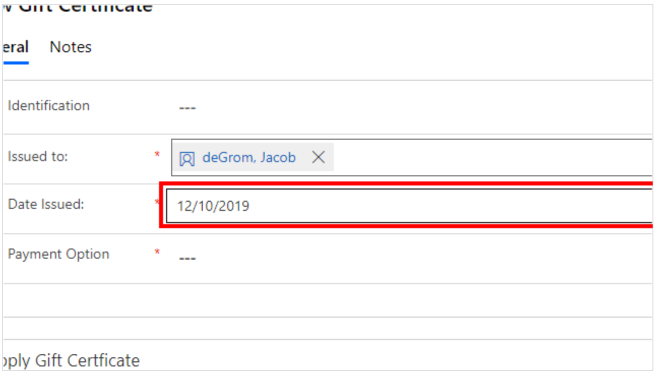
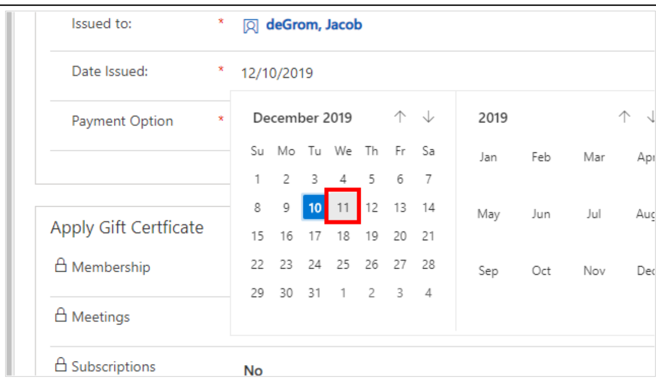
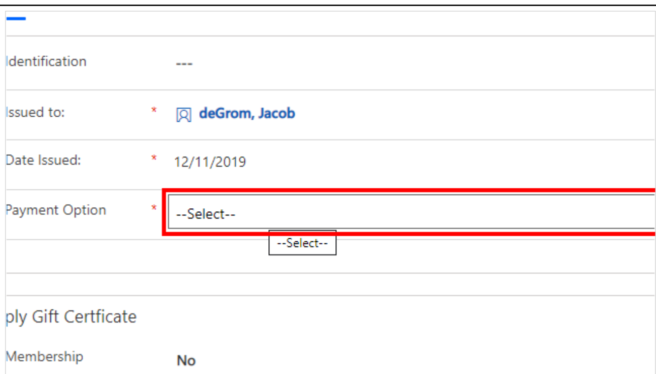


Click on the lookup field Issued to

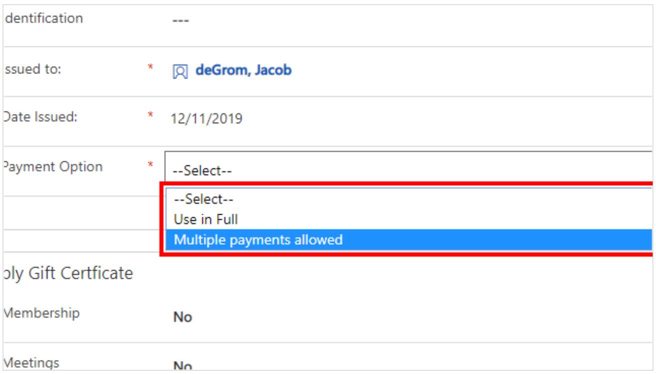


Type the name of the contact you are issuing this gift certificate to

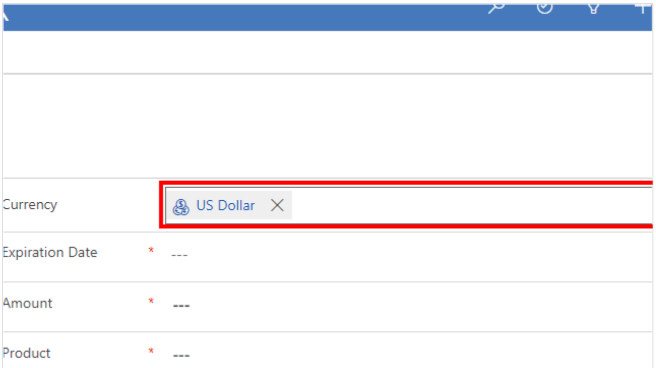


Select the contact you are issuing this gift certificate to	
Click on Date Issued	
Enter the date that this gift certificate was issued	
Click on the field **Payment Option**	

Select Use in Full if this gift certificate can only be used one time, select Multiple Payments Allowed if this gift certificate can be used for multiple payments

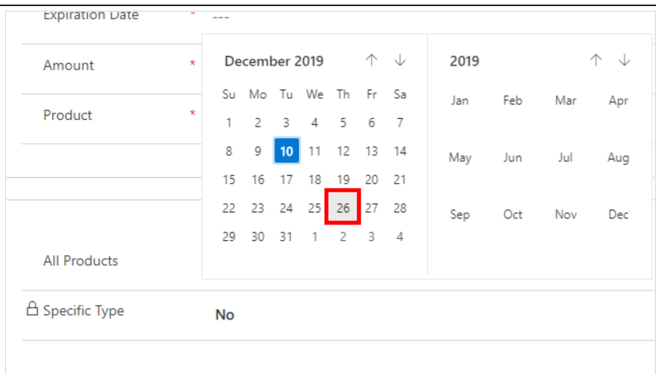


This is the Currency field, If necessary, click the Lookup button to select the appropriate currency for this gift certificate

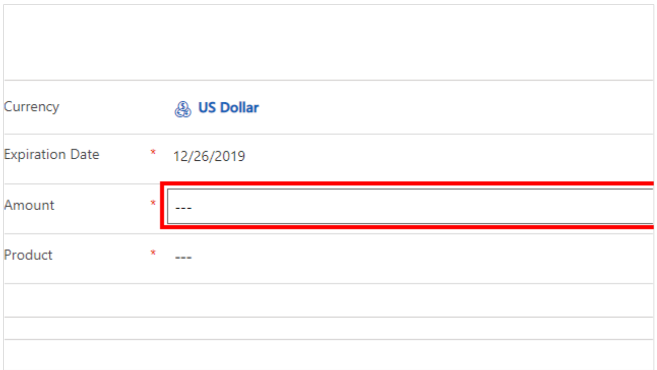


Click on **Expiration Date**

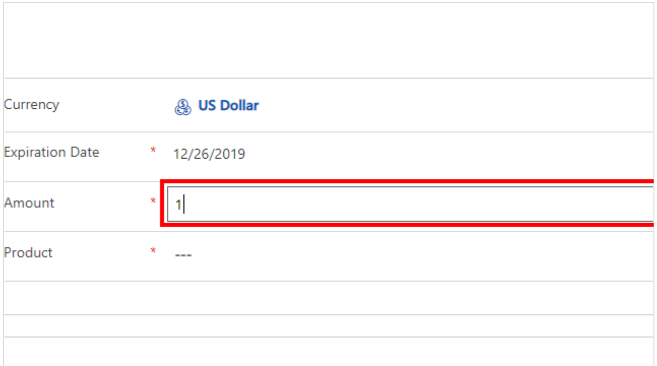
Enter the date that this gift certificate will expire. On this date, the gift certificate will no longer be available for use



Click on the text field **Amount**

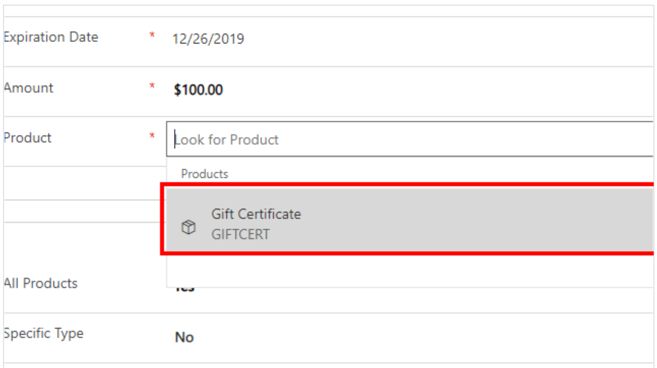


Enter the amount of the gift certificate

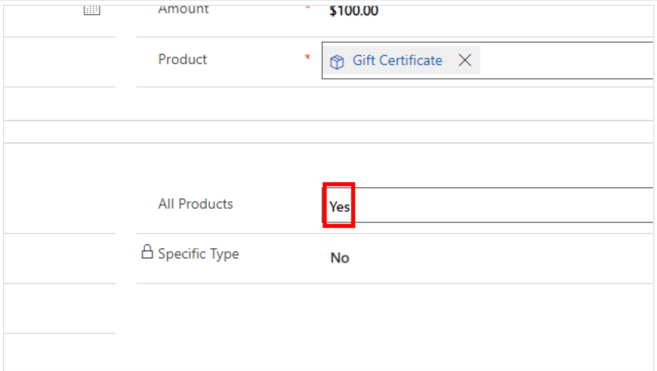


Click the Lookup button to search the payment product for this gift certificate

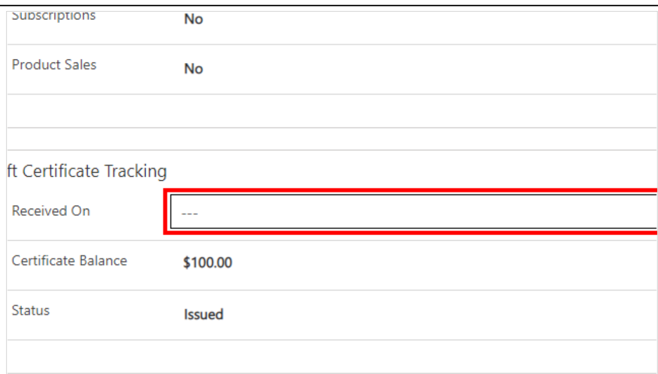
Select the payment product for this gift certificate



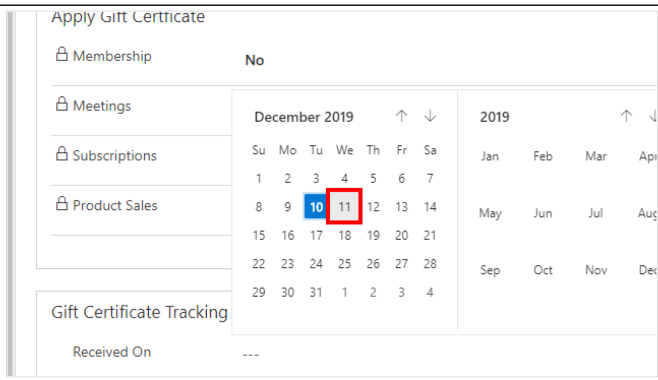
This field gives you the option to select what you would like to be applicable for this gift certificate. You can either Select 'YES' for all products or select a combination of membership,meetings,subscriptions and product sales.



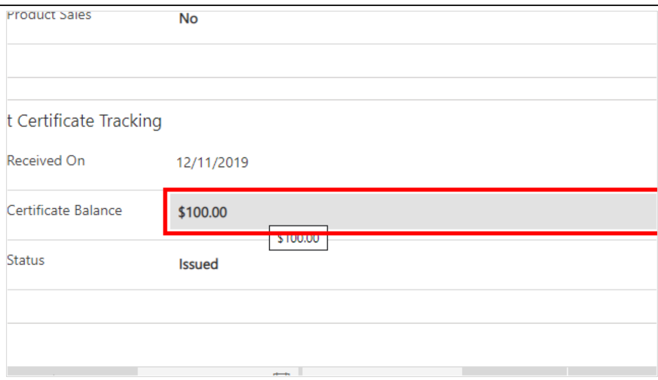
Click on **Received On**



This is an optional field where you can enter the date the contact received the certificate

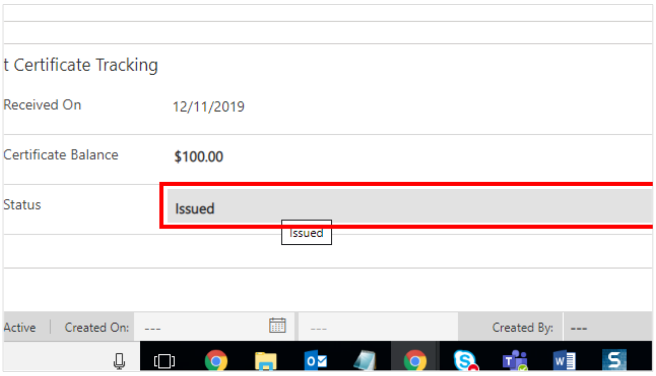


Certificate Balance is a system field that displays the amount remaining on the gift certificate. For unused certificates, this will be the amount of the issued certificate.



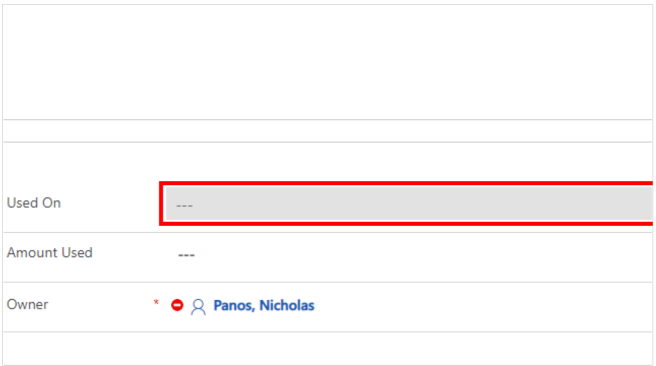
Once used: -For a Use in Full certificate, the system displays $0. -For a Multiple Payments Allowed certificate, the system displays the remaining amount available.

Status is a system field that displays the status of the gift certificate. This will be updated by the system as the certificate is used. The values differ based on the payment option for the certificate

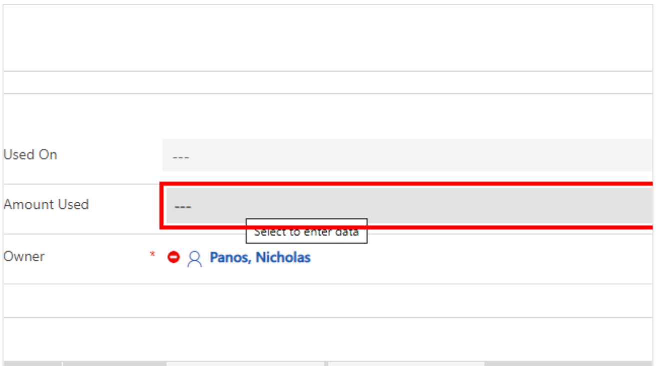


-Issued – Appears when the certificate is first issued. -Used – Indicates when a certificate with the Multiple Payments Allowed payment option has been used at least once but still has a balance available. -Cashed – Appears when the certificate balance is zero.

Used on is a system field that displays the most recent date that this gift certificate was applied to an invoice. For newly issued gift certificates, this field will be blank

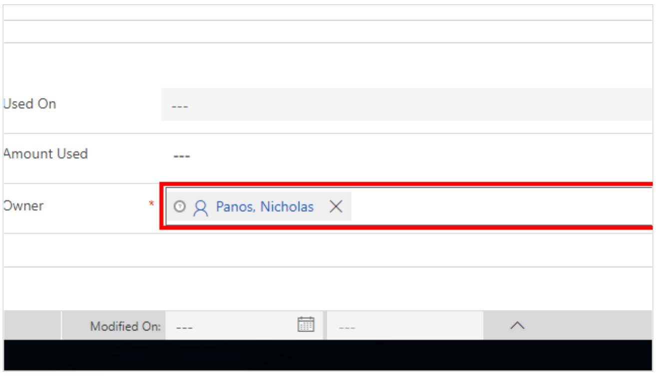


Amount Used field is blank until the gift certificate has been applied as a payment on an invoice

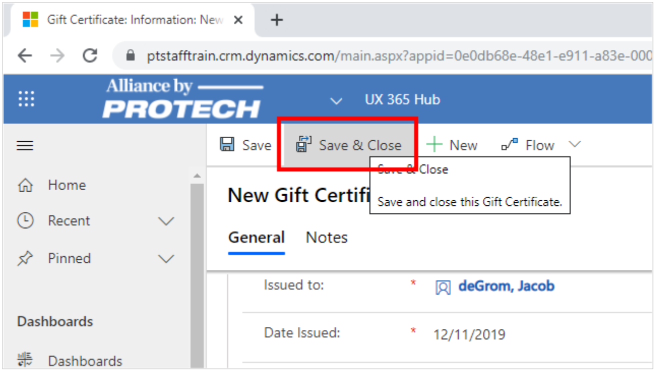


-For a Use in Full certificate, the system displays the original amount of the gift certificate, regardless of the amount applied to the invoice. For example, if the gift certificate has a value of $50, and it is applied to an invoice with a balance of $40, the Amount Used field will display $50. -For a Multiple Payments Allowed certificate, the system displays the total amount that has been applied to invoices. For example, if the gift certificate has a value of $50, and has been applied to one invoice with a balance of $40, the Amount Used field will display $40

The Owner field displays the user ID of the user who created this record



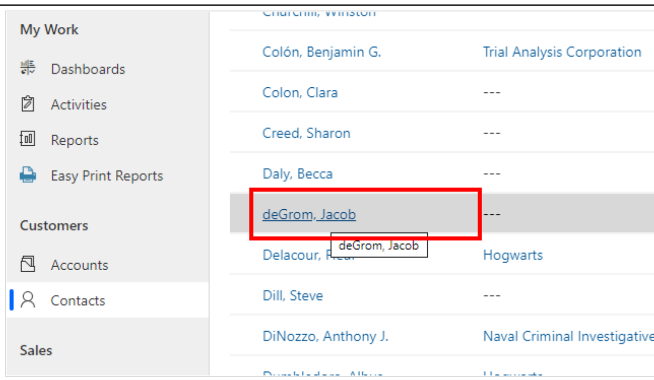
Click on the menu item **Save & Close**



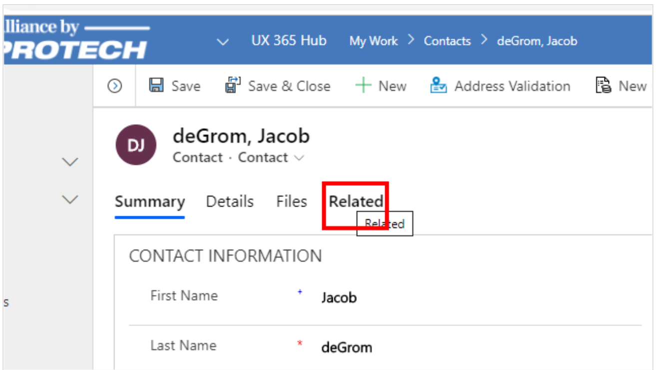
1.10.2. Issuing a Gift Certificate to a contact through the Contact Record

Click on the item **Contacts**

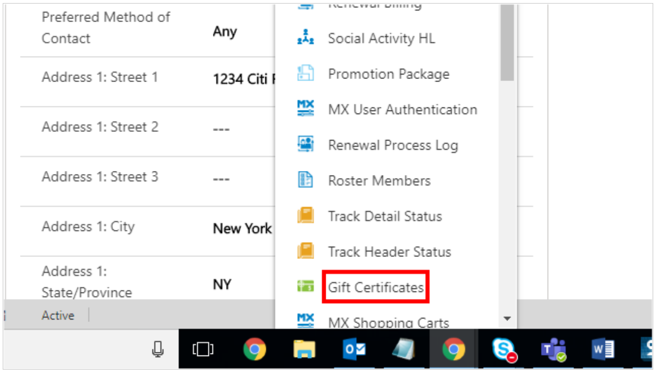
Click on the link in cell **Full Name**



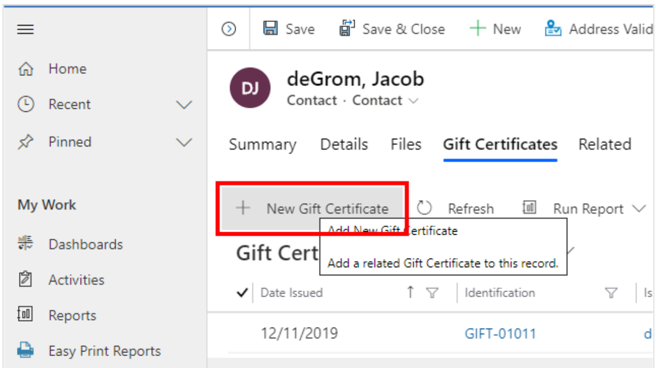
Click on the item **Related**



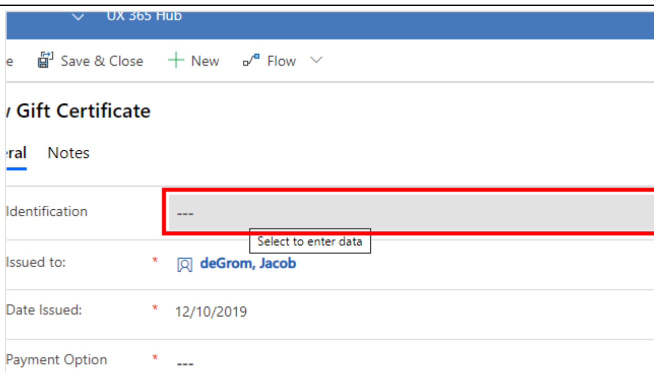
Click on the menu item **Gift Certificates**

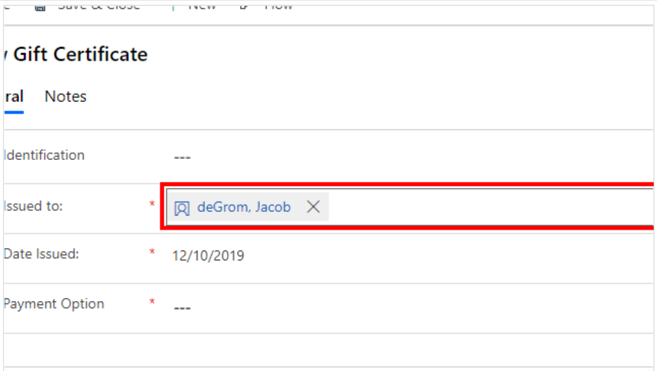
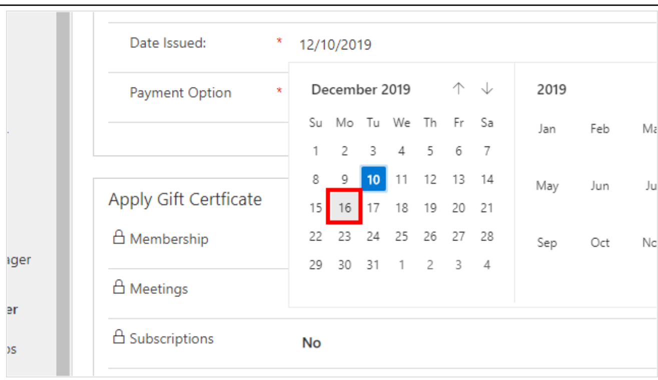
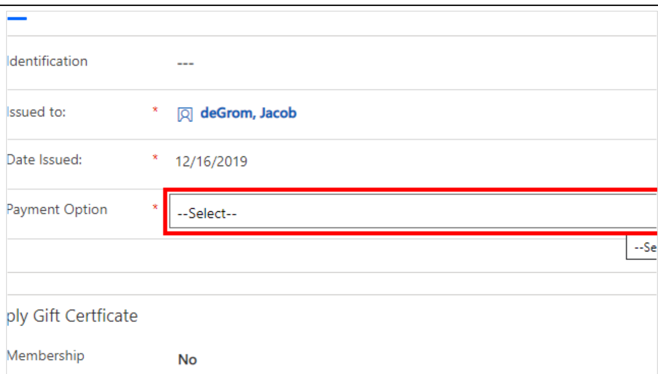


Click on the menu item **Add New Gift Certificate**

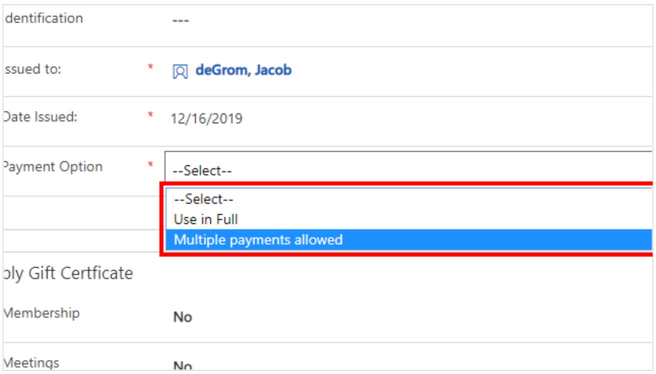


This is the Identification Field, If your system is set up for manually numbered gift certificates, enter an alphanumeric ID for this gift certificate. If your system is set up to automatically number gift certificates; this field is disabled and an ID number will appear when you save this record

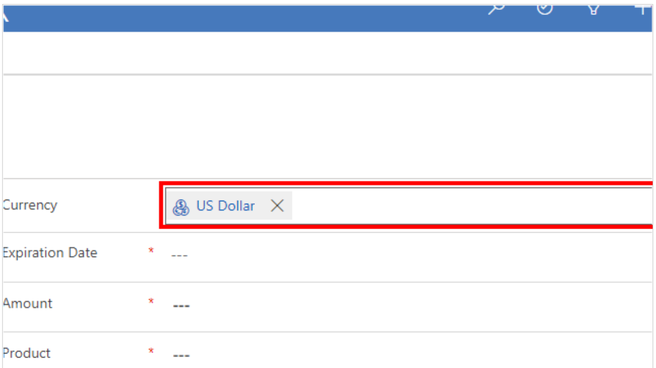


Notice the Contact Name is already populated in the Issued to field	
Click on Date Issued	
Enter the date that this gift certificate was issued	
Click on the field **Payment Option**	

Select Use in Full if this gift certificate can only be used one time, select Multiple Payments Allowed if this gift certificate can be used for multiple payments

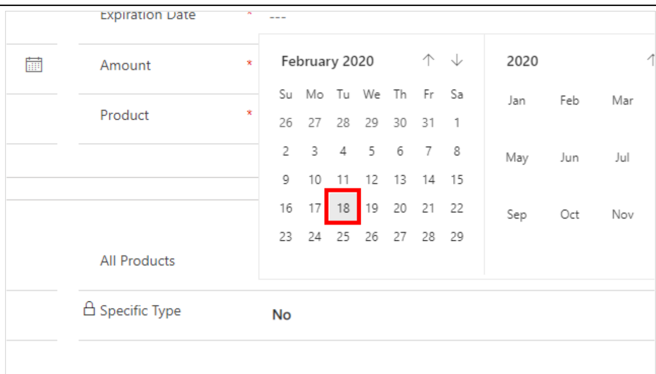


This is the Currency field, If necessary, click the Lookup button to select the appropriate currency for this gift certificate

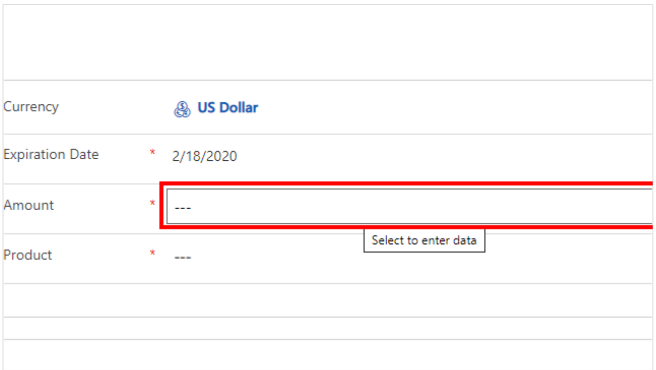


Click on **Expiration Date**

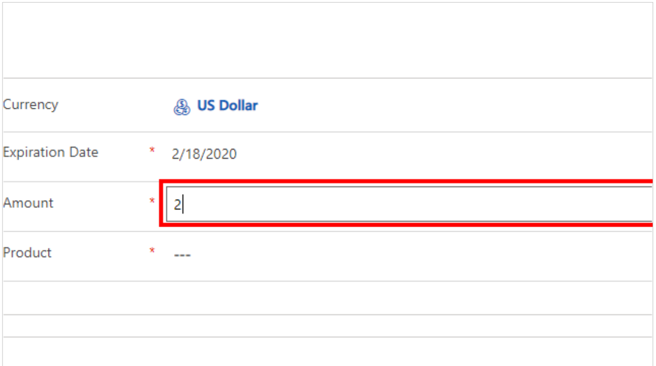
Enter the date that this gift certificate will expire. On this date, the gift certificate will no longer be available for use



Click on the text field **Amount**

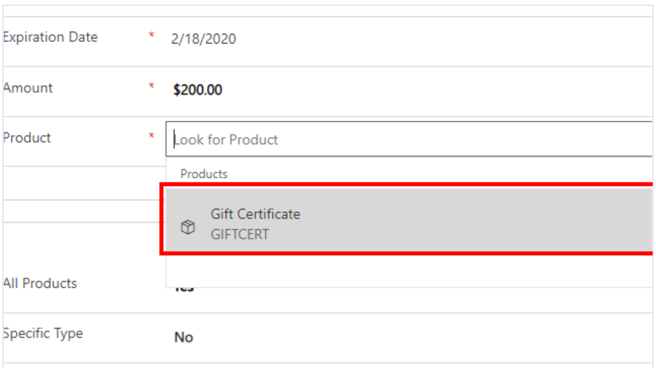


Enter the amount of the gift certificate

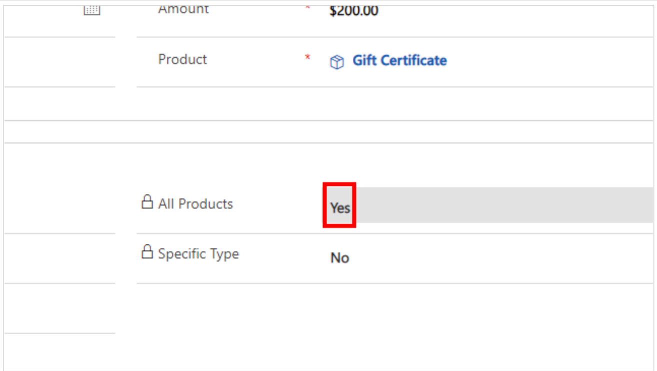


Click the Lookup button to search the payment product for this gift certificate

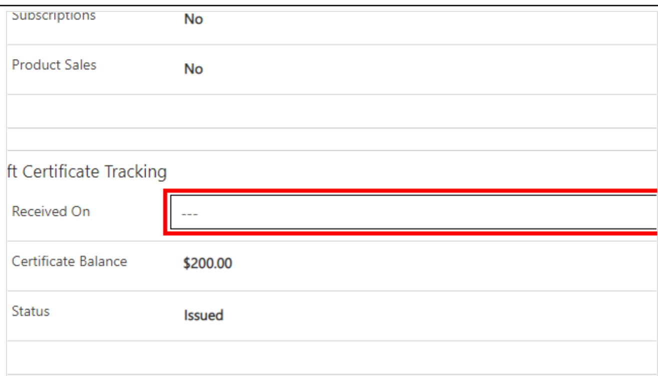
Select the payment product for this gift certificate



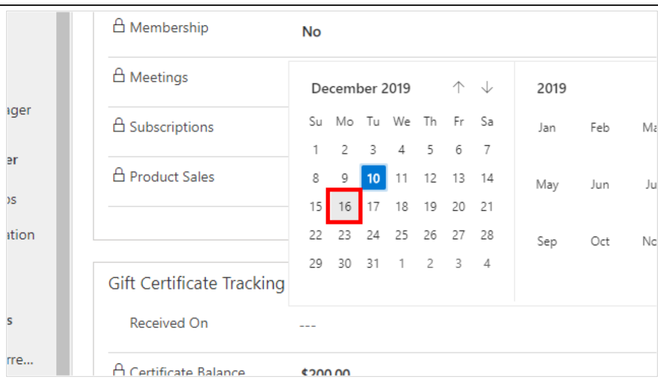
This field gives you the option to select what you would like to be applicable for this gift certificate. You can either Select 'YES' for all products or select a combination of membership,meetings,subscriptions and product sales.



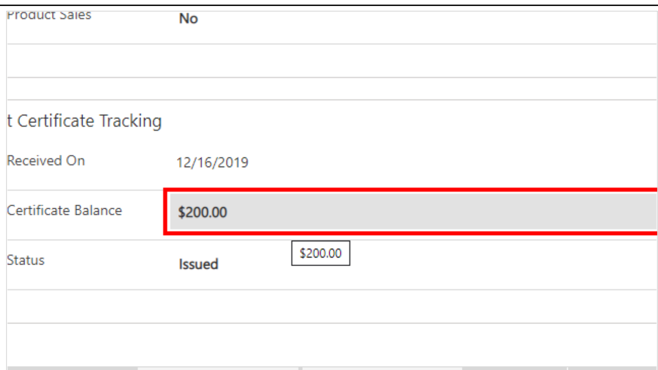
Click on **Received On**



This is an optional field where you can enter the date the contact received the certificate

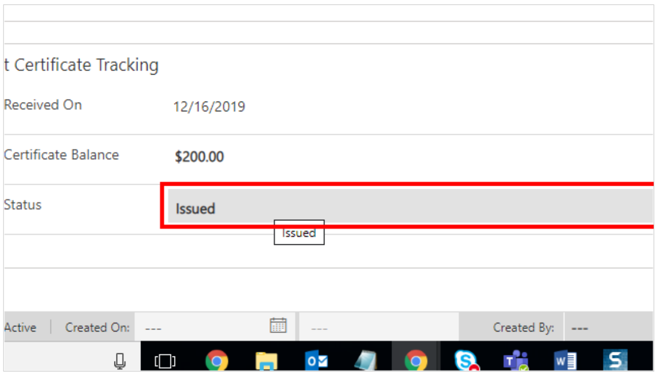


Certificate Balance is a system field that displays the amount remaining on the gift certificate. For unused certificates, this will be the amount of the issued certificate



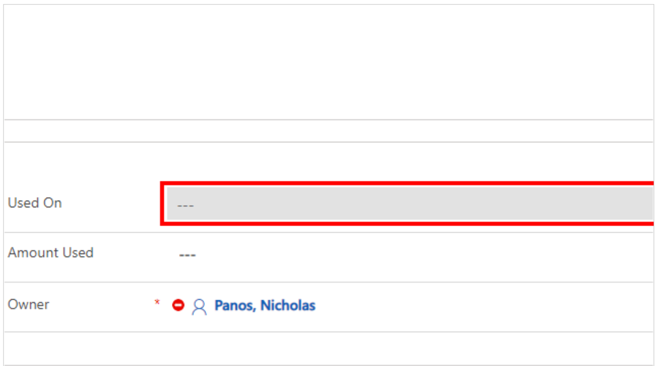
Once used: -For a Use in Full certificate, the system displays $0. -For a Multiple Payments Allowed certificate, the system displays the remaining amount available.

Status is a system field that displays the status of the gift certificate. This will be updated by the system as the certificate is used. The values differ based on the payment option for the certificate

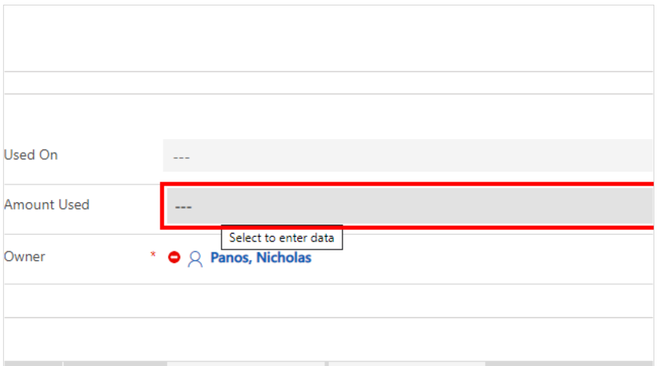


-Issued – Appears when the certificate is first issued. -Used – Indicates when a certificate with the Multiple Payments Allowed payment option has been used at least once but still has a balance available. -Cashed – Appears when the certificate balance is zero.

The Used On is a system field that displays the most recent date that this gift certificate was applied to an invoice. For newly issued gift certificates, this field will be blank

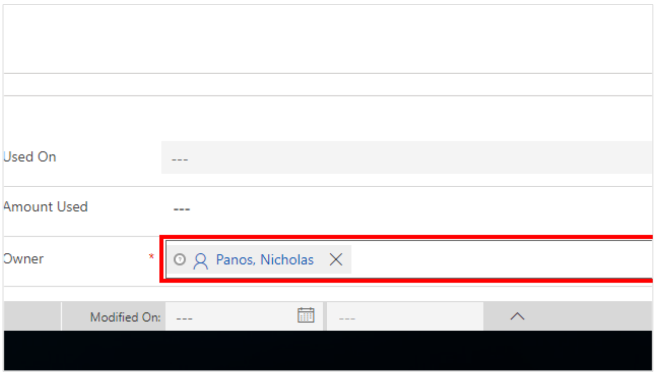


The Amount Used field is blank until the gift certificate has been applied as a payment on an invoice

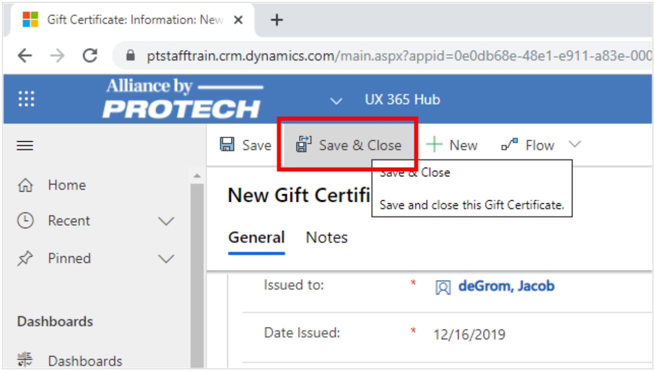


-For a Use in Full certificate, the system displays the original amount of the gift certificate, regardless of the amount applied to the invoice. For example, if the gift certificate has a value of $50, and it is applied to an invoice with a balance of $40, the Amount Used field will display $50. -For a Multiple Payments Allowed certificate, the system displays the total amount that has been applied to invoices. For example, if the gift certificate has a value of $50, and has been applied to one invoice with a balance of $40, the Amount Used field will display $40

The Owner field displays the user ID of the user who created the record

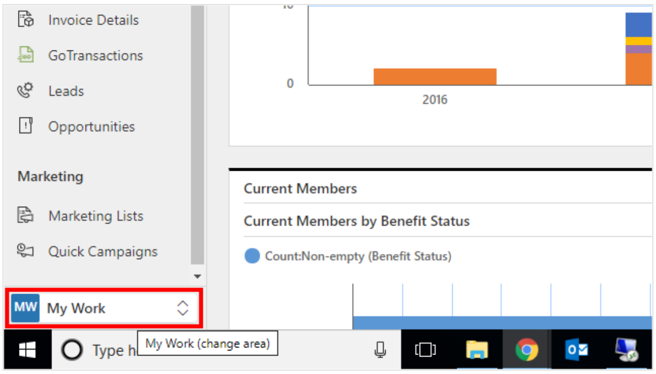


Click on the menu item **Save & Close**

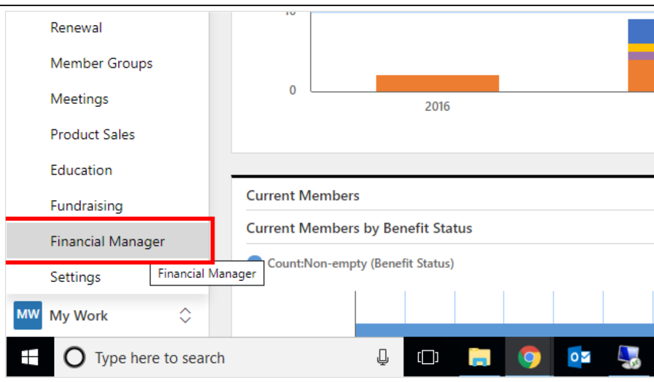


1.11. Posting a Batch

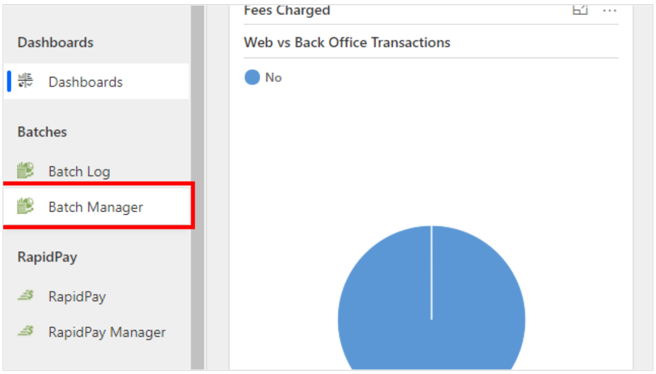
Click on the button **My Work**



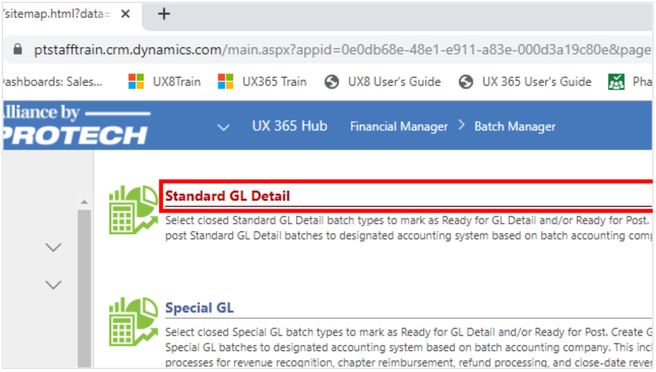
Click on the item **Financial Manager**



Click on the item **Batch Manager**

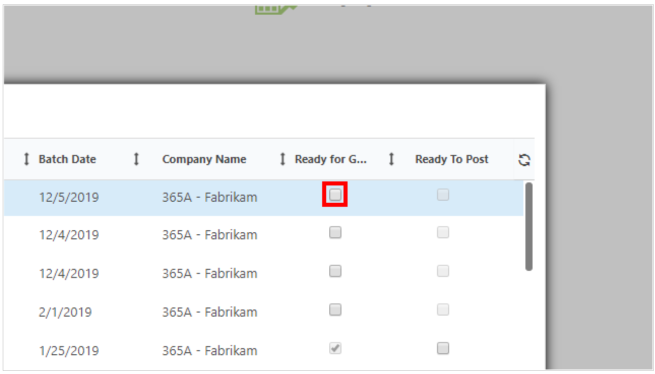


Click on **Standard GL Detail**

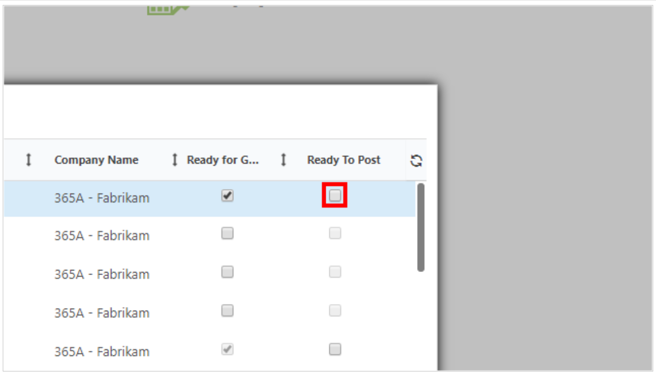


Selecting Standard GL Detail will open a new window listing closed batches where batch type = Standard GL Detail that have not been processed for GL Detail and/or Post to Accounting.

Click on the checkbox **Ready for GL Detail**



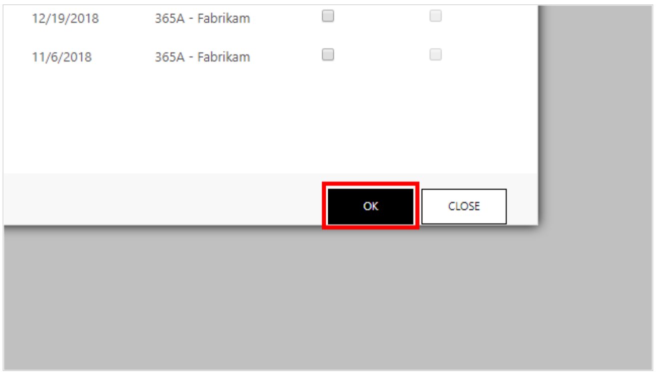
Click on the checkbox **Ready to Post**



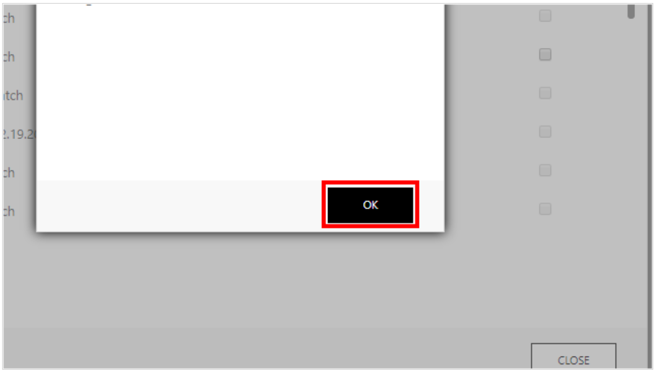
If GL detail has already been created for this batch, the GL Detail Created field will be checked. If it has not been created, you must mark the Ready for GL Detail checkbox before you mark the Ready to Post checkbox.

Select OK to initiate the process. After the process is complete, select Close to close the processing window.

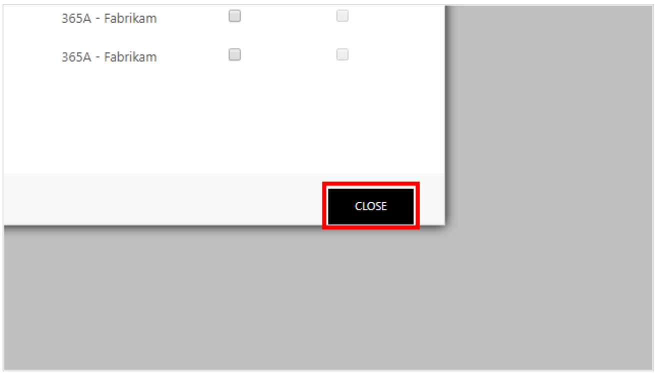
Click on the button **OK**



Click on the button **OK**

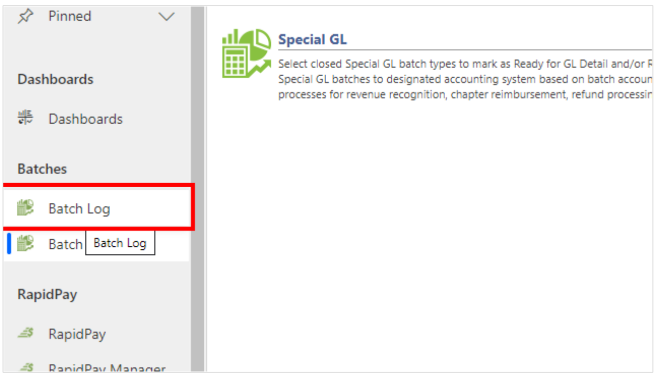


Click on the button **CLOSE**

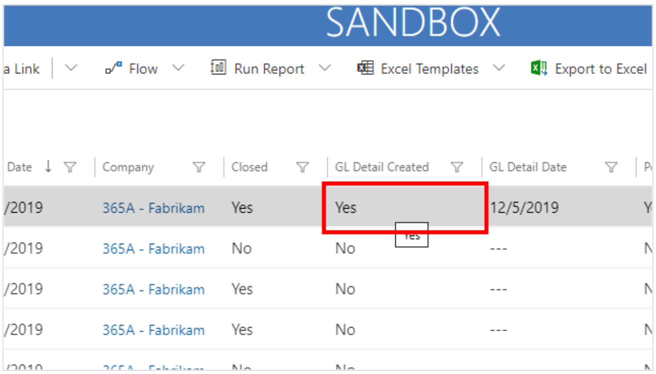


Upon completion, the system will update the batch fields Posted = Yes and Posted Date = [system date].

Click on the item **Batch Log**



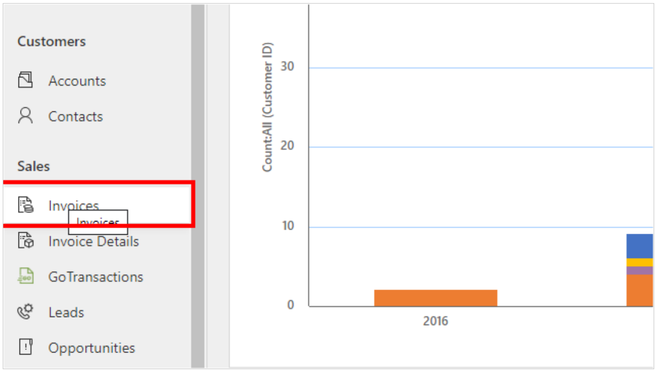
Note that the GL Detail Created and Posted flags are set to Yes and the GL Detail and Posted Dates are updated.



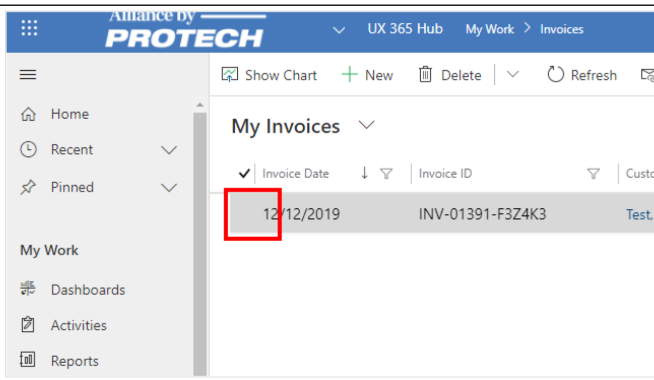
1.12. Processing Write Off Transactions

From any of the UX work areas on the Navigation Tile Bar, click Invoices.

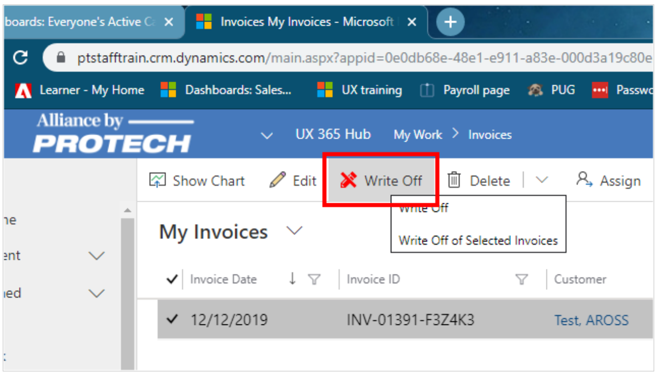
Click on the item **Invoices**



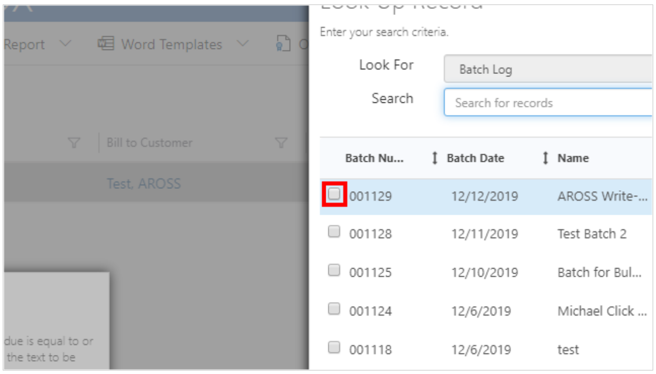
In the Invoices list, locate the invoices that you want to write off, and click to select them. (To select multiple invoices, hold the Ctrl key while clicking the invoices.)



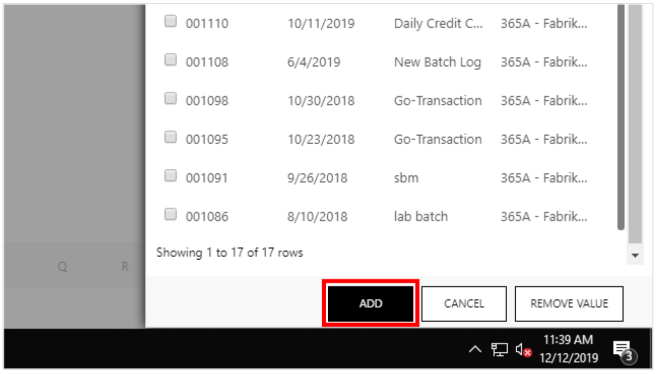
Click on the menu item **Write Off**



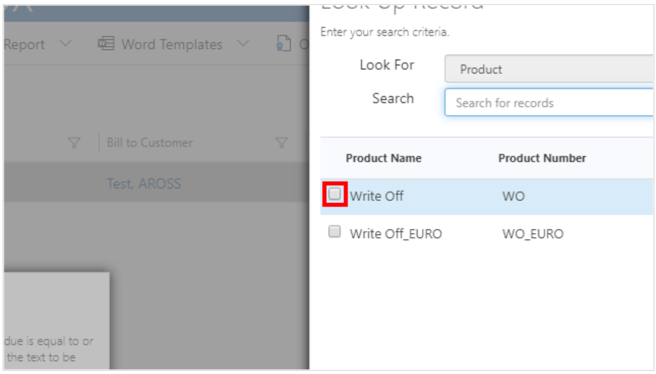
In the Invoice Write-off dialog, select the batch you want to use for the write-off transactions that will be created in the selected invoices. Protech recommends a separate batch used only for this process.



Click on the button **ADD**

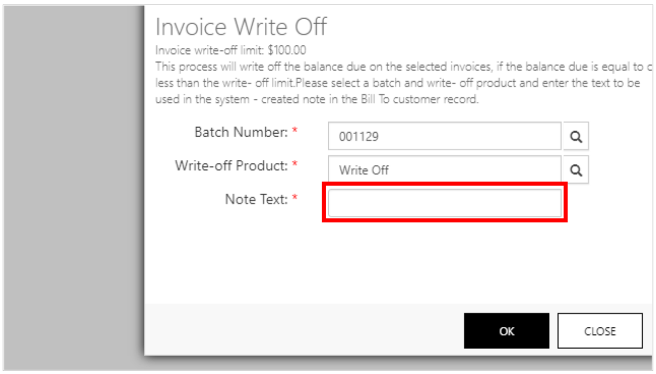


Select the write-off payment product to use.

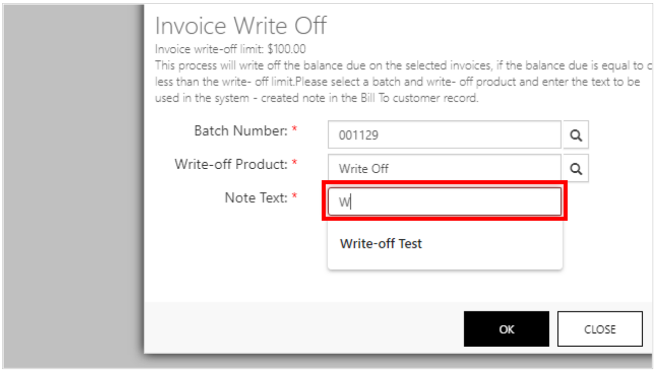


Click on the button **ADD**

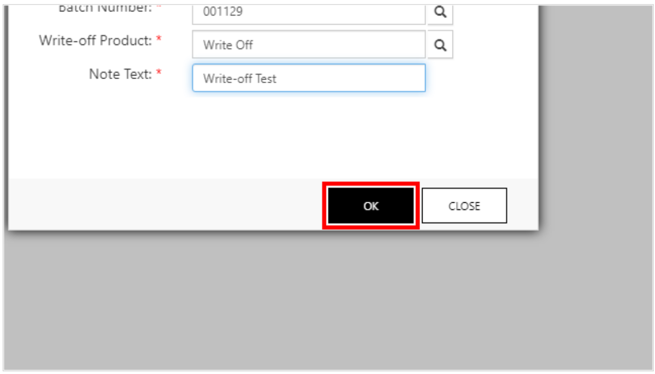
Enter the text that will appear as a note on the Bill To Customer for each of the invoices you have selected.



Enter the Note text here

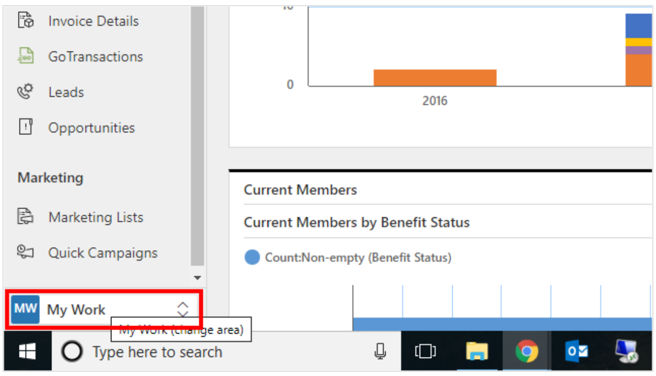


Click on the button **OK**

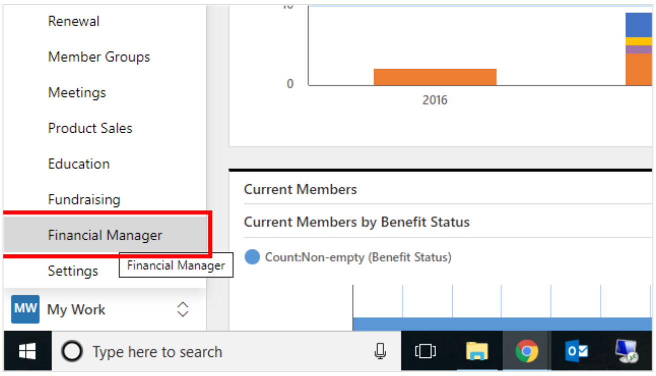


1.13. Rapid Pay Processing

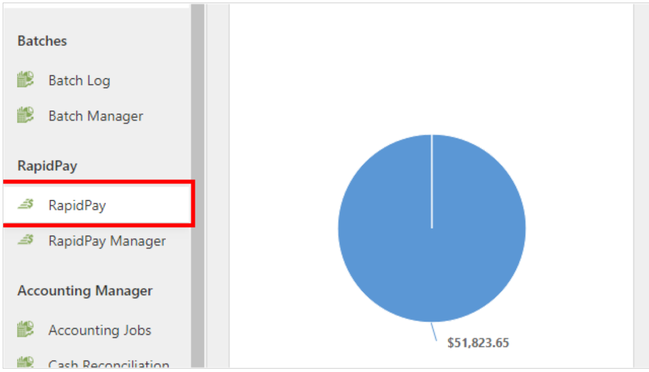
Click on the button **My Work (change area)**



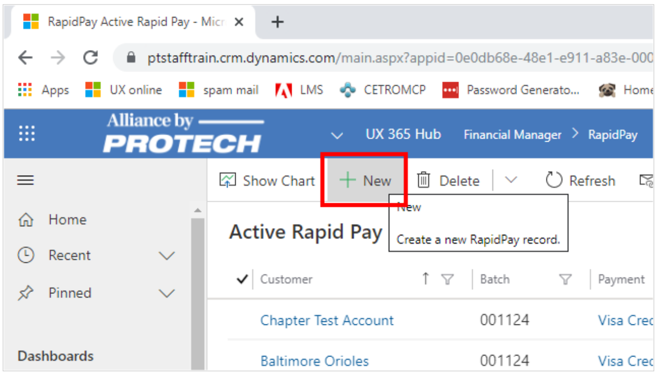
Click on the item **Financial Manager**



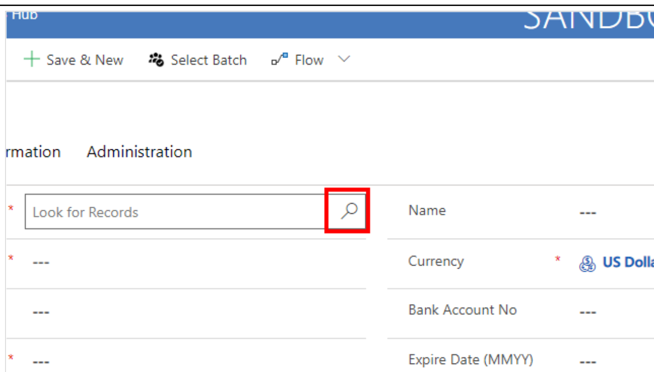
Click on the item **RapidPay**



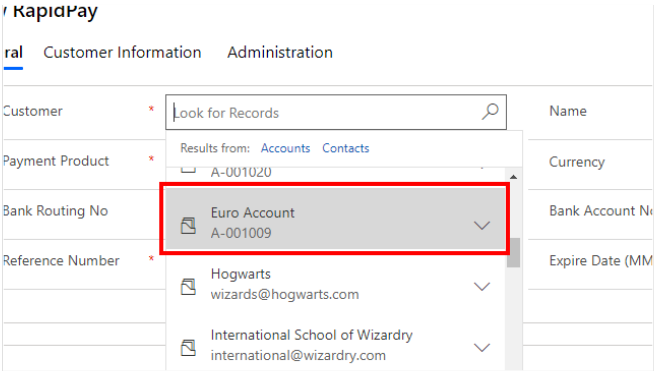
Click on the menu item **New**



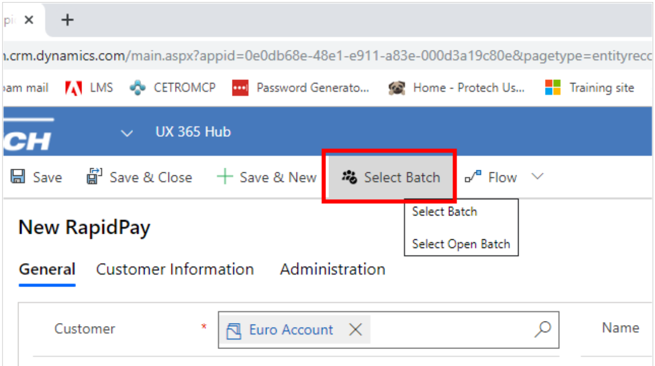
Click on the link **Search All Records**



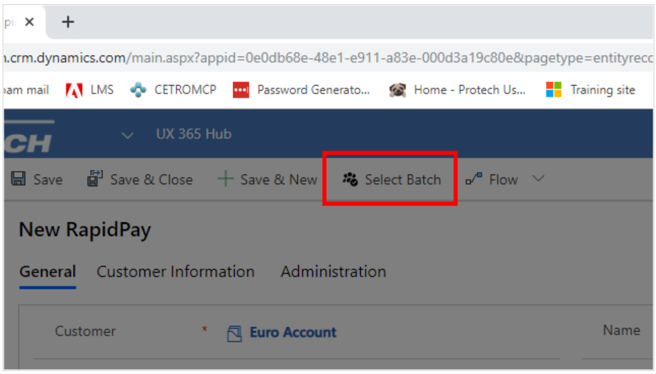
Select the customer



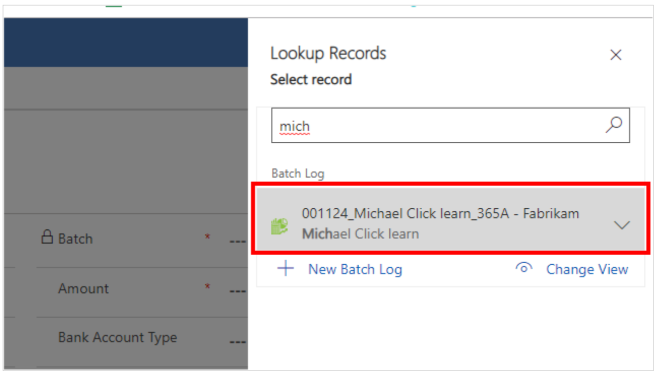
Click on the menu item **Select Batch**



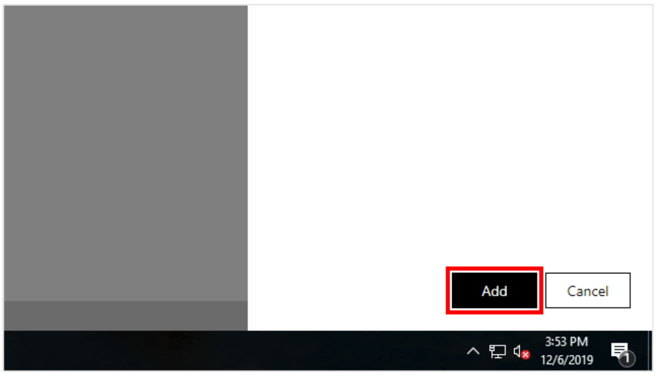
Enter the name of the batch you would like to use



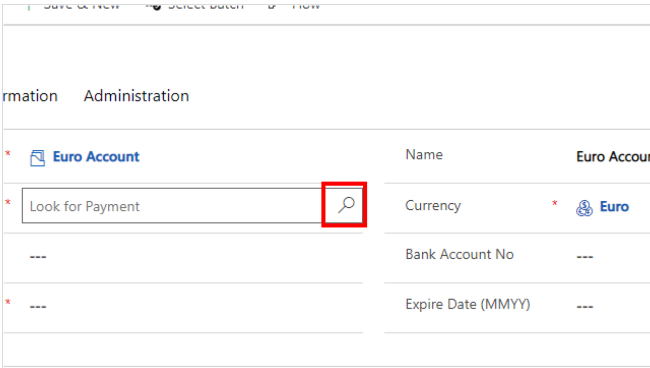
Click on the desired batch



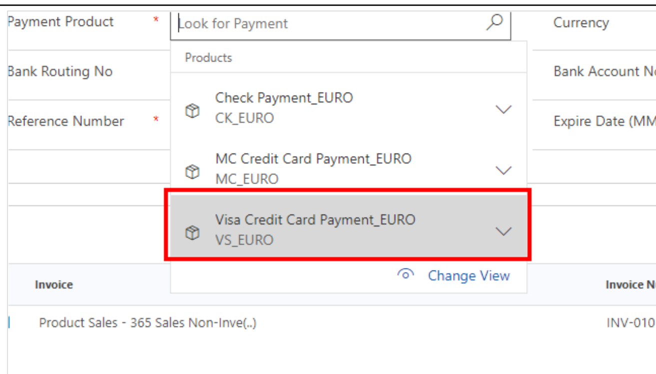
Click on the button **Add**



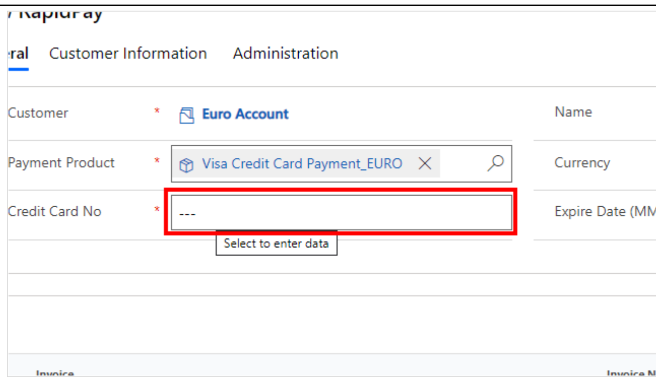
Click on the payment products look up



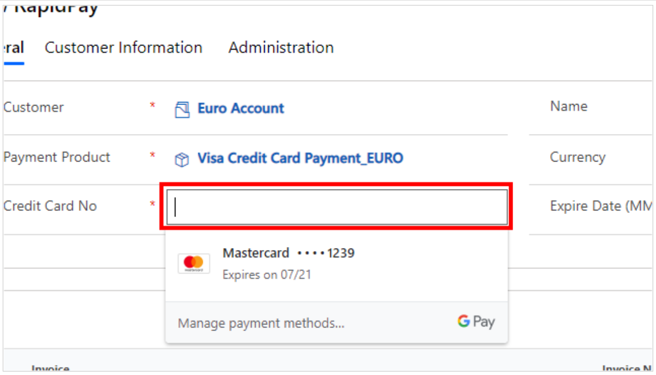
Select payment type



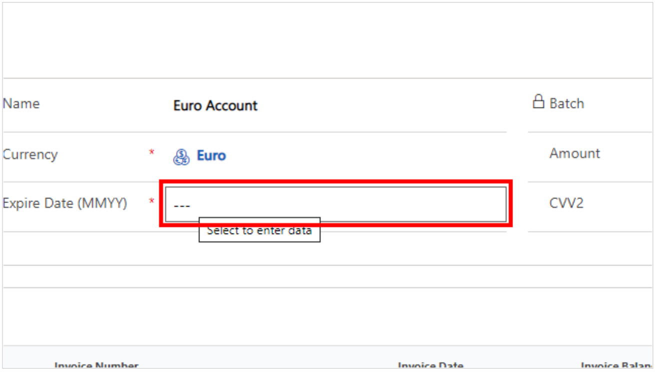
Click on the field Credit Card Number



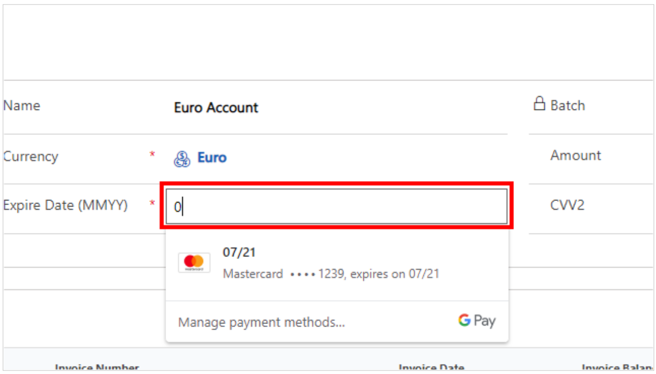
Enter CC Number



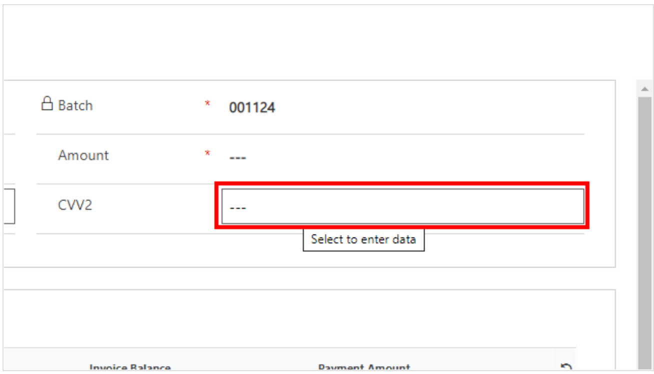
Click on the Expiration Date



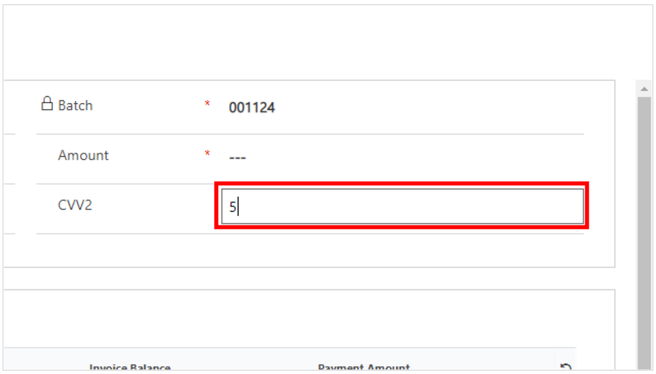
Enter Date



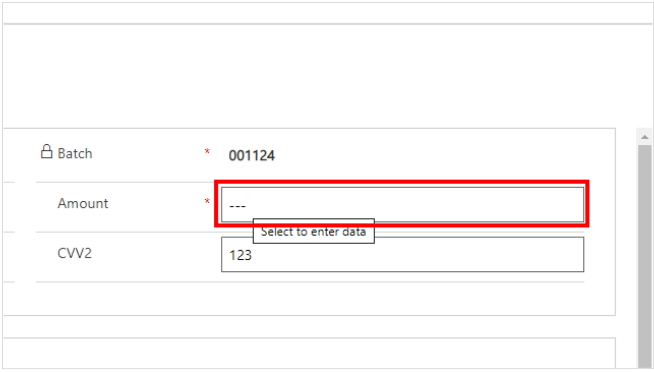
Click on the CVV2 field



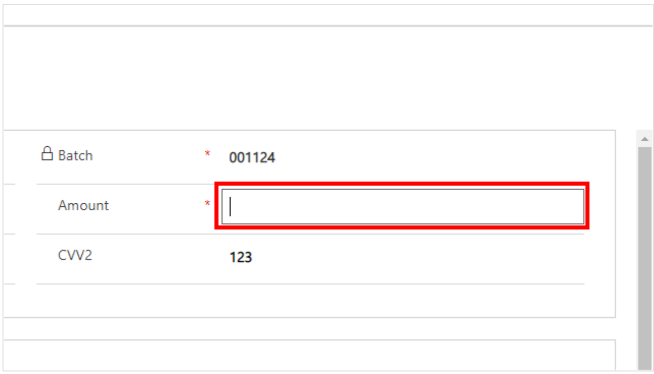
Enter security code



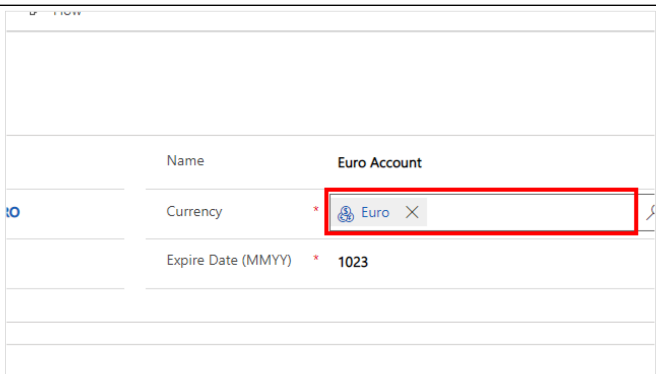
Click on amount field



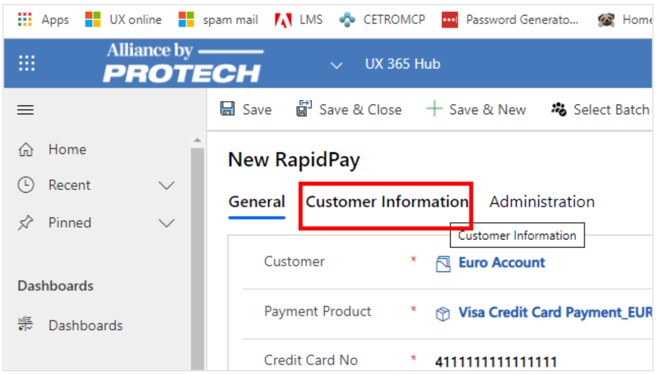
Enter payment amount



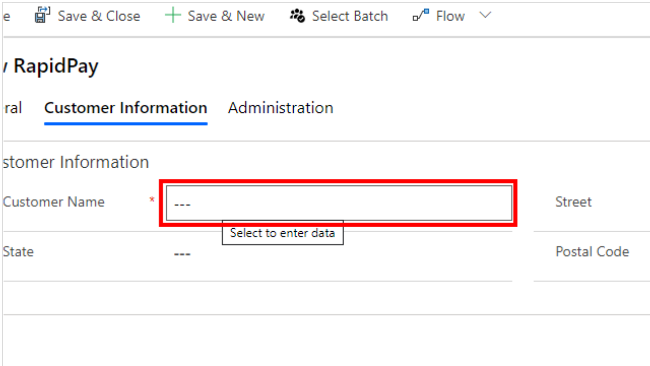
Make sure you are using the correct currency.



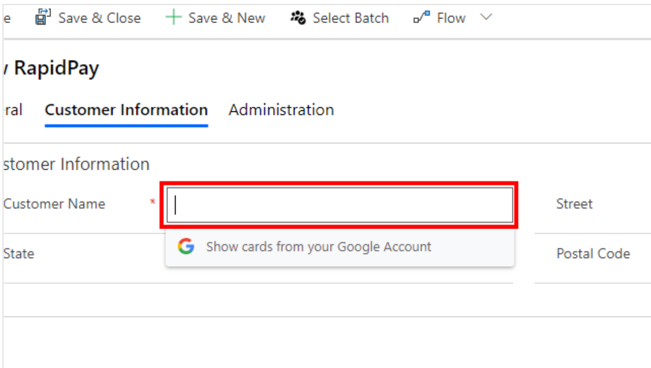
Click on the item **Customer Information**



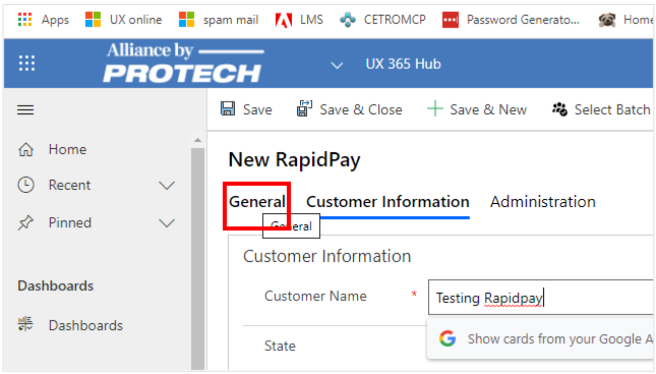
Click on the customer name field.



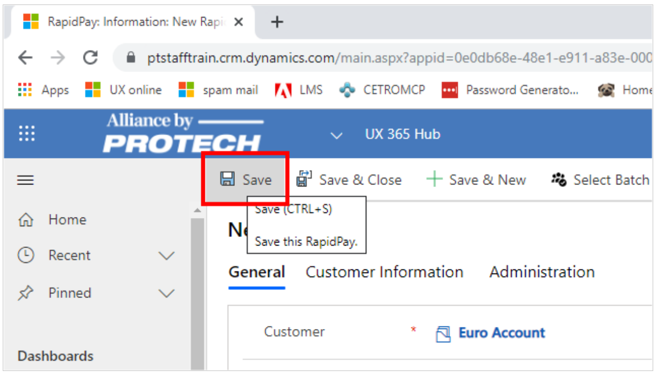
Enter customer name



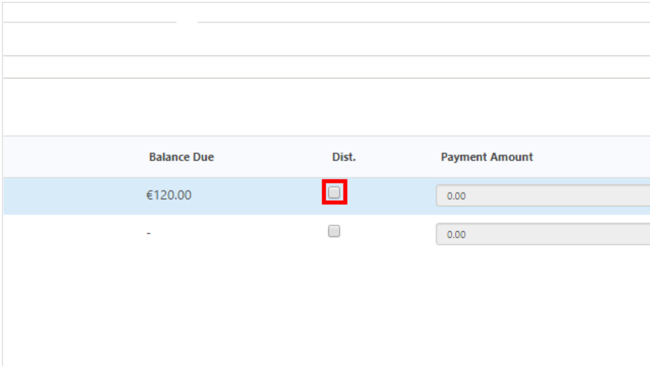
Click on the item **General**



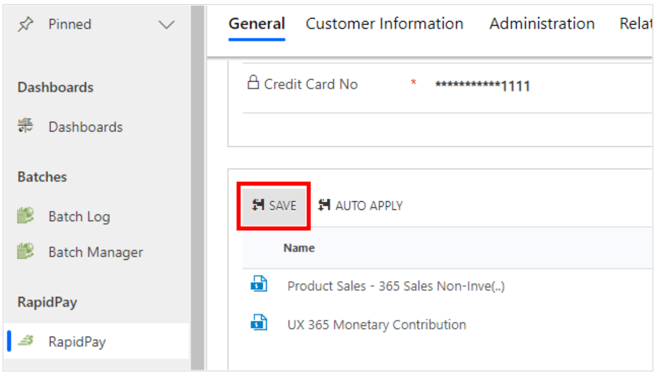
Click on the menu item **Save**



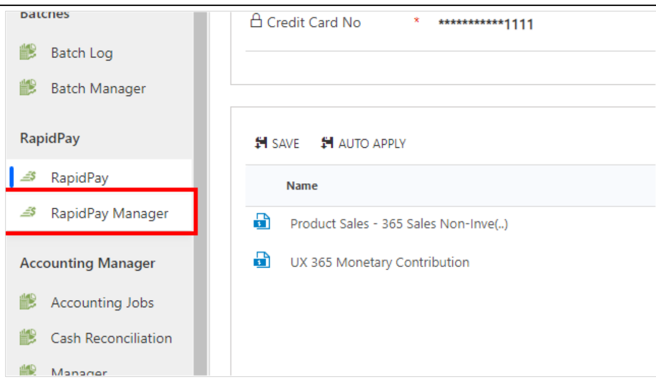
Select the invoices you would like to pay



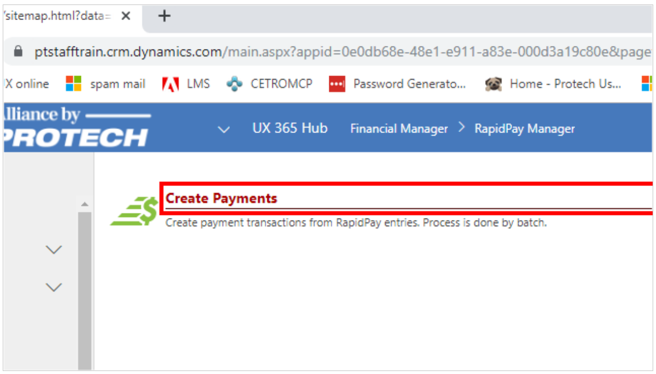
Click on **SAVE**



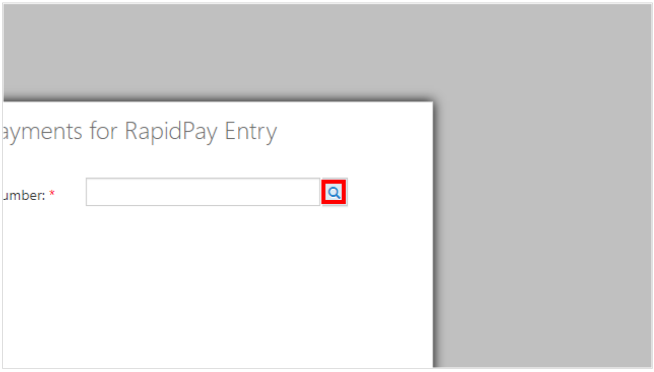
Click on the item **RapidPay Manager**



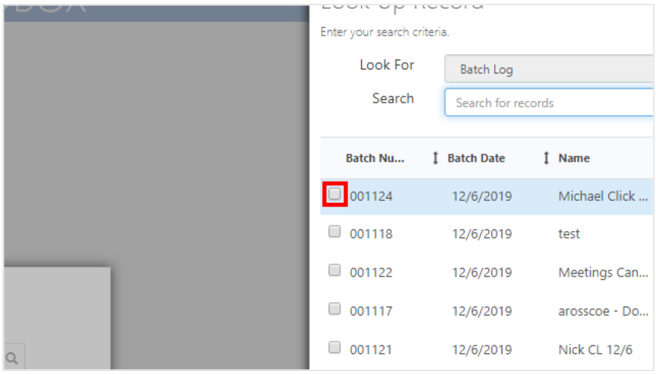
Click on **Create Payments**



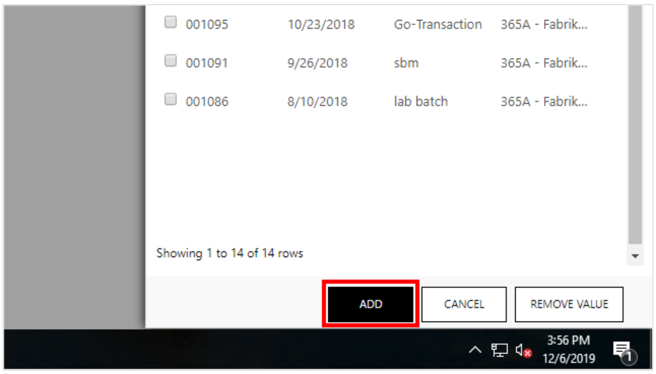
Select the batch you used when creating the new Rapid pay process



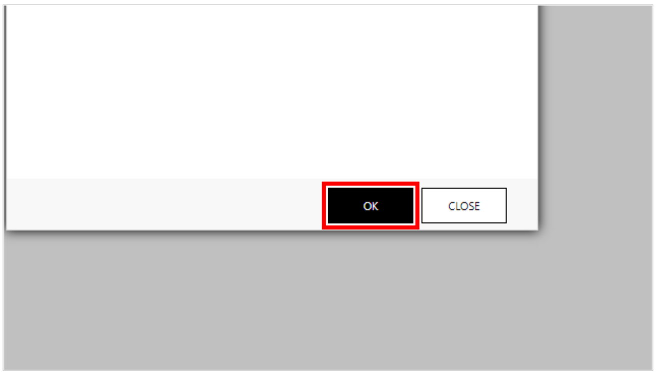
Click on the checkbox **on**



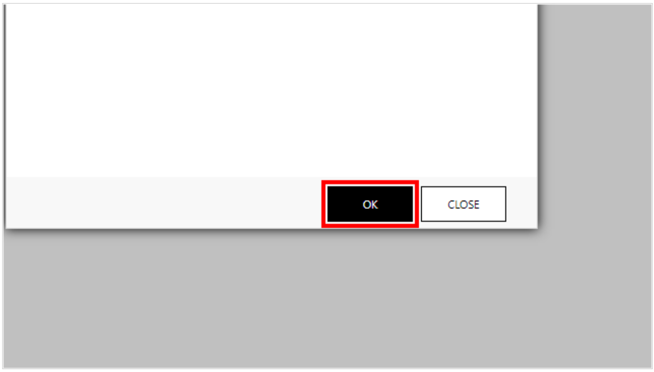
Click on the button **ADD**



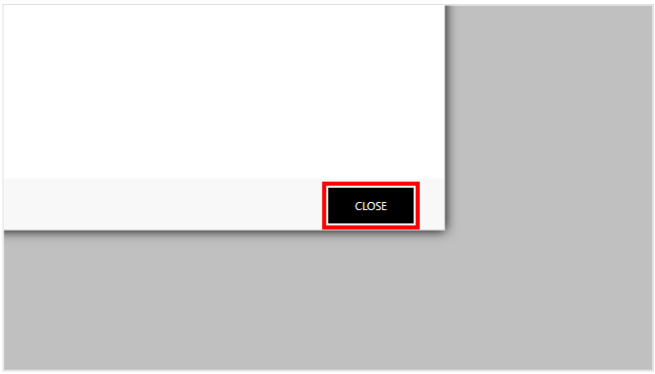
Click on the button **OK**



Click on the button **OK**



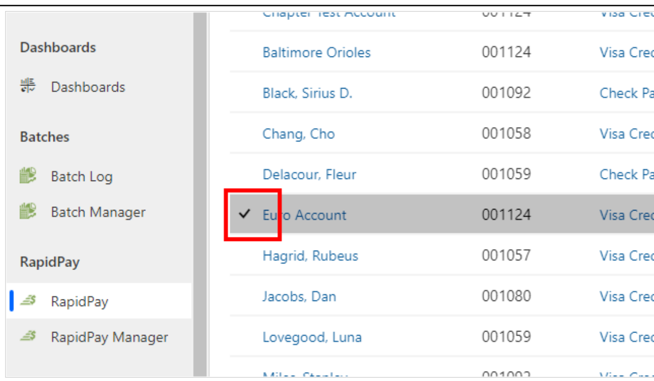
Click on the button **CLOSE**



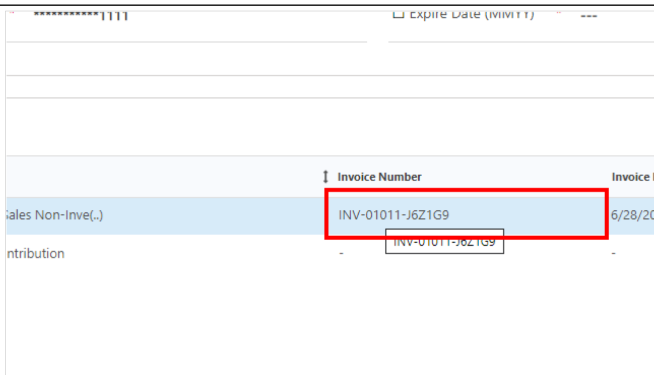
Click on the item **RapidPay**

Check to see the payment has been created successfully.

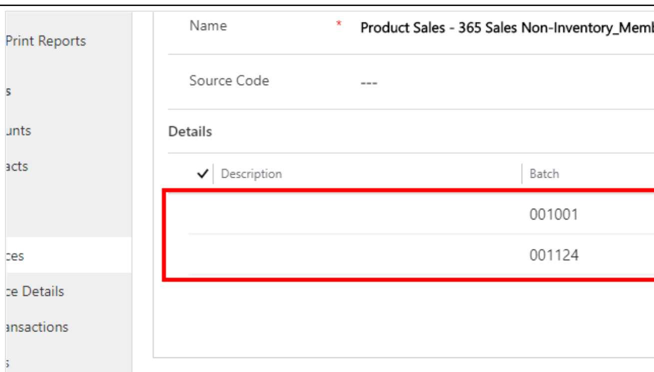
Double click on the Rapidpay line item



Review invoices paid



Move the mouse to **Invoice Detail Transactions**

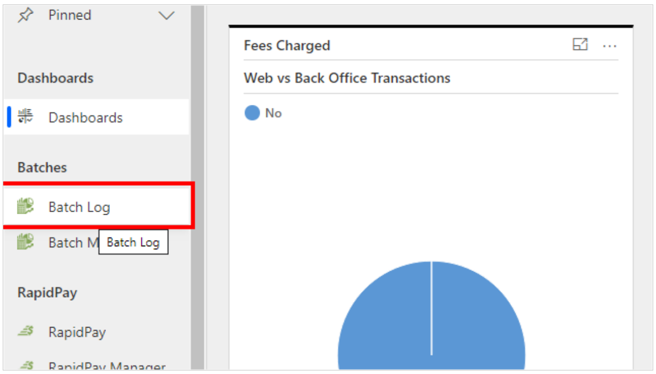


1.14. Resetting a Posted Batch

IMPORTANT: If the batch has been posted to your accounting system, you must address the batch from within your accounting system. If the batch has not been posted within your accounting system, delete it. If you have already posted the batch within your accounting system, you must void or reverse the transactions in that batch.

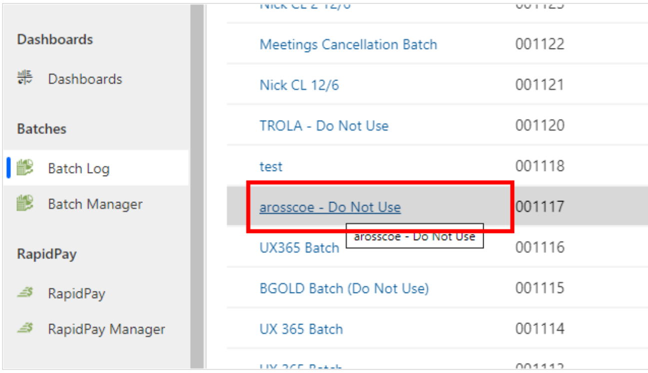
In the Navigation Tile Bar, select the Financial Manager work area > Accounting Manager > Batch Management > Batch Log to view a list of batch log records. This View will open in a new window.

Click on the item **Batch Log**



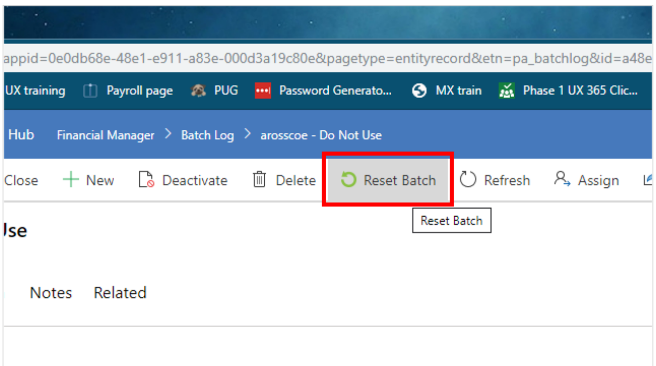
In the Batch Log list, locate and open the batch log record you want to reset. The batch log record will open in a new window.

Click on the link in cell **Name**

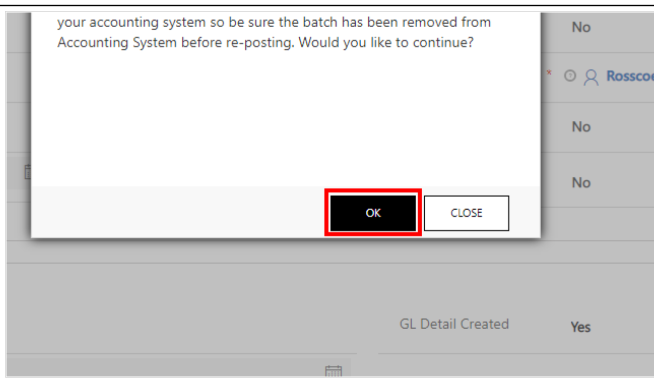


In the batch log record, select Reset Batch on the Record toolbar.

Click on the menu item **Reset Batch**

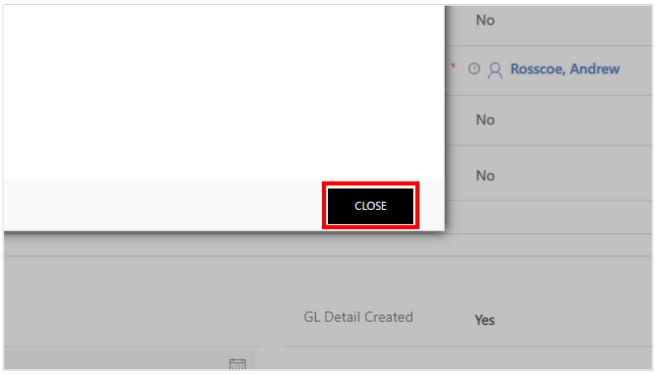


Click on the button **OK**



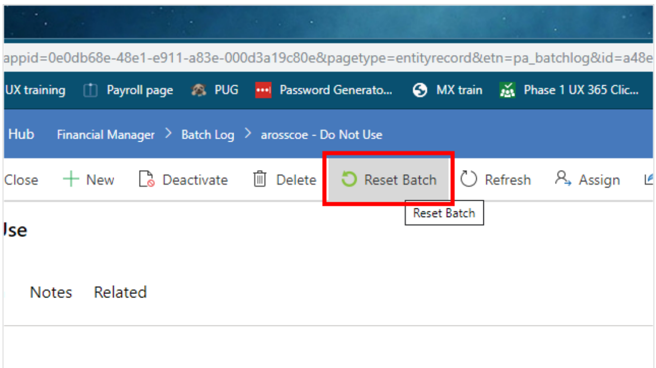
The Posted option will be reset to No, but the GL Detail Created option will still be Yes.

Click on the button **CLOSE**

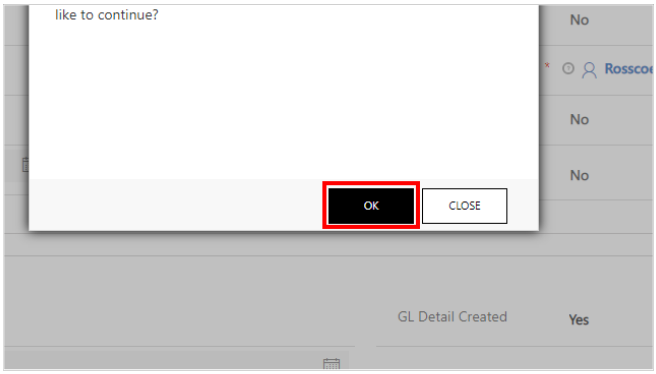


You must reset the batch again before you will be able to correct the transaction error.

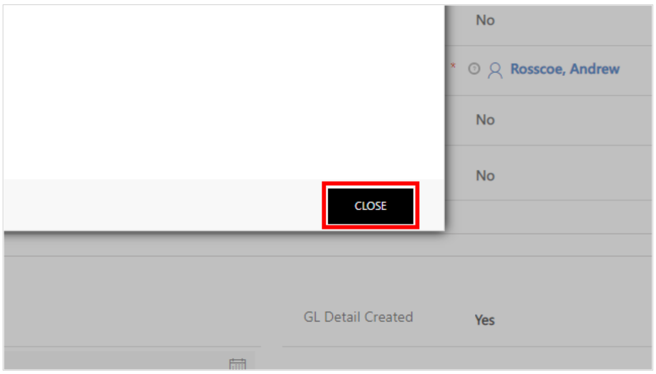
Click on the menu item **Reset Batch**



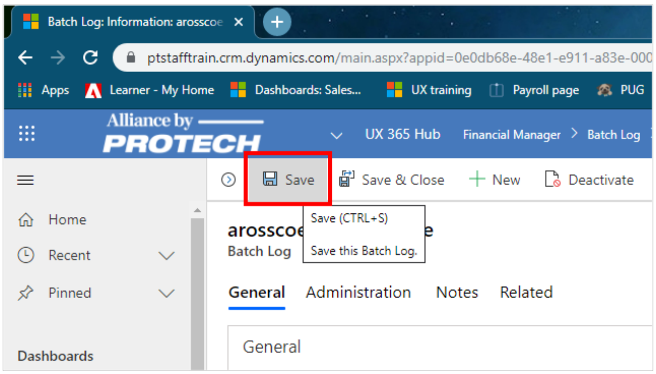
Click on the button **OK**



Click on the button **CLOSE**



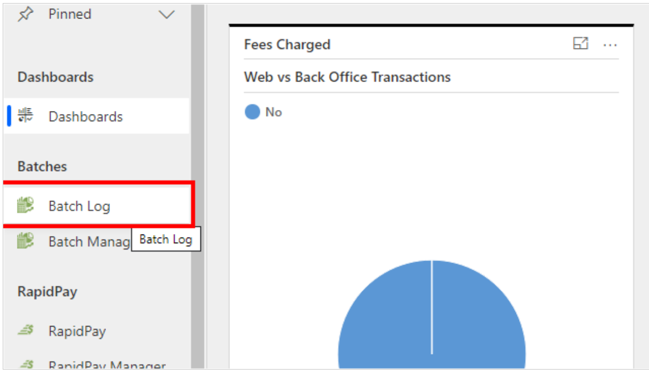
Click on the menu item **Save (CTRL+S)**



1.15. Resetting an Unposted Batch

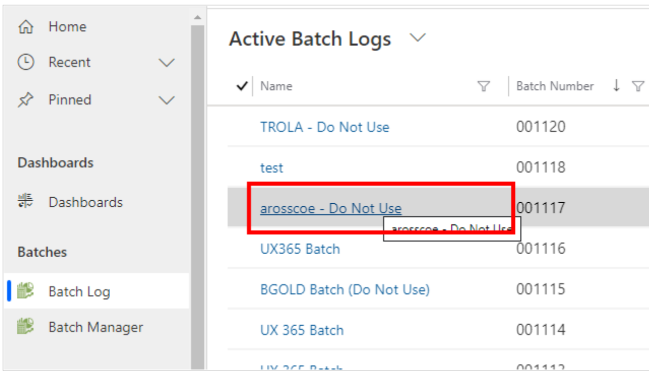
In the Navigation Tile Bar, select the Financial Manager work area > Accounting Manager > Batch Management > Batch Log to view a list of batch log records.

Click on the item **Batch Log**



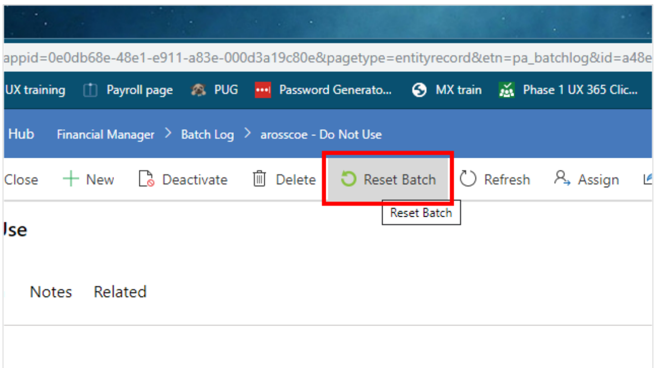
In the Batch Log list, locate and open the batch you want to reset. The batch log record will open in a new window.

Click on the link in cell **Name**

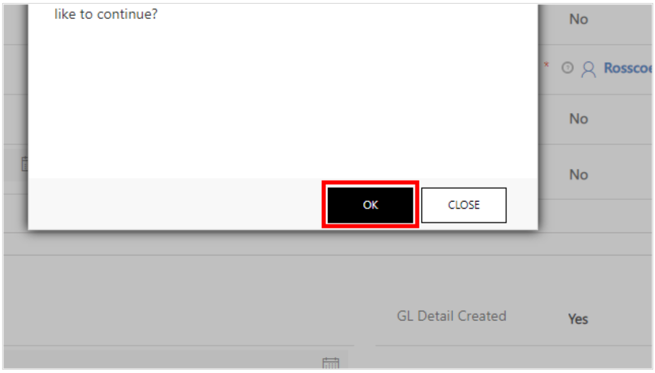


In the batch log record, select Reset Batch on the Record toolbar.

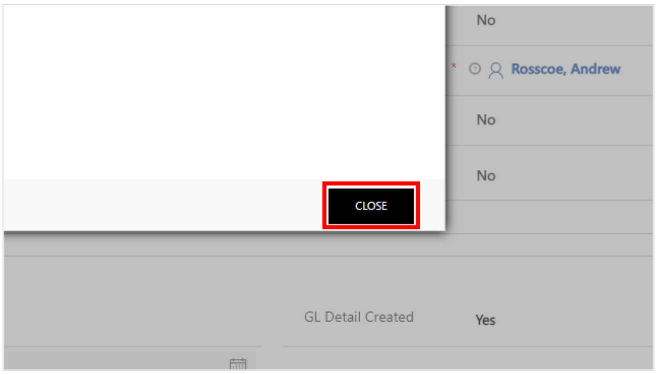
Click on the menu item **Reset Batch**



Click on the button **OK**

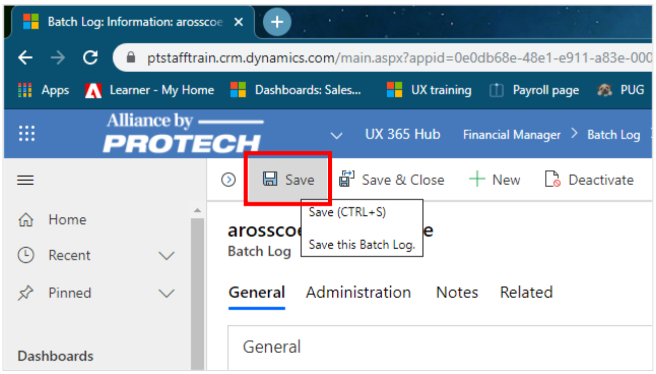


Click on the button **CLOSE**



The GL Detail Created option will reset to No. You can now unmark the Closed checkbox, make any necessary changes to the transactions in the batch, and then mark the batch as Closed. When you process the batch to create GL detail, the existing GL detail for this batch will be deleted and replaced with new, correct GL detail.

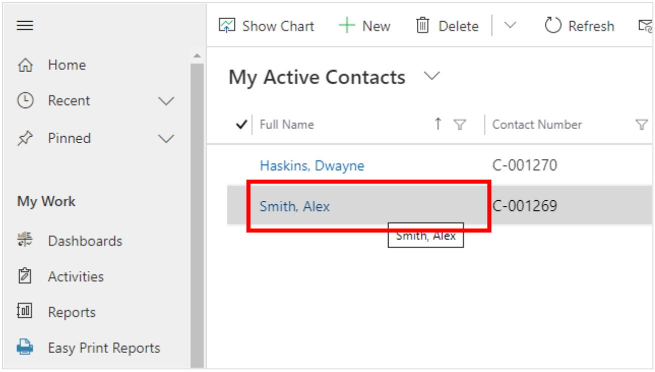
Click on the menu item **Save (CTRL+S)**



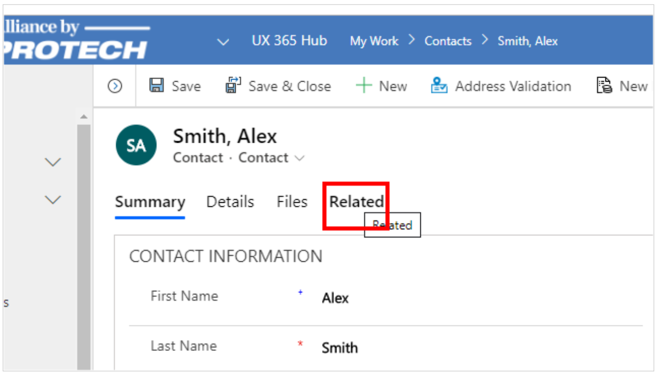
1.16. Transferring a Payment

Click on the item **Contacts**

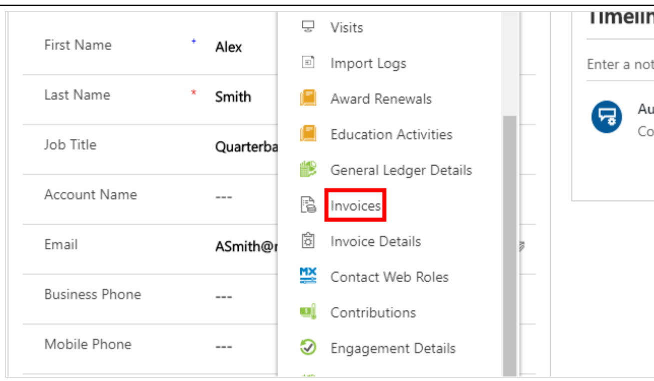
Click on the cell **Full Name**



Click on the item **Related**

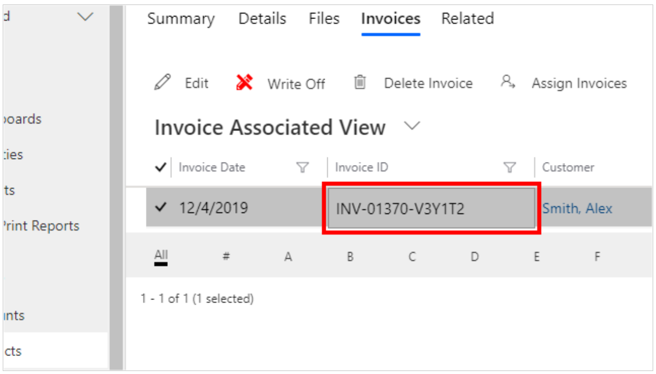


Click on the menu item **Invoices**

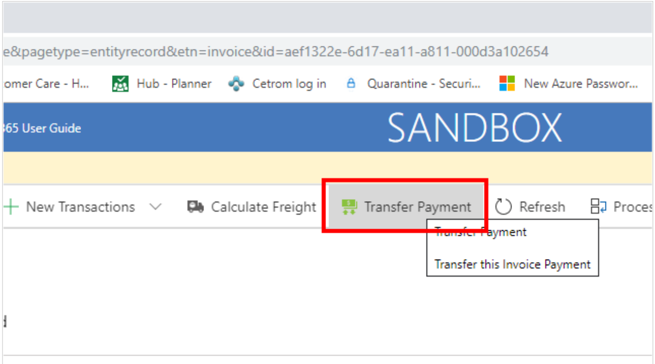


Locate and open the appropriate invoice. If you have not already selected your batch, select the appropriate open batch. You can open any invoice whether or not you are working in an open batch. However, to open invoice detail line items or make any changes to the invoice, you must be working in an open batch.

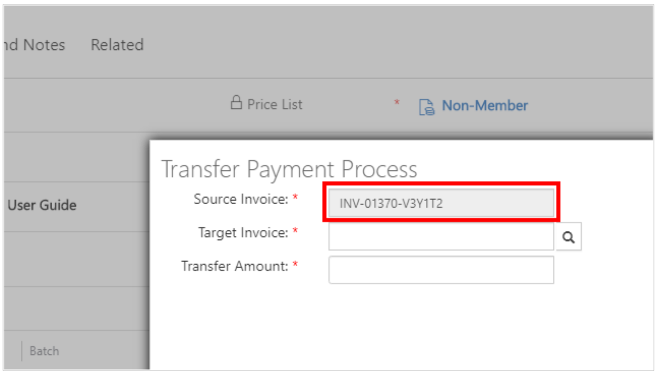
Double click on **Invoice ID**



Click on the menu item **Transfer Payment**

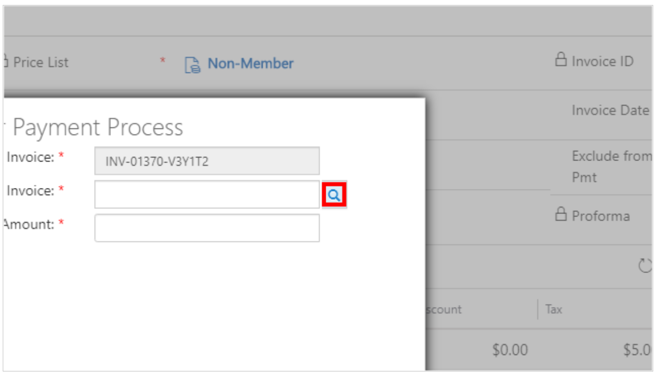


Transfer Payment Process

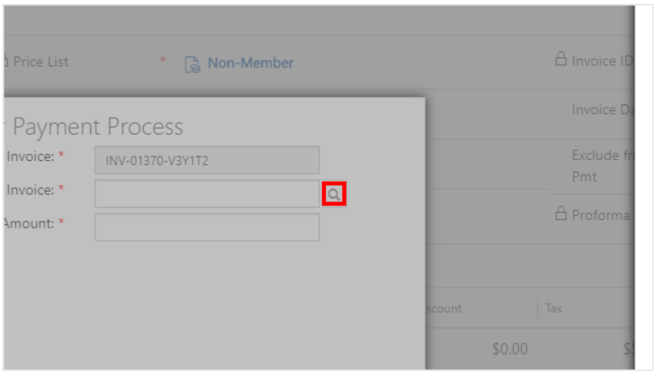


The Transfer Payment Process dialog appears, with the invoice number of the invoice you are transferring the payment from displayed in the Source Invoice field.

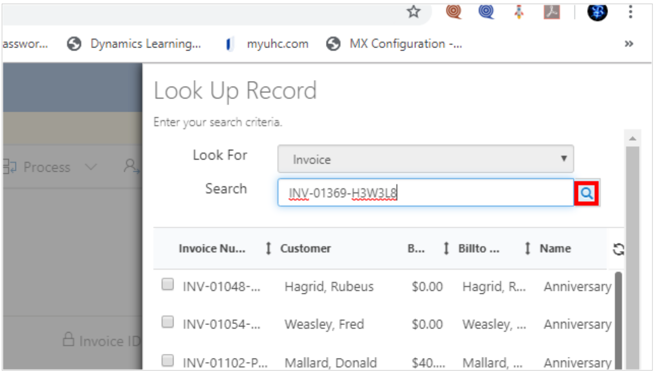
Click the Target Invoice Lookup button to select the invoice that you want to transfer the payment amount to.



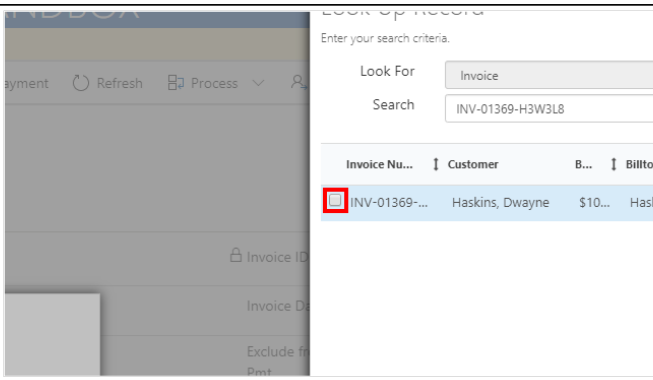
Enter the target invoice number.



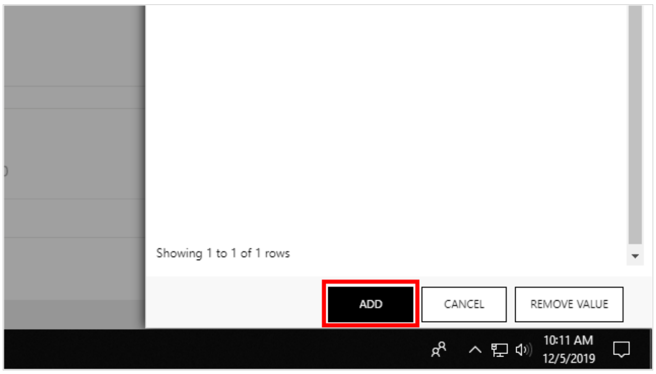
Click on the lookup



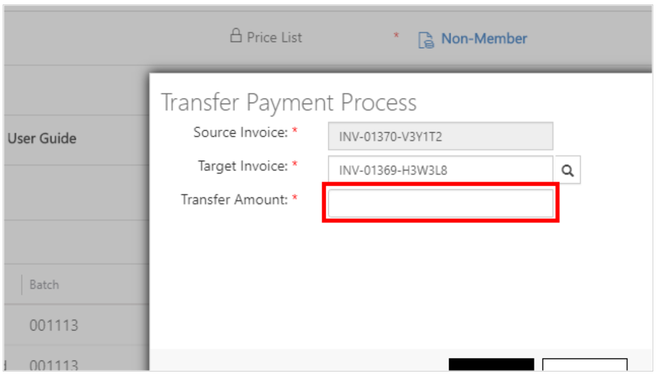
Click on the checkbox for the target invoice.



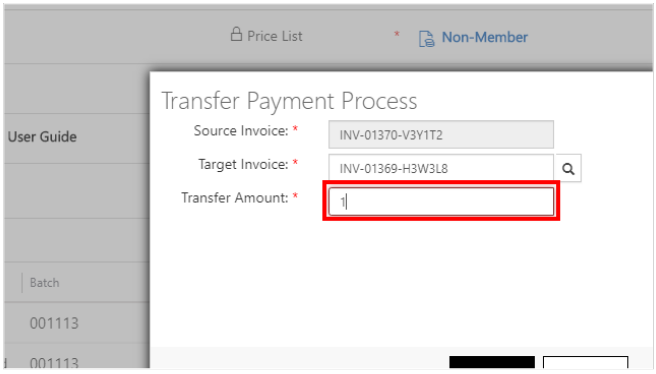
Click on the button **ADD**



Click on the Transfer Amount field

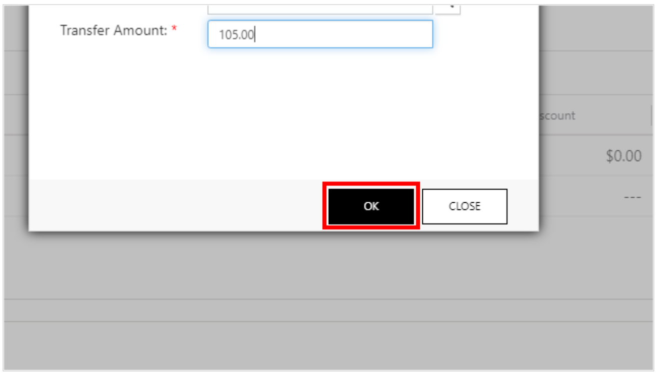


Enter the amount to be transferred to the target invoice.



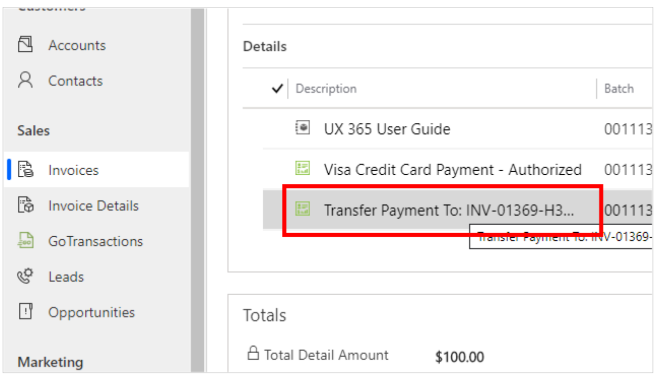
You cannot transfer an amount greater than the total payment amount displayed in the Payments field at the bottom of the invoice.

Click on the button **OK**

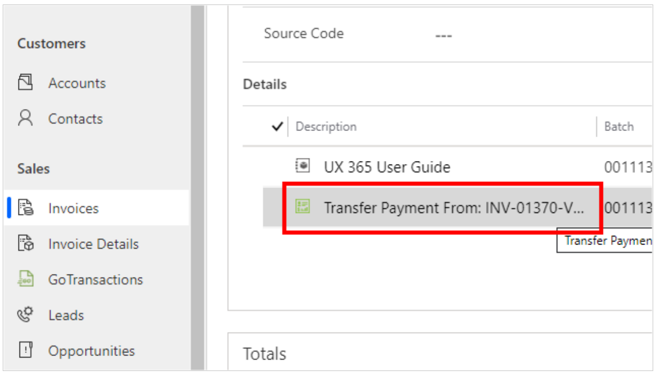


UX 365 will create the necessary invoice detail on both the source invoice and target invoice to transfer the payment amount.

Review the payment transfer "TO" on the Source invoice detail and verify all is correct



Review the payment transfer "From" on the Target invoice detail and verify all is correct

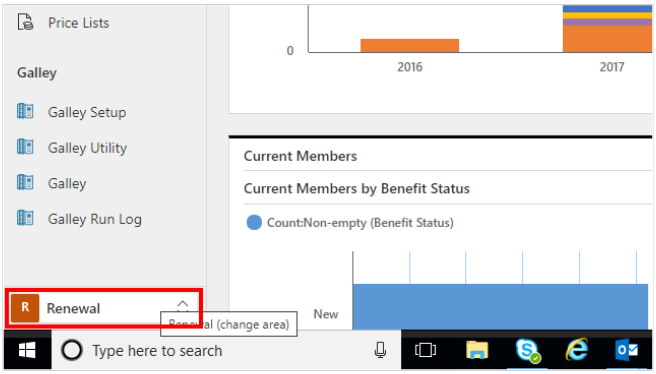


2. Basic Procedures

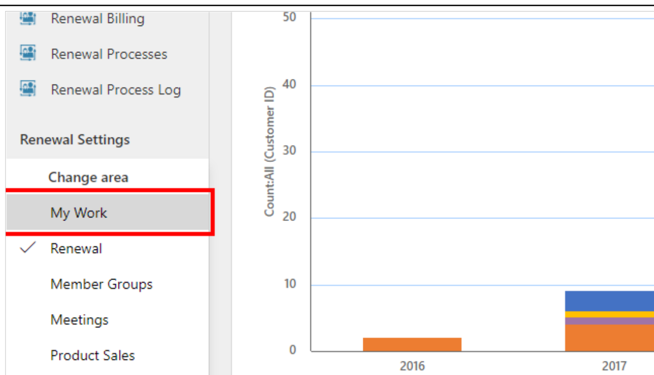
2.1. Account and Contact Record Maintenance

2.1.1. Account Record Maintenance

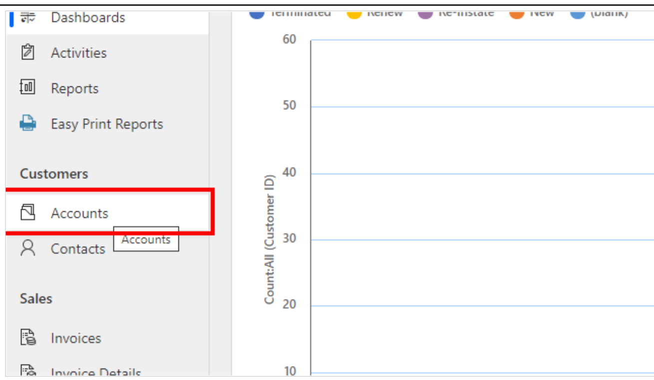
Click on the Change Area button



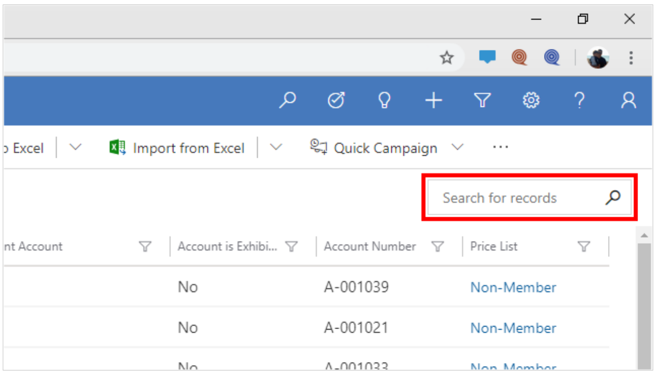
Click on the item **My Work**



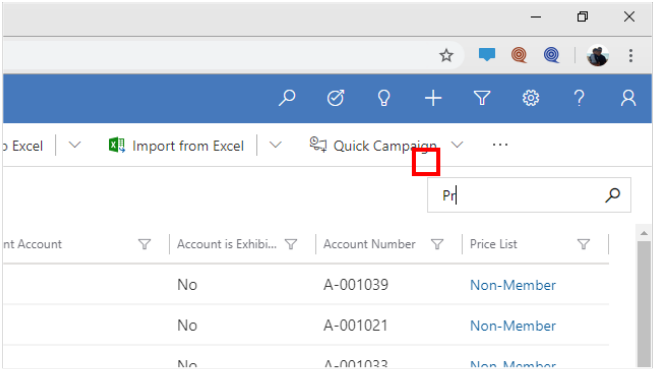
Click on the item **Accounts**



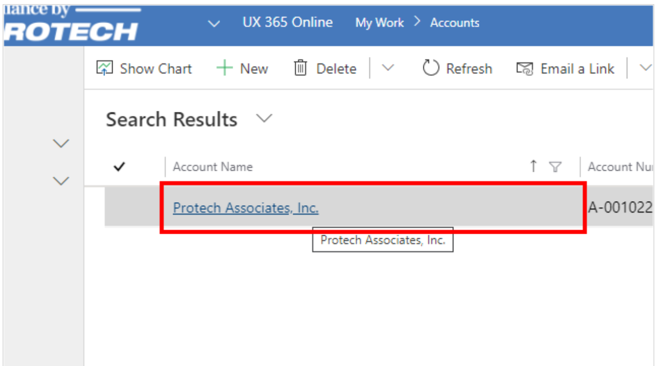
Click on the Search box



Type the name of the Account you are working with and hit ENTER

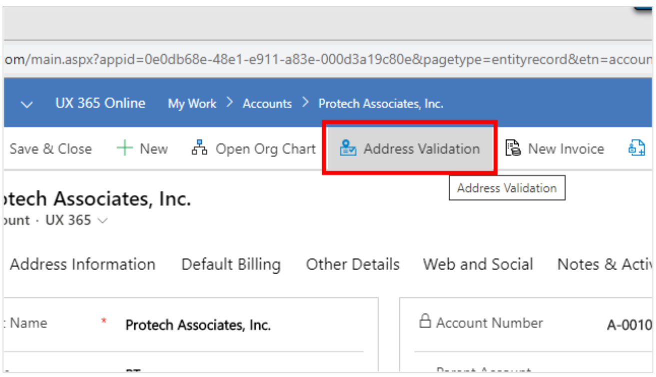


Click on the Account Name in the search results

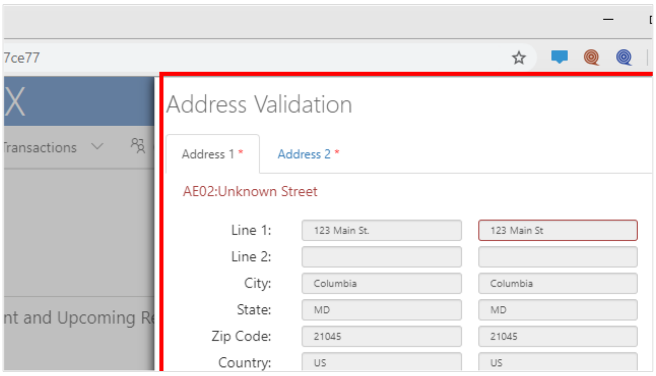


Once you are within the Account record there are a number of actions you can perform against the Account record located on the top menu bar…

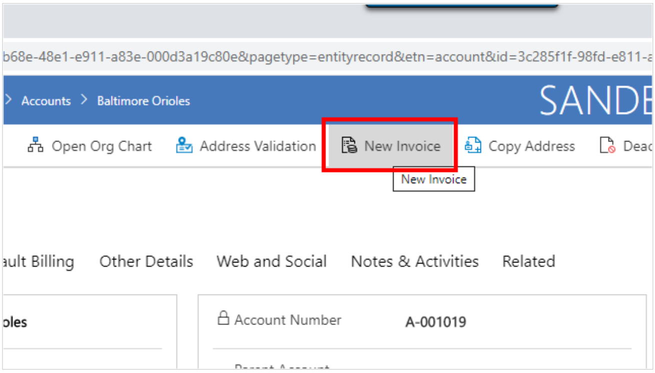
Click on Address Validation



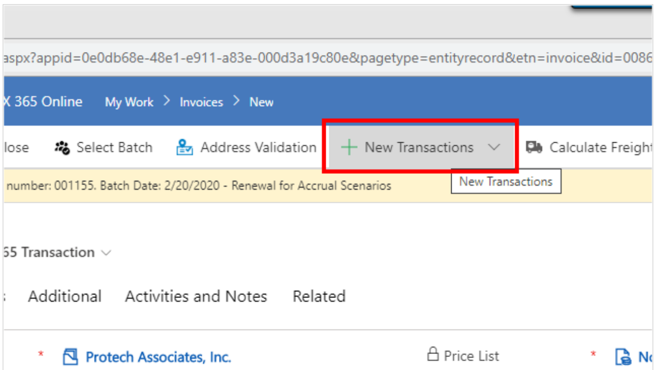
Here you can review the Accounts primary and secondary addresses for accurracy…



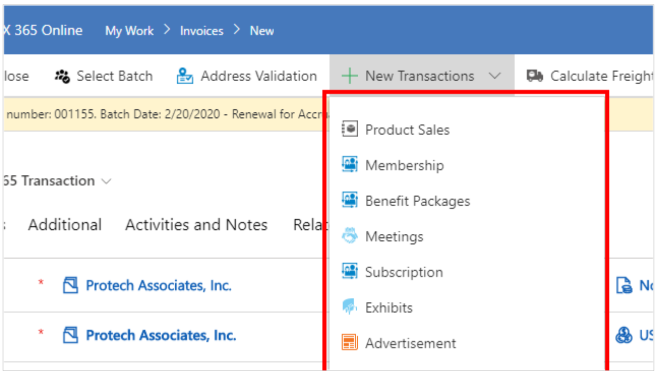
Process a new transaction for the Account by clicking on, New Invoice



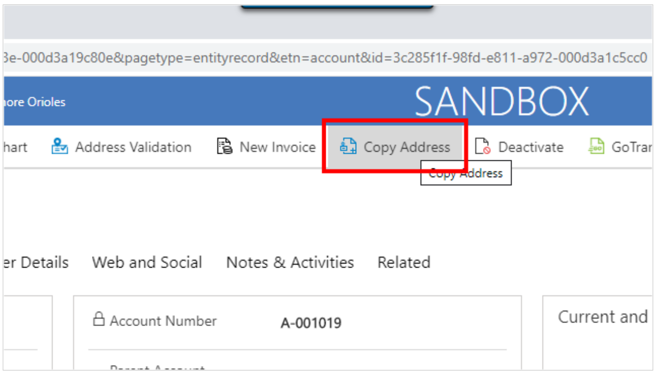
Click on the menu item **New Transactions**



Select the transaction type you would like to process

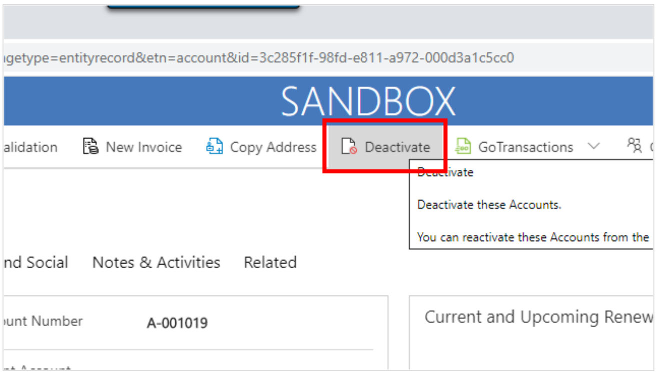


You can copy the Accounts address to your local clip board by selecting, Copy Address

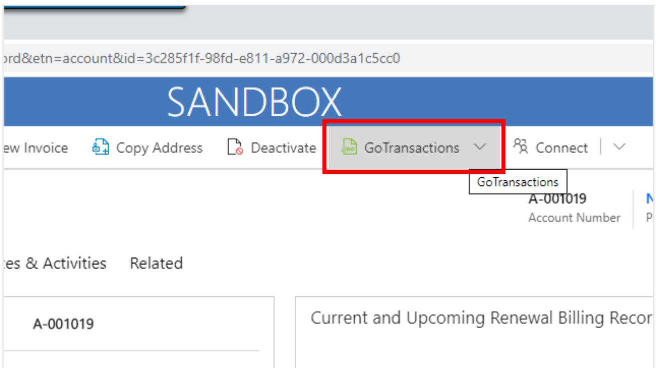


Click on the button **COPY**

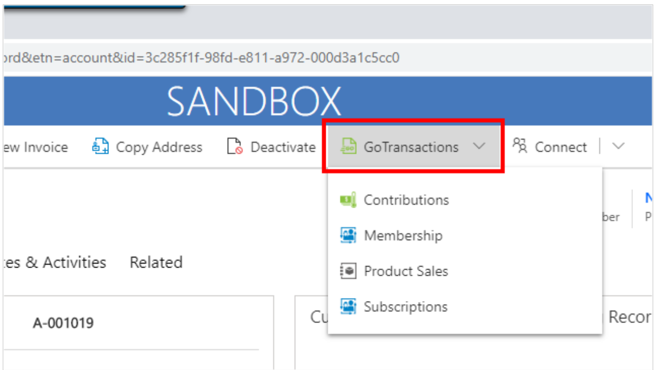
As an alternative to deleting an Account, you can Deactivate the Account. This will remove the Account from all views and searches within the system. In addition, the Account will be set to read only. Please note: If at any time you wish to restore the Account you simply use the same button to Reactivate.



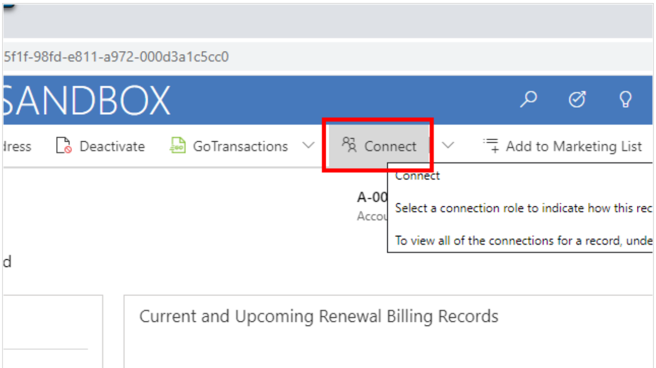
If you would like to expedite the process of creating a New Invoice, click on, Go Transactions



Here you will see a list of transaction types you can select to begin walking through the Go Transactions wizard

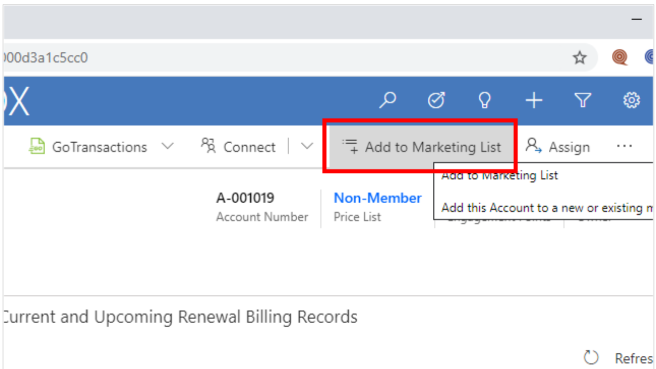


Click on the button, Connect. This will allow you to define a relationship with another record it the system.

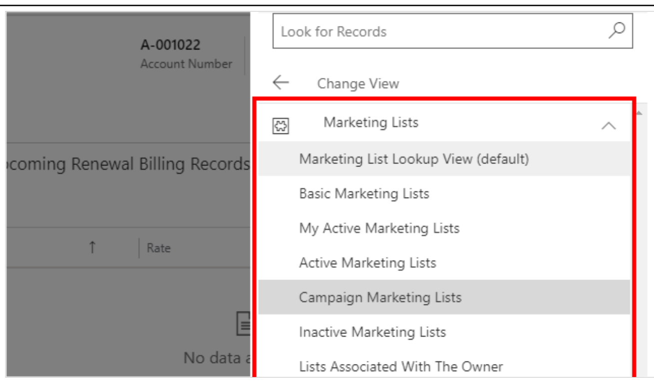


1. The Name field looks up the record you are connecting to…
2. Define the relationship by select a role. For example, Partner.

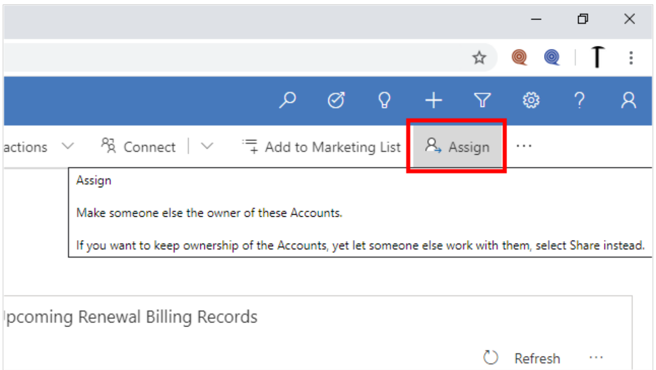
Quickly add the Account to an existing Marketing List by clicking on Add to Marketing List



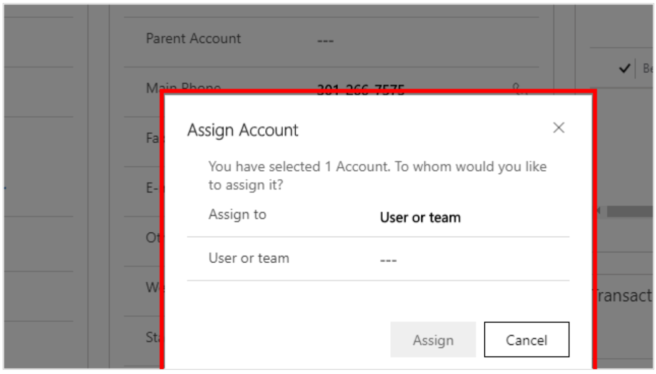
Click on an option from the list



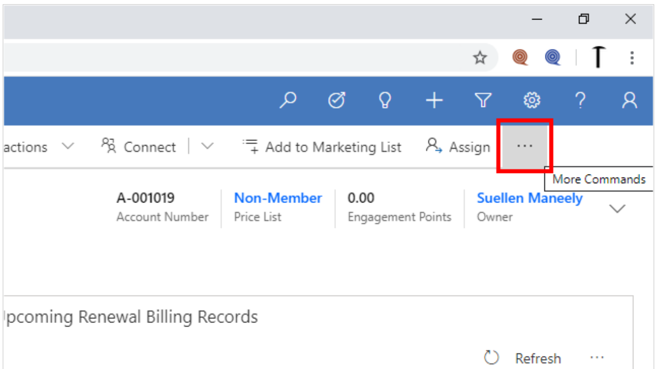
If you would like to assign ownership of the Account record to another user, click on the button, Assign



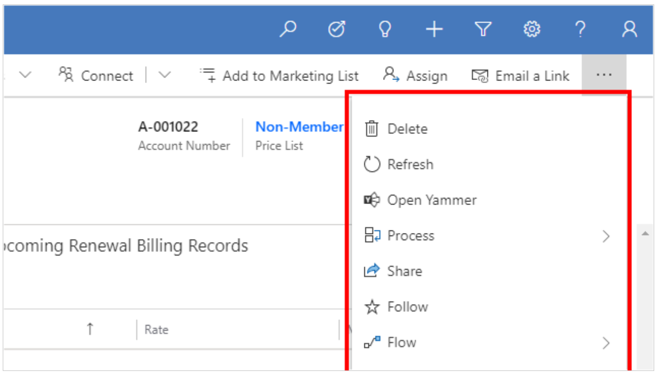
Assign Account to another User or Team



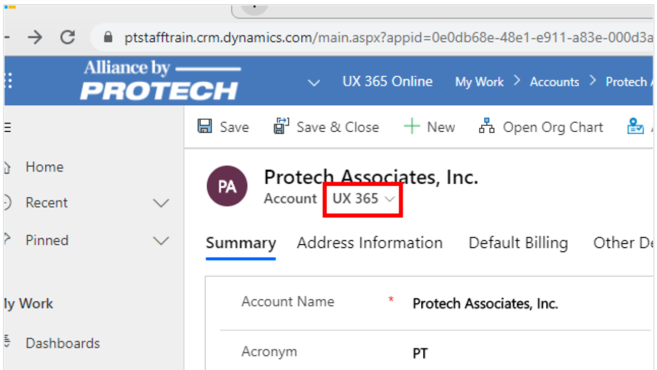
To see additional menu options click on the ellipses drop down



Here you will find a list of additional acctions available to perform against the Account record

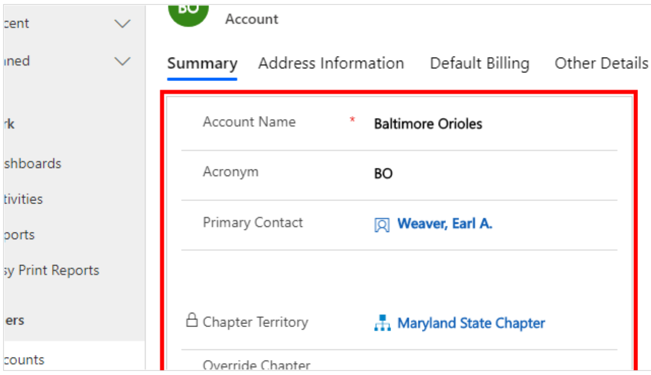


The default Account form in is called UX 365. Please note, when you implement your new UX 365 system, you can add forms that contain your own custom fields and demographics.

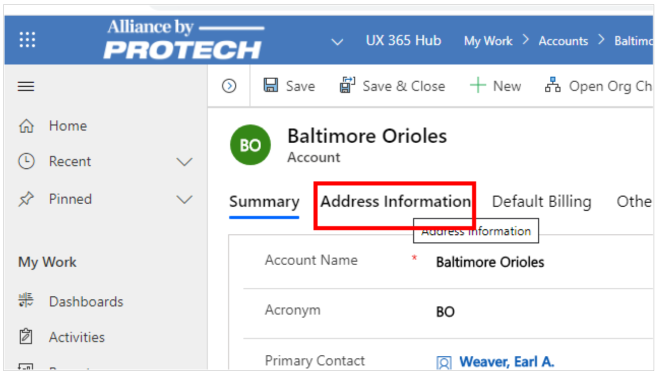


The Account form is made up of tabs across the top that contain sections and fields

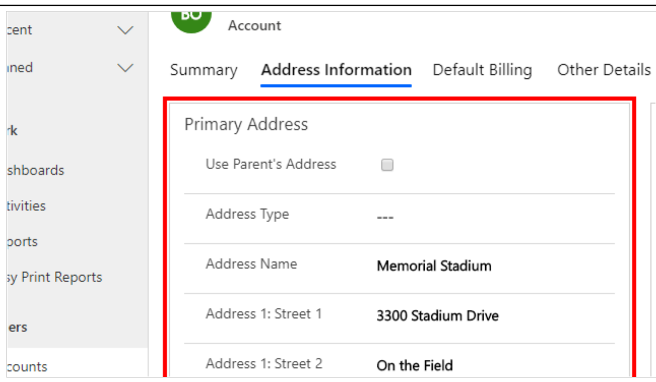
The summary tab is where you edit the Accounts general information or view sub grids of the Accounts Renewal and Transaction history.



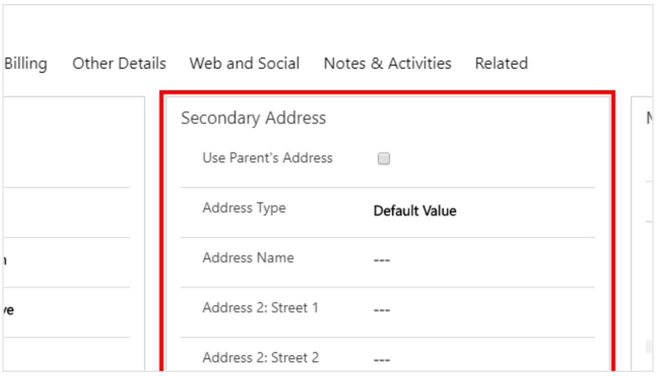
Edit the Contacts address by clicking on the tab, Address Information



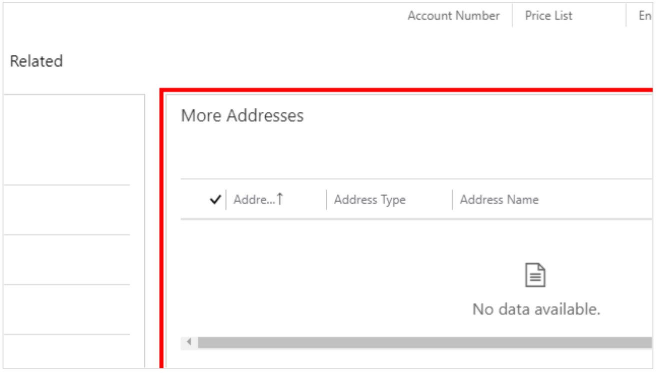
This is the section where you can edit the primary address of the account



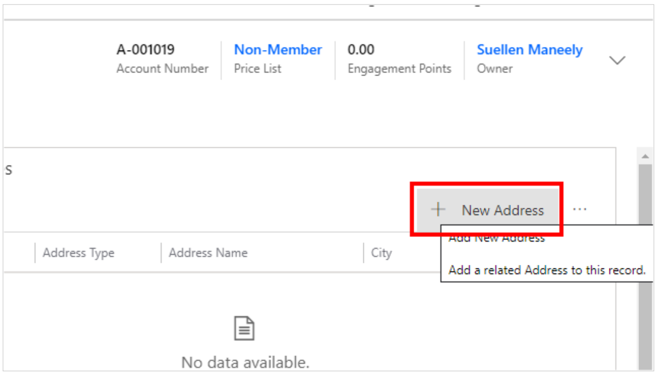
You can also edit the secondary address of the account.



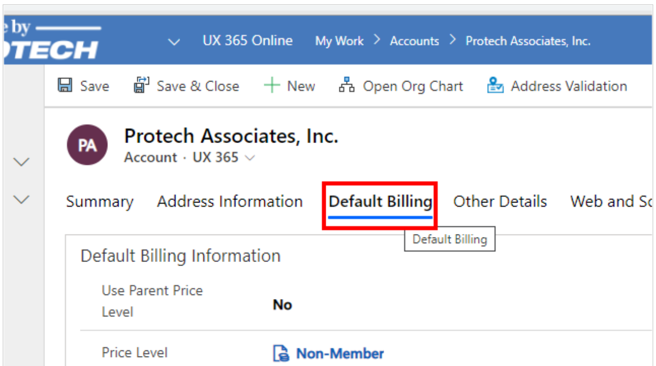
If the account has more than 2 addresses associated with it, you will see those here in the 'More Addresses' view.



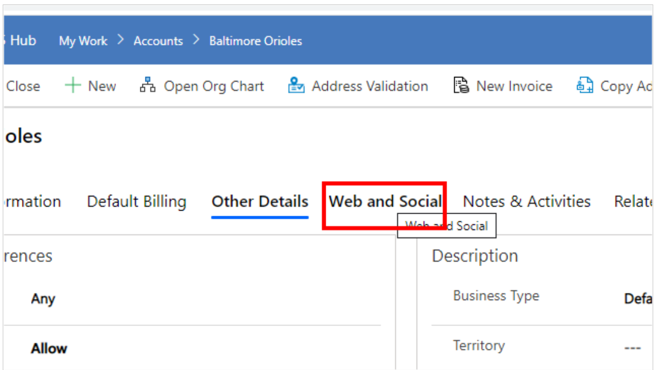
Select New Address if you would like to add another.



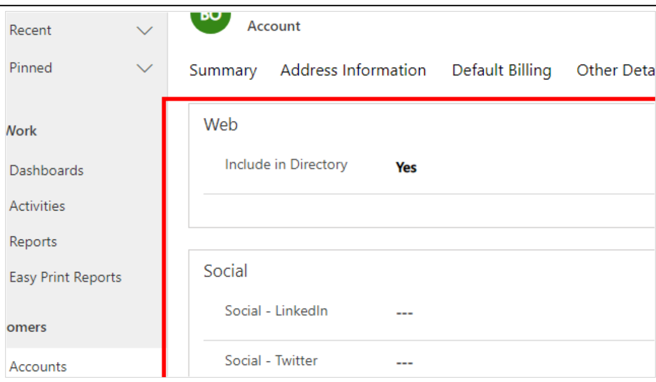
Click on the item Default Billing to view the account's billing information



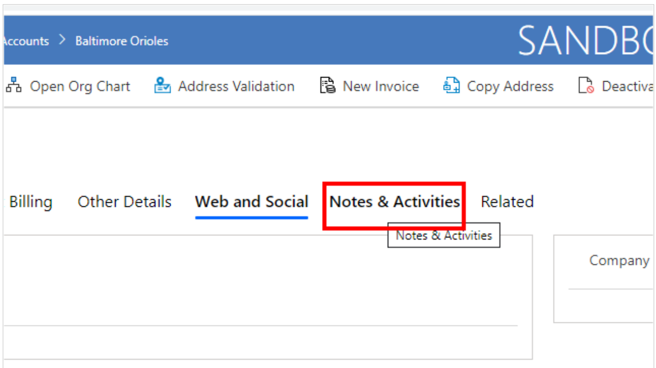
Click on the item **Web and Social**



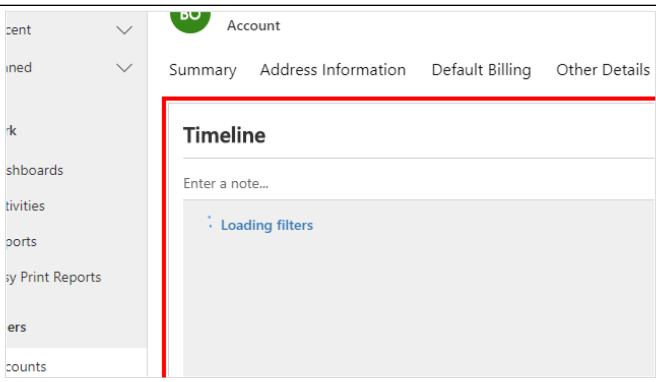
The Web and Social tab includes sections where you can manage whether or not the Account displays to your online member directory, maintain social links and store the Account's company logo.



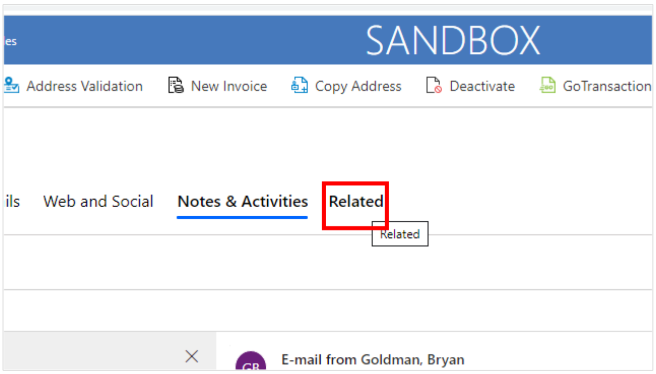
Click on the Notes and Activities tab



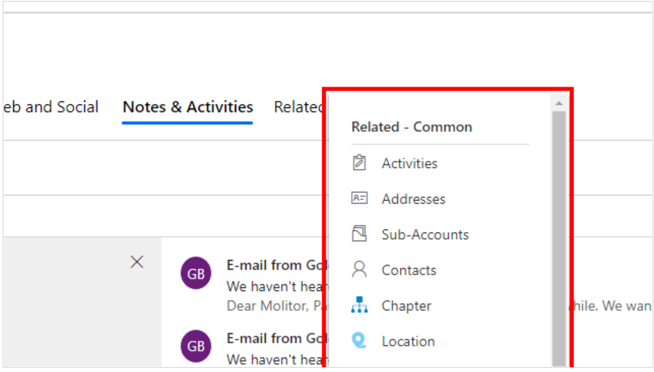
Here you will find the Timeline section that consist of all the Accounts activities in the format of a timeline. You can add additional Notes or Activities here as well.



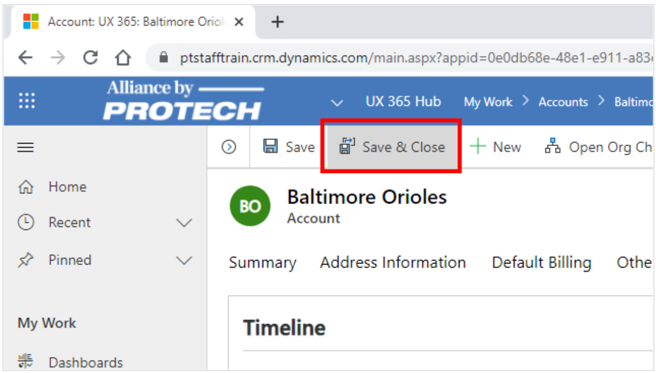
To view related records, click on the tab Related



Here you will find a list of related record types. For example, Invoices, Contacts, Renewal billing, Rosters and Committee records associated with the Account.

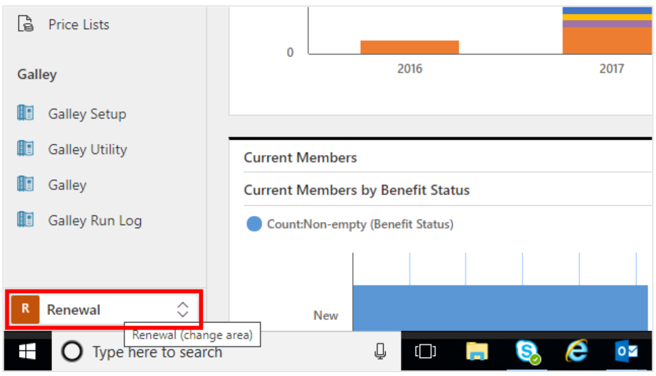


Click save or Save and Close to keep any changes made to the Account

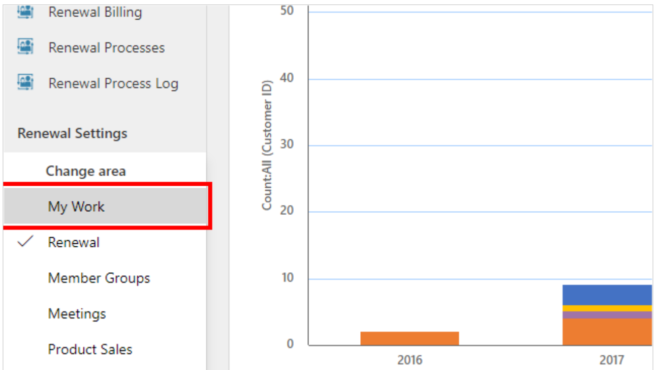


2.1.2. Contact Record Maintenance

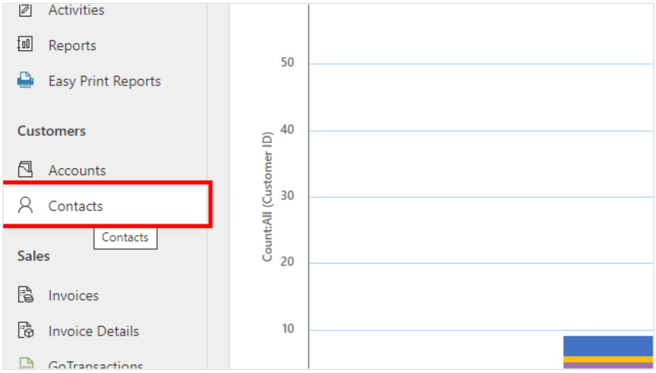
Click on the Change Area button



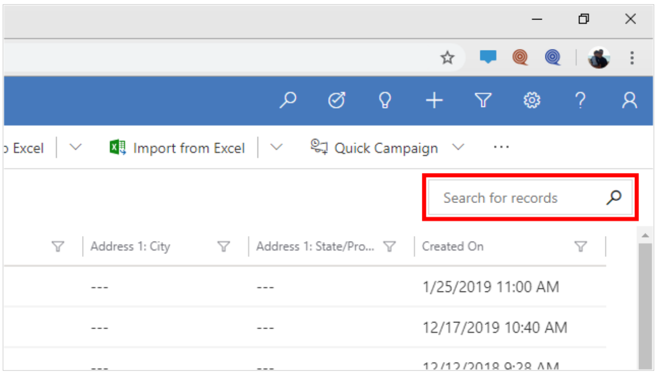
Click on the item **My Work**



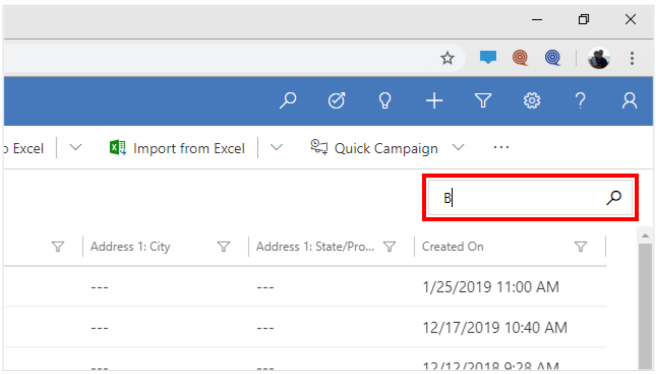
Click on the item **Contacts**



Search for the Contact you are working with…



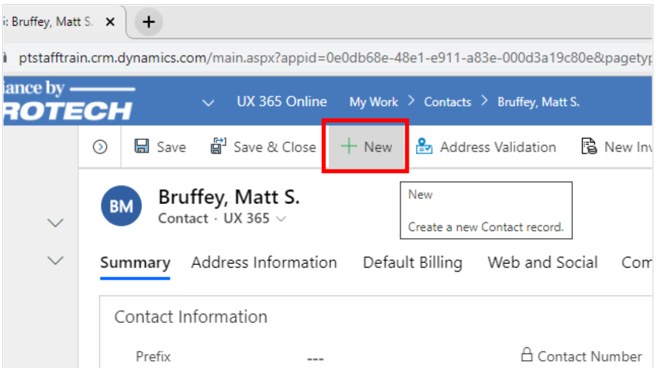
Enter the name, last name first and hit ENTER



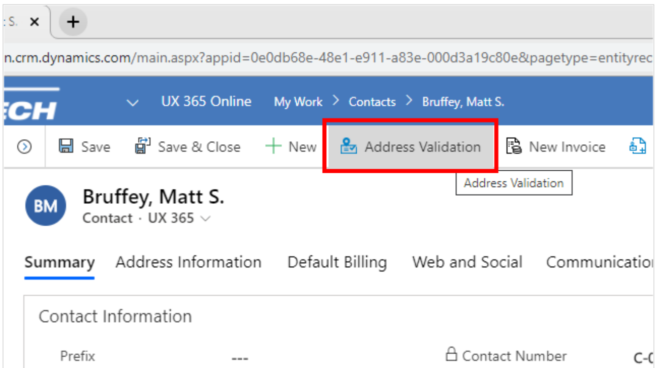
Click on the Contacts name in the search results

Once you are within the Contact record there are a number of actions you can perform against the Contact located on the top menu bar...

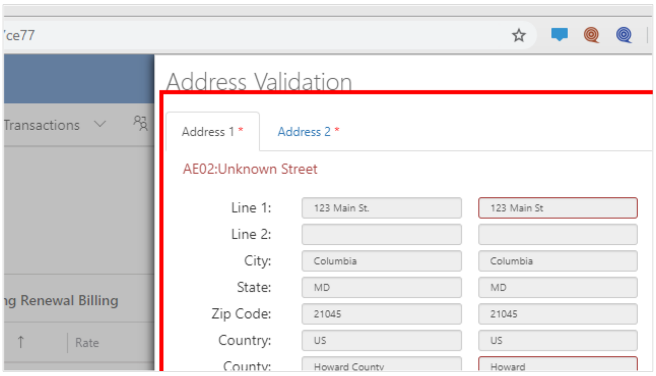
The New button allows you to quickly create a New Contact from within the Contact record you are working on. This is especially nice when you are performing a large amount of data entry.



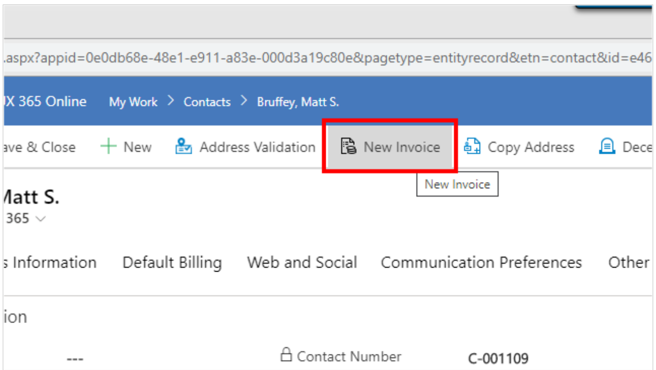
Click on the menu item **Address Validation**



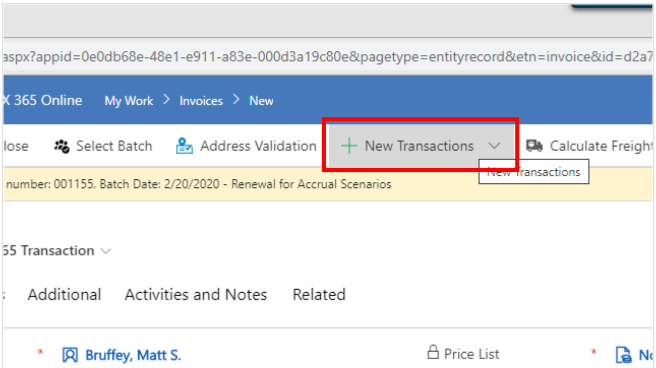
Address Validation allows you to review both the Primary and Secondary addresses of the Contact for accurracy. If you have a Melissa Data subscription it will update it automattically once you click ok



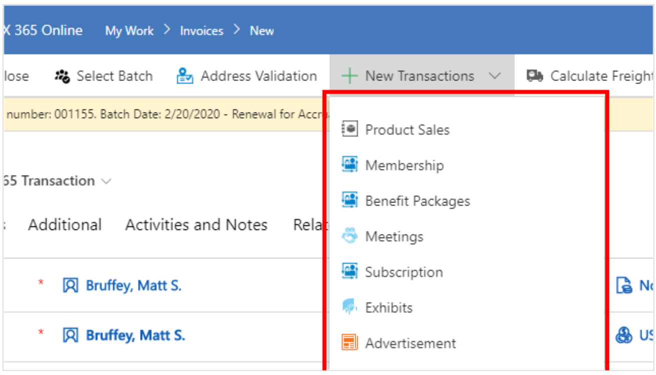
New Invoice button allows you to create a new transaction for the Contact



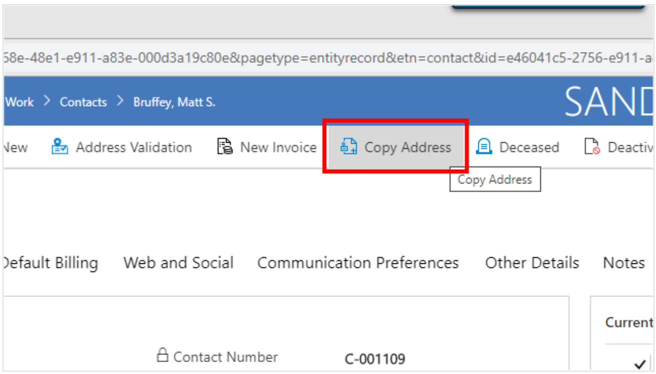
Click on New Transactions to see a list of transaction types you can perform



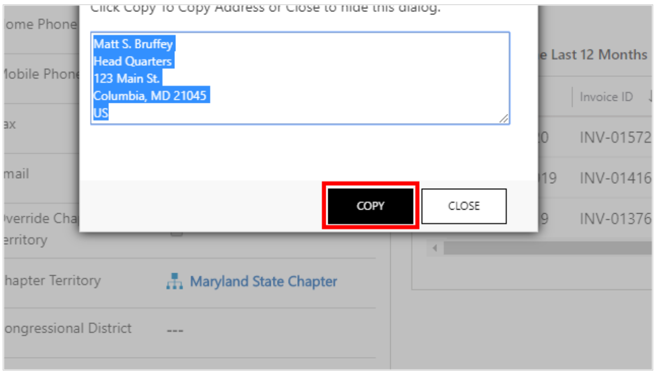
Here you will find a list of transaction types. For example, you can create a new membership, meetings or products sales invoice. As well as much more…



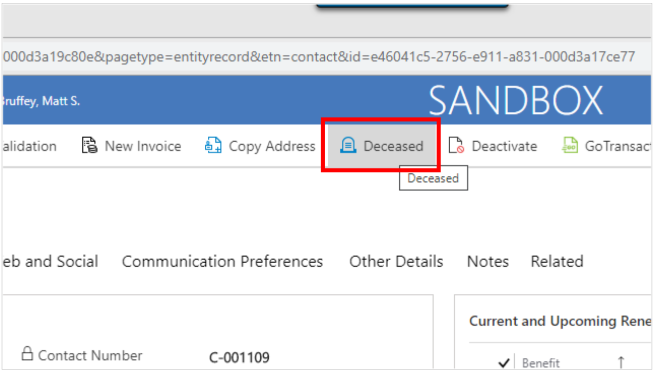
Click on the menu item **Copy Address**



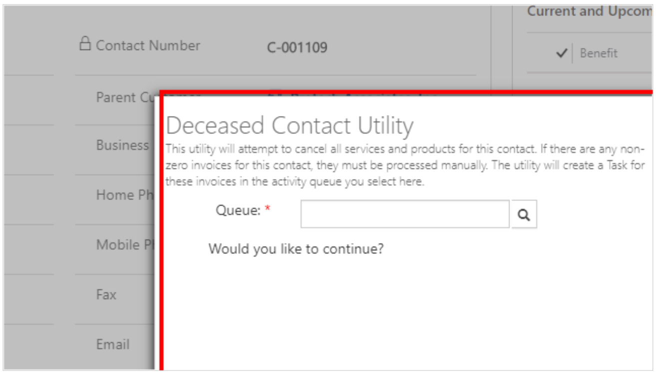
Click on the button COPY to copy the primary address to your local clip board.



The menu item Deceased executes a utitility that automattically performs a series of actions that allow for easier management of closing outstanding items related to the deceased member.

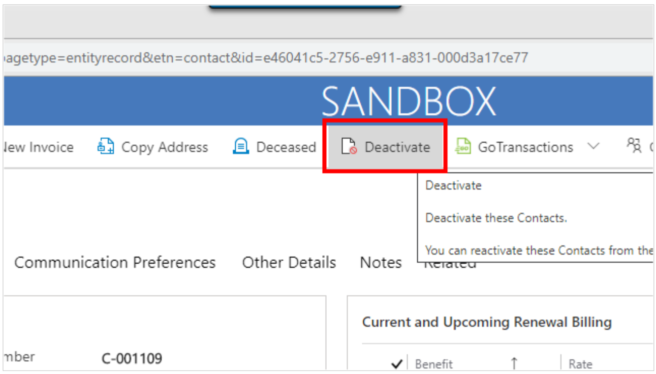


The utility will prompt you to select a queue where it will move all invoices with an open balance in the form of a Task record as a reminder to close those invoices out.

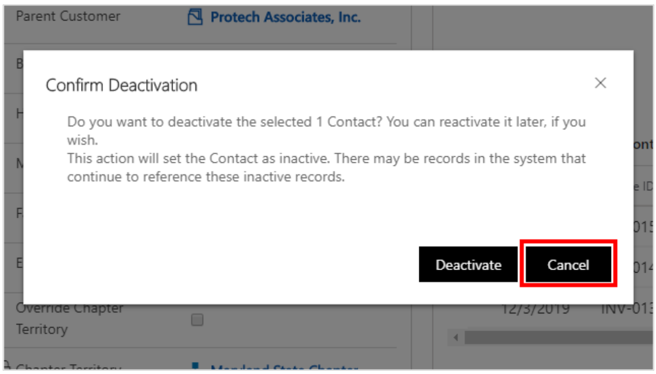


If one of your contacts is deceased, there are several records that you should update, including roster and committee memberships, renewal billing records and invoices with a balance due or a credit balance. You can use the Deceased Contact Utility to update this information. This utility will perform the following actions: Sets the price level to Non-Member and the Member flag updates to No on the contact record. Deactivates roster memberships. Updates current committee membership term end dates with the system date and deactivates nominee (future term) committee member records. Updates current chapter officer term end dates with the system date and deactivates nominee (future term) chapter officer records. Updates current region officer term end dates with the system date and deactivates nominee (future term) region officer records. Terminates active renewal billing records as of the system date and enters a termination reason of "Deceased." The utility also identifies invoices with a balance not equal to zero and sends a task to the Deceased Contact queue for follow up action. These invoices must be dealt with manually. We recommend that you cancel the dues invoice for the terminated renewal billing. If the invoice was paid, you can refund the credit to the deceased member's estate or transfer the balance to an open invoice, depending on your organization's business practices. Important Note: The utility does not deactivate the contact's record. If your organization's business rules require that a deceased contact's record should be deactivated, you must do that manually after you have resolved any remaining open invoices.

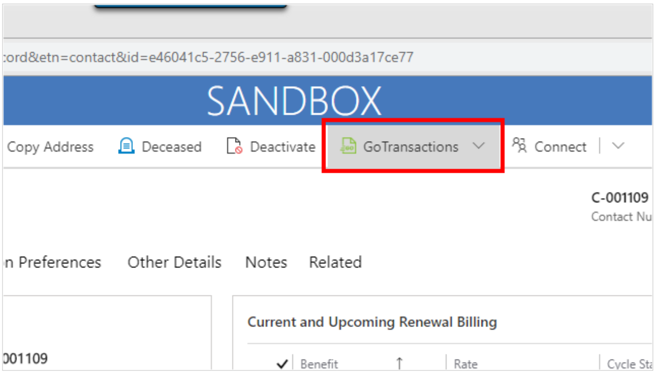
Click on the menu item **Deactivate**



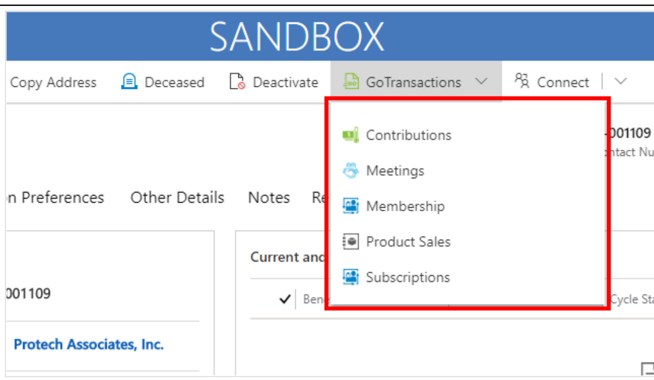
Deactivating a Contact is an alternative to deletion. This action will remove the Contact from all searches and views and will make the Contact read only. If for some reason you need to undo this action you can use the same button to reactivate the Contact.



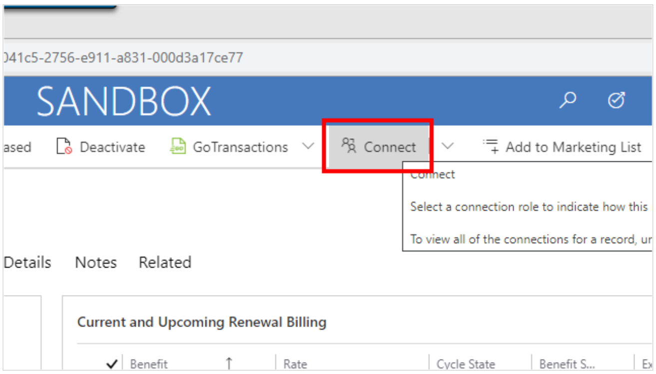
Click on the menu item **GoTransactions**



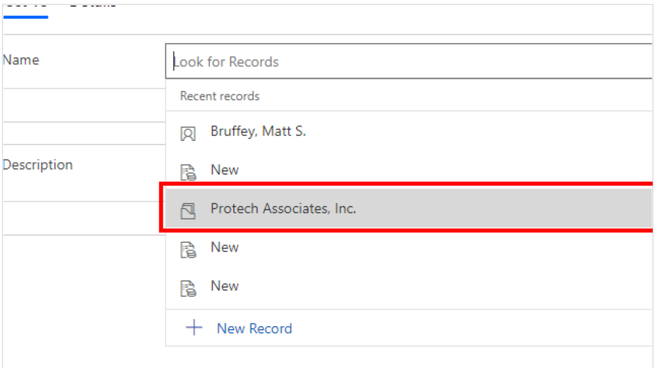
Go Transactions takes you through a quick create invoice wizard. Here is the list of transaction types available.



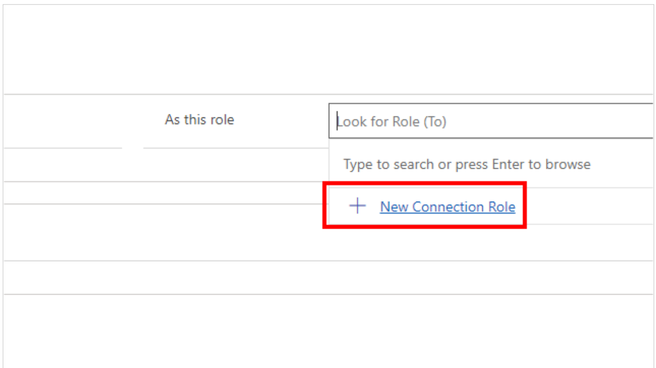
Use the Connect button to create a relationship with another record…



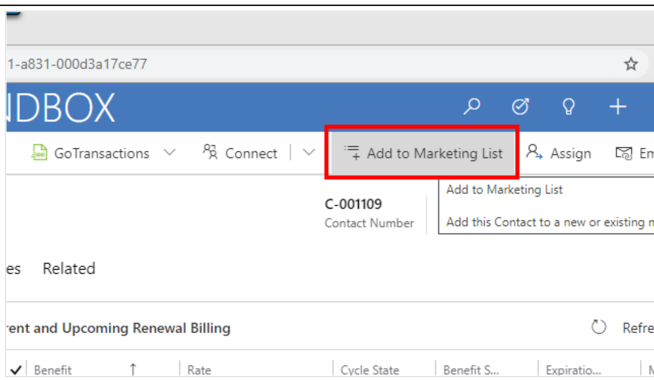
Find and select the record your connecting the Contact to. It can be an Account, Contact whatever you want



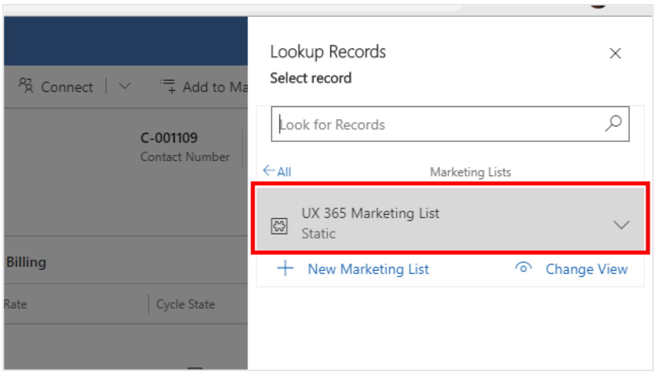
Define the relationship by selecting a pre-defined Role. For example, Business Partner



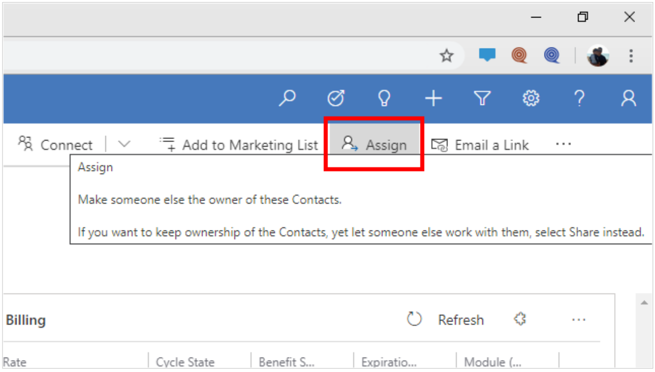
Click on the menu item **Add to Marketing List**



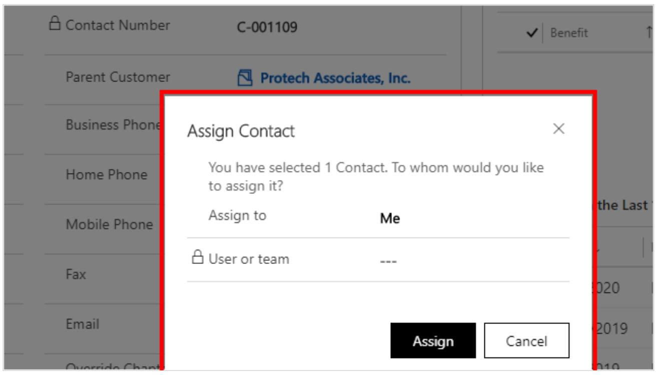
Quickly add the Contact to an existing Marketing List to begin recieving email updates



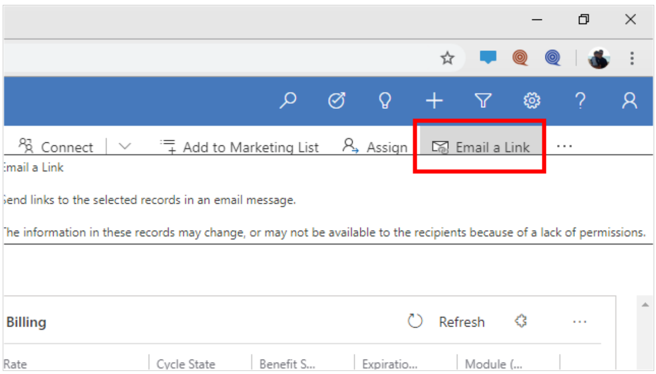
Click on the menu item **Assign**



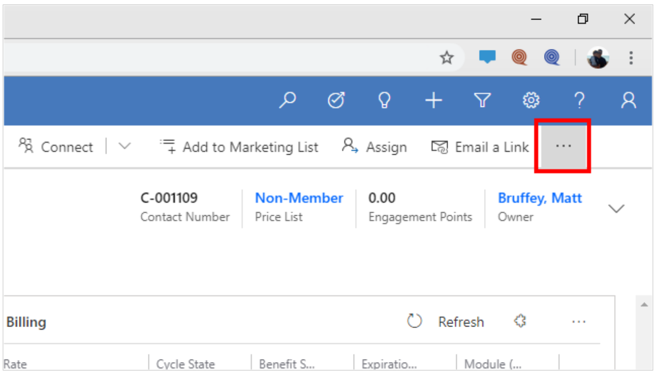
You can assign ownership of the Contact to another User or Team within your organization given you have the appropriate permissions.



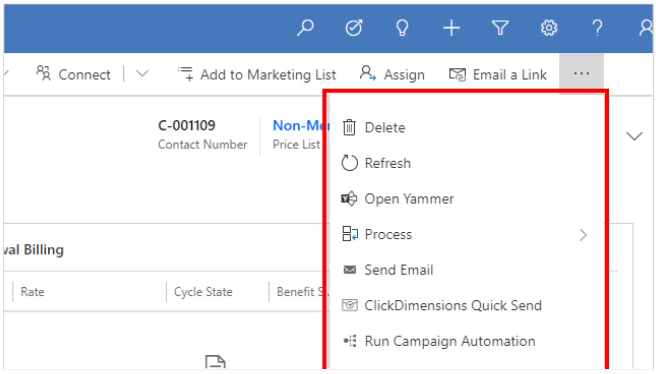
Email Link will allow you to share a Contact record with another user within your network via Email. When you click on the Email Link button it will automattically copy the URL to your email client for you to send another user where they can simply click on the Contact link to access and review.



Click on the elipses to see additional commands

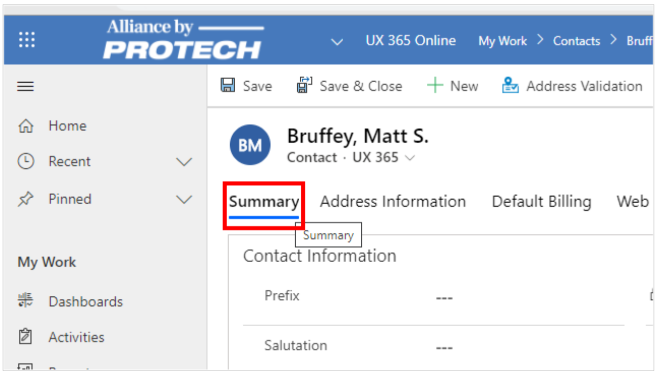


Here you will find more actions you can perform against the Contact

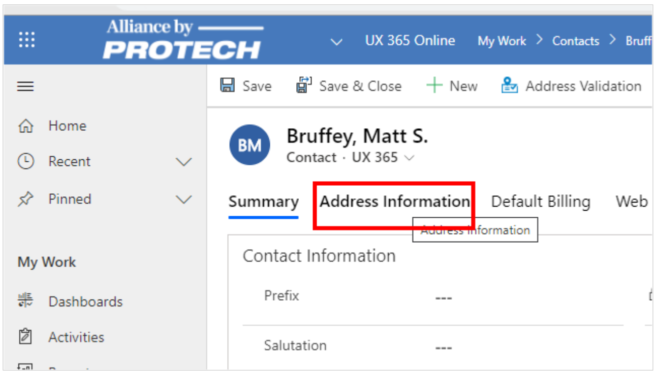


The Contact form is made up of Tabs across the top that contian sections and fields

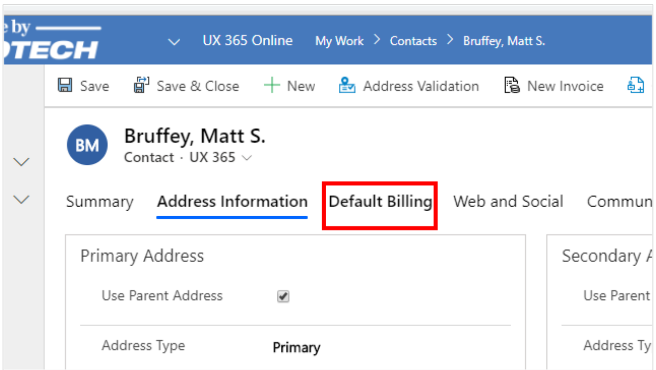
The Summary tab contains the Contacts profile information. For example, First and Last name.



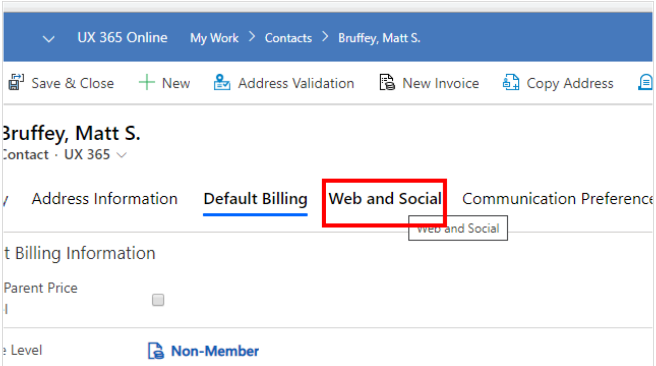
The Address Information tab contains the Primary and Secondary address along with the option to add more addresses.



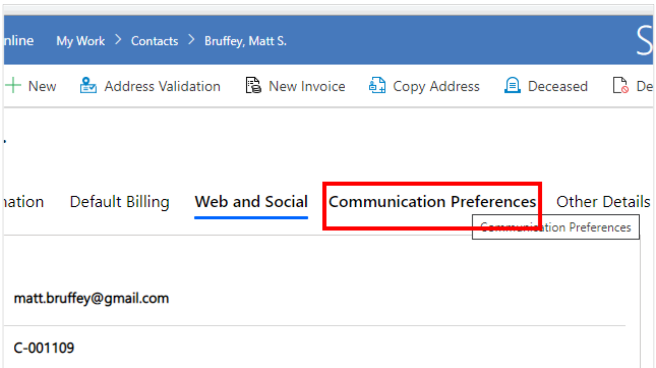
The Default Billing tab will display the billing information. For example, the Contact's price level that indicates whether or not the record is a Member or Non-member. Or if all billing should go to the Parent Account via Bill to



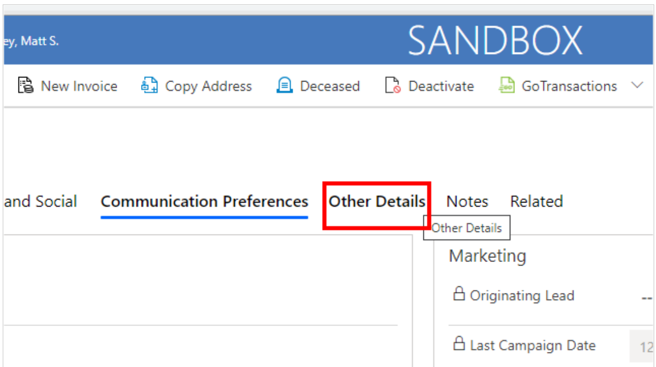
Click on the tab Web Social. This tab contains all sections related to MX Online and Social media accounts. For example, your members Web Login Name and Password are stored in the Web section.



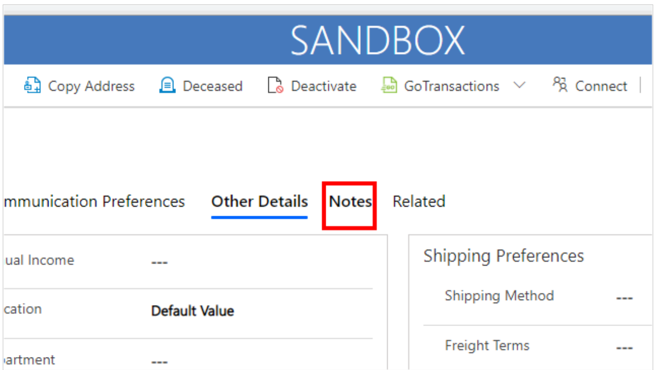
Click on the tab Communication Preferences. The information here provides a summary of how the Contact would like to receive communications.



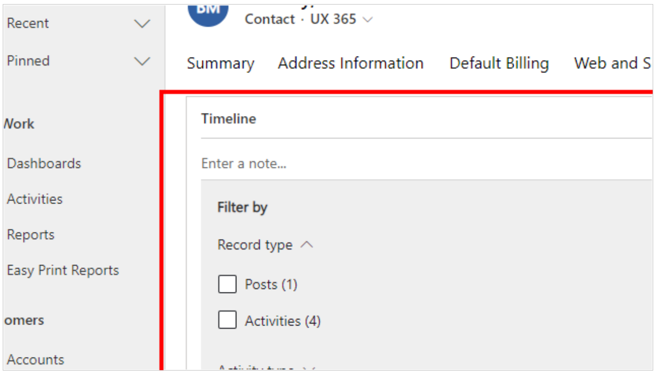
Click on the tab Other Details. This contains general demographic information about the Contact. For example, Gender and Birthday.



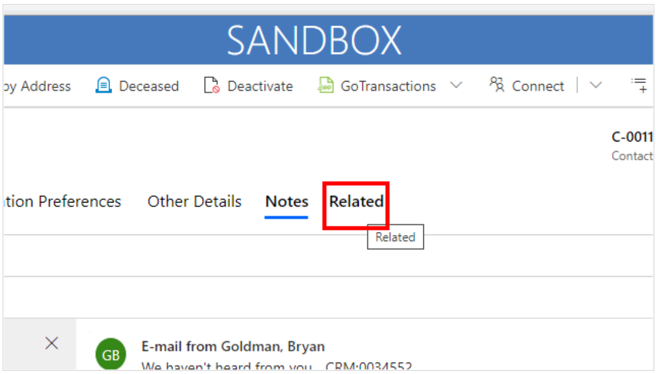
Click on the tab Notes



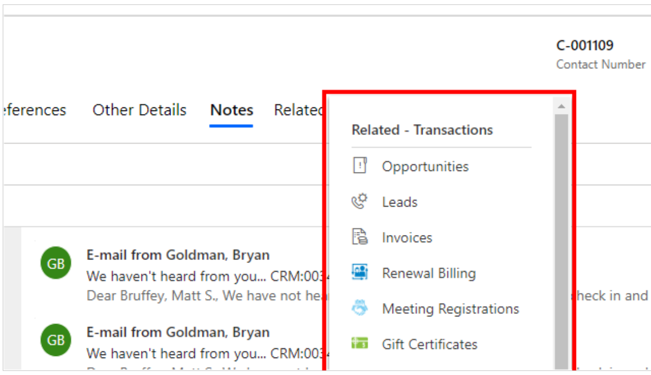
The Notes contains all activities within a section called Timeline. For example, you can review all Notes, Emails, Task or Post related to the Contact.



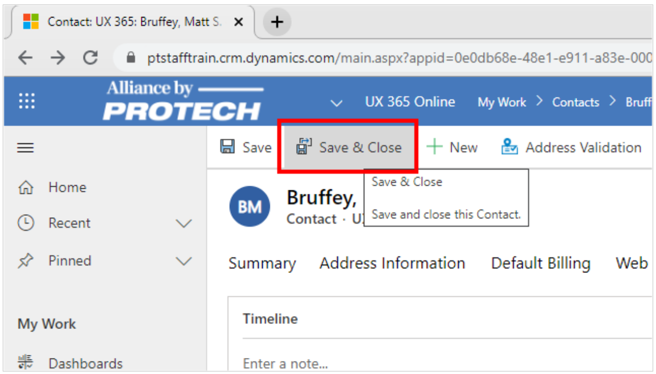
Click on the tab Related



Here you will find a list of record types that are related to the Contact. For example, Invoices, Meeting Registrations, Renewal Billing and much more.



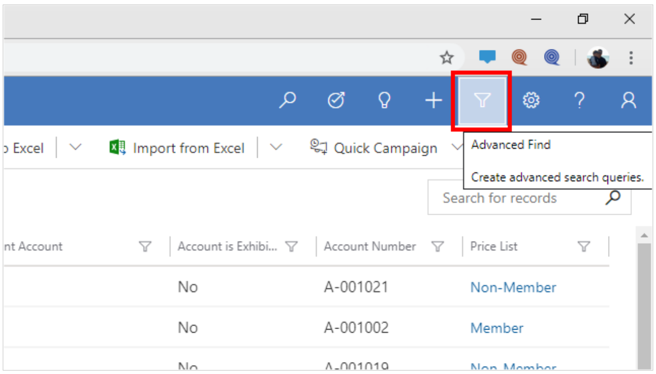
This concludes the review of the Contact record, please click on Save and Close to exit.



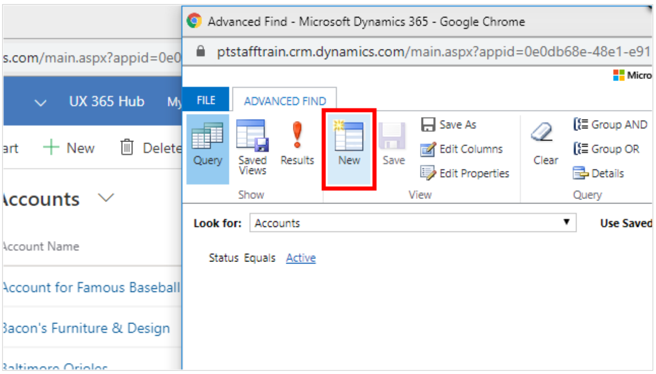
2.2. Advanced Find and Saved Views

Find the records you want in UX 365 by using the Advanced Find command. You can also use Advanced Find to prepare data for export to Office Excel so that you analyze, summarize, or aggregate data, or create PivotTables to view your data from different perspectives. What's New? Now you can use the advanced find option to build a “Not In” query records using Does not contain data option

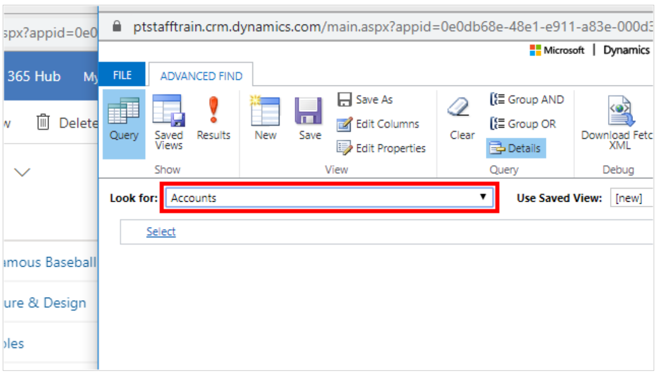
Click on the menu item **Advanced Find**



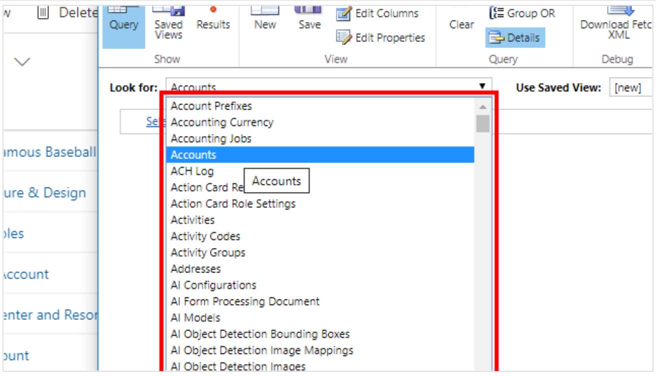
Click on the ribbon item **New**



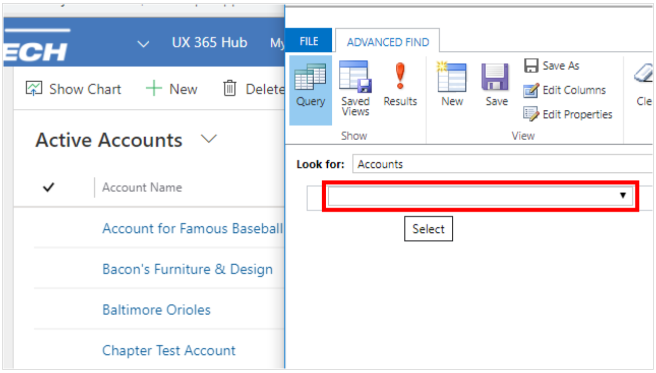
In the Look for list, select a record type



Select Accounts

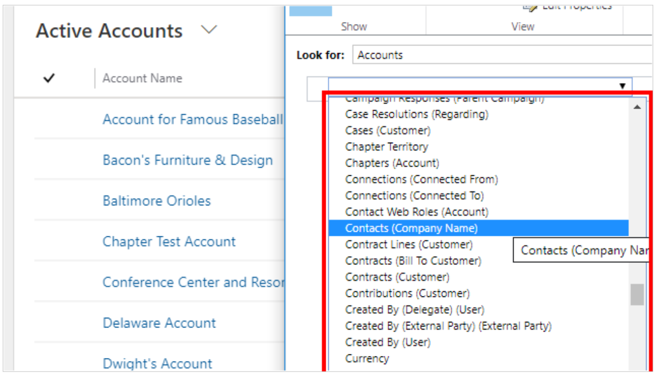


Define search criteria

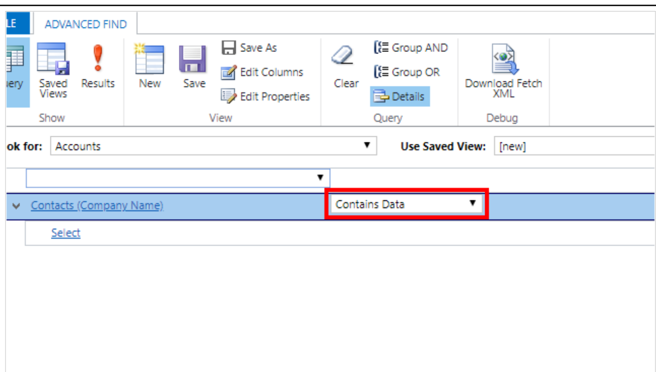


For example, find Accounts without any related Contact records

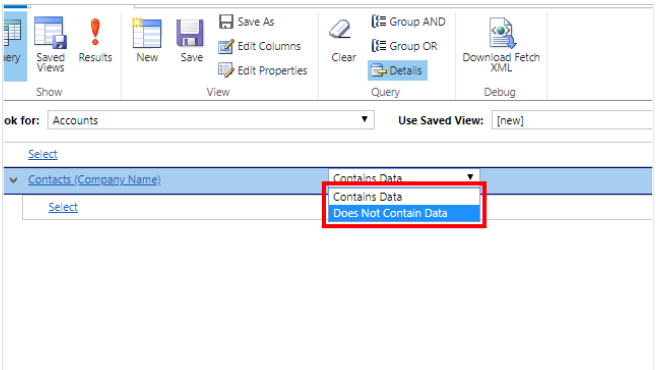
Click on the regarding entity, Contacts



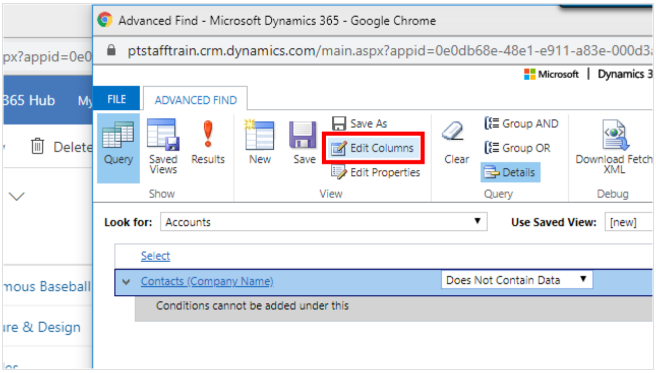
Open the selection criteria



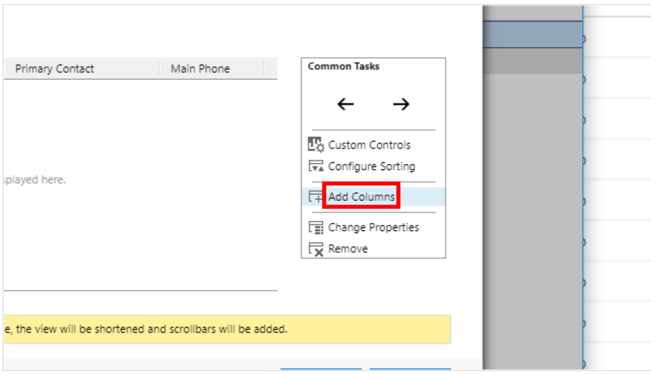
Choose, Does Not Contain Data. This will return all Accounts that do not have any related Contact records



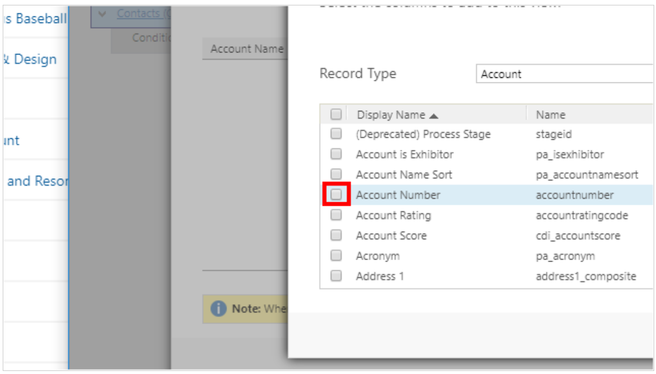
Specify the columns to include in the search results. Click on the button, Edit Columns



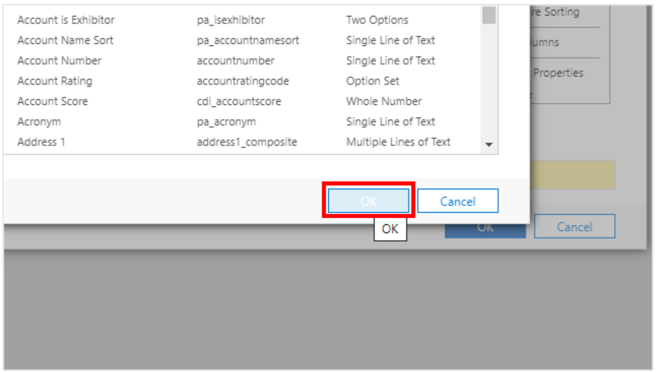
Click on the link **Add Columns**



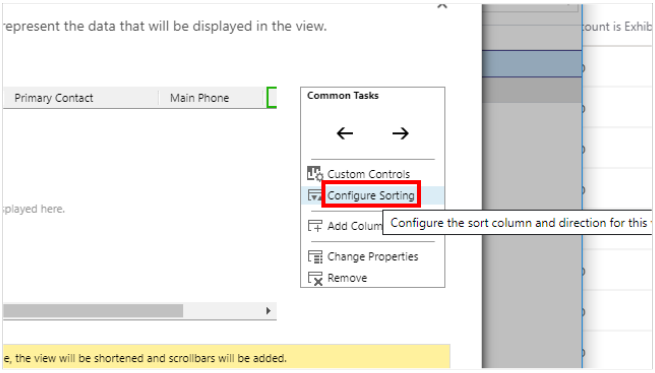
Check mark the fields you would like included in the search results



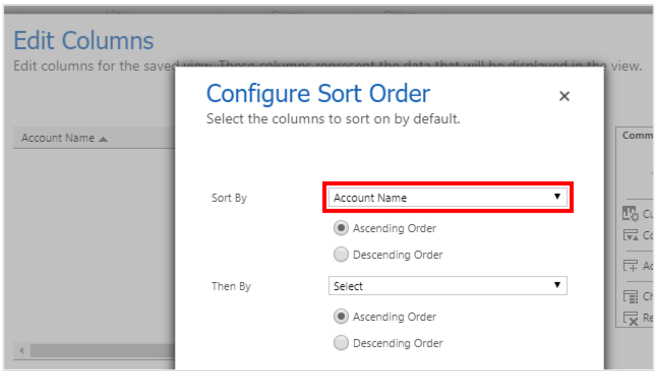
Click on the button **OK**



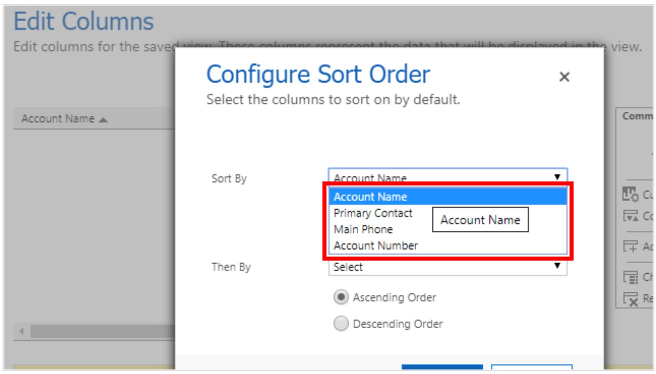
Configure sorting



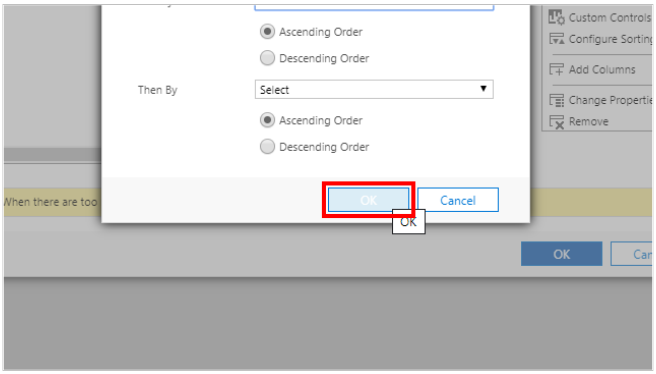
Configure Sort By



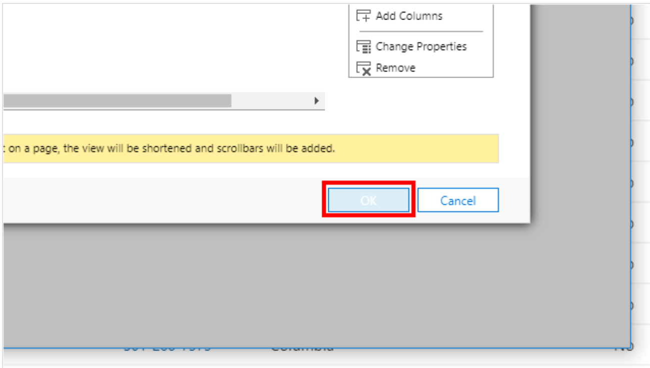
Click on the item **in the list**



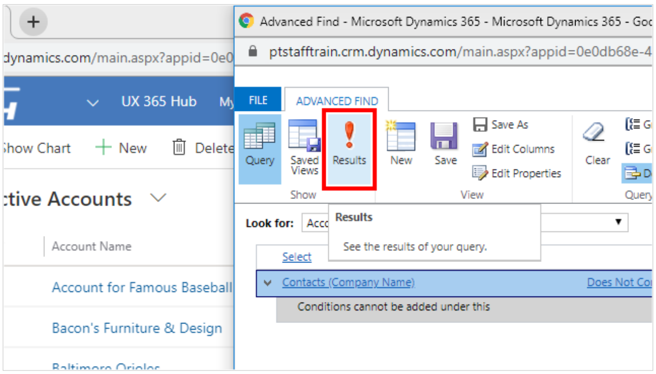
Click on the button **OK**



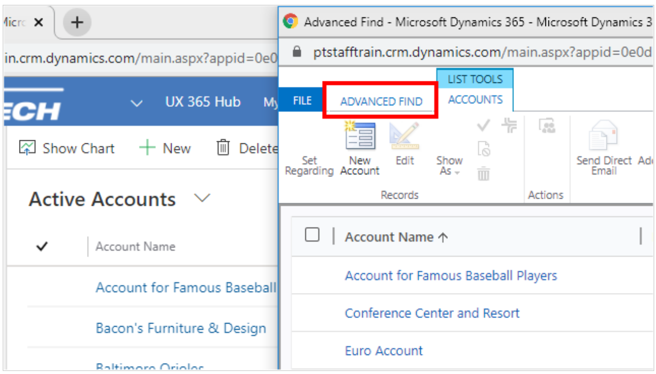
Click on the button **OK**



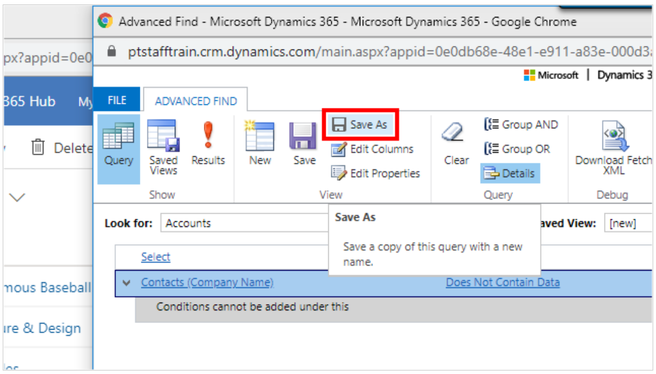
Click on the ribbon item Results to execute the query



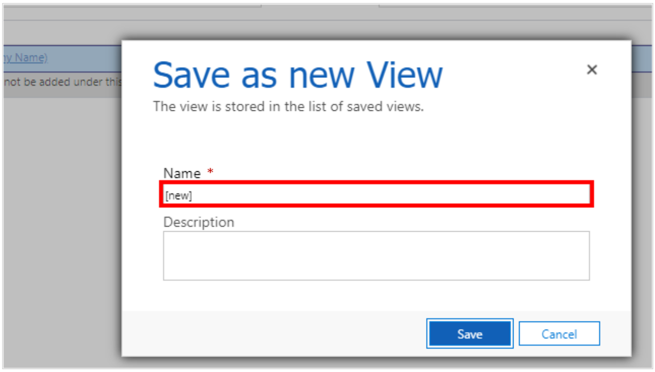
Review results and return to the Advanced Find query builder



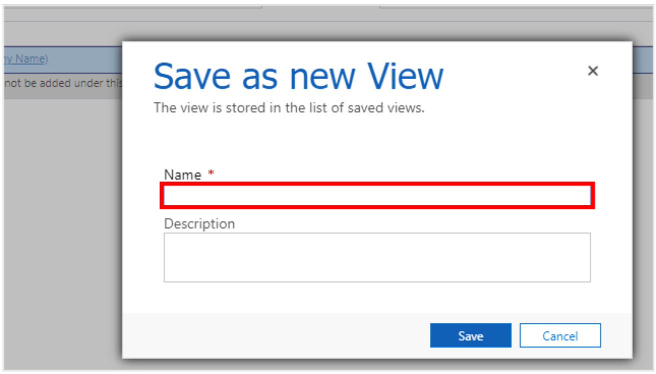
Click on the link **Save As**



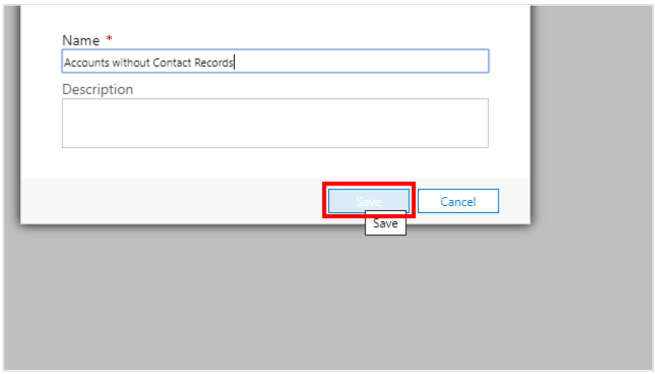
Give your query a name



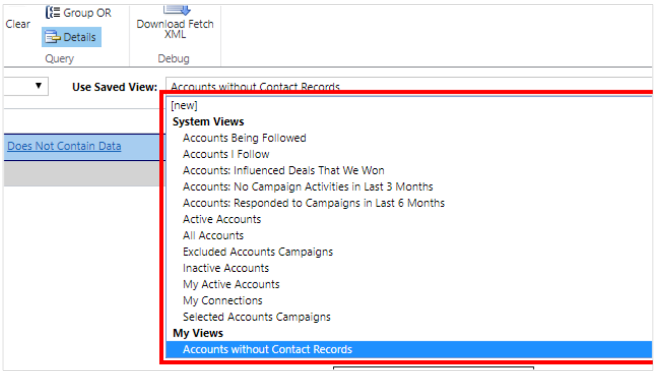
For example, enter the text Accounts without Contact Records



Click on the button **Save**



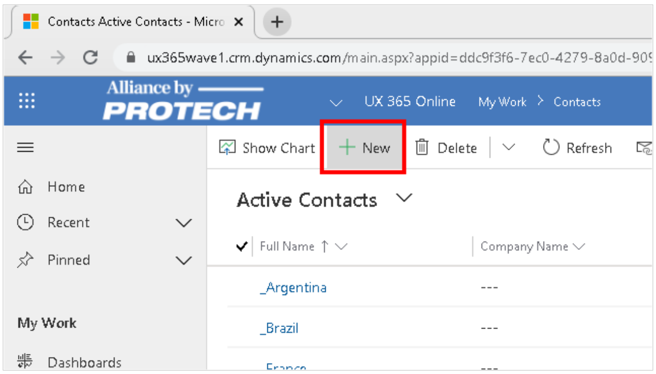
Your new query is now accessible from, My Views



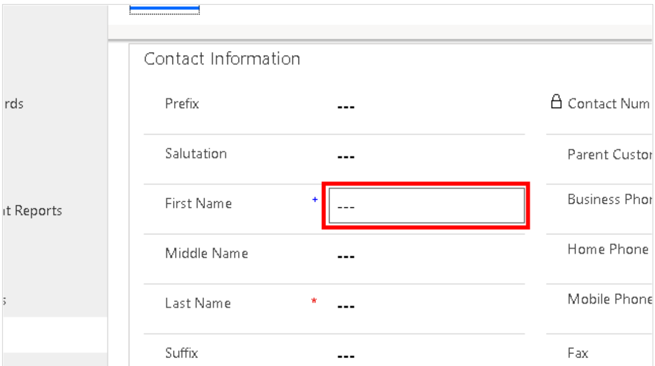
2.3. Country-based Address and Telephone Number Formatting

2.3.1. Country-based address formatting

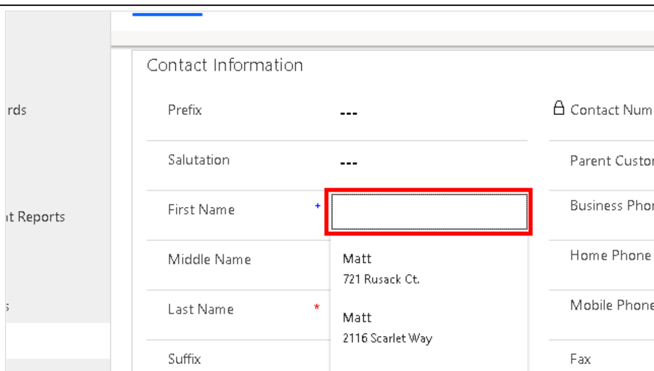
First, create a new contact by clicking on New



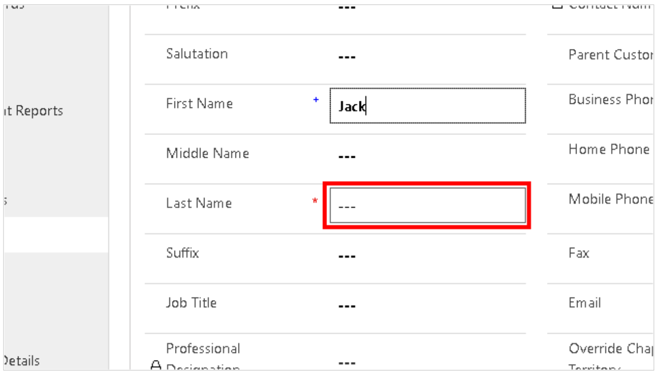
Click on the First Name field



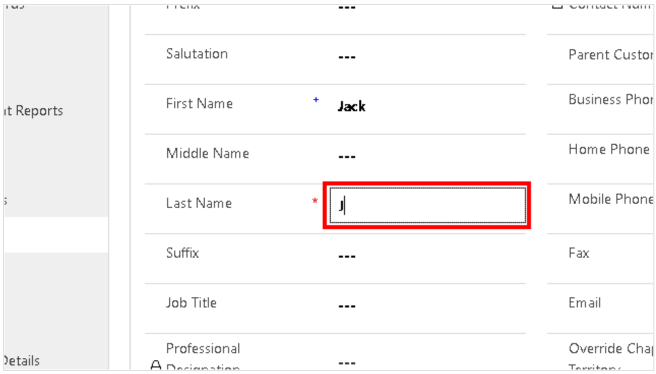
Enter name



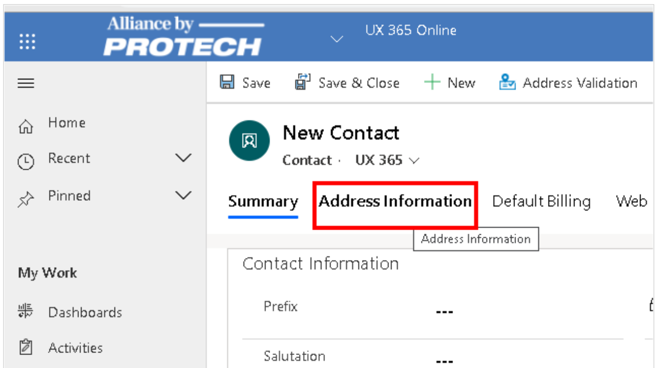
Click on the Last Name field



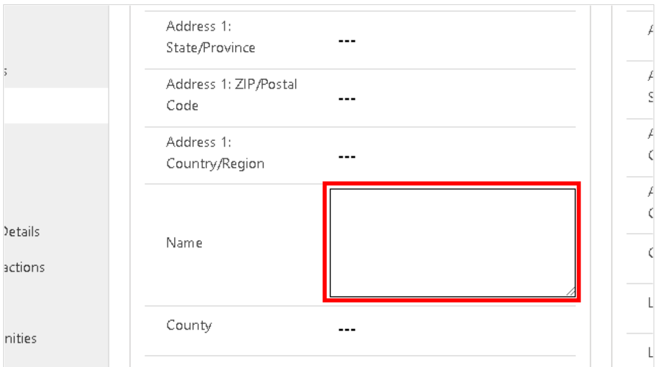
Enter name



Select the Address Information tab to expose the Primary Address

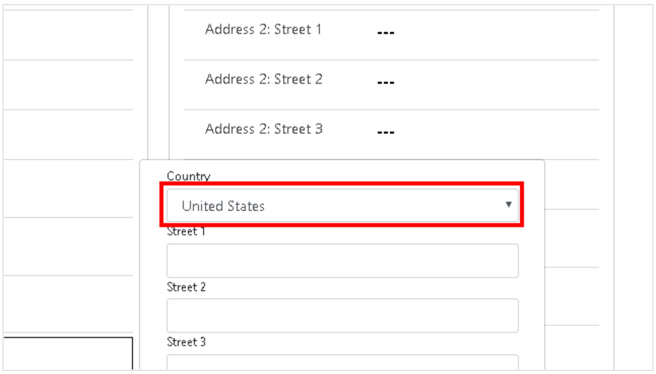


In the Primary Address, click in the Name field to open a dialog of address element fields.

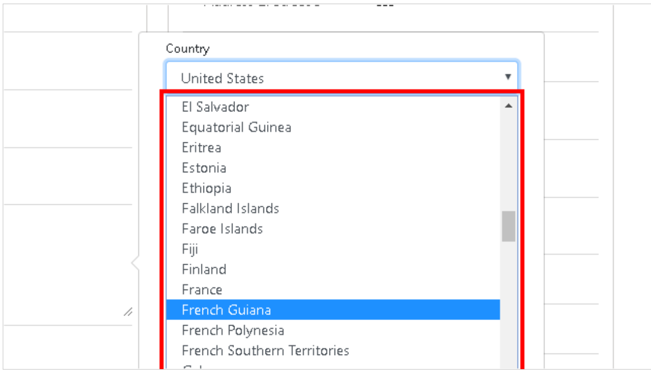


Enter data in to the various dialog address element fields. You will notice that for most countries, there is a drop down list of valid country-specific data. For example, if Country = India, there is a dropdown list of States in India. If Country = Japan, there is a dropdown list of Prefectures.

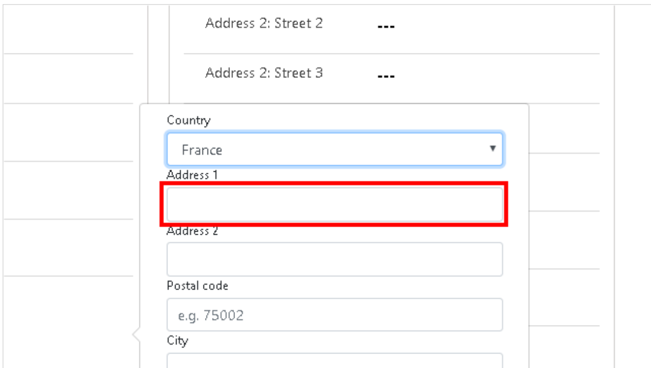
Click on the combo box **Country**



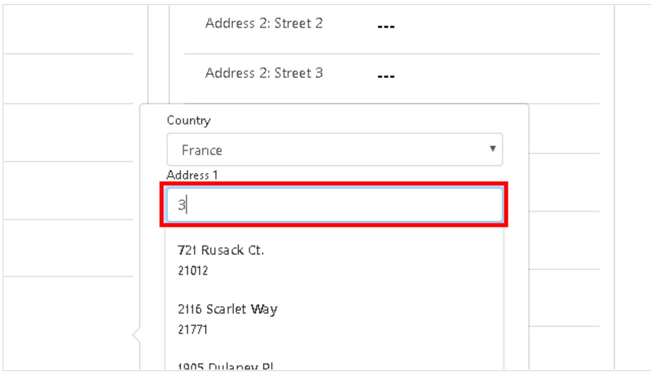
Click on an option from the list



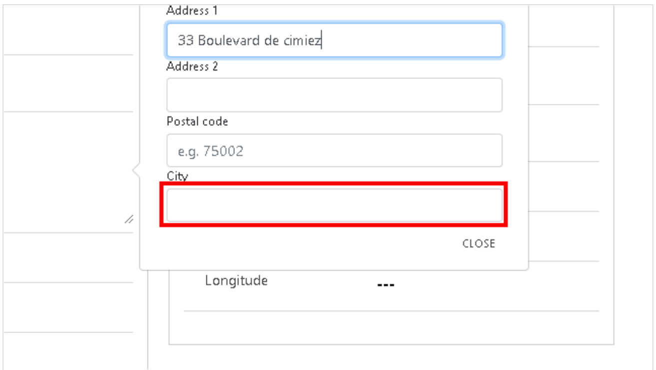
Click on Address



Enter the address

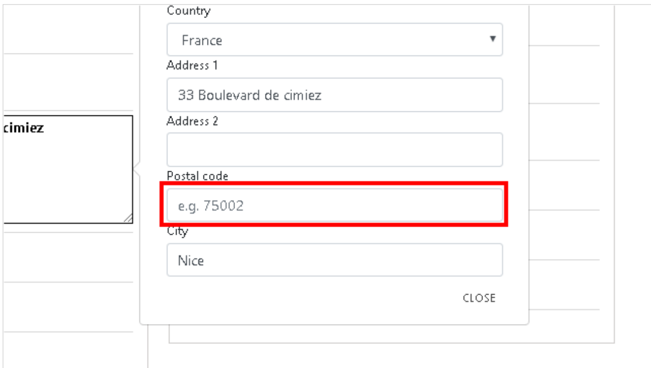


Click on City

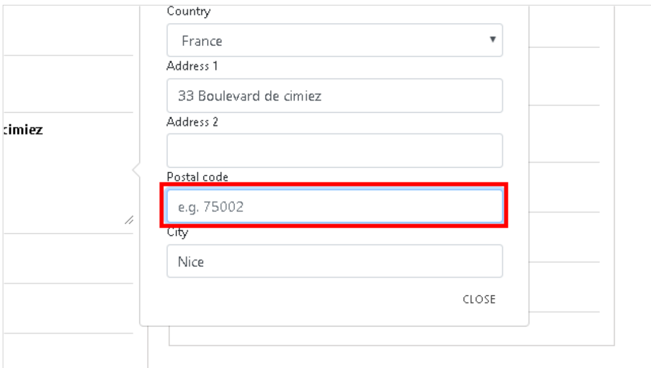


Enter **City**.

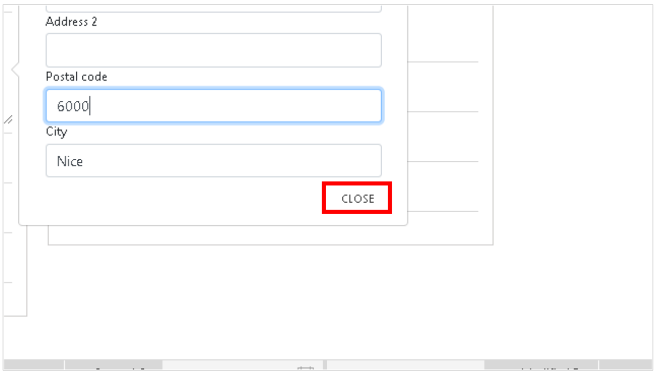
Click on Postal Code



Enter Postal Code



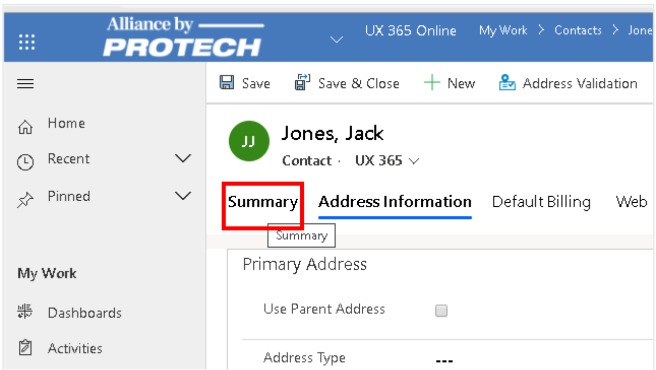
Click on the button **CLOSE**



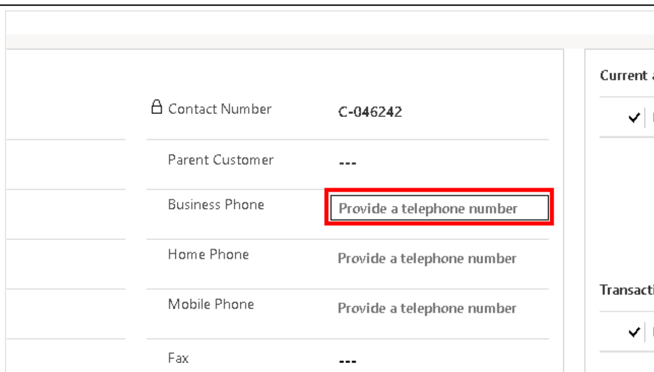
primary address Name field is populated with the data selected in the dialog

2.3.2. Telephone Formatting

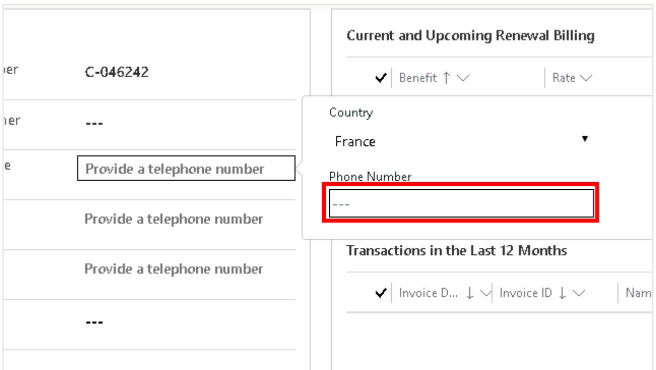
Click on the Summary tab



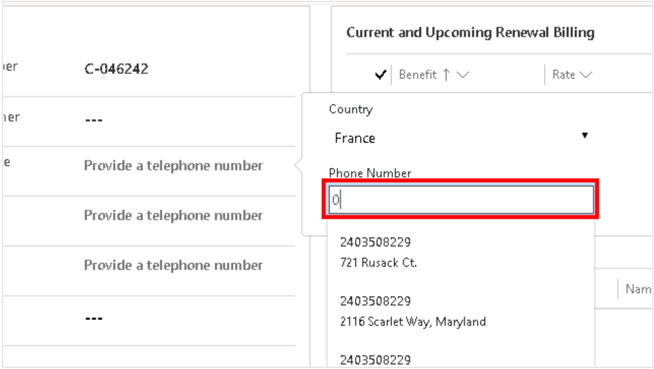
Click on the field **Business Phone**



Click on the number input field

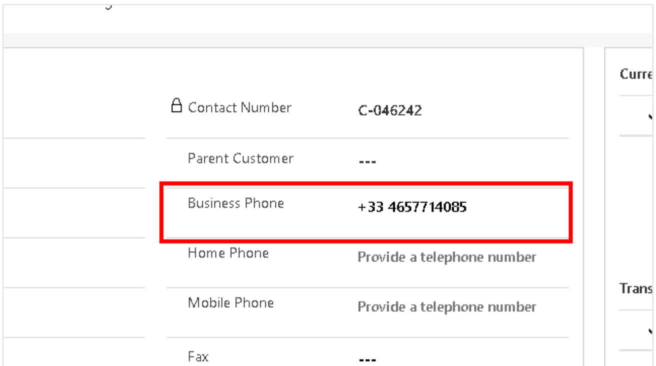


Enter phone number

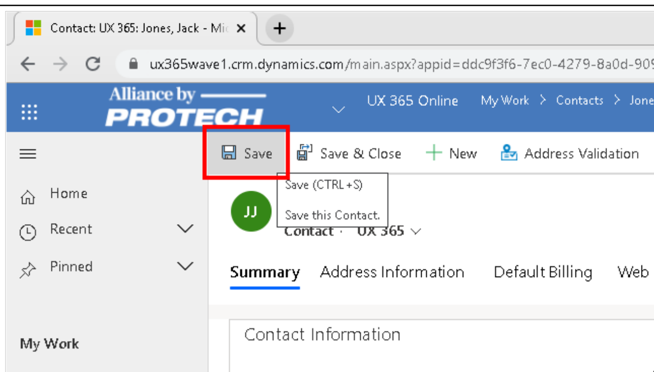


Please note: it will only format if it recognizes the number and spacing of digits that are used for that country

You'll immediately notice that the phone entered in the dialog appears as a country-specific number in the Business Phone field, including the country code.



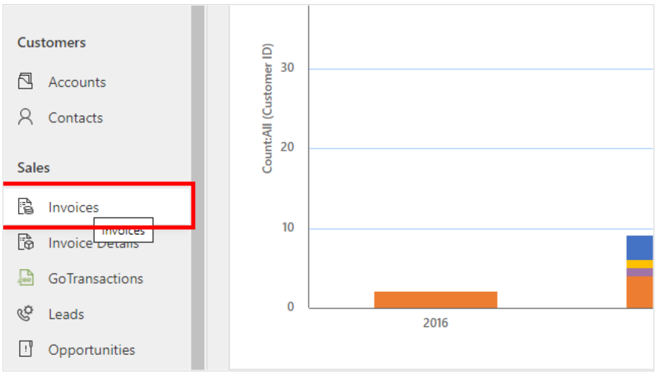
Click on the menu item Save



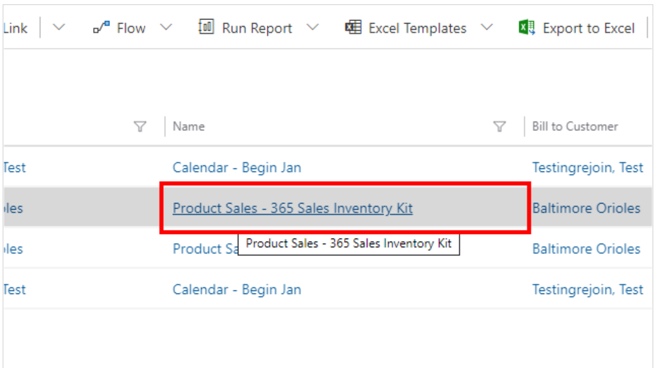
2.4. Invoices Management

2.4.1.1. Invoice Record Elements

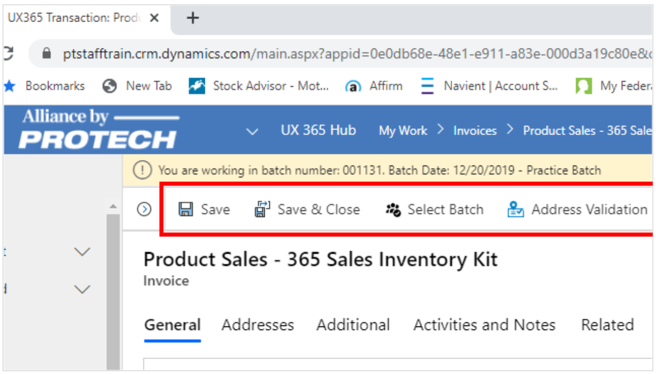
Click on the item **Invoices**



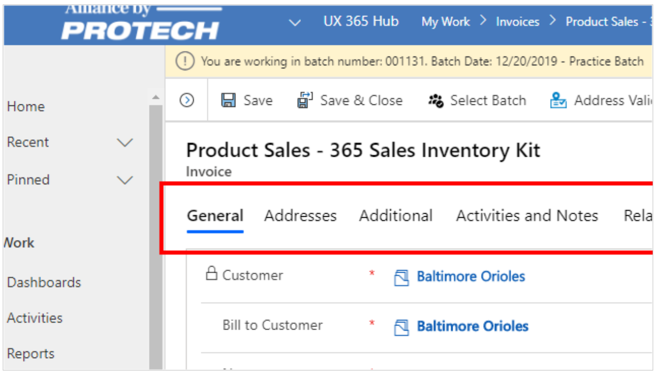
Click on the invoice you would like to view.



At the top is the record toolbar.
Located across the top of the invoice record, the Record toolbar provides additional buttons that manage additional UX 365 functionality for the invoice. These include: Save Save & Close Select Batch – For information about batches, see Batch overview . Address Validation – For information about validating an invoice Bill To or Ship To address, see Validating invoice Bill To and Ship To addresses . New Transactions – Drop-down of available transactions types. Calculate Freight – For information about calculating freight for product sales invoices, see Calculating freight charges for a product invoice . Transfer Payment – For more information, see Transferring a payment from one invoice to another . See, also, Defining a default payment transfer product . Refresh – Manually refreshes the invoice record. Assign – Reassign ownership to a different user. Share - Share this invoice with a select person or team but continue to hold ownership. Email a Link - Send a link of this record in an Email. Flow - Run a flow on this invoice (used to be called Workflows). More Actions – Includes options such as Run Report – Click this button to print the invoice report.

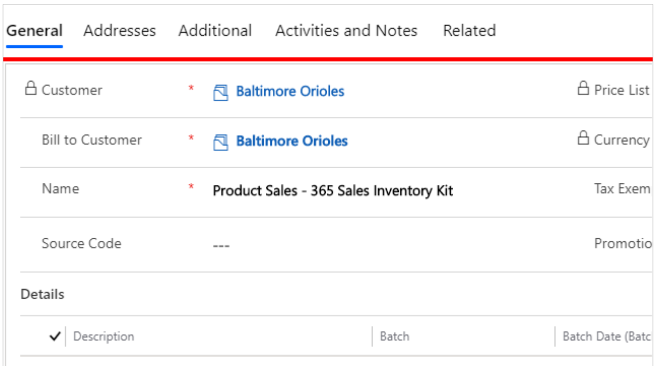


Move to the invoice navigation bar.



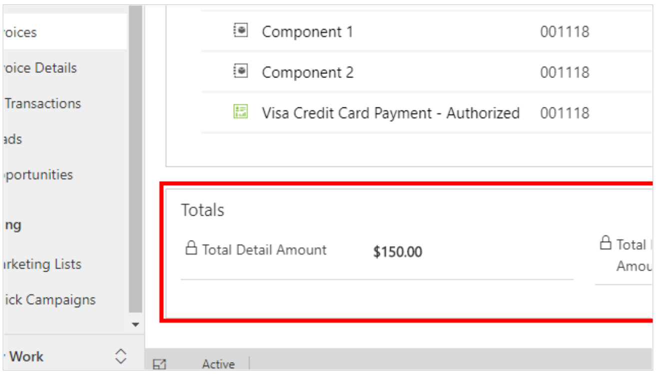
Here is a navigation bar that gives information about the invoice. This is also where you view and edit the address information.

Move to the general invoice information.



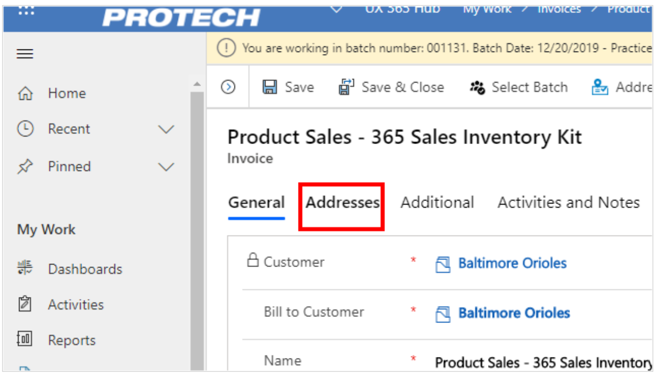
This includes the customer, price list, invoice name, and other details.

Move to the invoice totals.



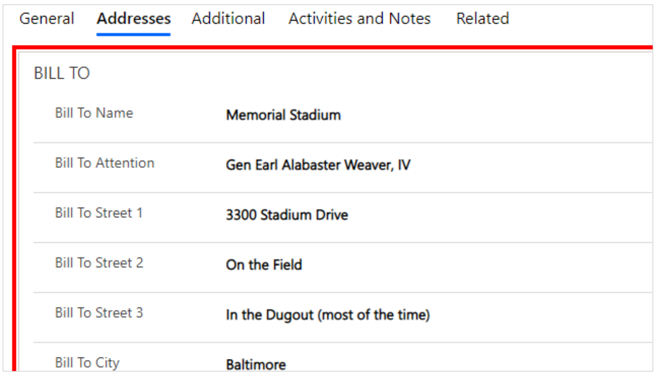
This displays a summary of the invoice detail line items, as well as any calculated tax, the amounts paid, and the balance due.

Click on the item **Addresses**

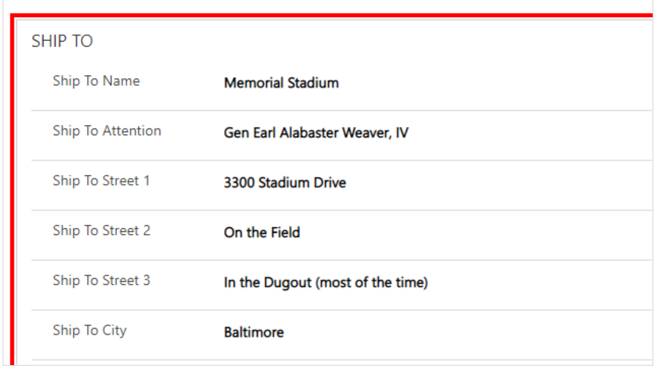


The address data is populated upon Save or when adding the first New Transaction. Like the address data in an account or contact record, invoice addresses are composite address fields. The invoice includes 2 components, bill to and ship to addresses.

Bill to Address

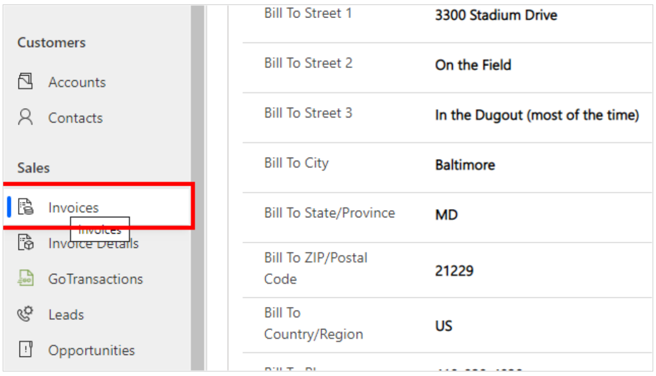


Ship to Address

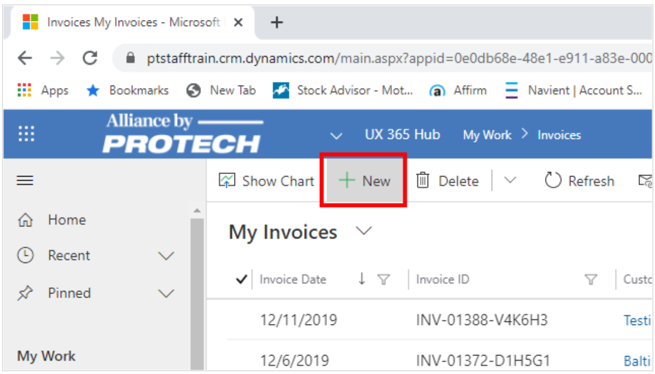


2.4.1.2. Creating an invoice and entering invoice basic information

Click on the item **Invoices**

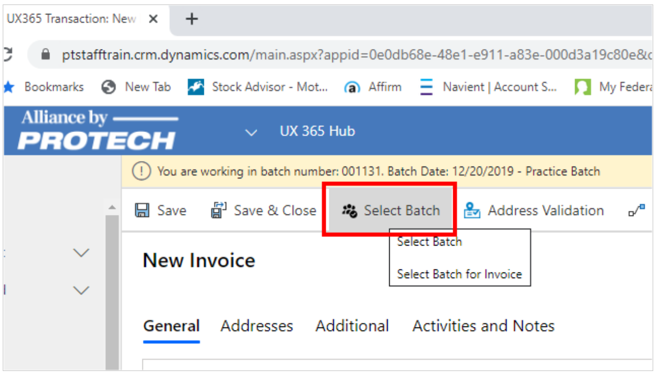


Click on the menu item **New**

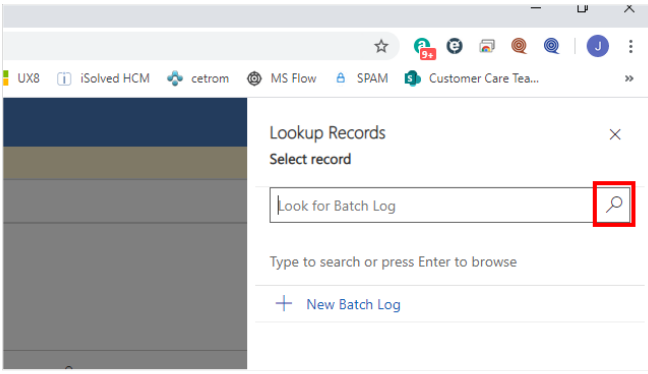


Click on the menu item **Select Batch**

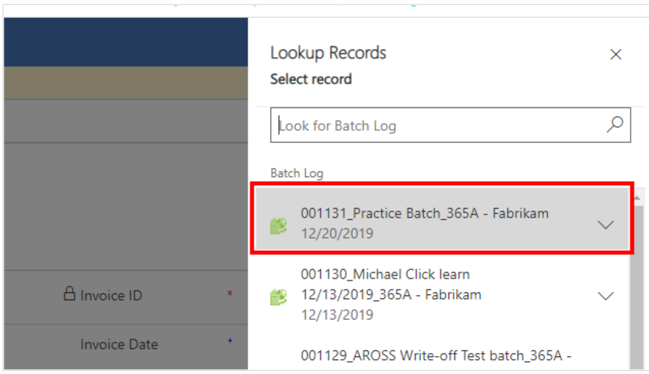
Click Select Batch to select the appropriate open batch based on your organization's business rules. For information about batches, see Batch overview . You must be in an open batch in order to enter or open invoice detail. If you are not in an open batch, a warning message directs you to select a batch. If you already are in an open batch, confirm that you are working in the correct batch.



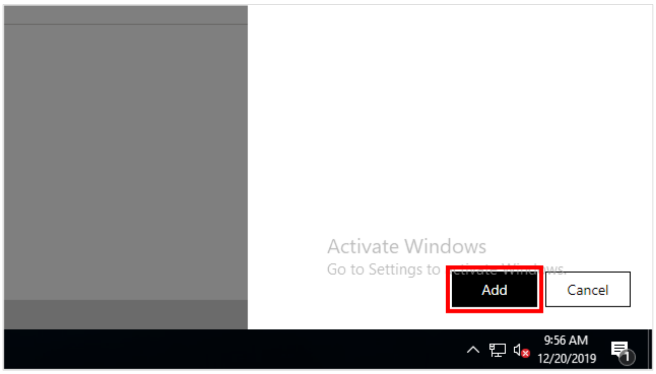
Click on the magnifying glass to search all records.



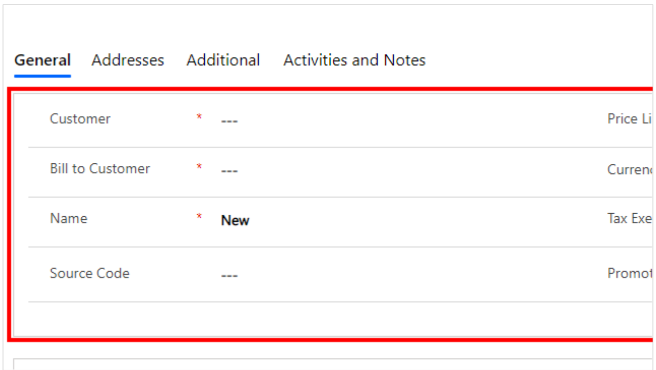
Select the appropriate batch.



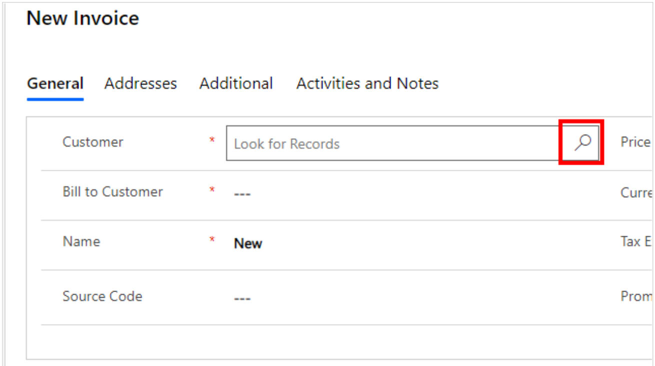
Click on the button **Add**



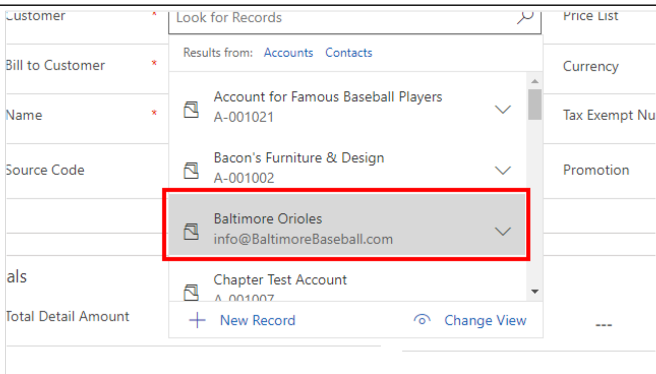
Enter information into the required fields of the invoice.



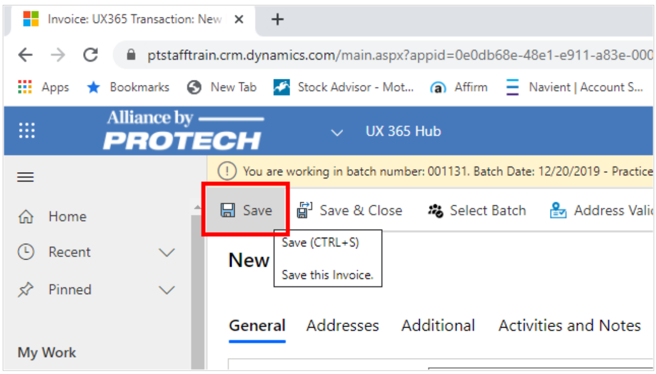
Click on the magnifying glass to search through customers.



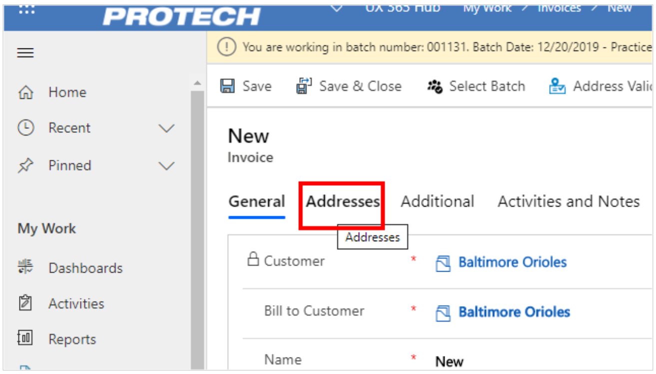
Select the customer you are making this invoice for.
After selecting the customer, the rest of the fields with automatically populate with information in the customer's record.



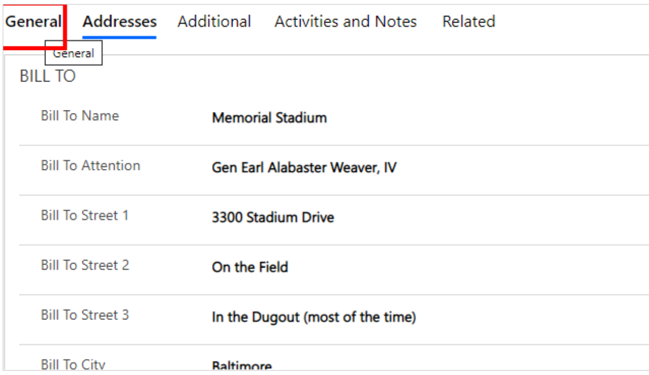
Click on the menu item **Save (CTRL+S)**



Click on the item **Addresses**
Verify that the Bill to and Ship to addresses are correct. After doing so, return to the general page of the invoice.



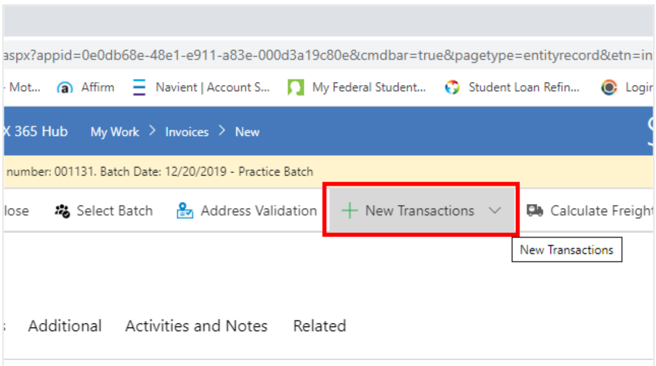
Click on the item **General**

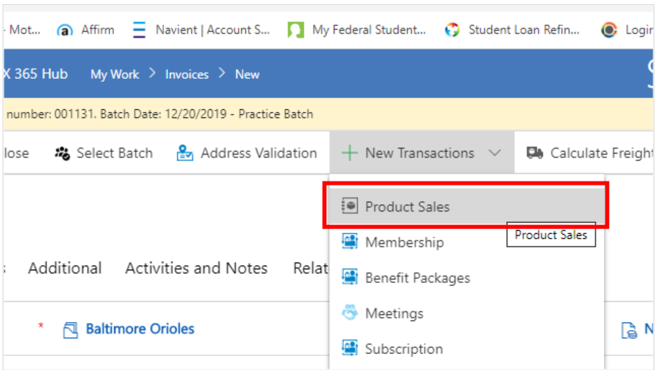
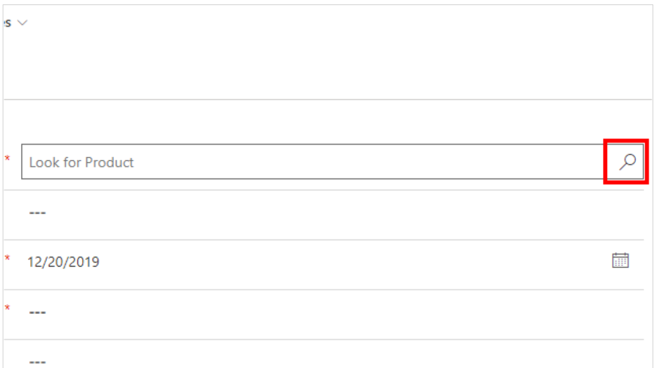
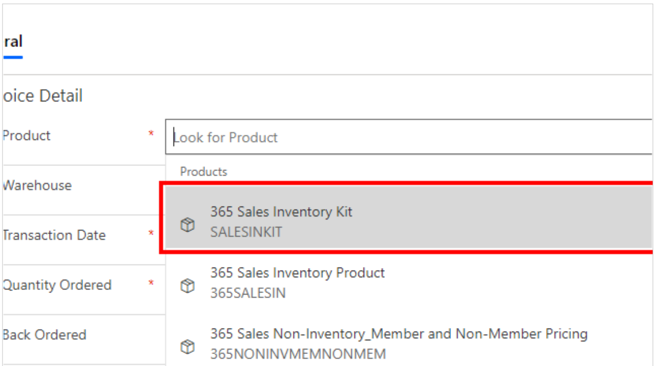
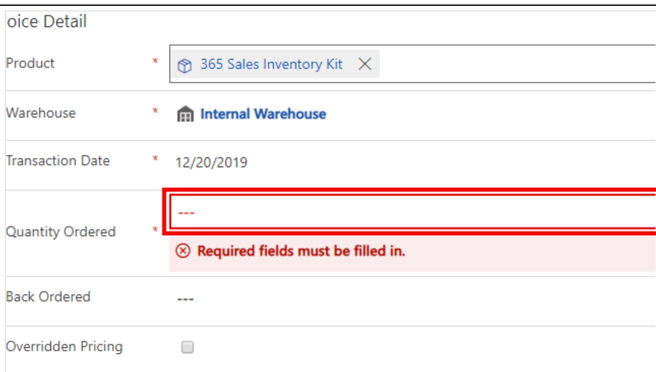


2.4.1.3. Creating invoice transactions

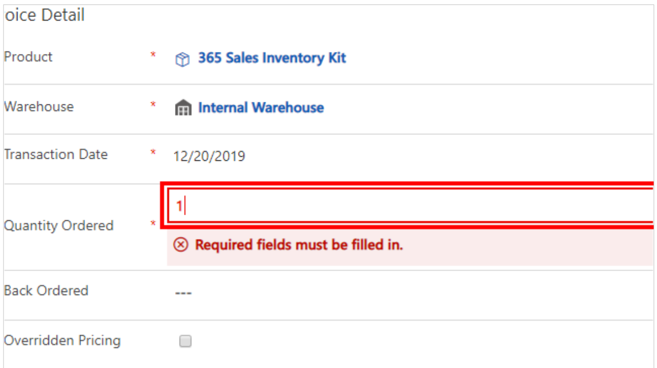
The system will add a separate invoice detail line item for each individual transaction on the invoice. For example, if you are recording an invoice for a customer's meeting registration, you will create a meeting transaction, resulting in an invoice detail line item for the meeting registration. If you are creating a payment, you will create a payment transaction, resulting in an invoice detail line item for the payment. Each invoice transaction type has a specific invoice detail type code that is useful when search for invoices that contain a particular transaction type through Advanced Find. For a list of invoice detail type codes, see Invoice Detail Type Codes below.

Click on the menu item **New Transactions**
The New Transactions button on the Record toolbar is used for creating transactions for dues, meeting registrations, contributions, etc., as well as for creating payment transactions. From the drop-down, select the type of transaction you want to enter. Each transaction type uses a different transaction entry form. Depending on your security role settings, the available invoice transaction types may include: Product Sales (See Product Sales Transactions for detailed instructions.) Membership Dues (See Membership Renewal Billing Transactions for detailed instructions.) Benefit Packages (See Membership Renewal Billing Transactions for detailed instructions.) Meetings (See Meeting Transactions and Processing for detailed instructions.) Subscriptions (See Subscription Transactions for detailed instructions.) Exhibits (See Exhibit and Booth Transactions for detailed instructions.) Advertisements (See Advertising Contracts for detailed instructions.) Professional Development (See Certification and Accreditation Transactions and Processes for detailed instructions.) Contributions (See Fundraising Transactions for detailed instructions.) Promotion Package (See Promotion

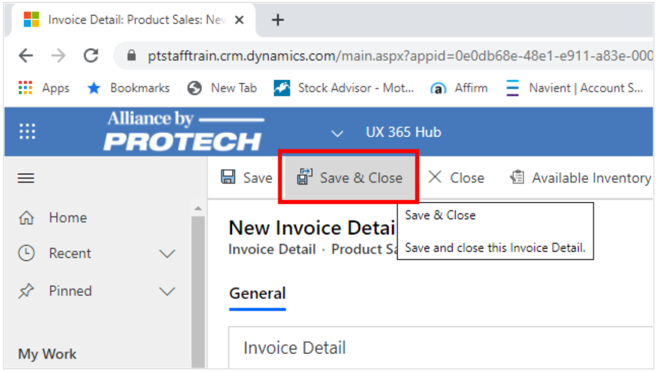


Packages for detailed instructions.) Payment & Adjustment (See Payment and Adjustment Transactions for detailed instructions.) Comments (See Adding a comment to an invoice for detailed instructions.)	
Click on the type of transaction you would like to create. For this example, Product Sales	
Using the search bar, look for the product you want to add to this invoice.	
For this example we are using the 365 Sales Inventory Kit.	
For product sales, you will need to enter the quantity of the product ordered. Other transaction types will have different transaction forms with different required fields.	

Enter the quantity.

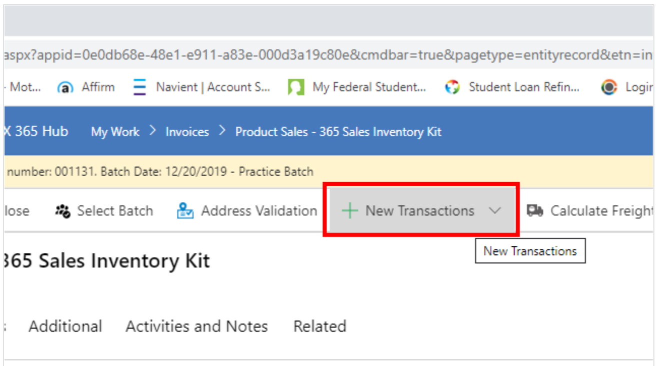


Click on the menu item **Save & Close**

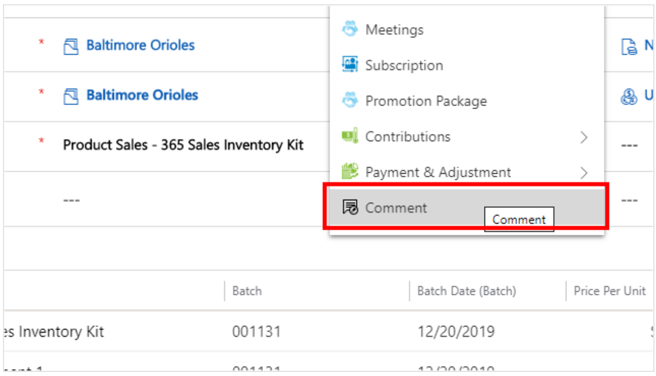


2.4.1.4. Adding a comment to an invoice

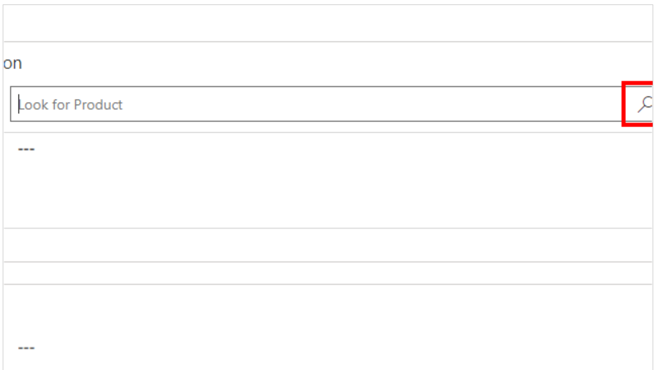
Click on the menu item **New Transactions**



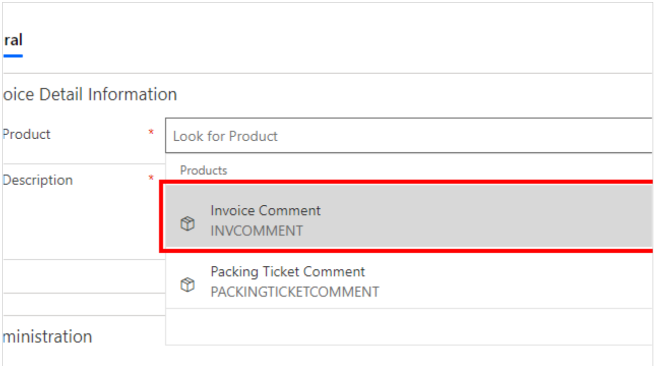
Click on the menu item **Comment**



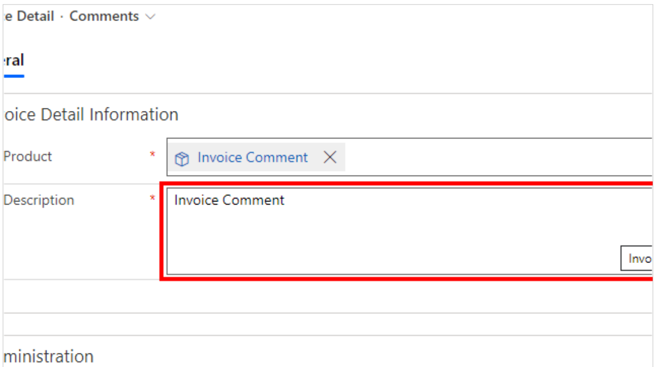
Click on the link **Product**



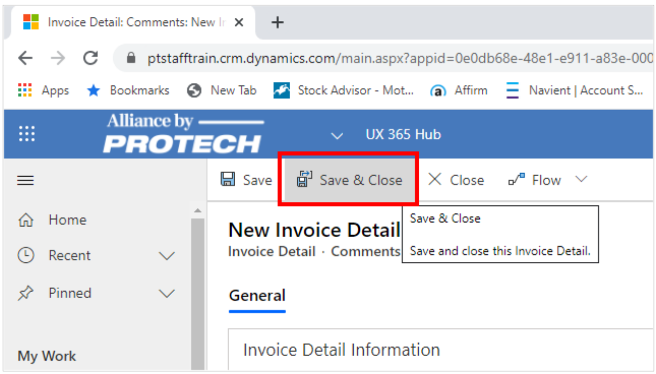
Select a invoice comment product.



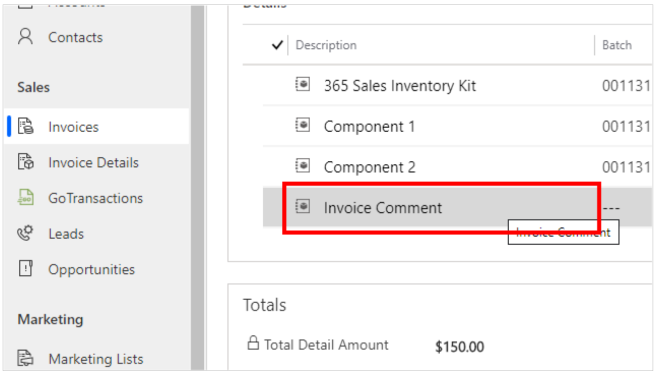
Enter in the comment text here.



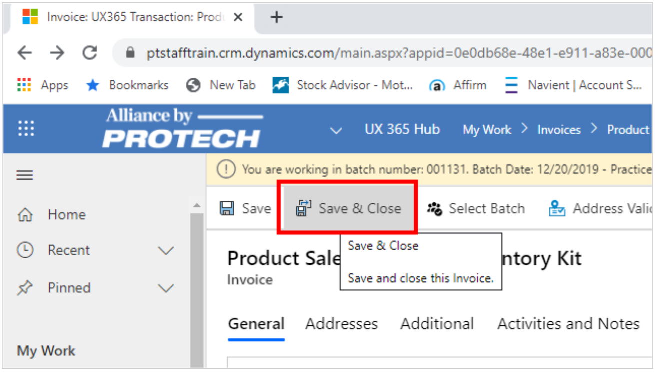
Click on the menu item **Save & Close**



Your comment will appear just like a usual transaction.



Click on the menu item **Save & Close**

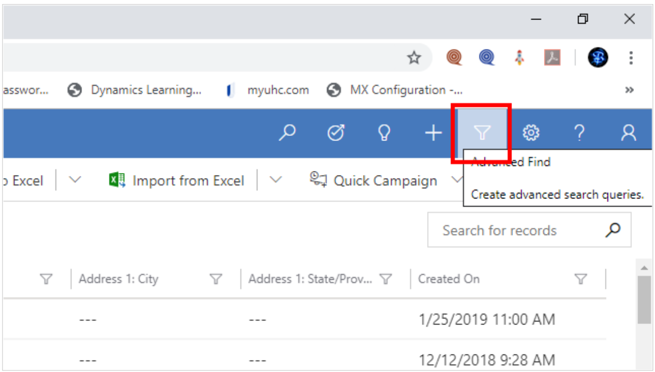


2.5. Sending Email

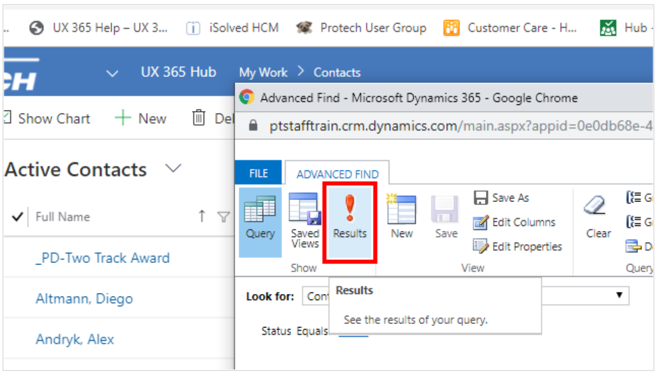
2.5.1. Sending email from a Quick Campaign

There are multiple ways that you can send email via UX 365. One way is through quick campaigns. You are able to email using a quick campaign by querying who you will want to send the email to.

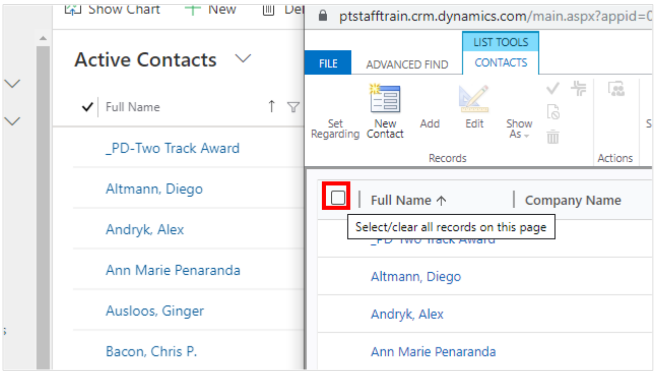
Click on the menu item Advanced Find and query on who you want to target through the quick campaign.



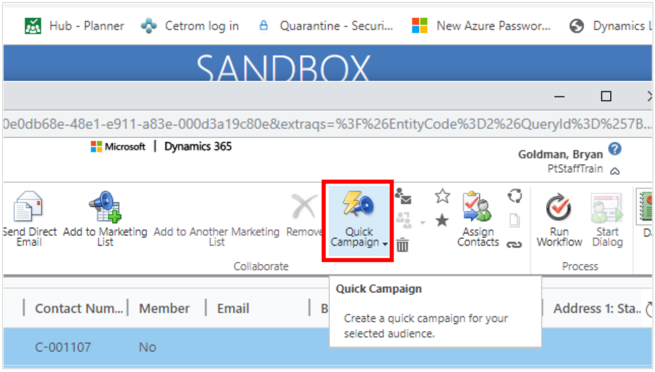
Click on the ribbon item **Results**



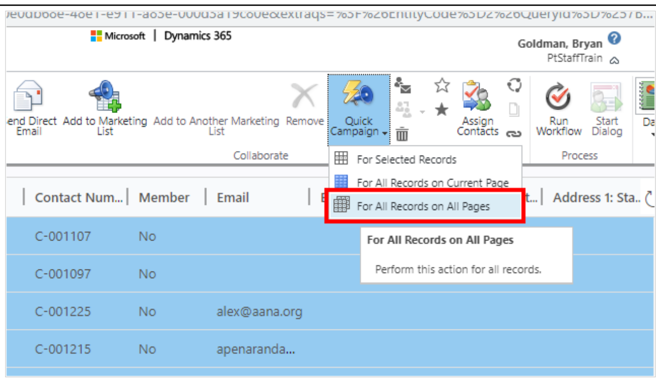
Select all or specific records you will want to email using quick campaign.



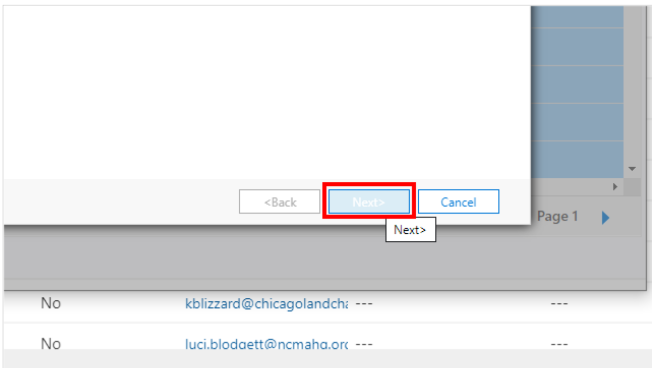
Click on the ribbon item **Quick Campaign**



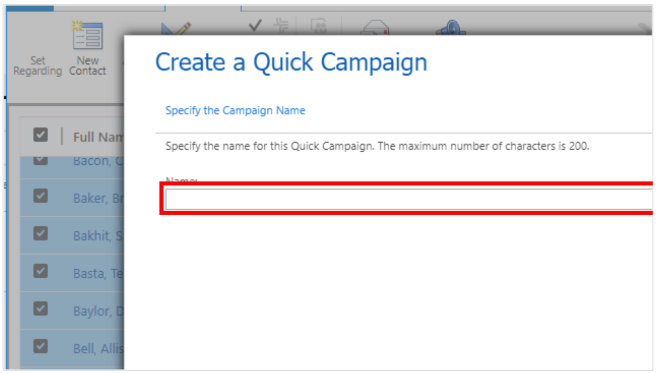
Click on the link **For All Records on All Pages**



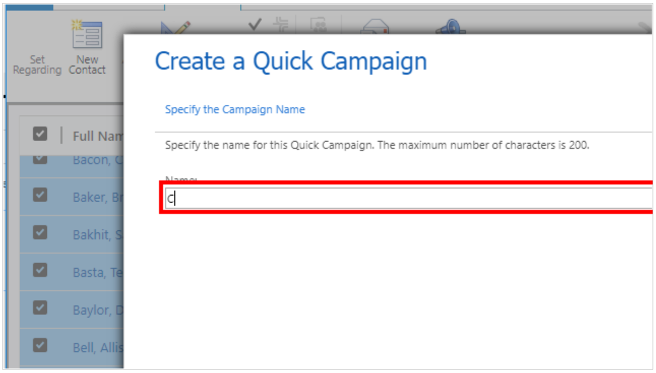
Click on the button Next



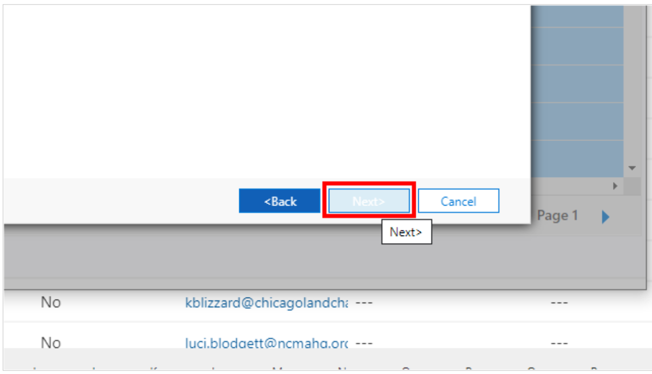
Click on **Name:**



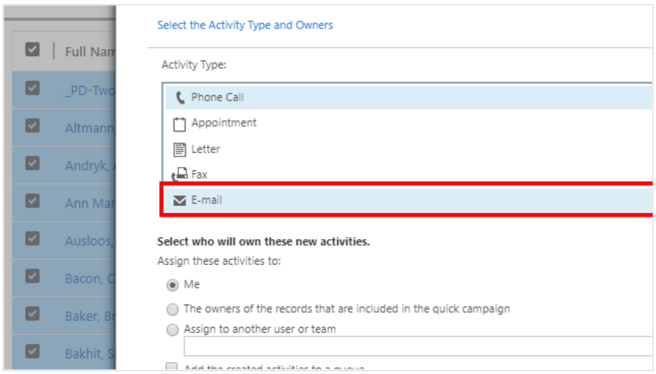
Enter a descriptive name for the Quick Campaign



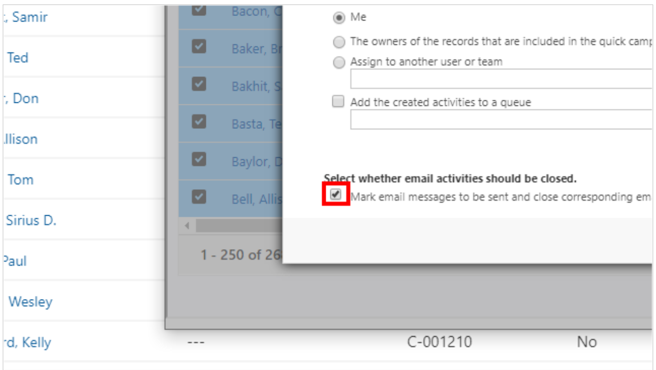
Click on the button Next



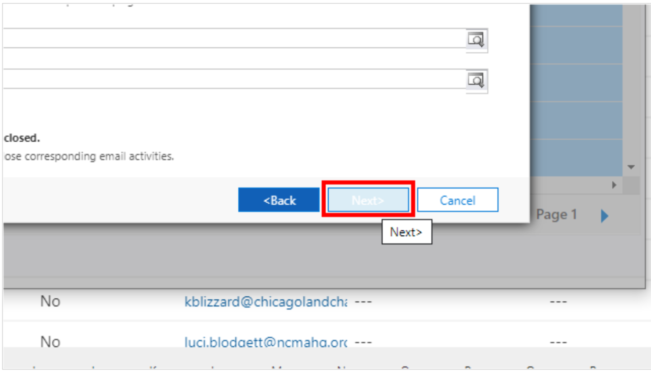
Click on the item **E-mail**



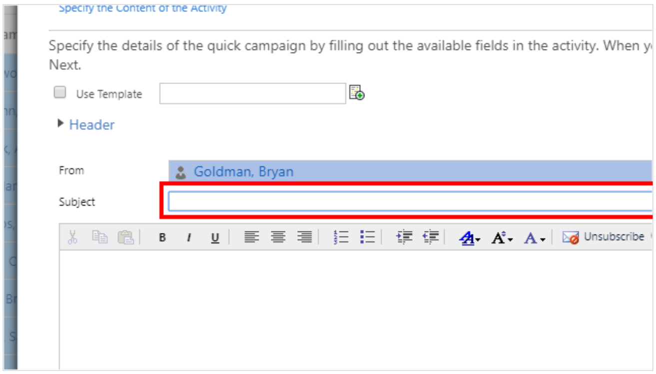
Mark email messages to be sent and close corresponding email activities.
Check this box if you want Dynamics CRM to send the email immediately. This is the default setting. Uncheck this box if you want do not want to send the email immediately. The e-mail activity status will be Draft in the Quick Campaign and the activity will be available in your Workplace Activities until you open each e-mail activity and Send.



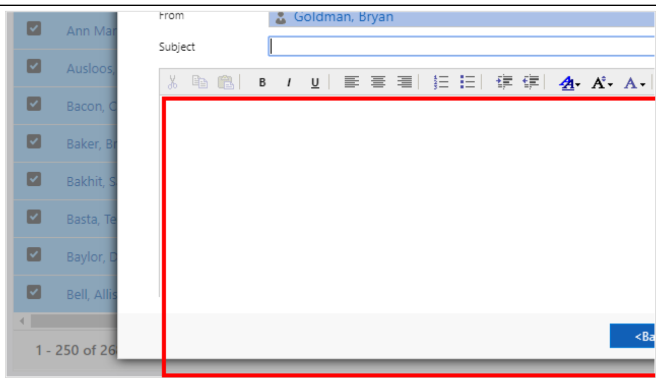
Click on the button Next



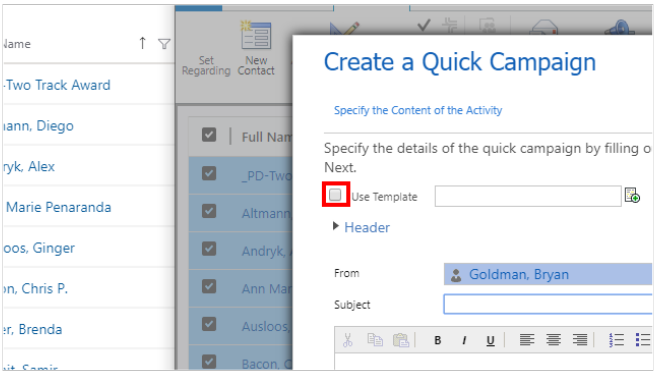
When composing an email message, enter a subject and the message content.



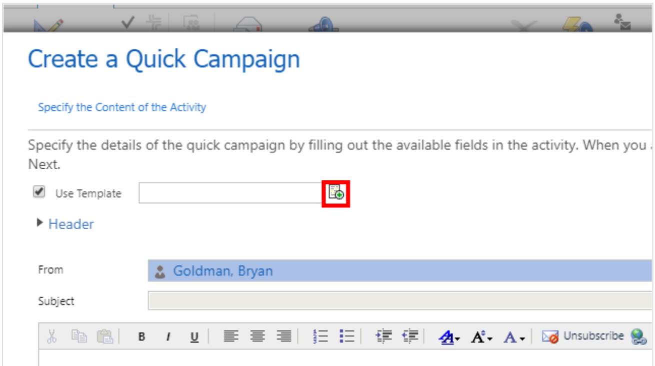
Email Content



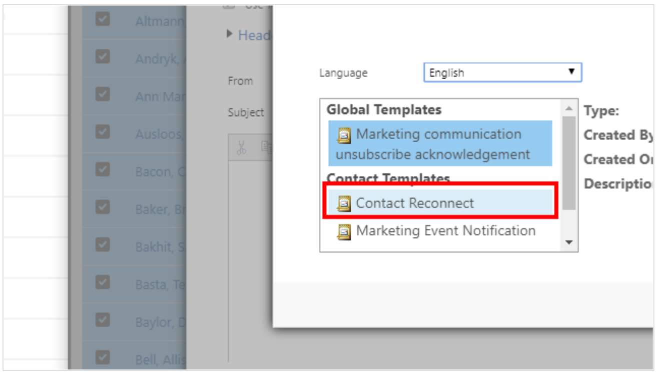
Click on the checkbox **Use Template**



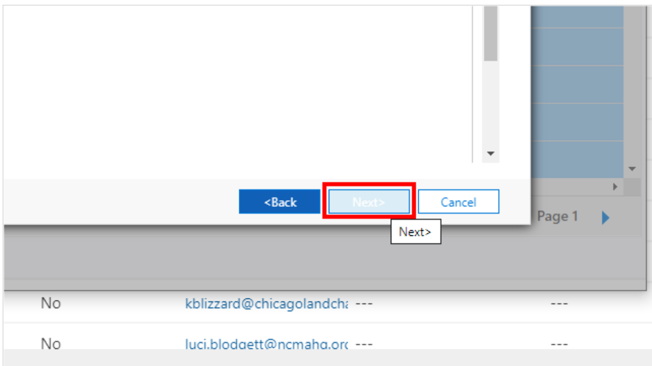
Click on the link **Select Template**



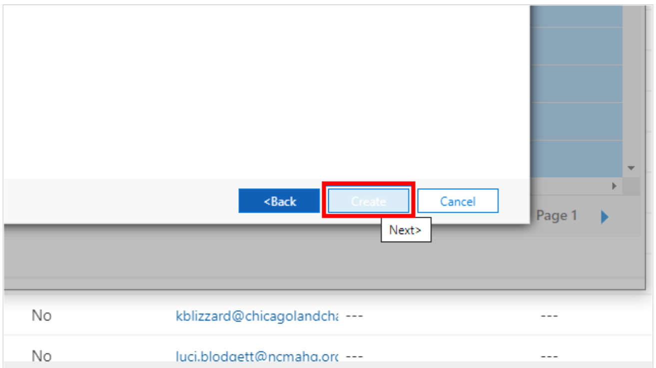
Click on desired email template.



Click Next to review a summary of the Quick Campaign. The summary displays the name of the campaign, the number of records, the activity type, and activity owner.

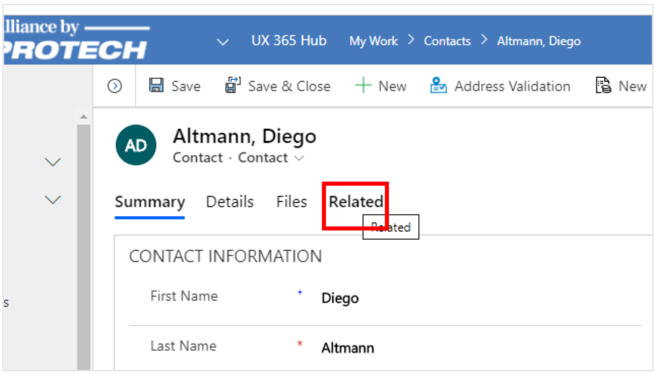


Click Create to create the Quick Campaign and create the e-mail activities. Dynamics CRM immediately creates the e-mail activities for all of the contacts you selected.
Contacts where the contact communication preferences do not allow e-mail or do not allow bulk e-mail will be excluded from the Quick Campaign results.

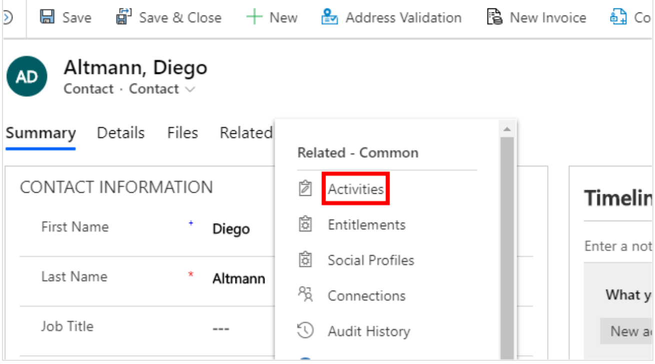


2.5.2. Sending email from a single contact record

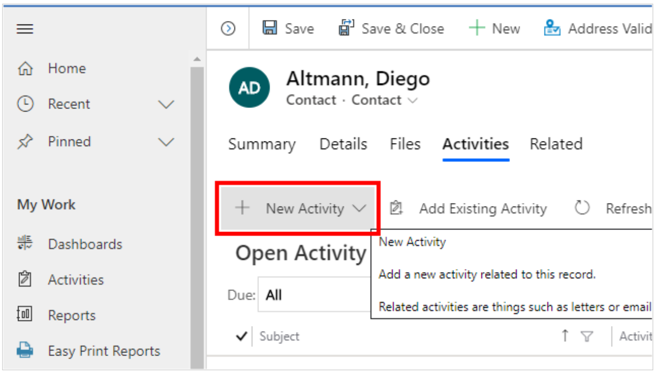
From the contact record, click on the item Related



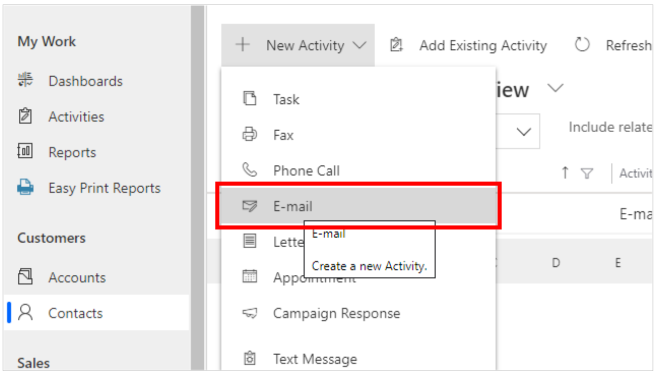
Click on the menu item **Activities**



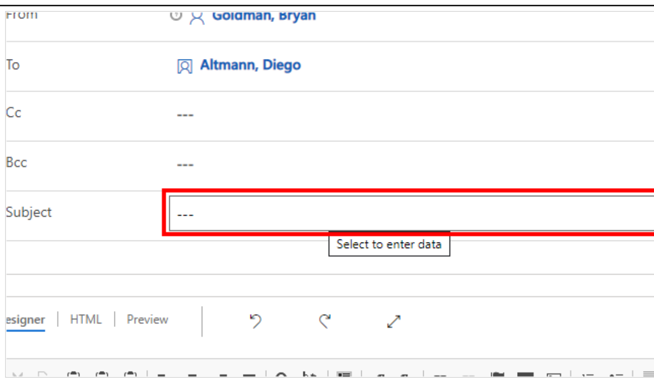
Click on the menu item **New Activity**



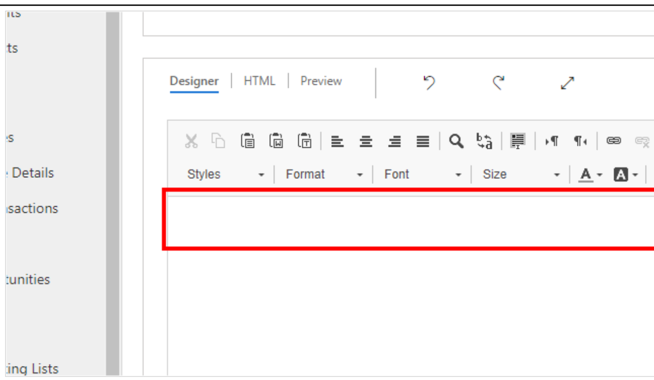
Click on the menu item **E-mail**



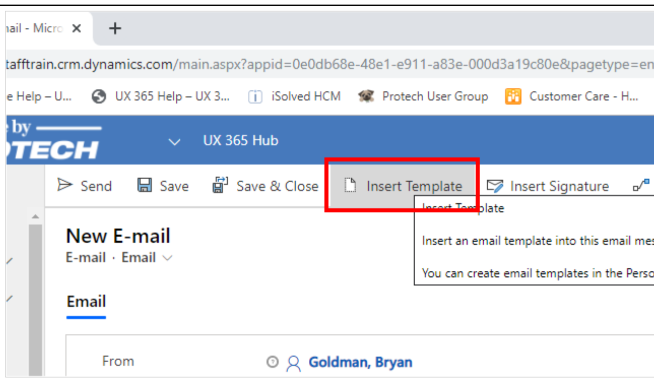
When composing an email message, enter a subject and the message content.



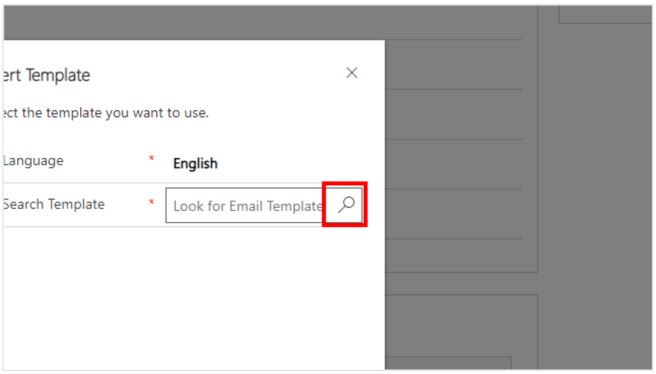
Email Content



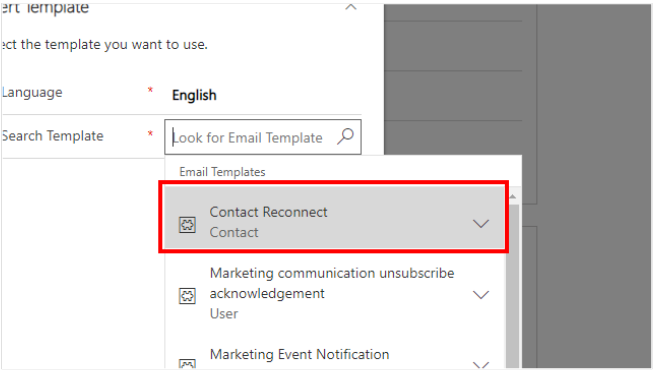
Click on the menu item **Insert Template**



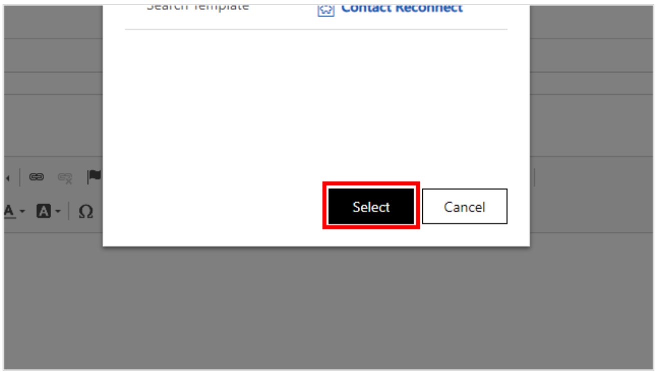
Click on the link **Search Template**



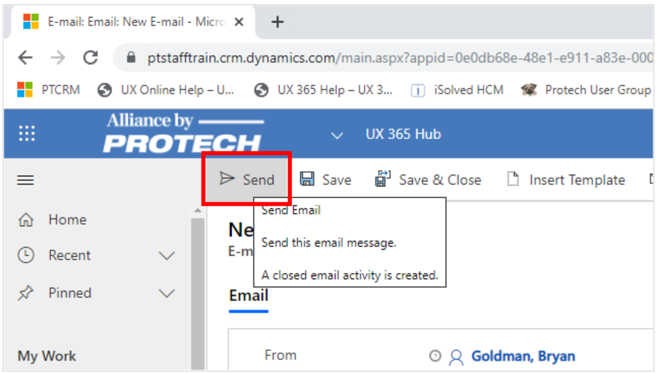
Click on desired email template.



Click on the button **Select**

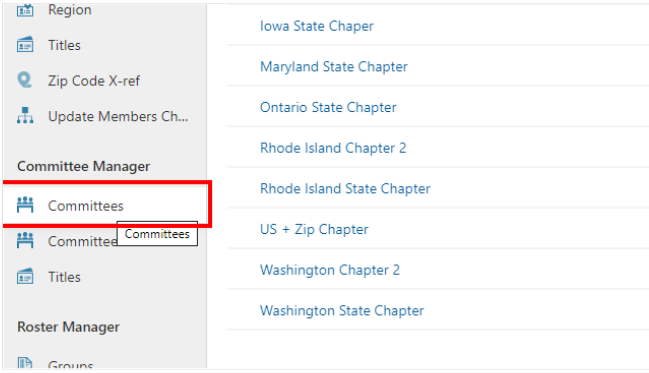


Click On Send to send email.

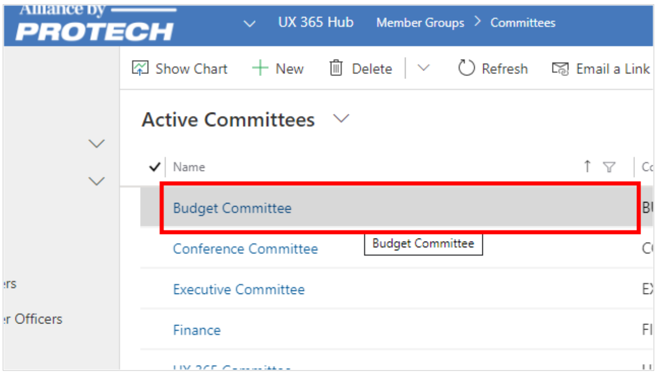


2.5.3. Sending email to a Committee or Roster

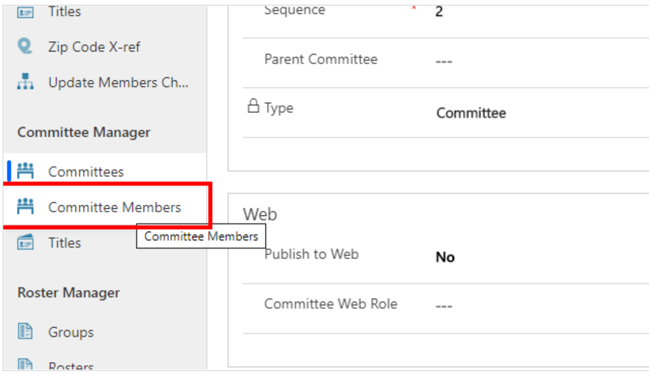
Click on the item **Committees**



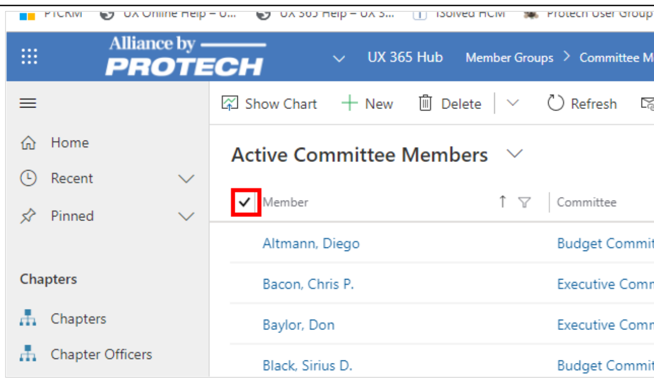
Open Committee record.



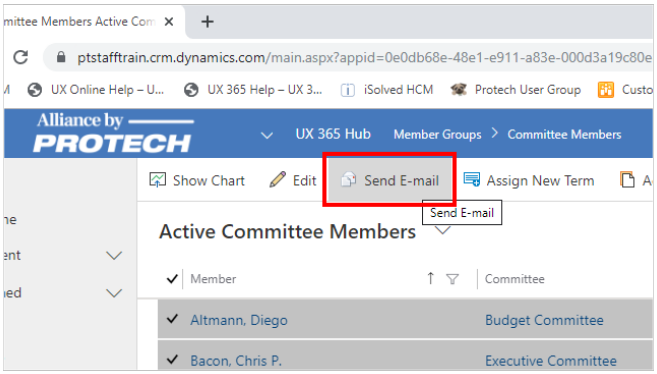
Click on the item **Committee Members**



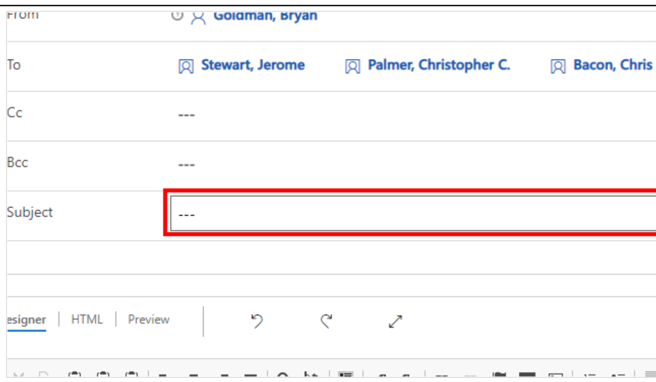
Click on specific committee members to send email to.



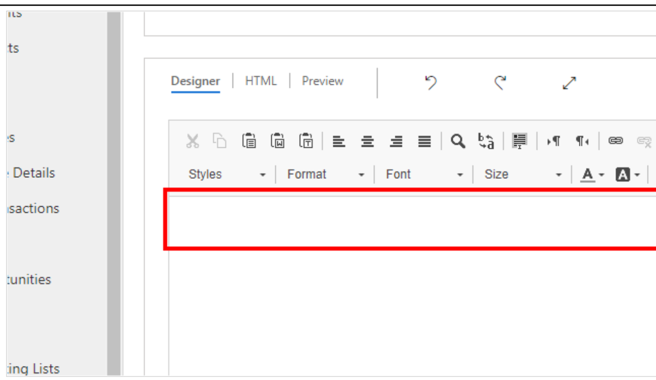
Click on the menu item **Send E-mail**



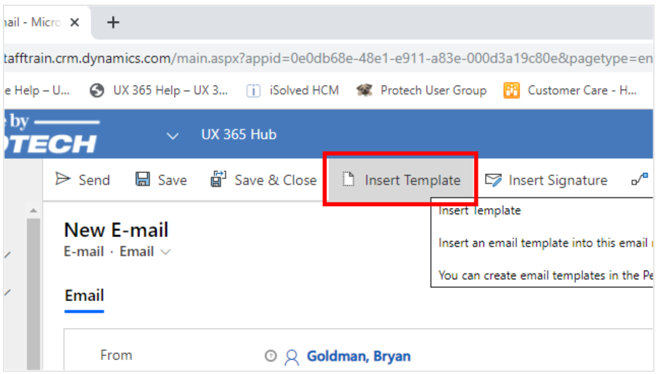
When composing an email message, enter a subject and the message content.



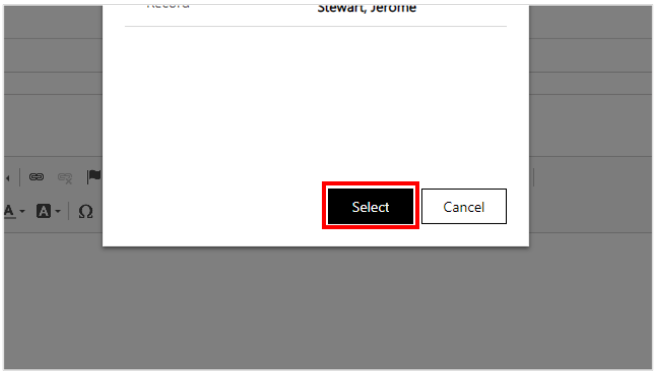
Email Content



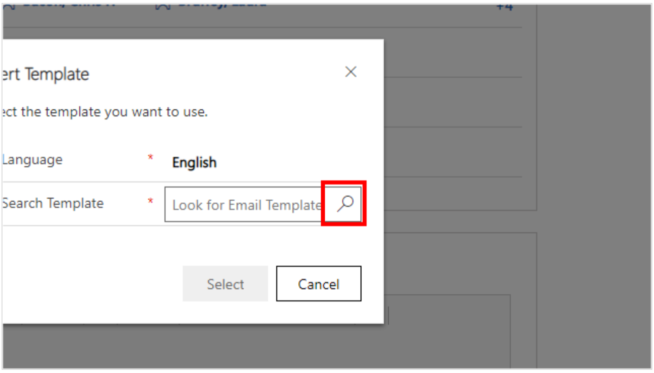
Click on the menu item **Insert Template**



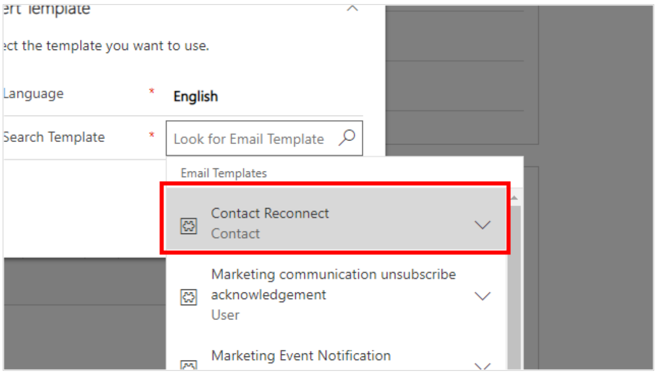
Click on the button **Select**



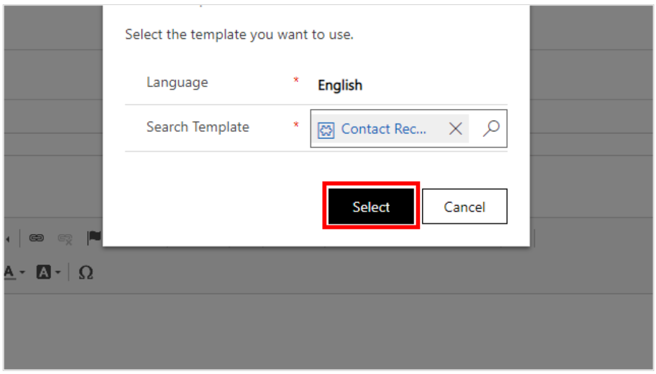
Click on the link **Search Template**



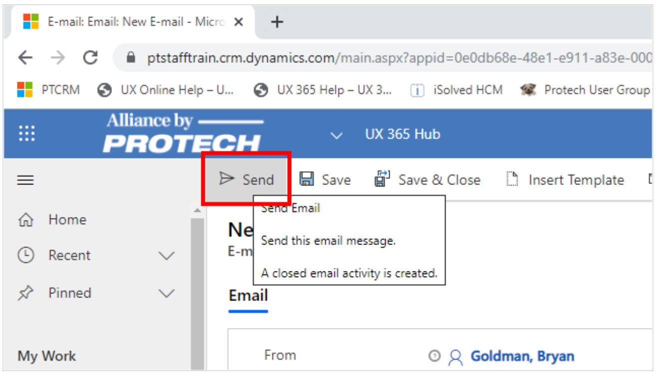
Click on desired email template.



Click on the button **Select**



Click On Send to send email.
These same steps can be taken in a Roster record to send email.

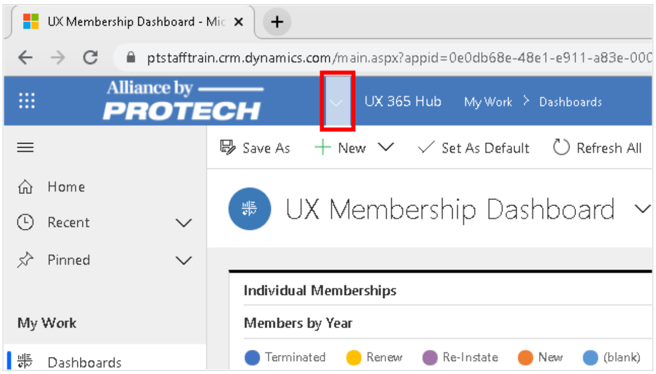


2.6. UX 365 User Interface

Welcome to the UX 365 User Interface!

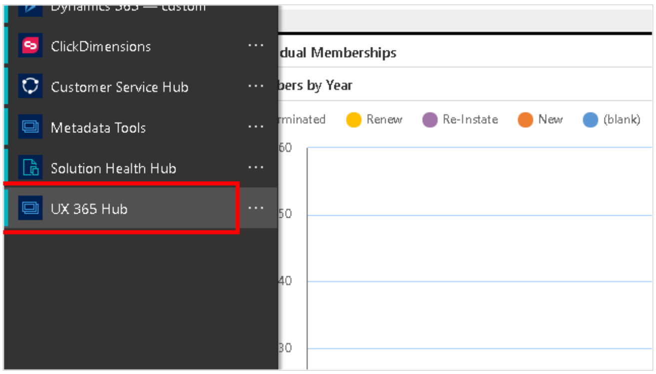
2.6.1. Top Navigational Toolbar

Click on the **switch app** button

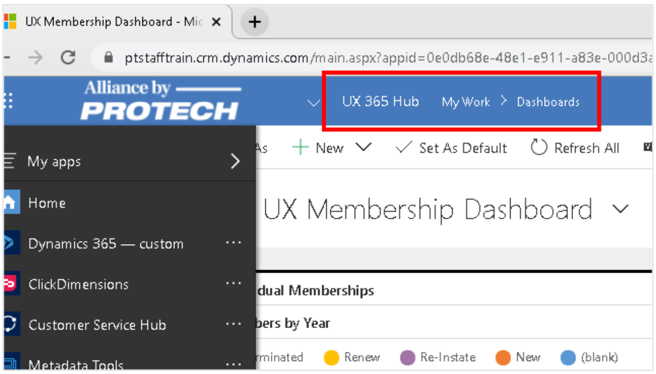


Click here to change the app your working in

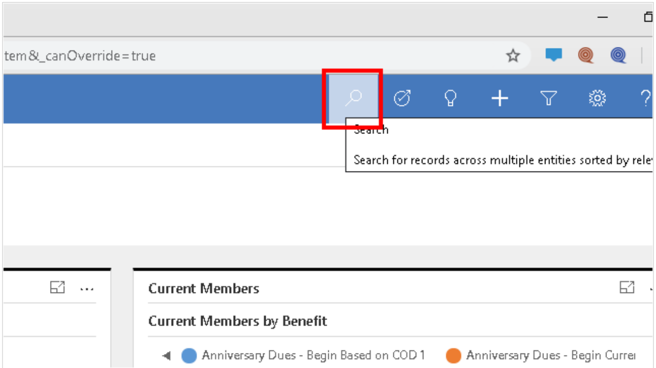
Click on the UX 365 Hub app



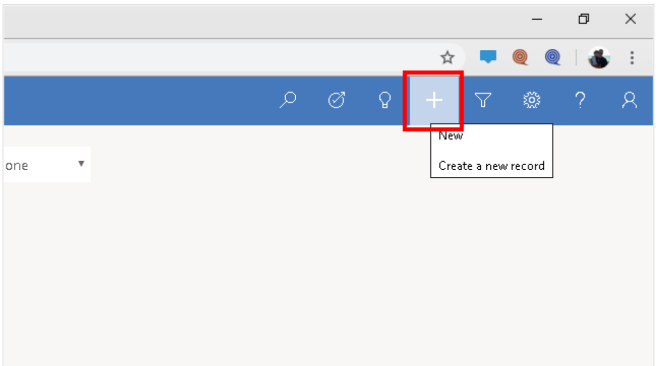
Navigational bread crumbs



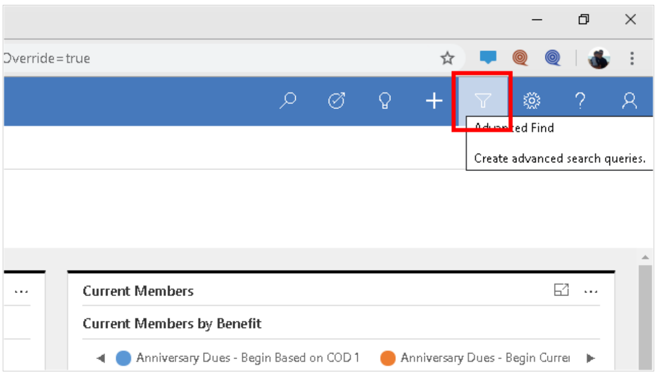
Search for records



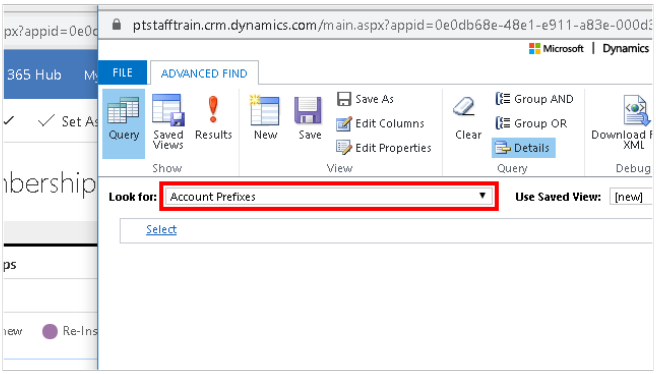
Create a new record



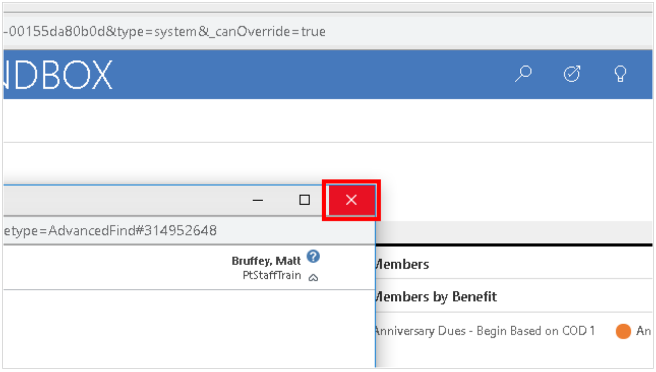
Click on the menu item **Advanced Find**



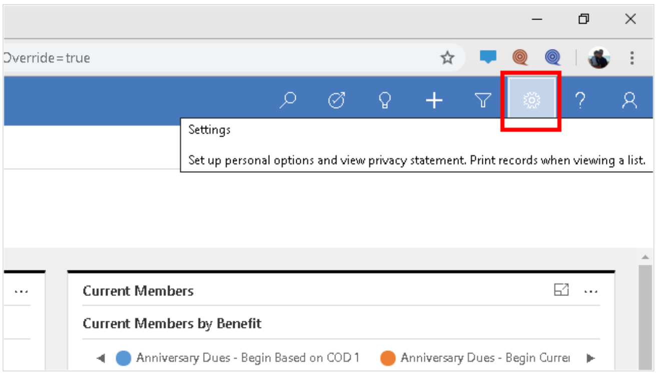
Click on the combo box **Look for:**
Here you can submit an advanced search and save views



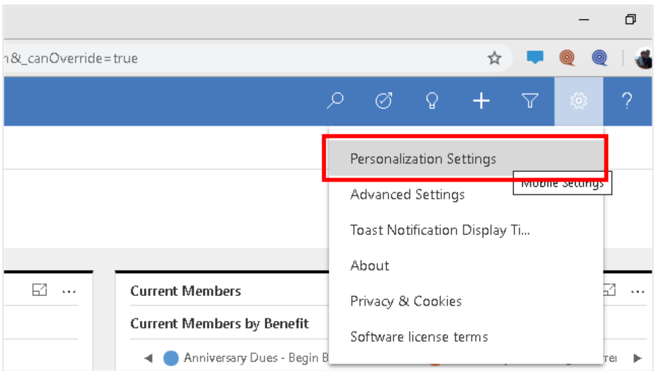
Click on the button **Close**.



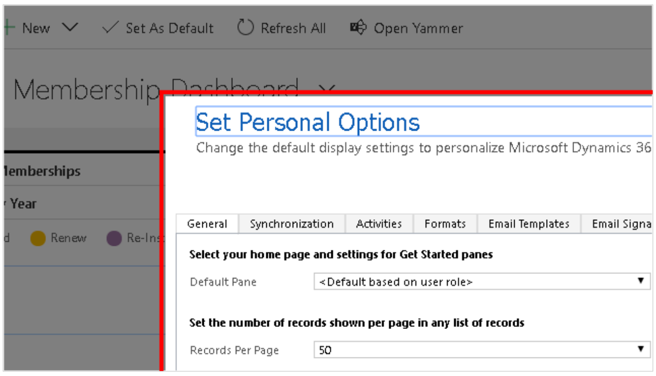
Click on the menu item **Settings**



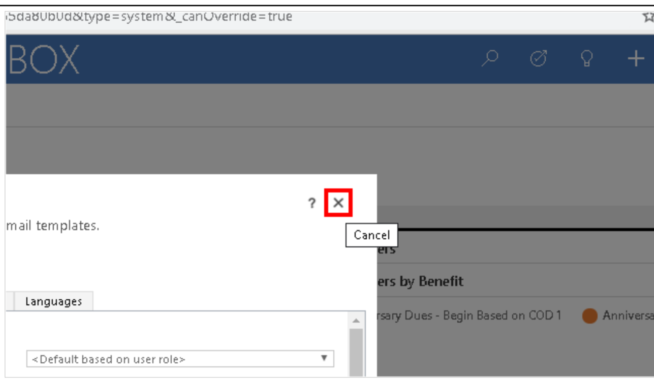
Click on the menu item **Personalization Settings**



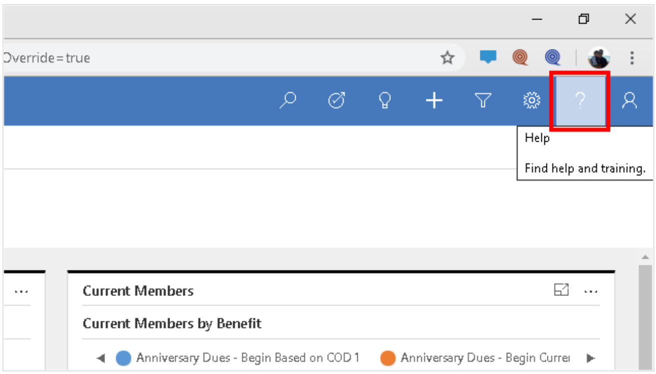
Change your personal settings here



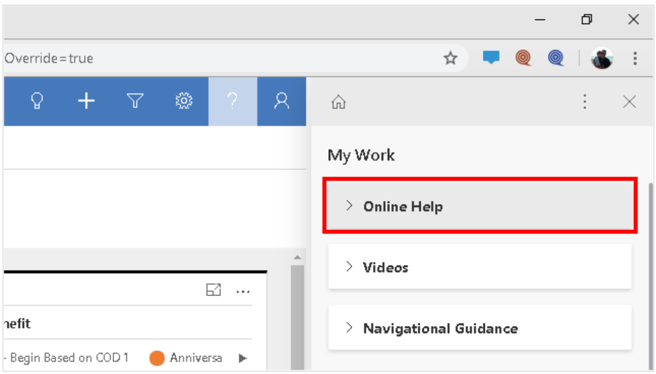
Click on the link **Cancel**



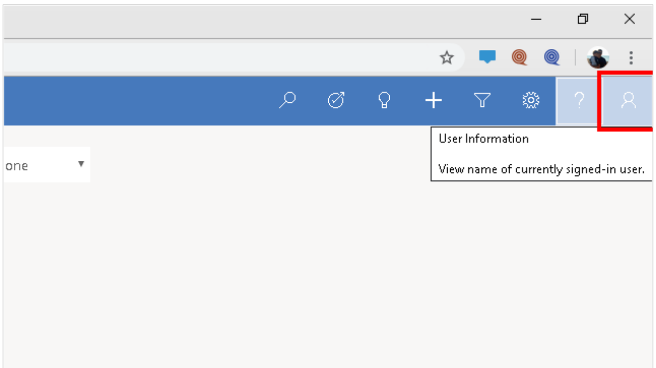
Click on the menu item **Help**



Click on the button □ **Online Help**

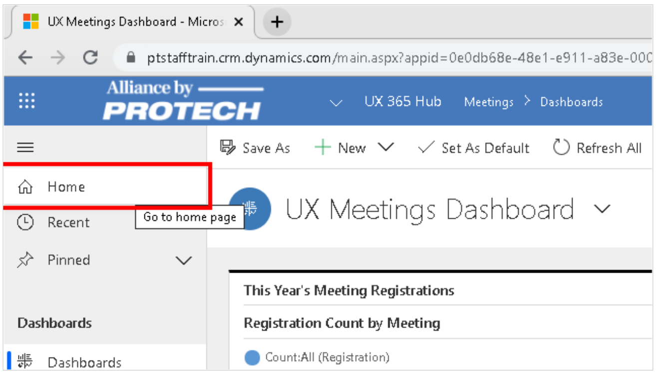


Sign out of the system

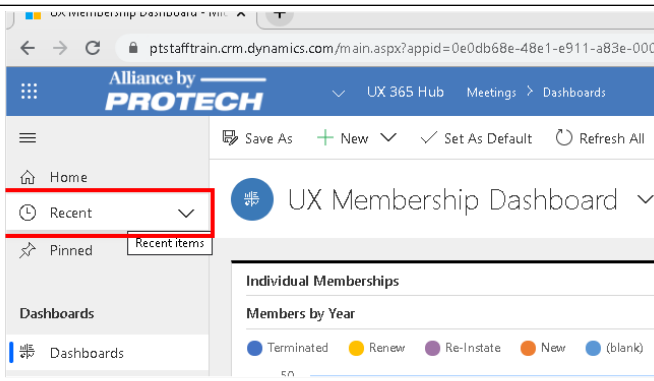


2.6.2. Left Navigation Toolbar

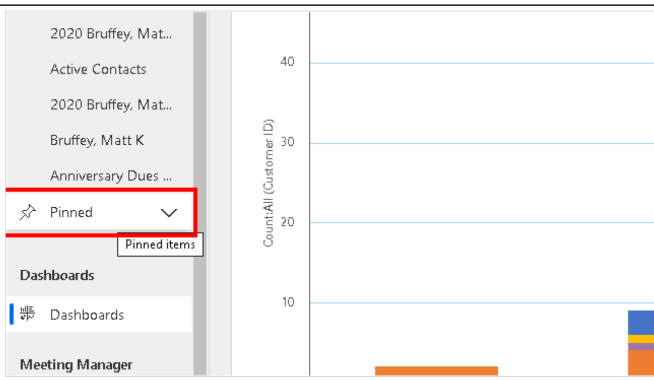
Home Page. This can be defined within the Personal Settings section to fit your needs



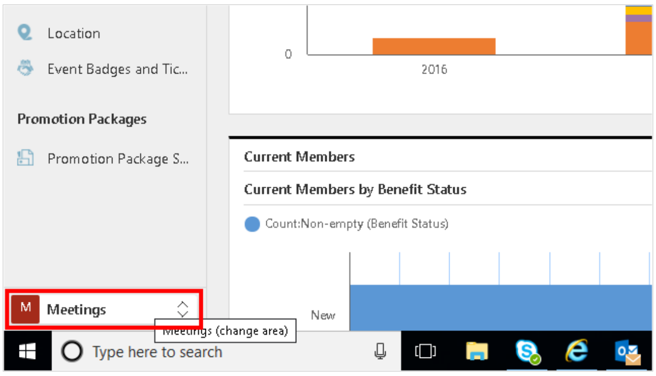
Recent items. Displays the last 10 areas you have navigated to within the system



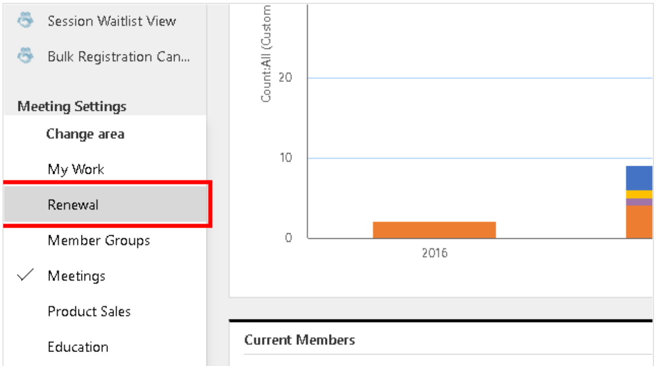
Show all your pinned system views or favorites



Change area. Displays all the areas of the system you can navigate to. This is based on module. For example, Renewal, Meetings or Product Sales



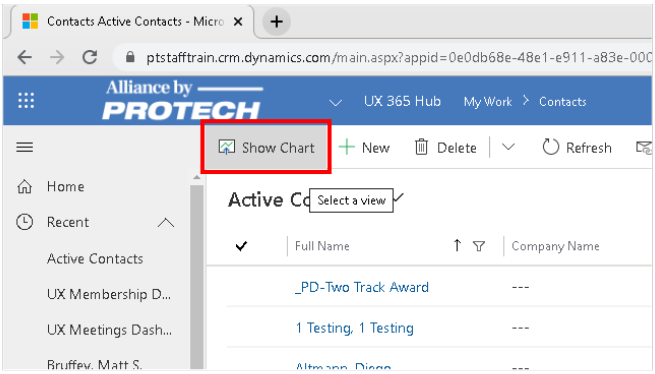
Module area
This is an example of a Module area, Renewal



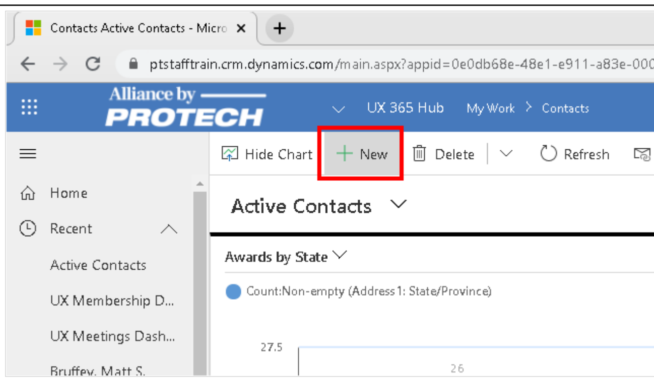
2.6.3. List View Toolbar

2.6.3.1. List View Toolbar without a record selected

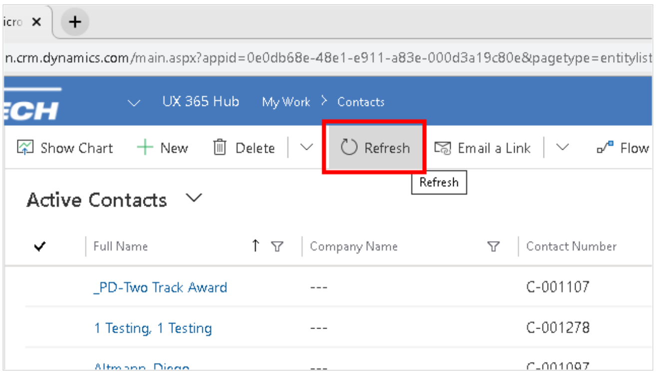
Show Chart. Displays any saved charts related to the record view



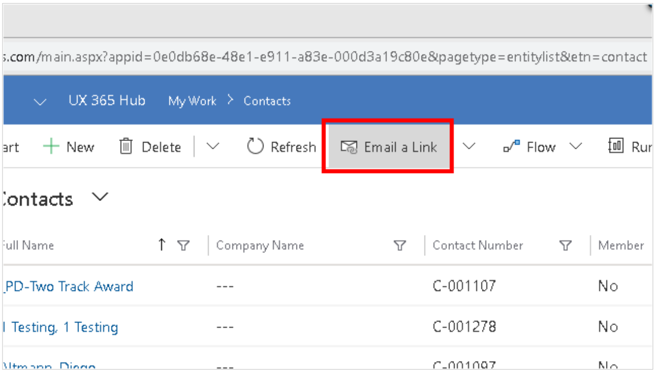
Create a New record



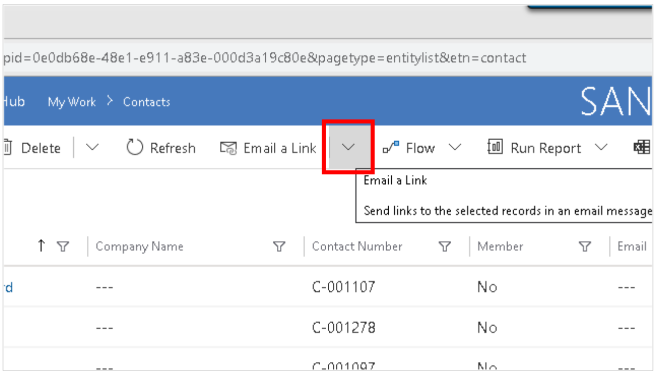
Refresh button. Allows you to refresh the view to see any changes made real time



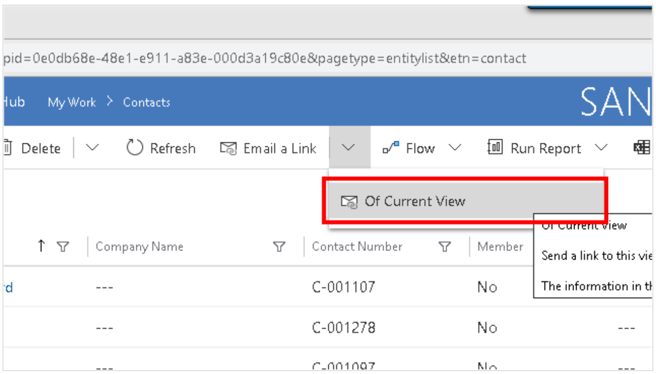
Email a Link. User can send a link to another user within their organization to the view they are working in



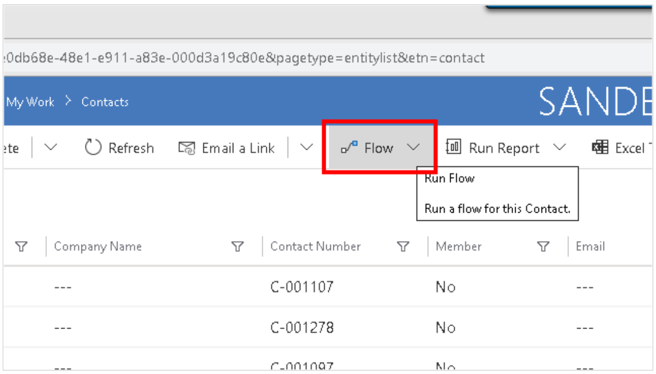
Click on the menu item **Email a Link**



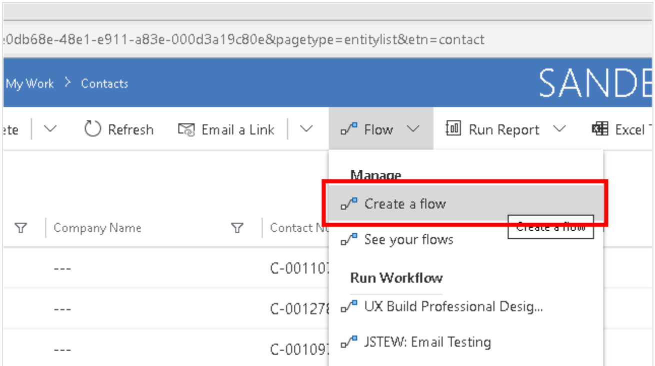
Click on the menu item **Of Current View**



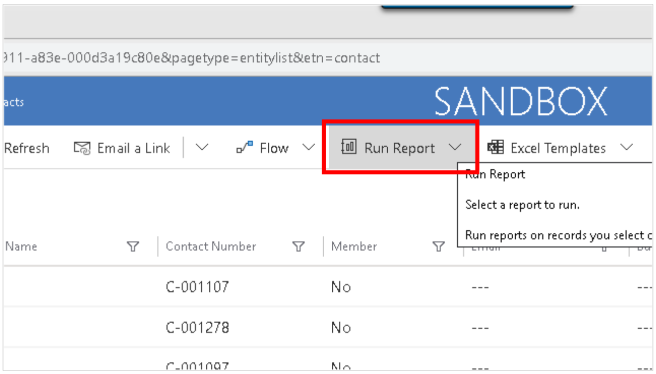
Run Flow. User can run a saved Microsoft Flow



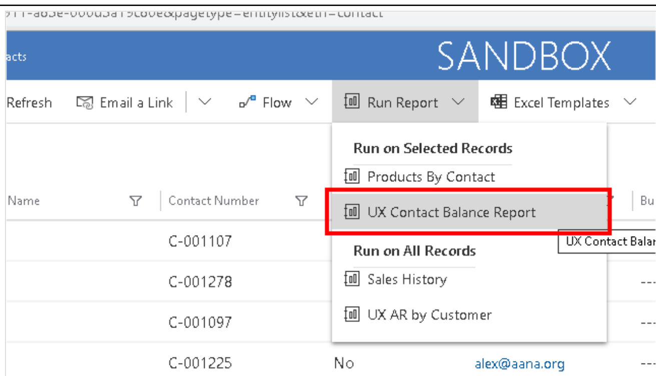
Flow Options



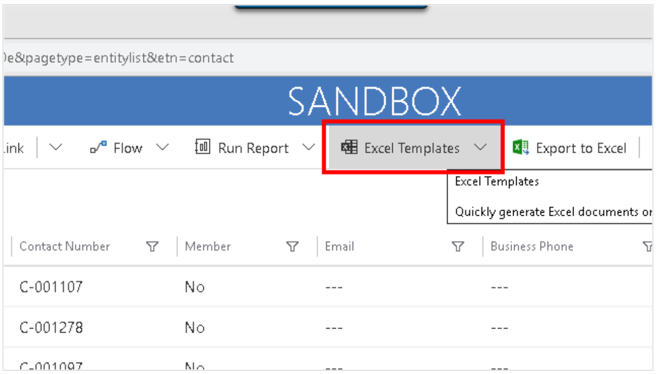
Run reports



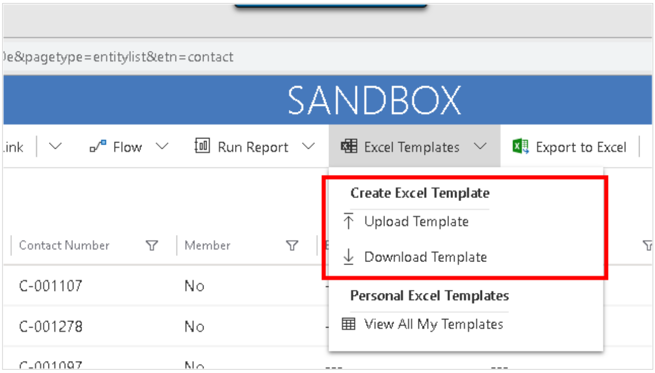
Report options



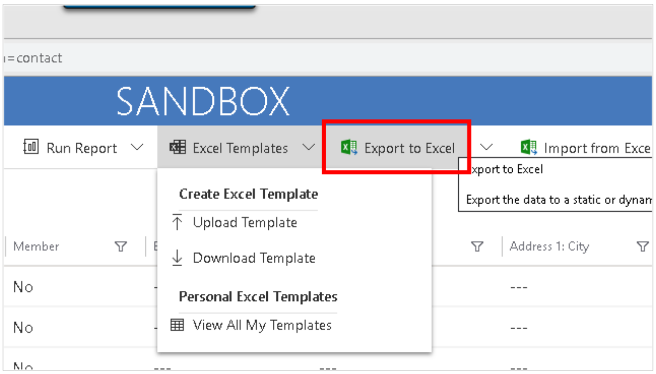
Upload and download Excel templates



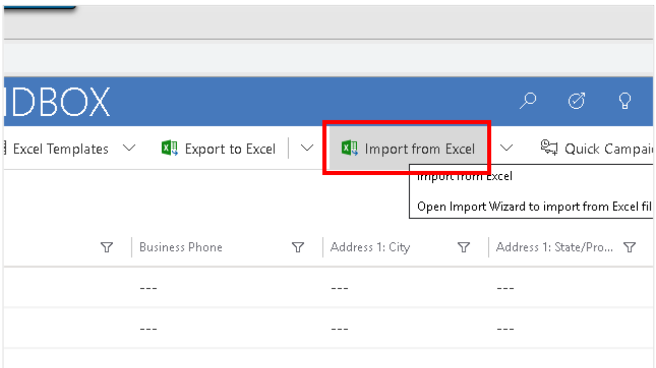
Template options



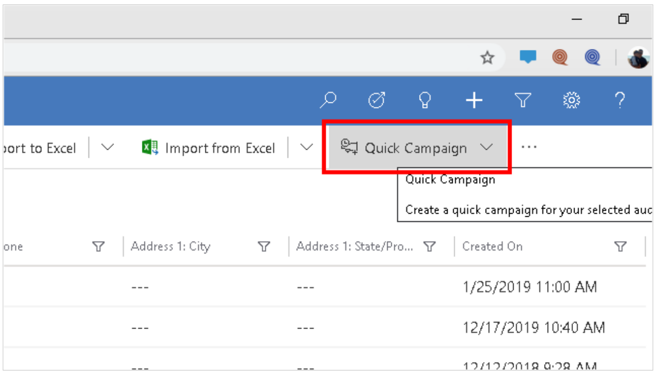
Export to Excel



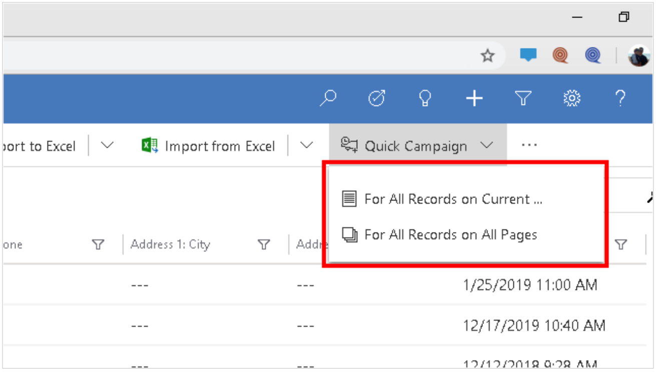
Import records from Excel



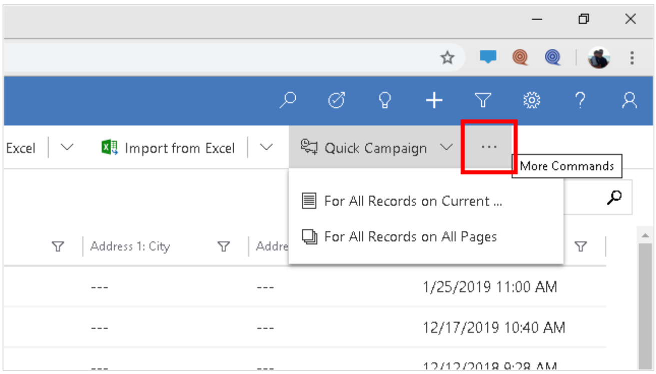
Create a Quick Campaign



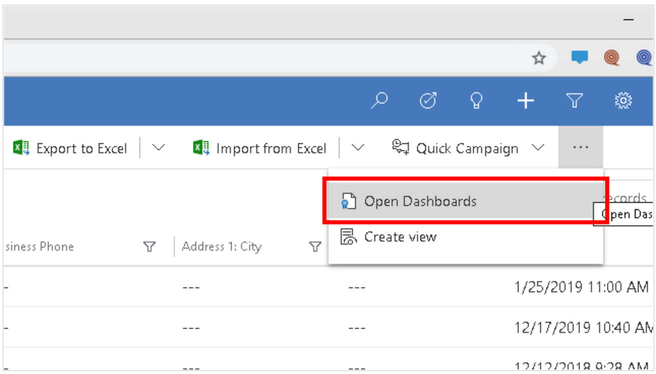
Quick Campaign options



Additional options

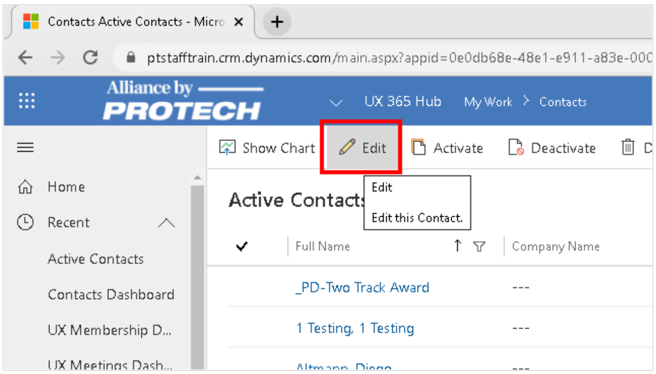


Open Dashboards and Create a View

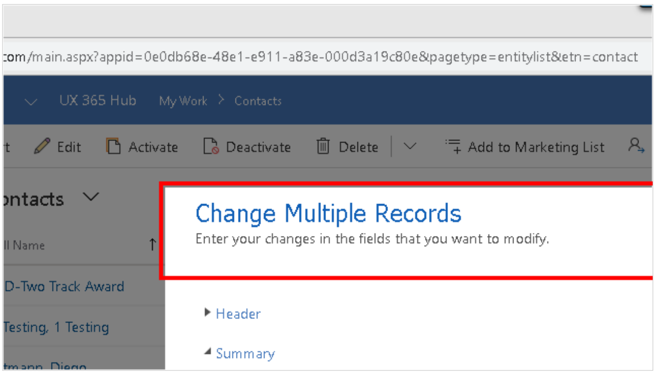


2.6.3.2. List View Toolbar with a record selected

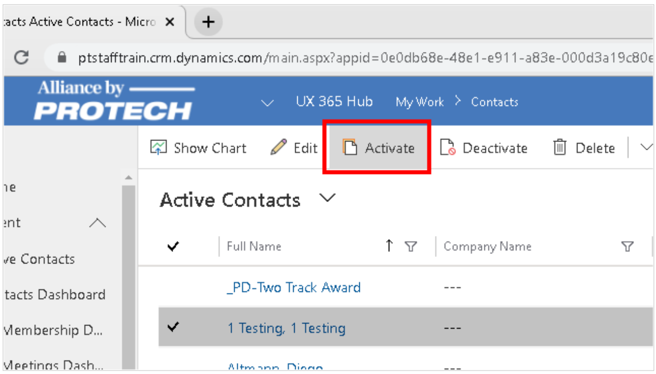
Edit. You can edit one or multiple records at the same time



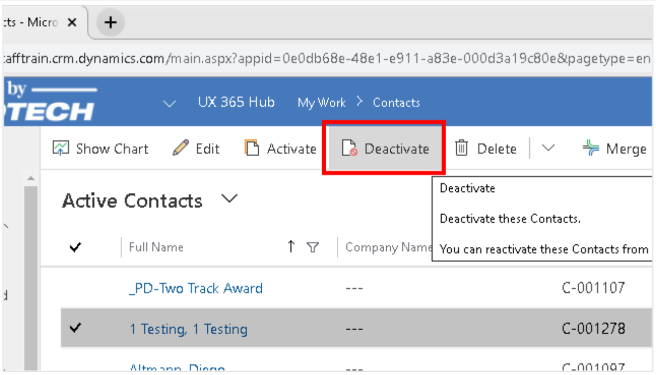
Edit mode



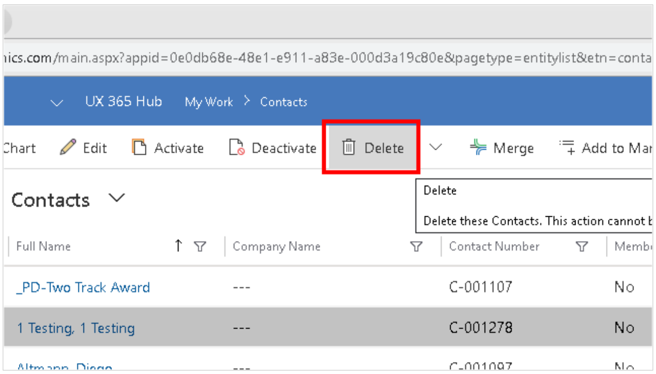
Activate a deactivated record



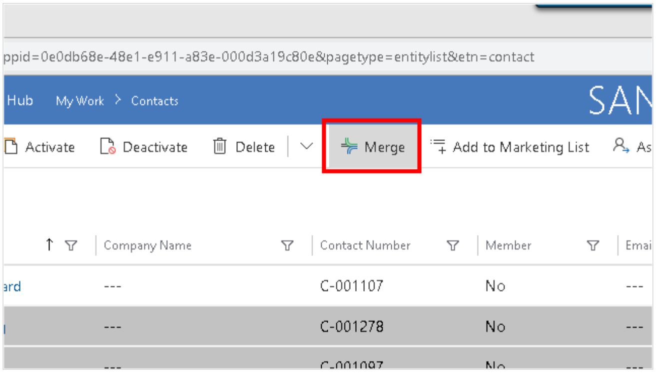
Deactivate an Active record



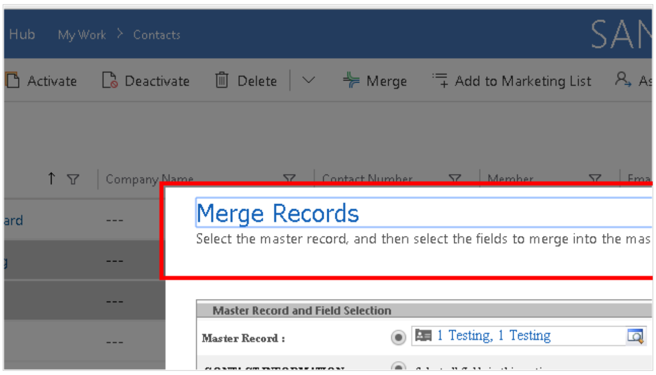
Delete. This will Permanently remove the record from the database



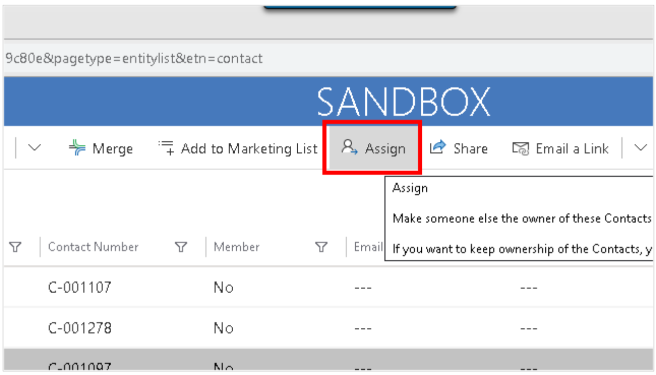
Merge. You can merge duplicate records. Please note, the Master record will retain all the history from the subordinate record.



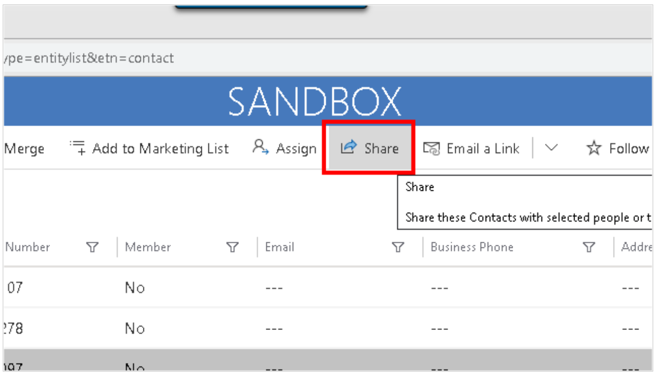
Merge wizard



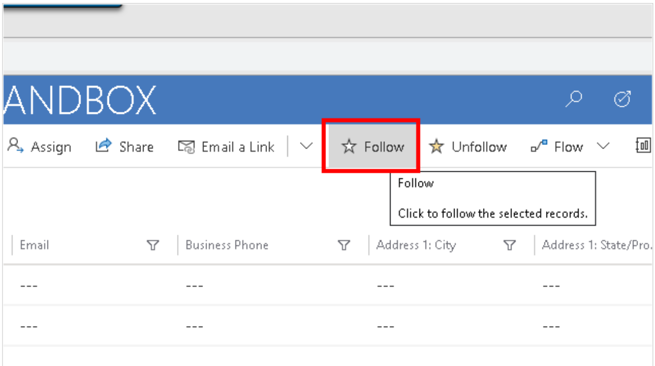
Assign. Users can assign owership of records they own to other users in the organization.



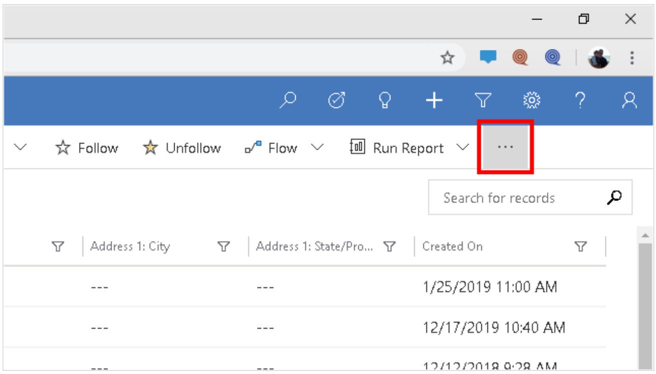
Share. Users can share records with other Users to allow for collaboration on maitaining a record



Follow. Following a record will result in any post to that record showing up on your activites

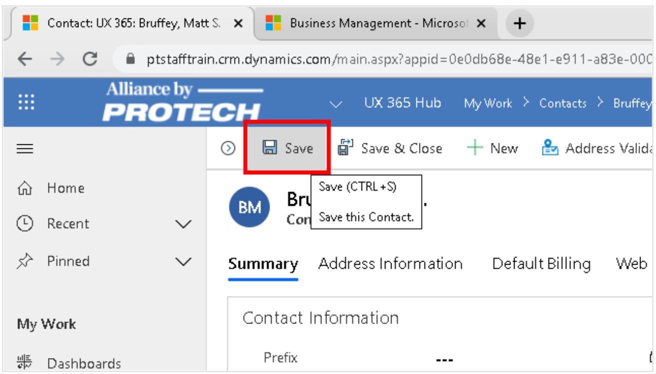


More Commands

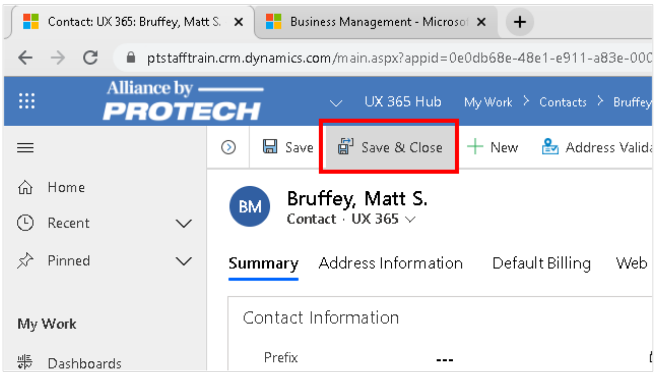


2.6.4. Record Toolbar

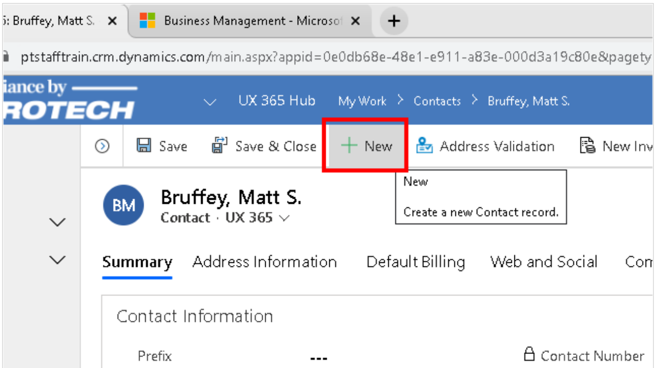
Save record changes



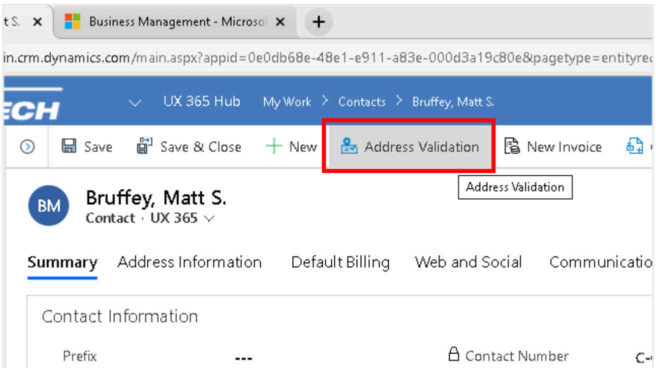
Save record changes and close



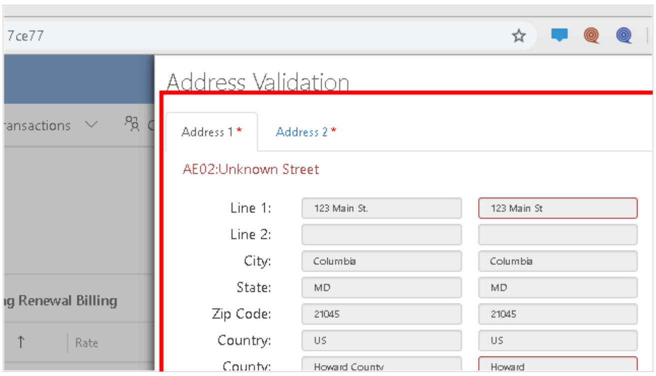
Create a new Contact



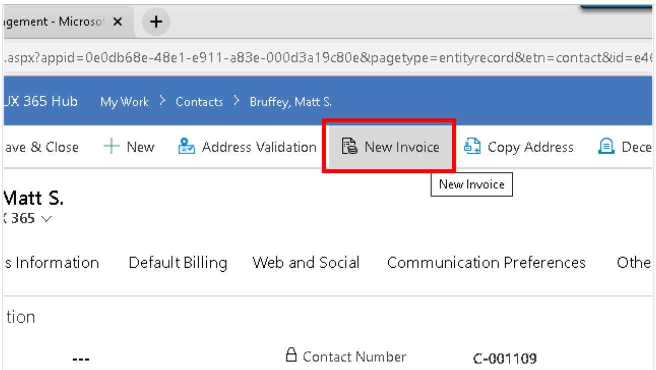
Address validation allows you to add the zip plus 4 and correct any mistakes in the primary address block



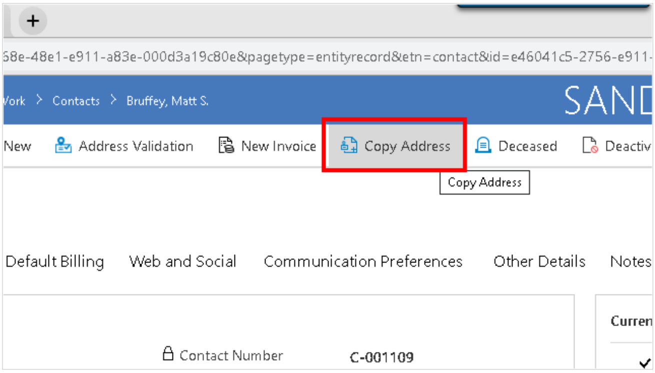
Address Validation panel



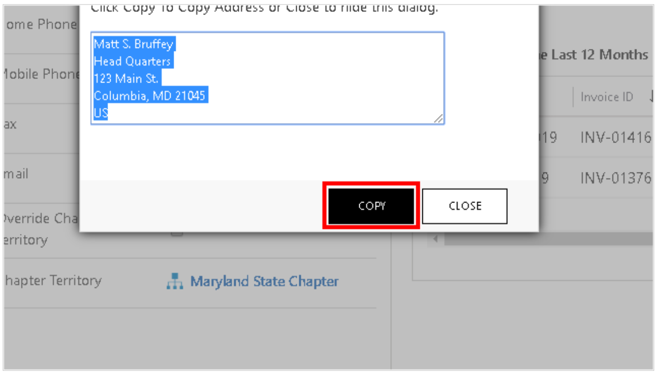
Create a New Invoice



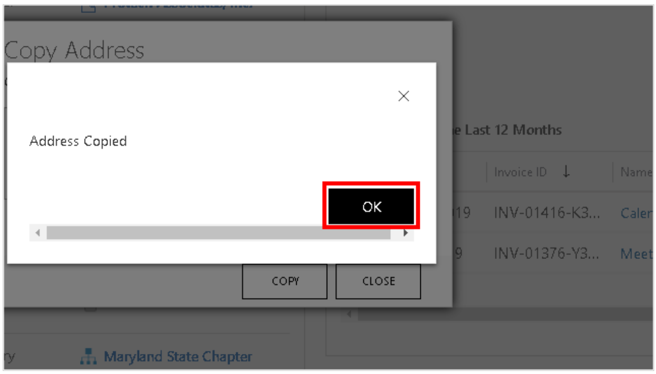
Copy Address allows you to copy the primary address block to your clipboard for use in other applications



Click on the button **COPY**

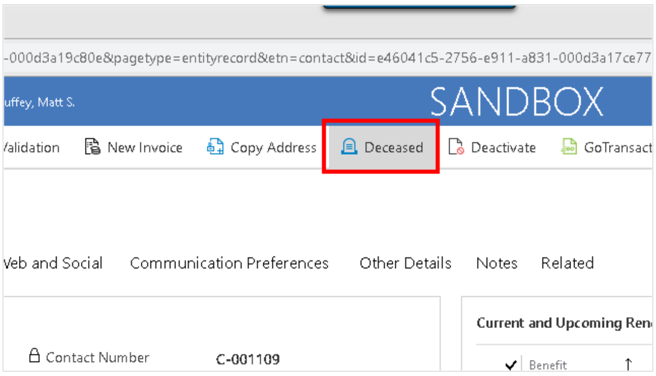


Click on the button **OK**

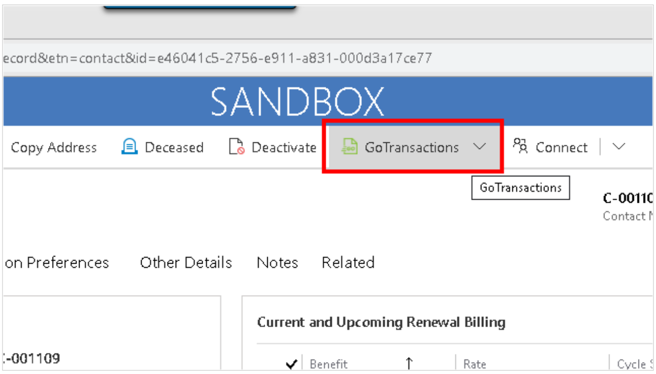


Deceased utility

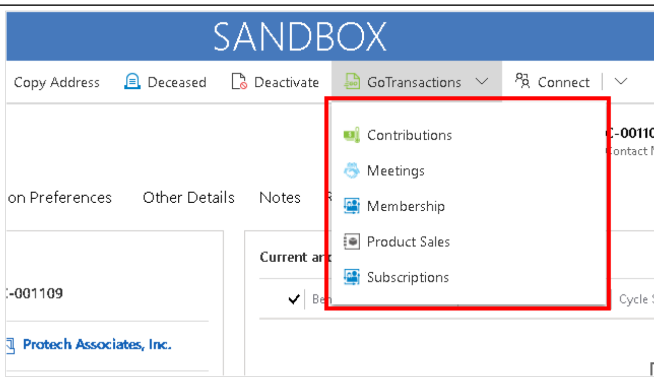
If one of your contacts is deceased, there are several records that you should update, including roster and committee memberships, renewal billing records and invoices with a balance due or a credit balance. You can use the Deceased Contact Utility to update this information. This utility will perform the following actions: Sets the price level to Non-Member and the Member flag updates to No on the contact record. Deactivates roster memberships. Updates current committee membership term end dates with the system date and deactivates nominee (future term) committee member records. Updates current chapter officer term end dates with the system date and deactivates nominee (future term) chapter officer records. Updates current region officer term end dates with the system date and deactivates nominee (future term) region officer records. Terminates active renewal billing records as of the system date and enters a termination reason of “Deceased.” The utility also identifies invoices with a balance not equal to zero and sends a task to the Deceased Contact queue for follow up action. These invoices must be dealt with manually. We recommend that you cancel the dues invoice for the terminated renewal billing. If the invoice was paid, you can refund the credit to the deceased member’s estate or transfer the balance to an open invoice, depending on your organization’s business practices. Note The utility does not deactivate the contact’s record. If your organization’s business rules require that a deceased contact’s record should be deactivated, you must do that manually after you have resolved any remaining open invoices.



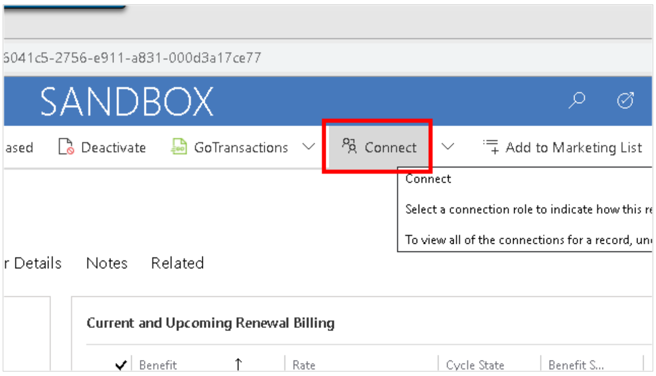
Go Transactions allows you to quickly create an invoice using the Go Transaction wizard that walks you through the data entry for fast invoice creation



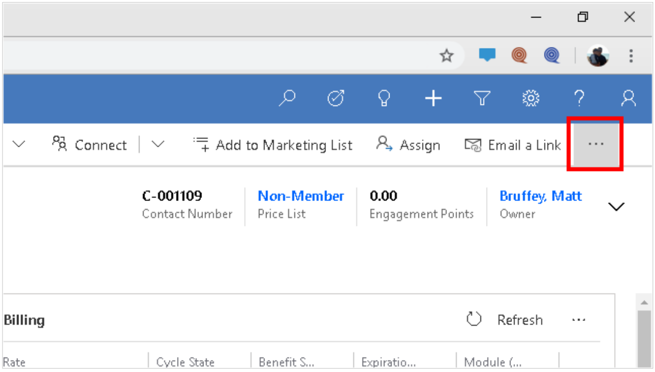
Go Transaction options



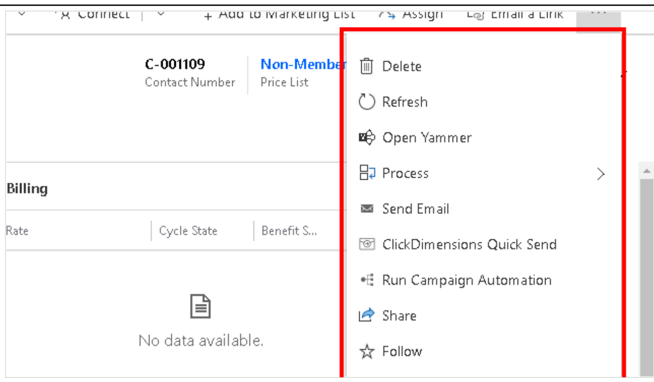
Connect allows you to associate the record with another record using a specific relationship definition. Relationship roles are setup within system settings



More commands

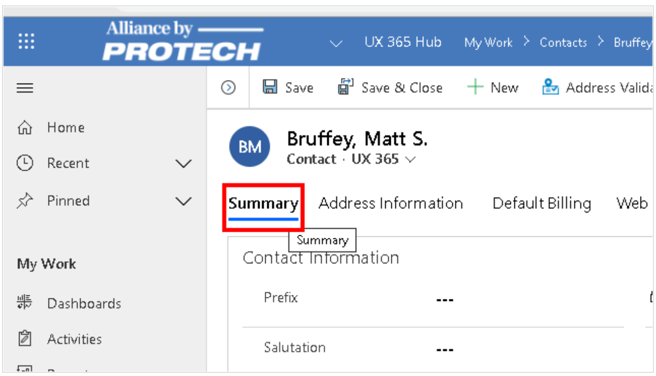


More command options

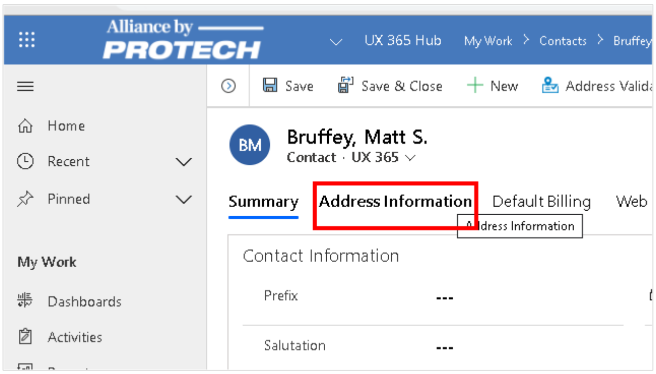


2.6.4.1. Record Tabs

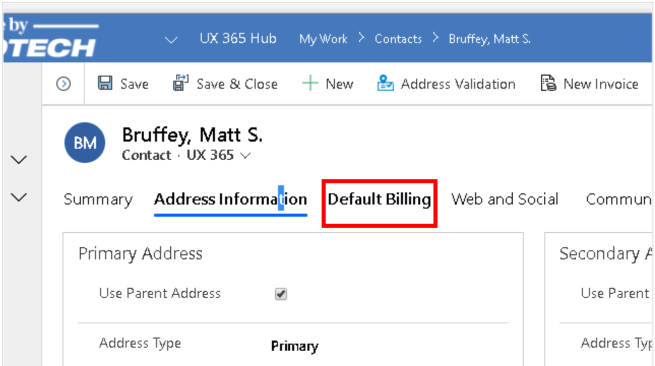
Click on the item **Summary**



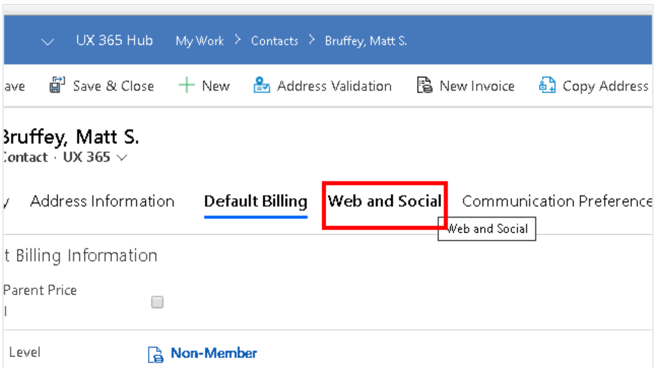
Click on the item **Address Information**



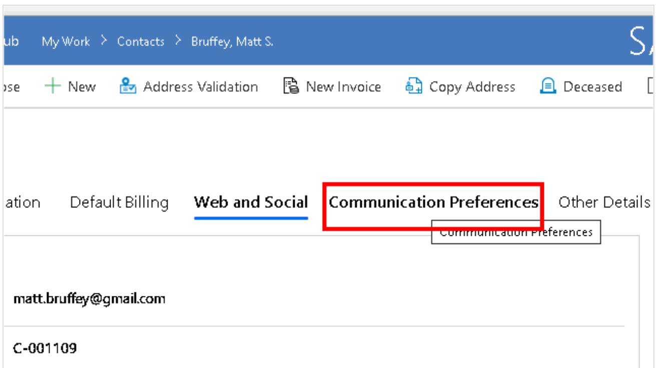
Click on the item **Default Billing**



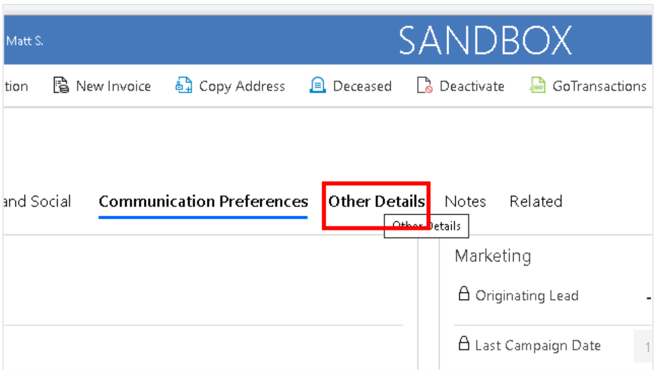
Click on the item **Web and Social**



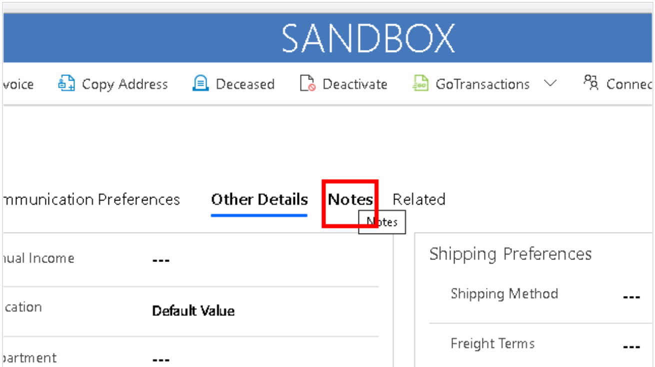
Click on the item **Communication Preferences**



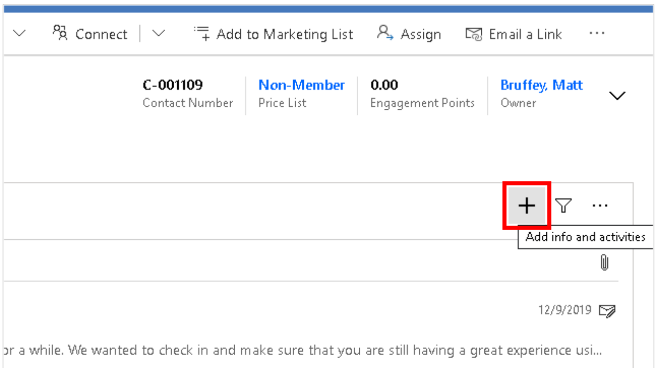
Click on the item **Other Details**



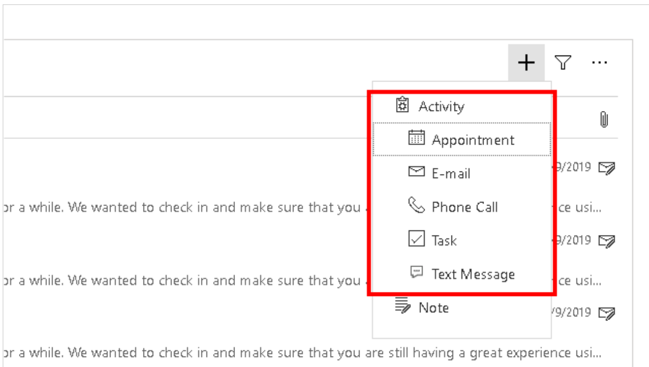
Click on the item **Notes**



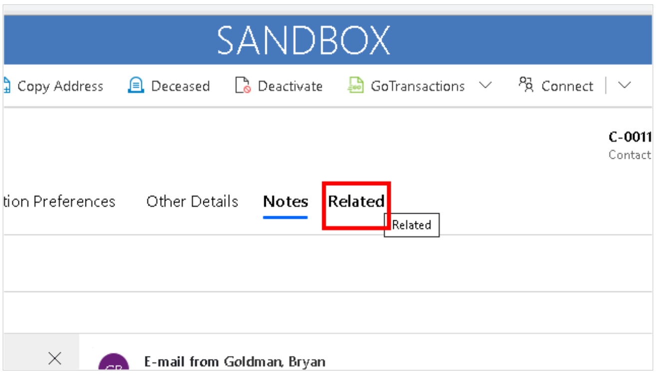
Add new activities



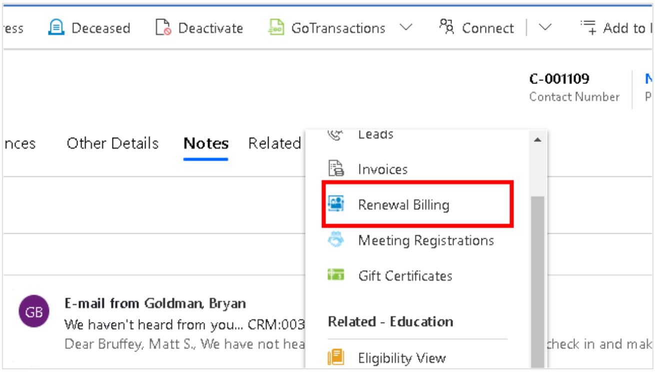
Activity options



Related records can be found here



For example, associated Renewal Billing record and Meeting Registrations

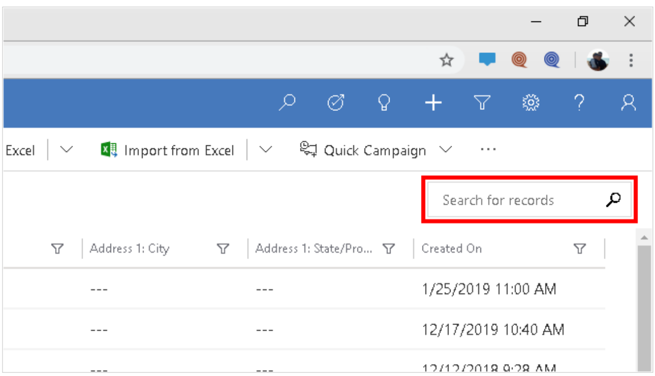


2.6.5. List Views

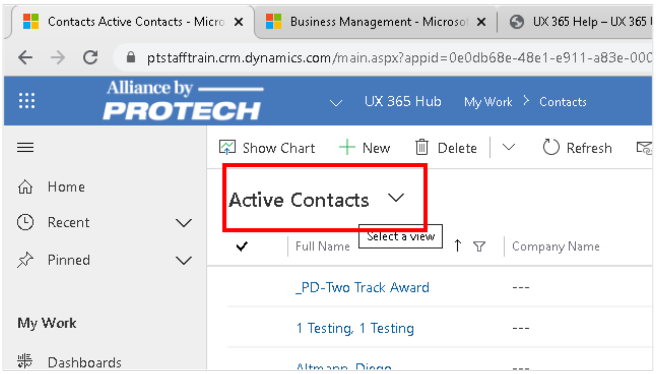
2.6.5.1. Look For and View Filters

The Look For and View filters appear at the top of each list view window. The Search filter allows you to enter partial or complete information about the records you are searching for. You may also use a wildcard (*) to broaden your search. The View filter allows you to pick from a list of pre-defined system views and custom views to display a list of records. All entities come with standard system views that cannot be modified. (For example, the Committee Members list includes views to show Active Committee Members, Current Members, Inactive Committee Members, Members Elect & Nominees, and Past Members.) However, you can create your own custom views and add them to a list, making them available to all users. You can also create personal views just for yourself. These are called My Views and will only appear for you. To learn more about creating custom views, see Advanced Find and Saved Views . Personalize your default view If there is a system or custom personal view of records that you access frequently, you can set that view as the default view for displaying records. For example, if you have created a personal view of all contacts in New York named “NY Contacts” that you work with regularly, you can set that view as your default each time you navigate to Contacts. To set the default view, first select the “NY Contacts” view to open the list of selected records. At the top of the page, click the “Push Pin” icon next to the View Name. Once “NY Contacts” is set as your default view, each time you return to Contacts, the system will display the records from your default view.

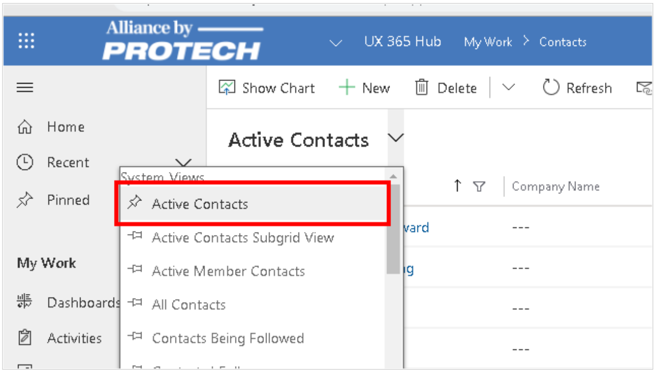
Search for records



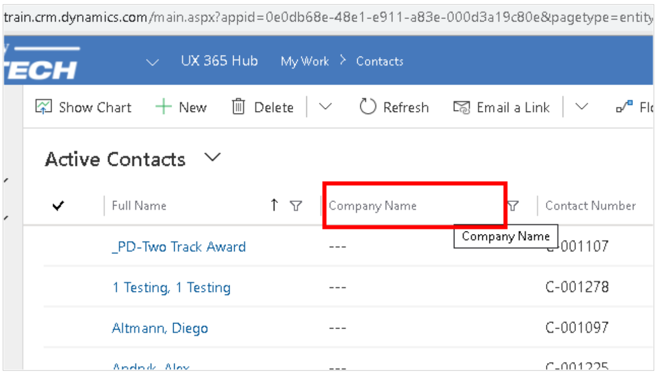
Select a view



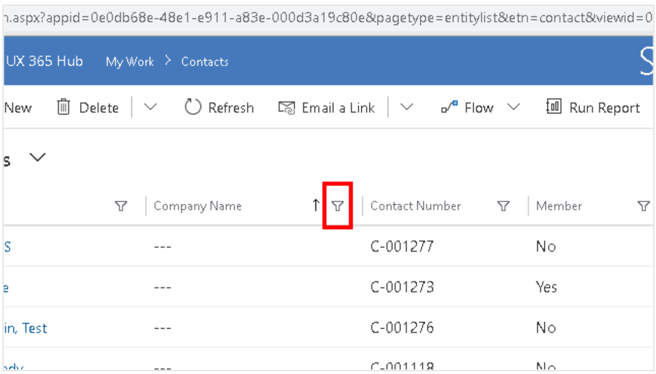
Pin the Active Contacts view



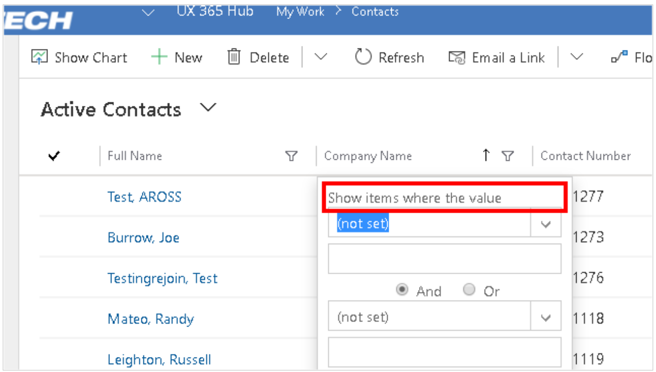
Sort list view by Column header



Filter list view by Column header values

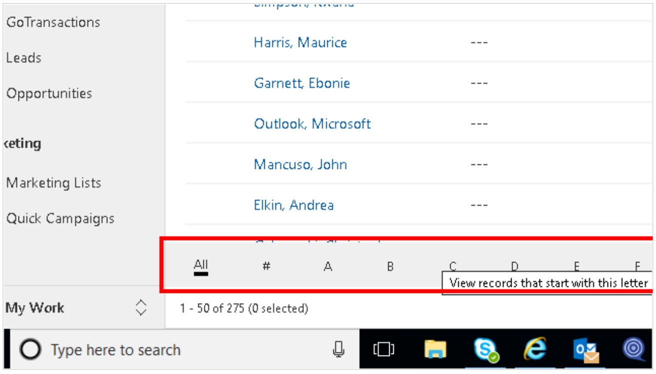


Filter options

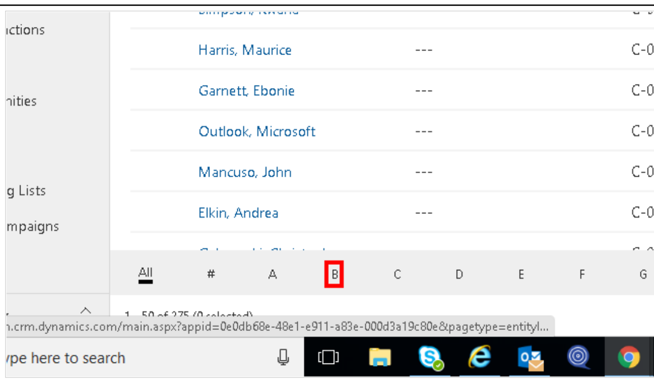


The Alphabet bar is available at the bottom of List Views that open in the same UX 365 window, such as accounts, or contacts. Click on a letter to view a list of records that begin with that letter. Directly above the alphabet bar, the number of records being displayed in the view is shown. To view more records in a list, you may use the Page arrows provided in the lower, right hand corner of this list view. If no arrows are activated, then there is only one page of data that matches your search on the view you are working with.

List view Alphabet bar



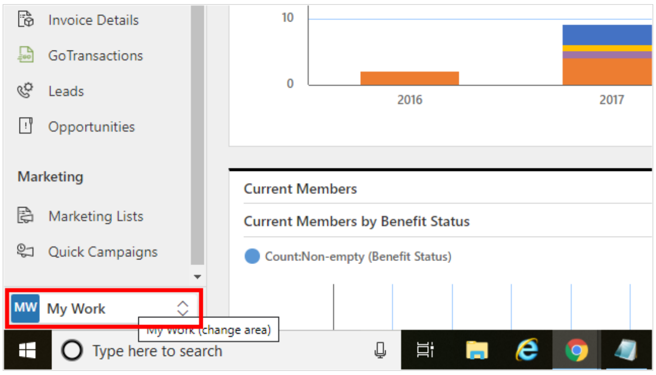
Click on a letter to sort by



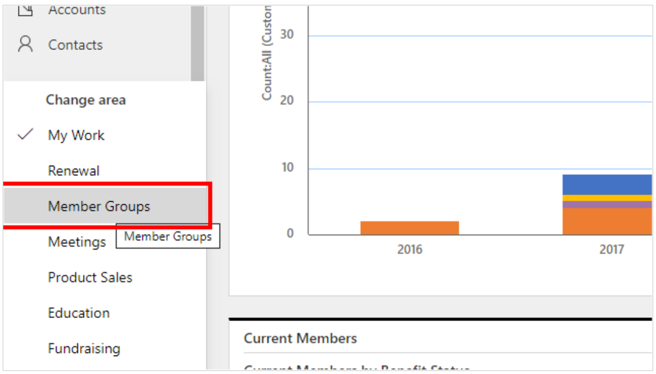
3. Chapters

3.1. Creating a Chapter

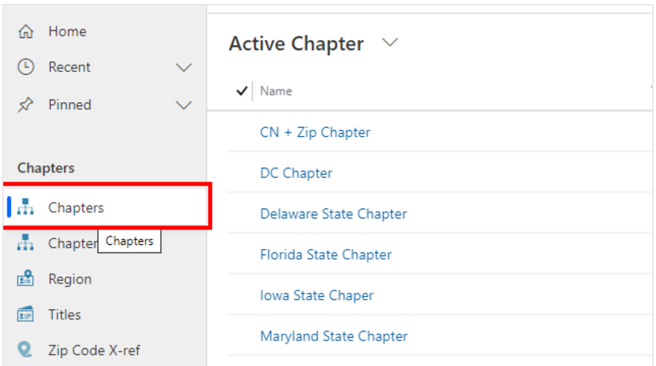
To create a chapter, first click on the button my work to change areas.



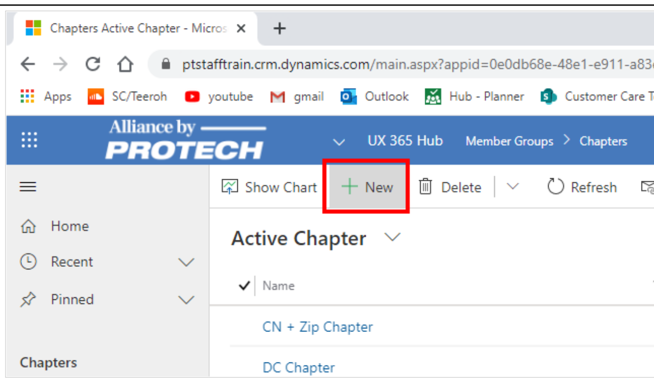
Click on the item 'member groups'



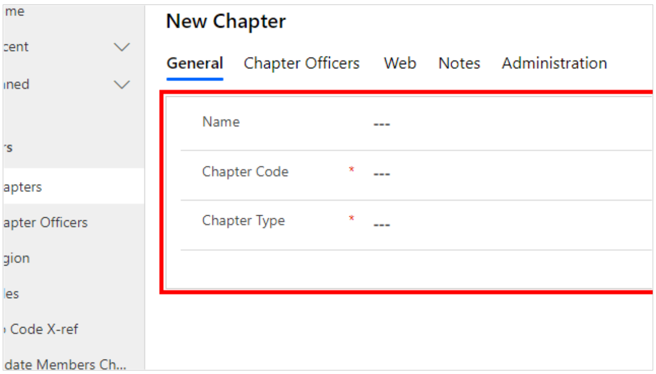
Click on the item **Chapters**



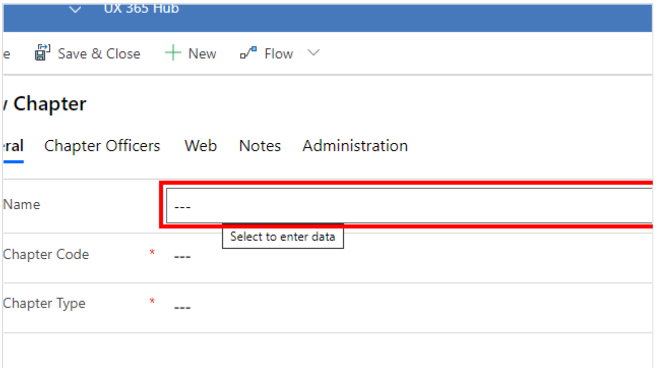
Click on the menu item **New**



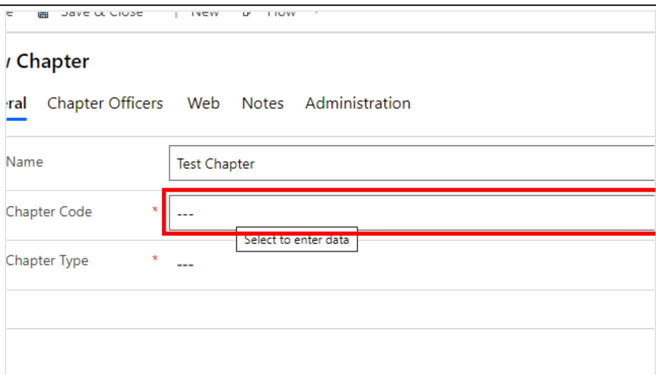
The General tab is where you can change the Name, Chapter Code, Chapter Type, Region, and Account.



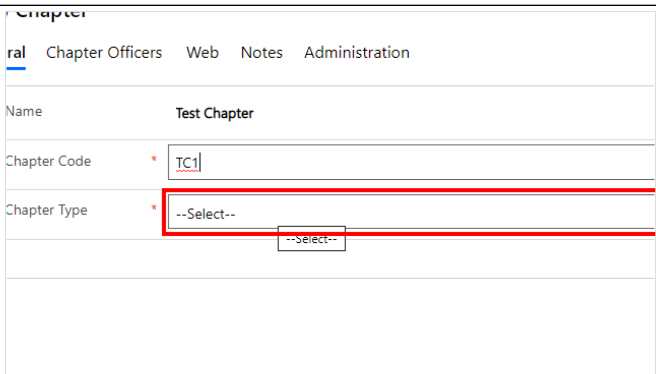
To change the name of the chapter, click the field to the right of 'name'



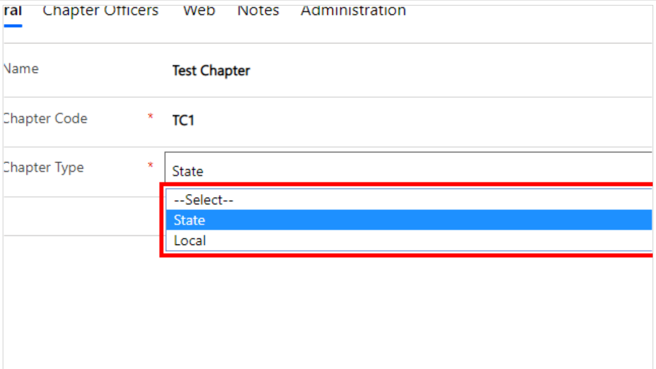
To change the chapter code, click on the field to the right of chapter code.



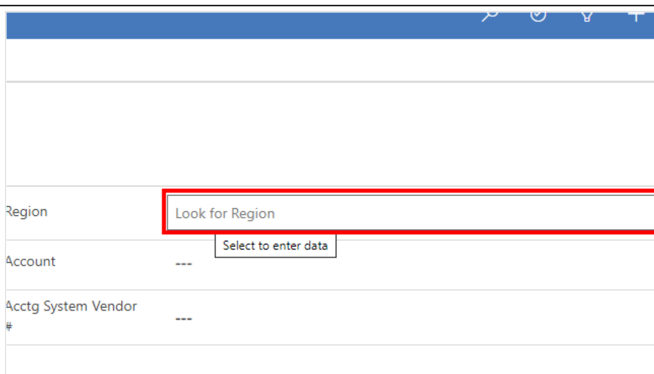
Click on the field chapter type to display a dropdown of chapter types



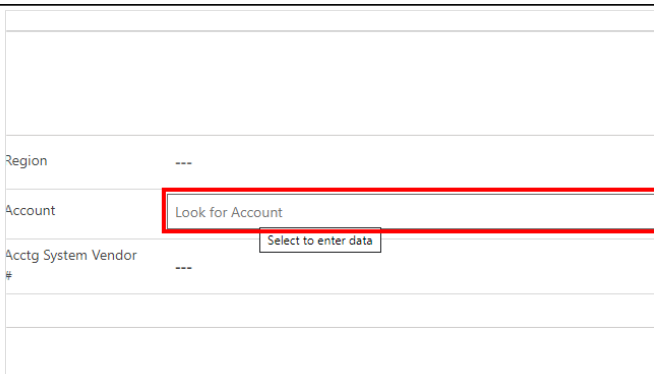
Choose which type of chapter you would like to create



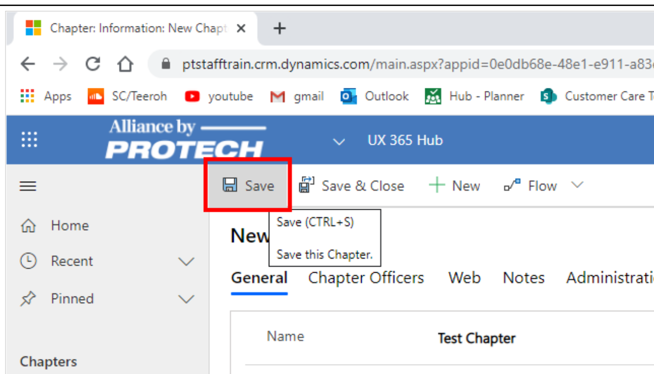
This is where you can change the region of your chapter



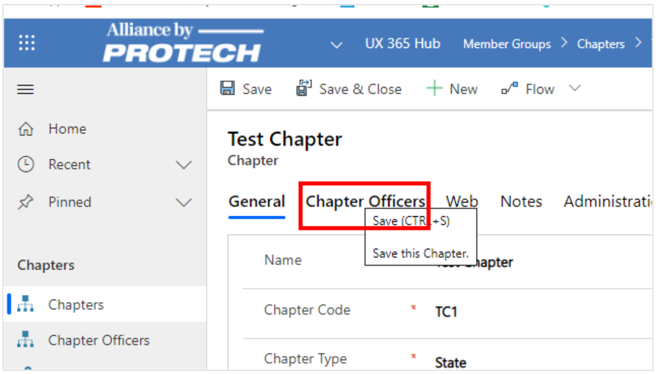
Click on, account look up in order to tie an account to the chapter



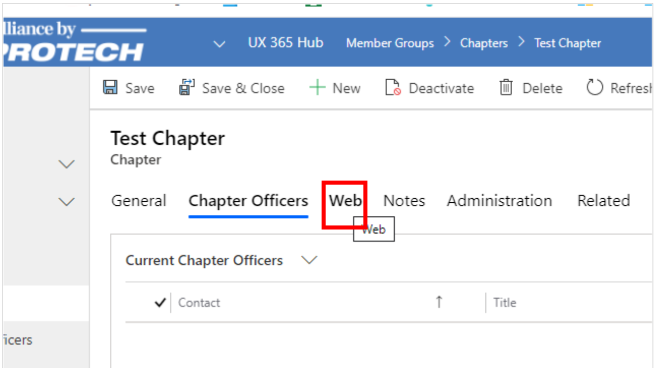
You must save the chapter record before adding chapter officers



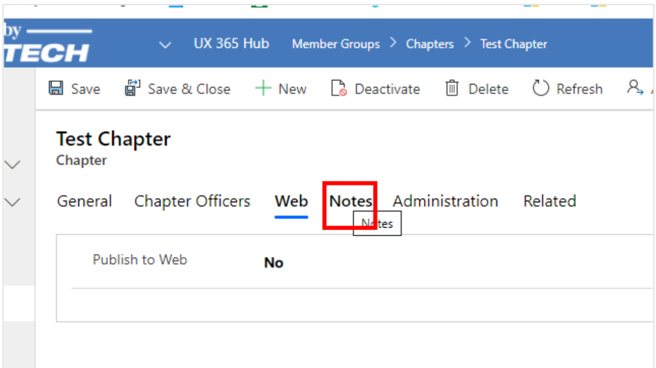
To add chapter officers, click into the tab and press 'new' on the record toolbar.



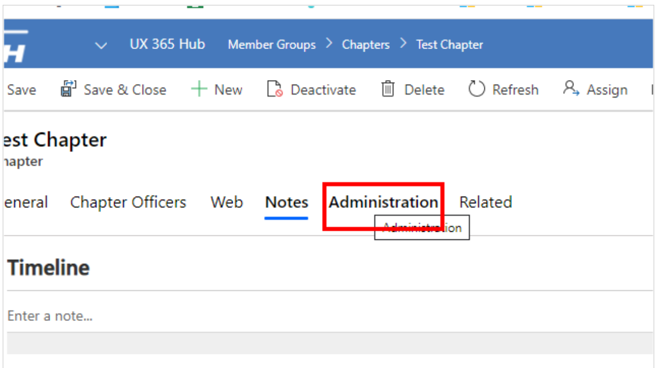
To change web info, click the button 'Web'



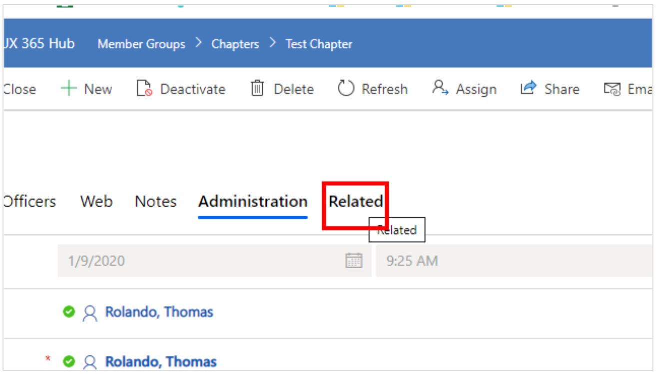
Click on the section 'Notes' to see the timeline and notes of the chapter.



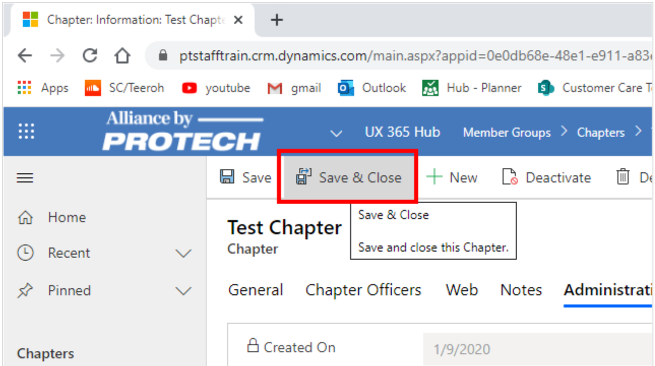
Click on the administration tab to see information such as Created on and by, as well as modified on and by.



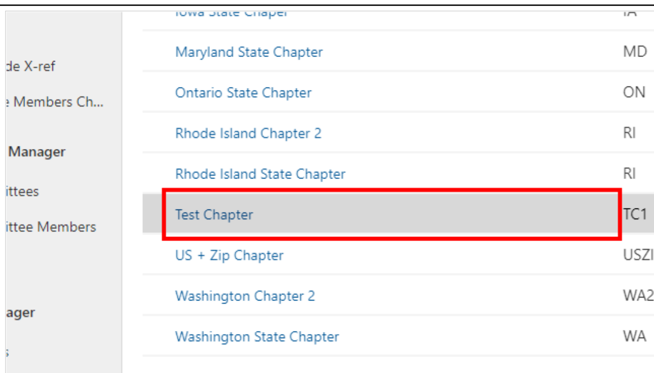
Once the chapter is saved, the related tab will appear showing all related records associated with the chapter.



Click save and close to finish creating the new chapter



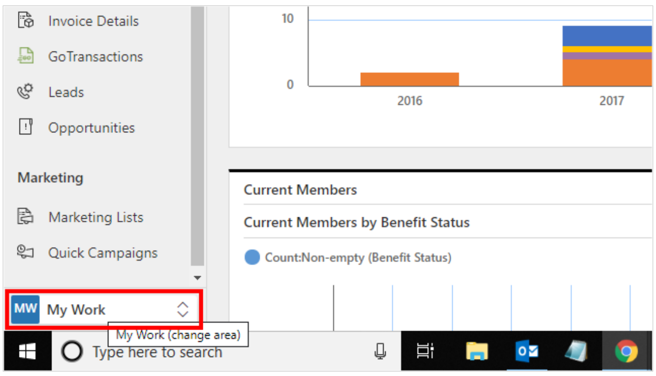
You can see the new chapter in the 'active chapter' associated view.



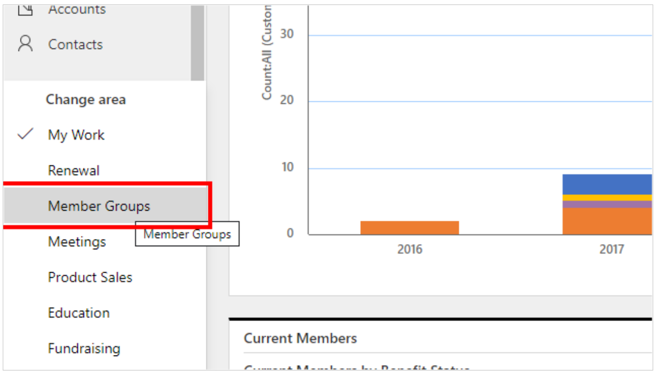
3.2. Creating a Region

You can use regions to group chapters that share common characteristics, based upon your organizations requirements. By using regions, you can easily keep track of region officers, their titles, and their terms. If you create regions and assign chapters to them, you can create reports for specific chapter regions, or perform queries on those regions. (Creating and using regions is optional.) If your organization groups chapters by region, Protech recommends that you create regions before you create your chapters so that you can assign the region to the chapter during setup.

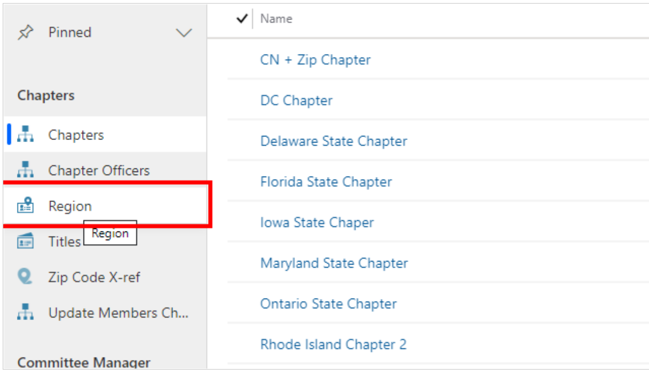
Click on the button **My Work (change area)**



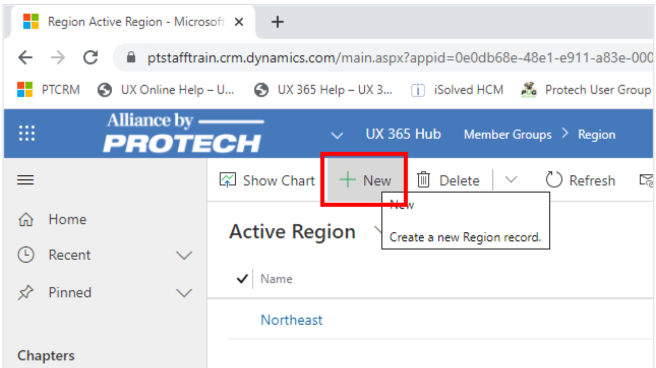
Click on the item **Member Groups**



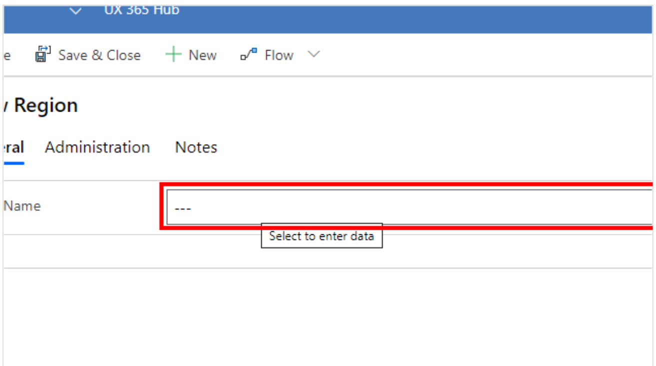
Click on the item **Region**



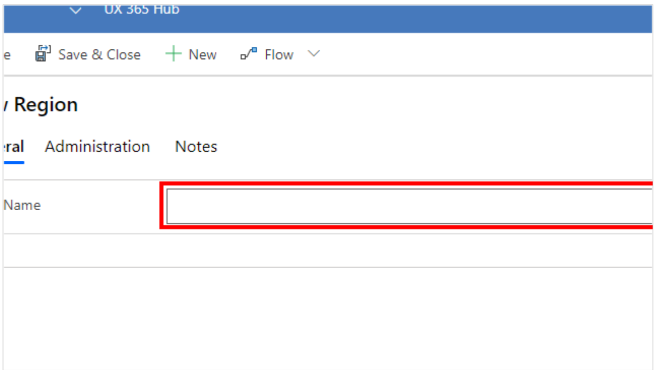
Click on the menu item **New**



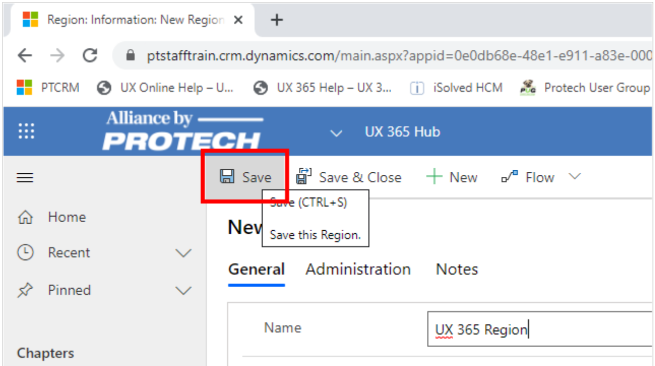
Click on the text field **Name**



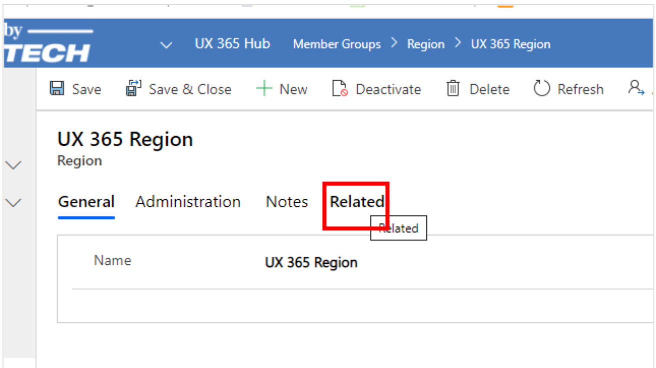
Enter the name of the region



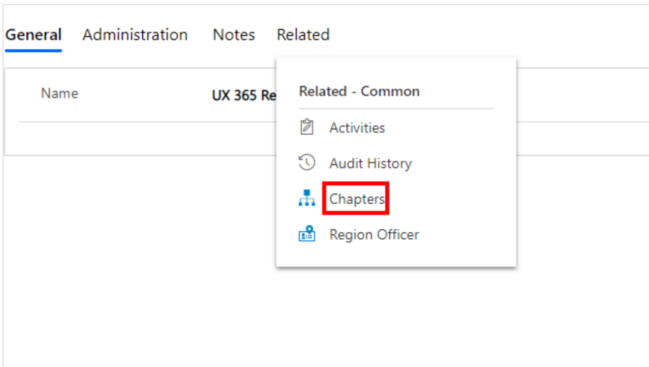
Click on the menu item Save



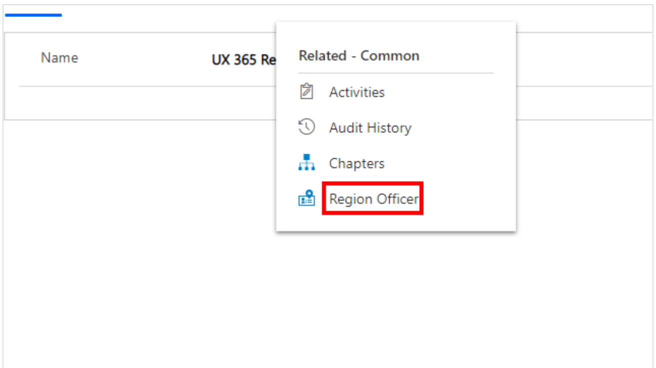
Related



Chapters
Click Chapter to view all chapters related to this region.

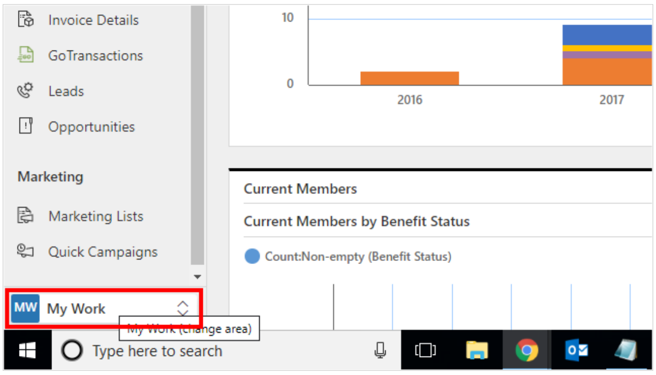


Region Officer
Click Region Officer to view all officers related to this region.

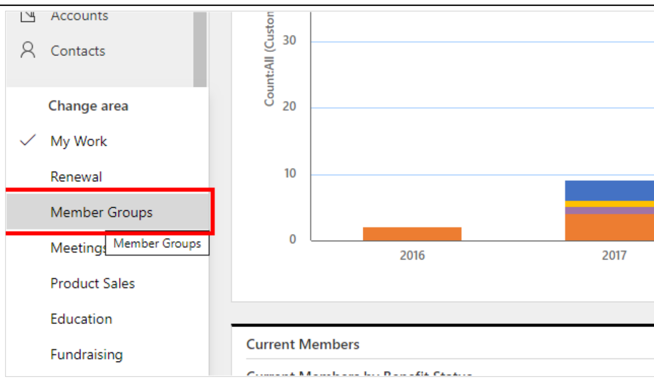


3.3. Setting up a Chapter Officer

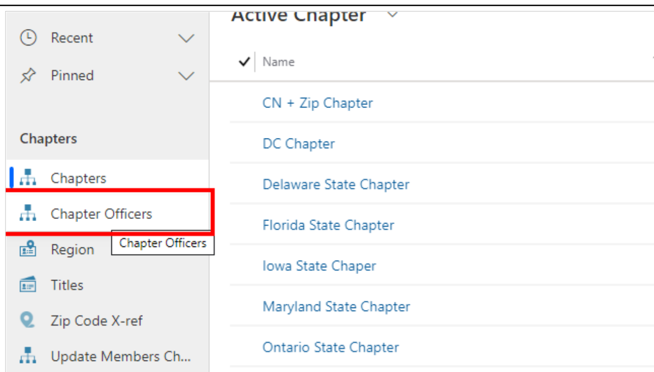
Click on the navigation menu at the bottom left of your screen.



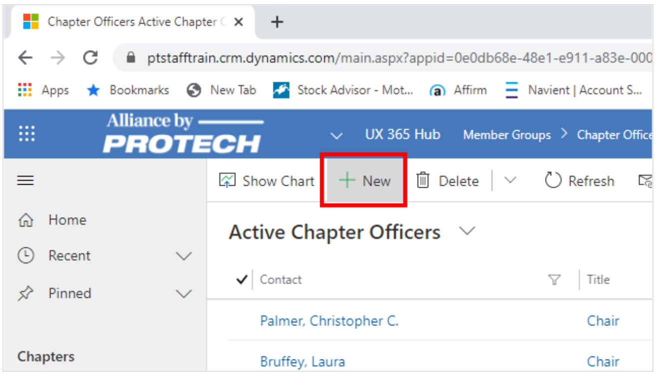
Click on the item **Member Groups**



Click on the item **Chapter Officers**

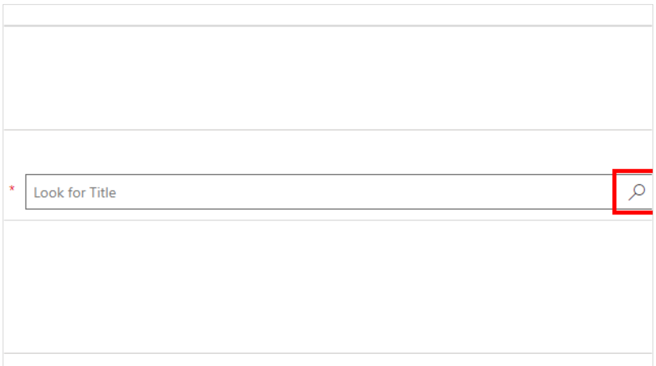


Click on the menu item **New**

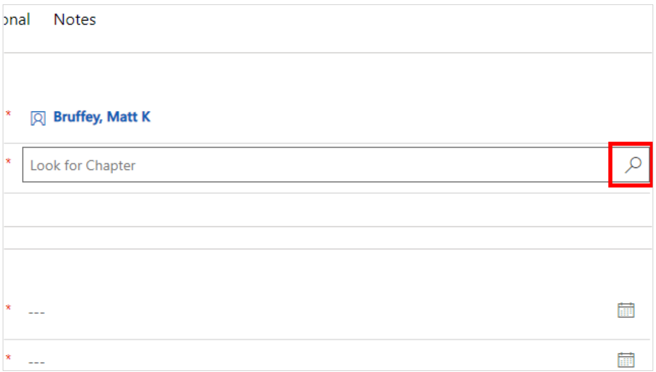


Click on the lookup button to select a contact for the chapter officer.

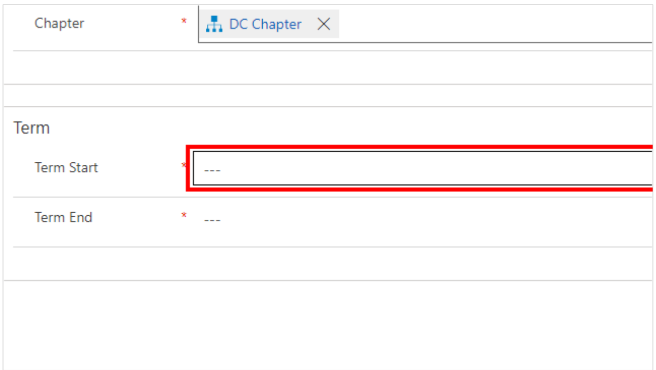
Select a Title for the chapter officer.



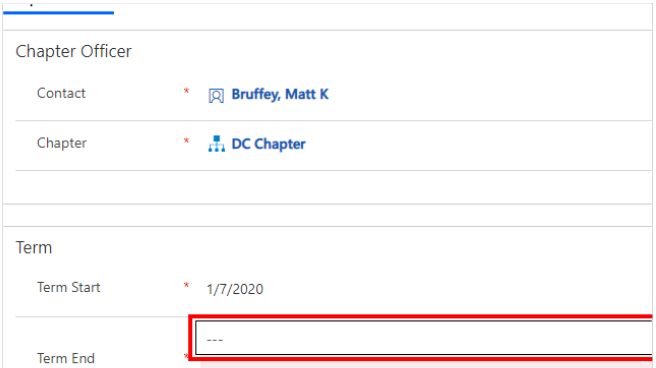
Use the lookup button to select the Chapter you are creating the Officer for.



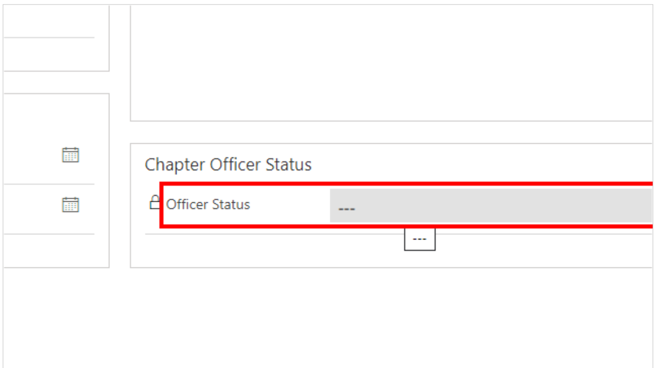
Enter in the beginning date of the Officer's term or click on the calendar button to select a date.



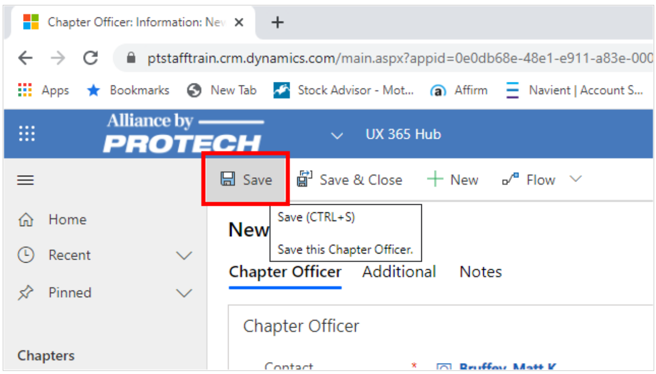
Enter in the end date of the Officer's term or click on the calendar button to select a date.



The Officer Status is populated by the system upon saving. This is updated daily by the nightly system job based on term start and end dates.

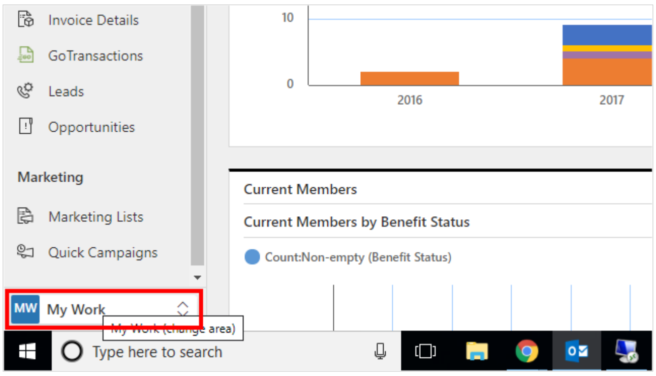


Click on the menu item **Save (CTRL+S)**

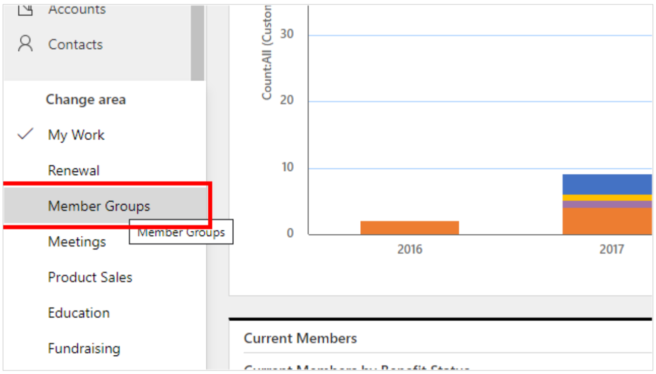


3.4. Setting up a Region Officer

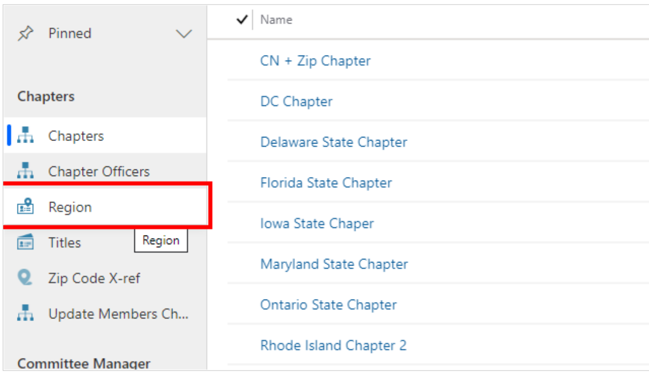
Click on the button **My Work**



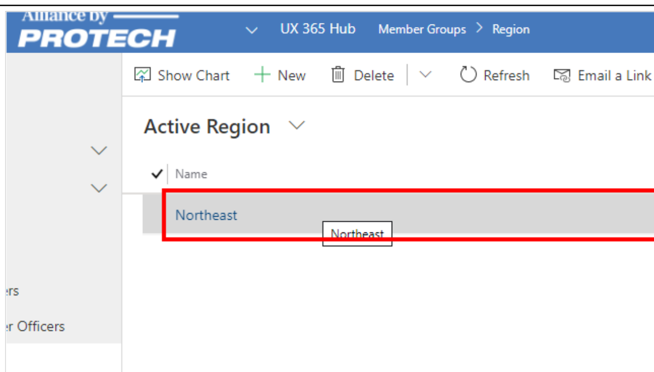
Click on the item **Member Groups**



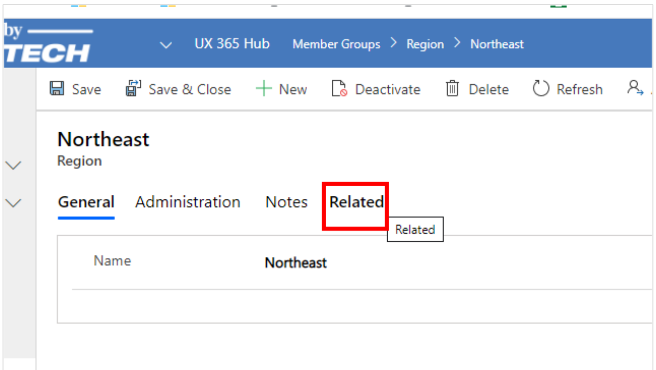
Click on the item **Region**



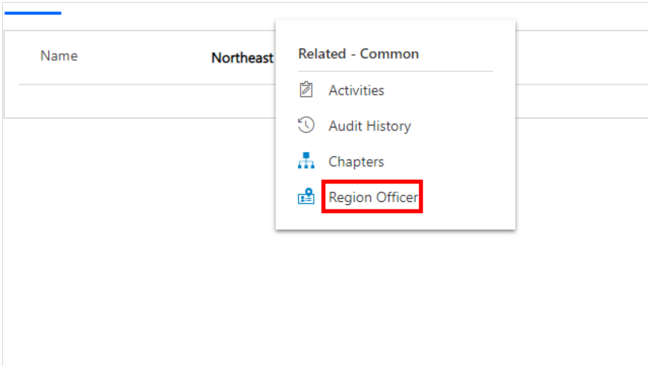
Select your Region setup record



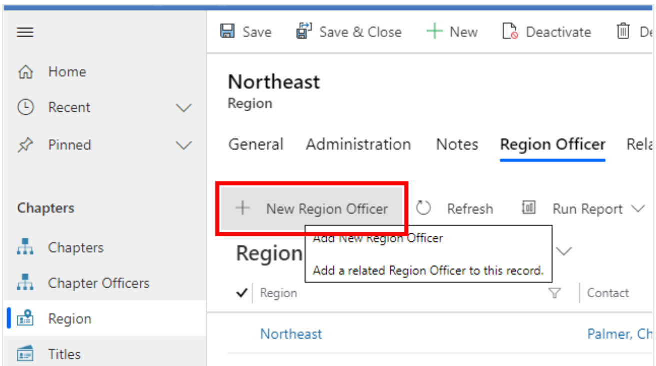
Click on the item **Related**



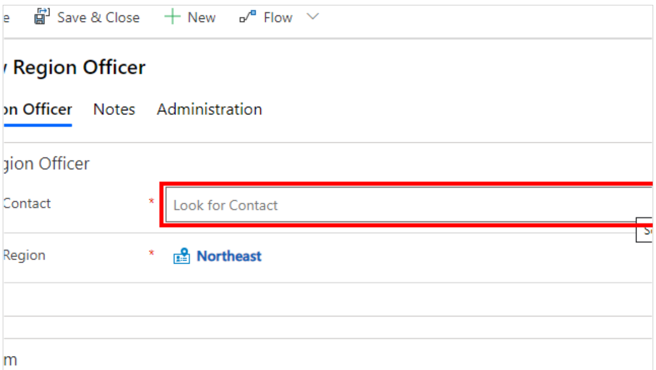
Click on the menu item **Region Officer**



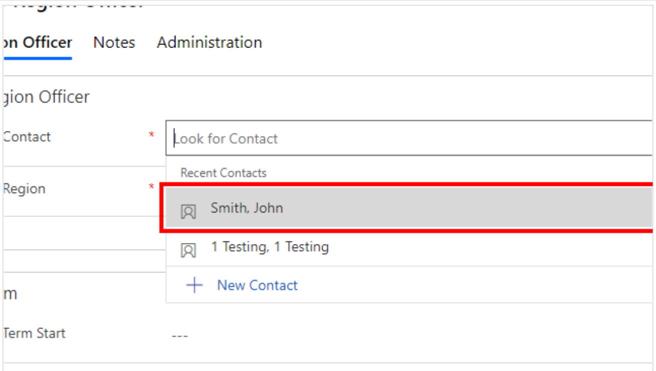
Click on the menu item **Add New Region Officer**



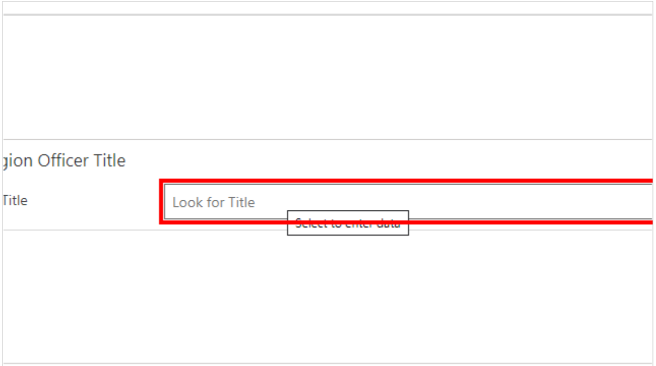
Click on the lookup field **Contact**



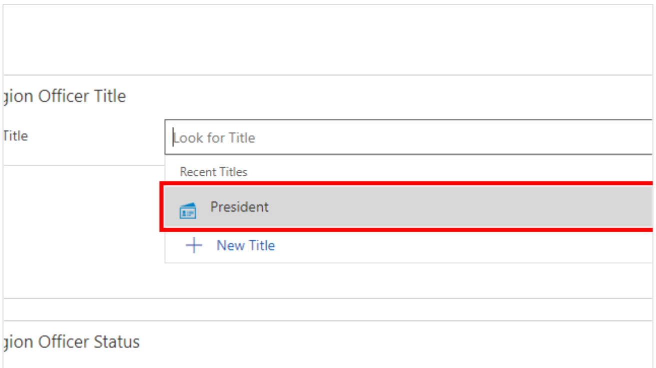
Select the Contact



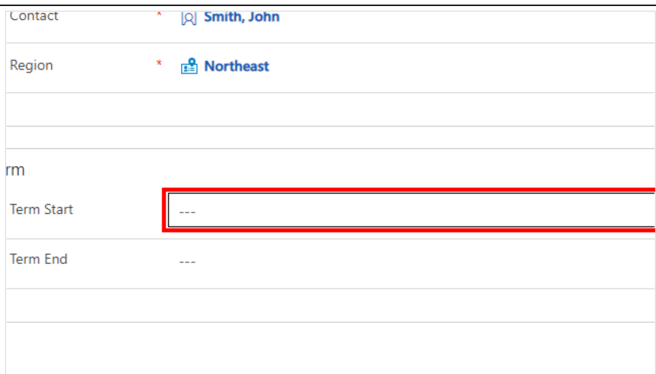
Click on the lookup field **Title**



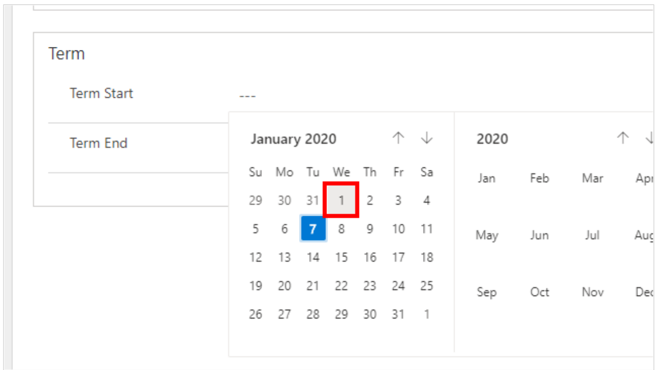
Select the officer Title



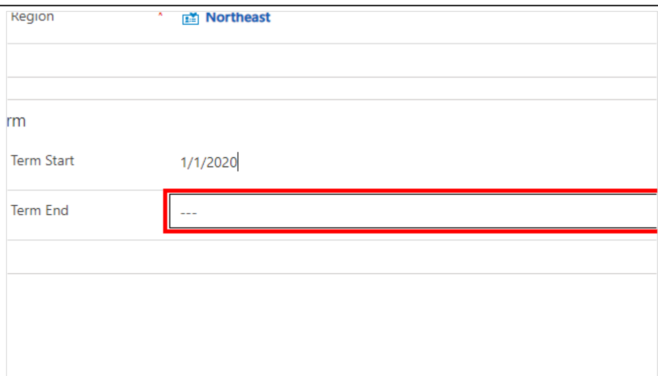
Click on the input field **Term Start**



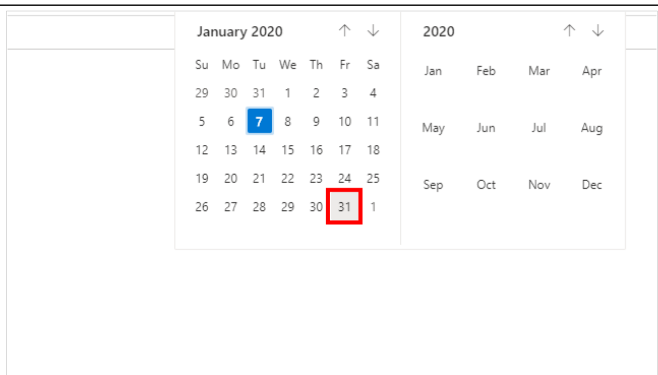
Select the Term Start Date



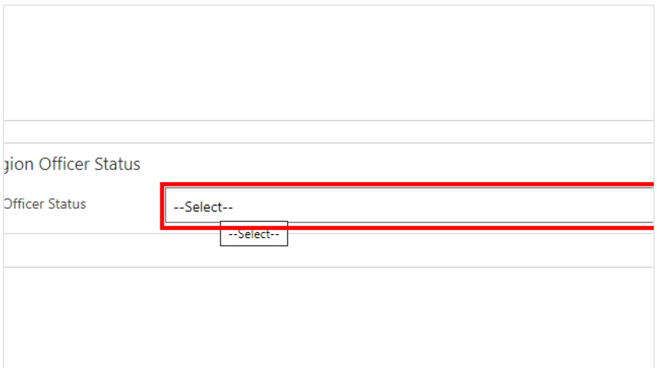
Click on the input field **Term End**



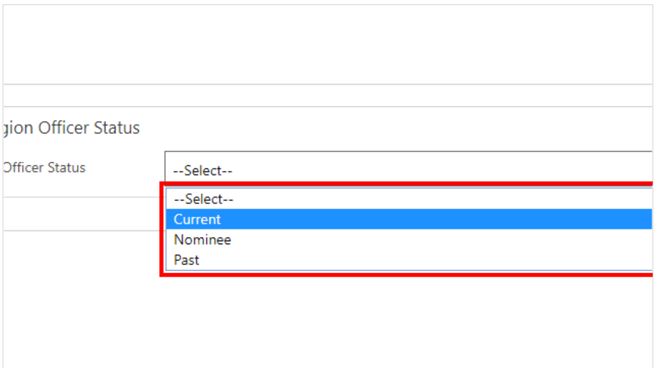
Select the Term End Date



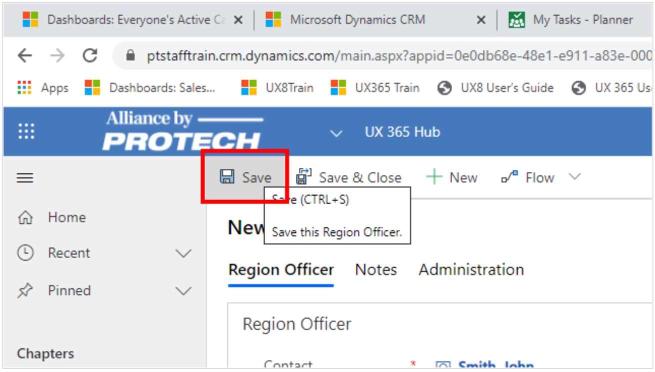
Click on the field **Officer Status**



Select the status of the officer
When selecting the officer status, select "Current" if you are adding a current officer; "Nominee" if the officer has been nominated, or if they have been elected but their term has not started yet; or" Past" if this officer's terms has expired.



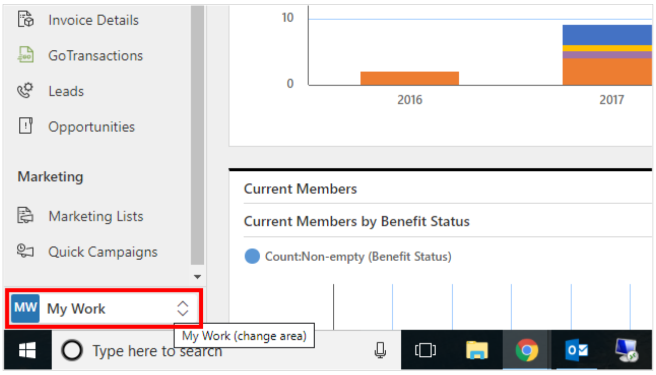
Click on the menu item **Save (CTRL+S)**



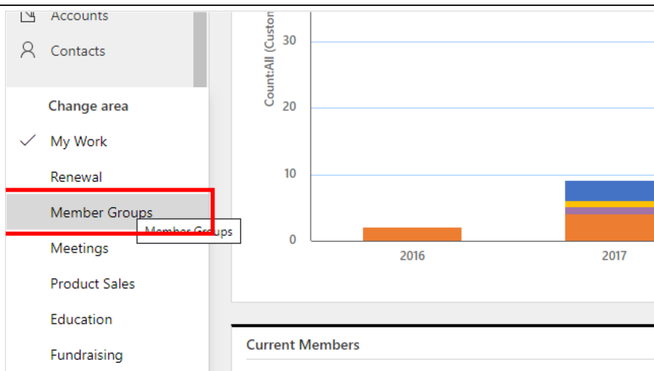
4. Committees and Rosters

4.1. Adding a Committee Member

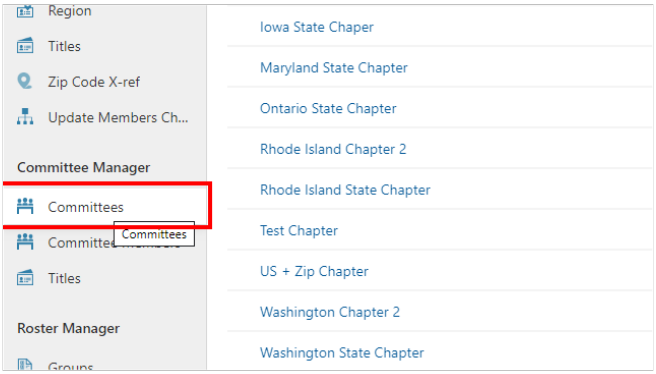
Click on the button **My Work (change area)**



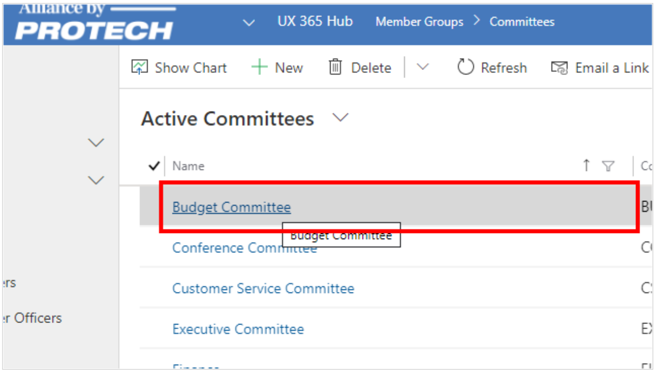
Click on the item **Member Groups**



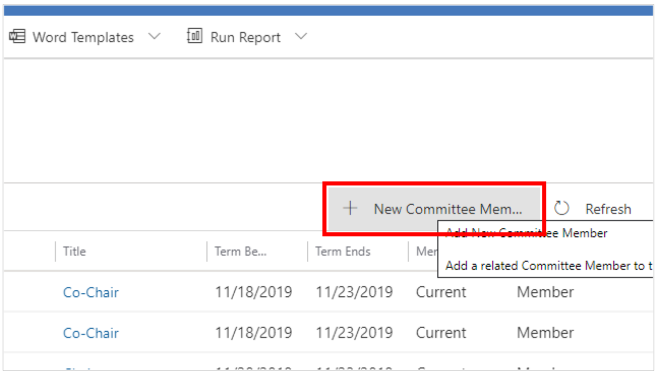
Click on the item **Committees**



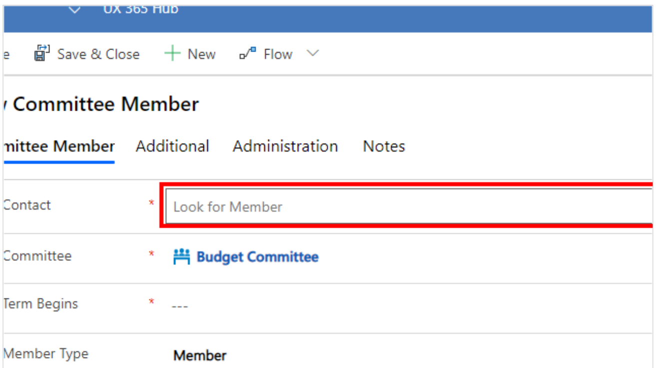
Select the committee you would like to add a member to



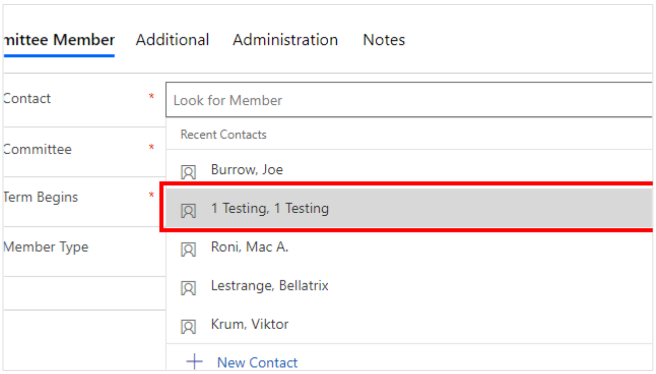
Click on the menu item **Add New Committee Member**



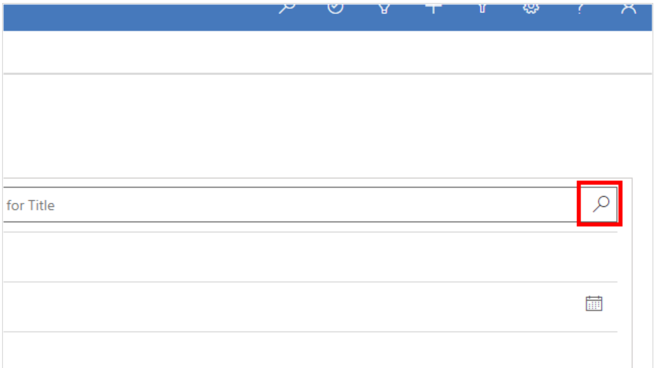
Click on the lookup field **Contact**



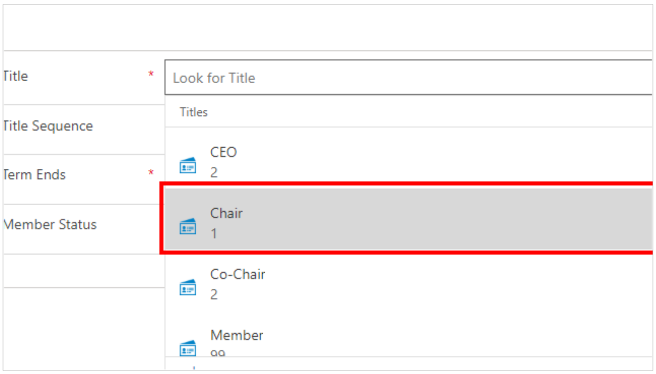
Select the Contact you would like to add



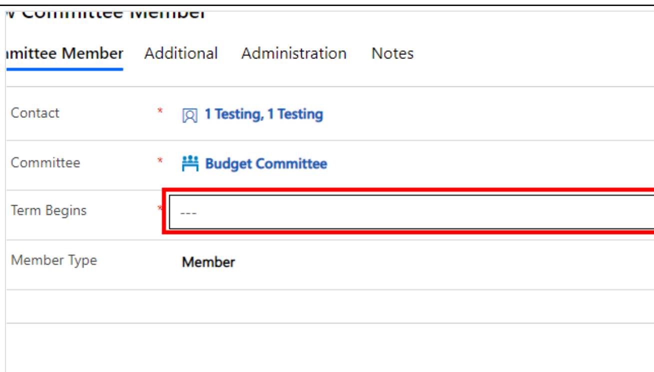
Click on the link **Title**
Select the position or title of the committee member if appropriate(chair member, CEO, ect.)

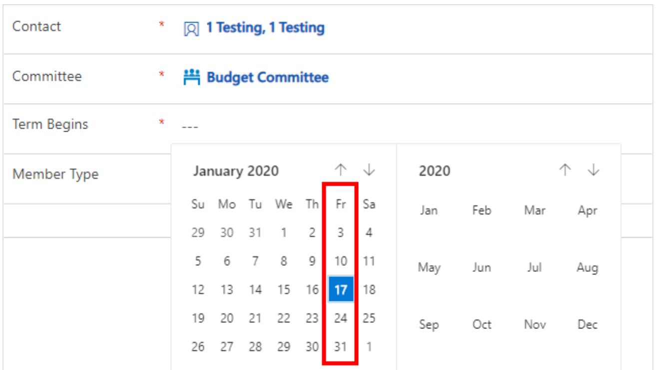
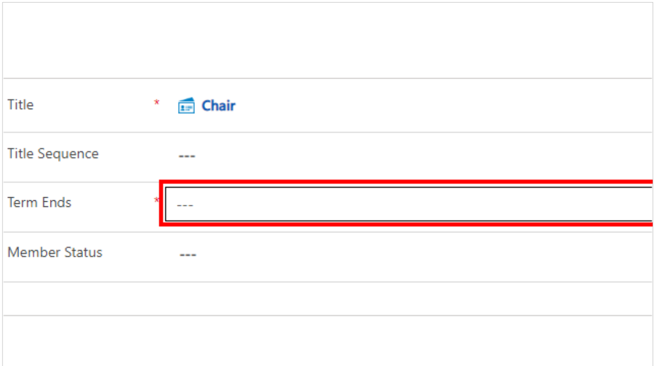
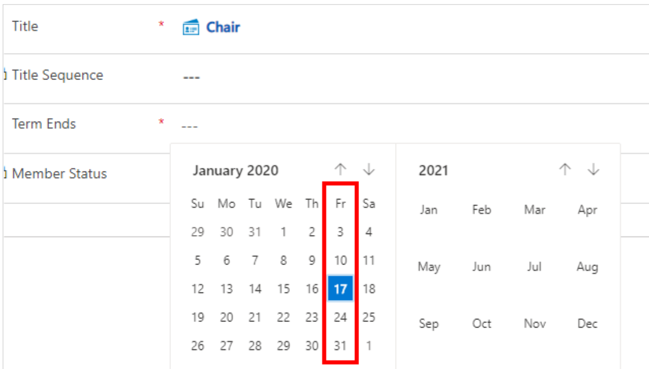
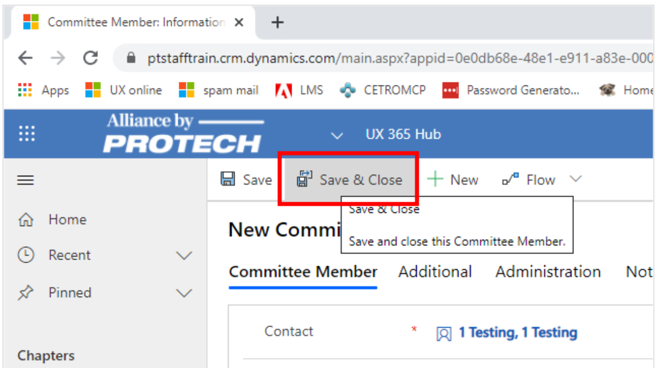


Select the title of the new committee member

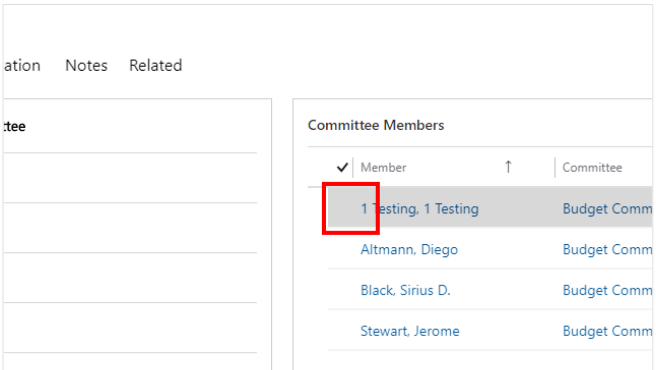


Click on the field **Term Begins**



Click on a date in the calendar	
Click on the field **Term Ends**	
Click on a date in the calendar	
Click on the menu item **Save & Close**	

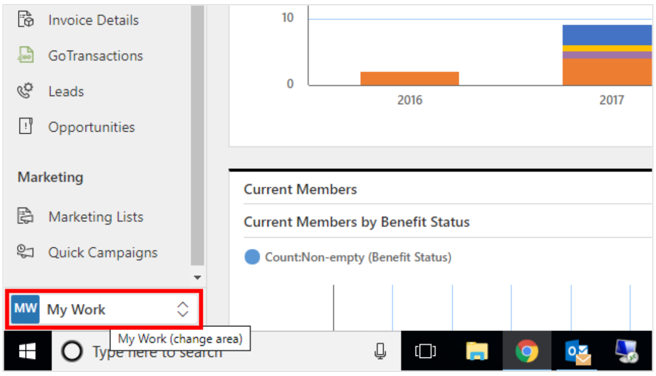
You should now see the new commitee member added to the committee member list



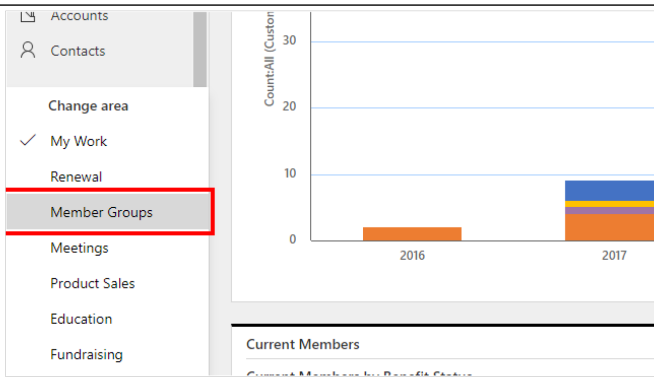
4.2. Adding a Roster Member

4.2.1. Adding Roster Members using the Group record

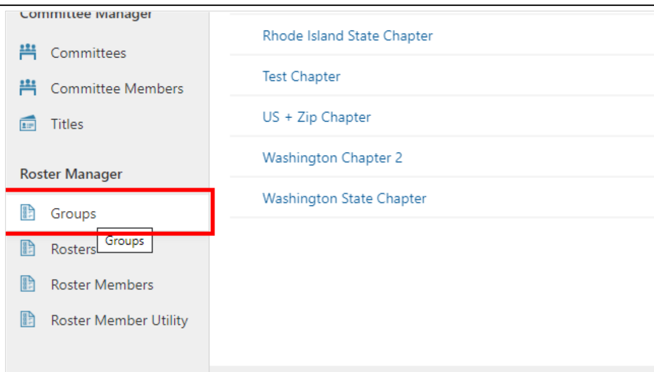
Click on the button **My Work**



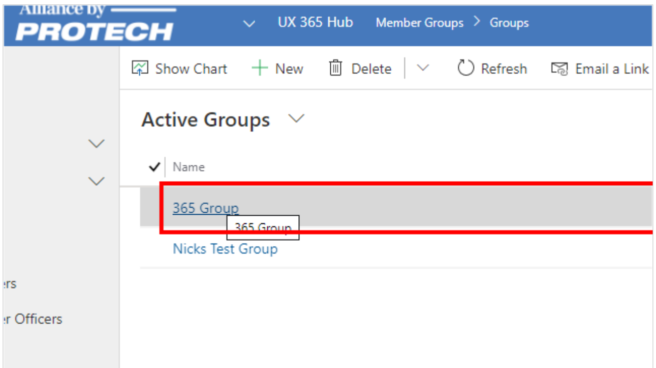
Click on the item **Member Groups**



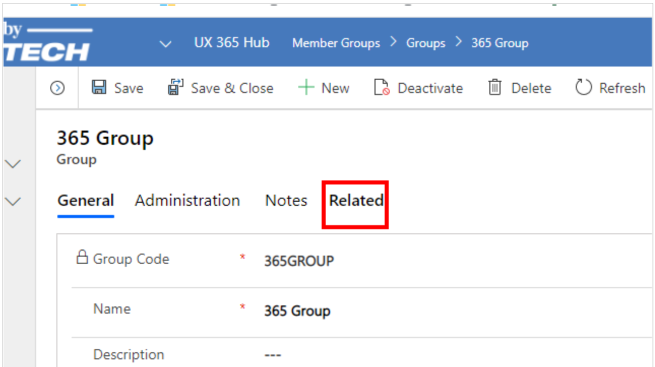
Click on the item **Groups**



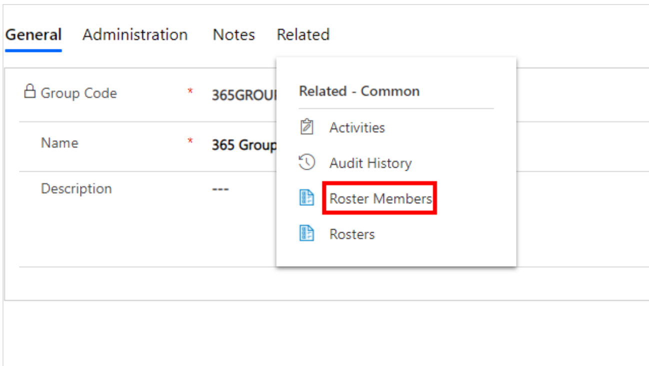
Select the Group



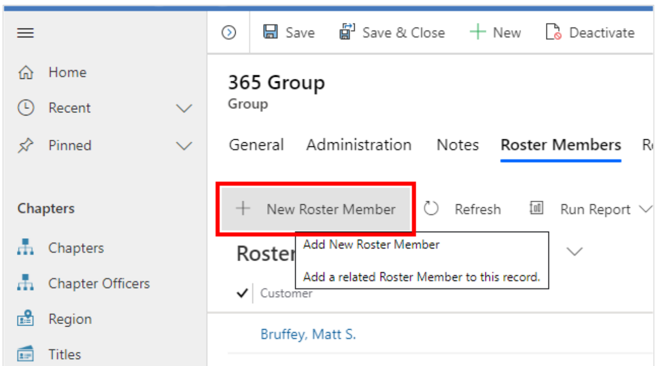
Click on the item **Related**



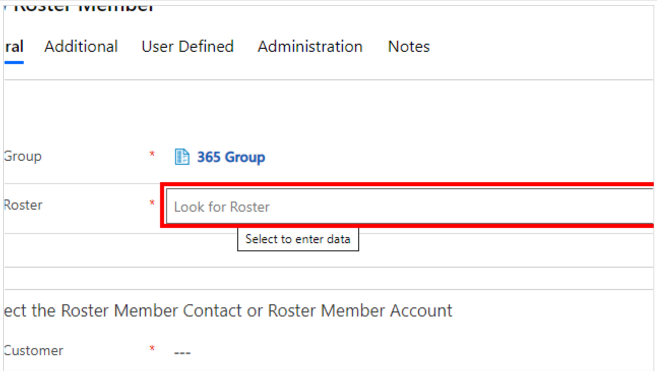
Click on the menu item **Roster Members**



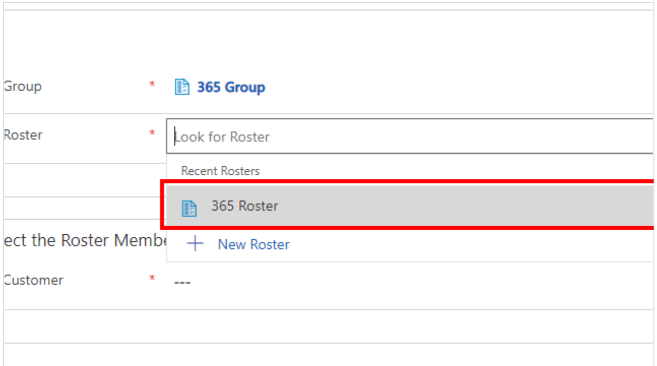
Click on the menu item **Add New Roster Member**



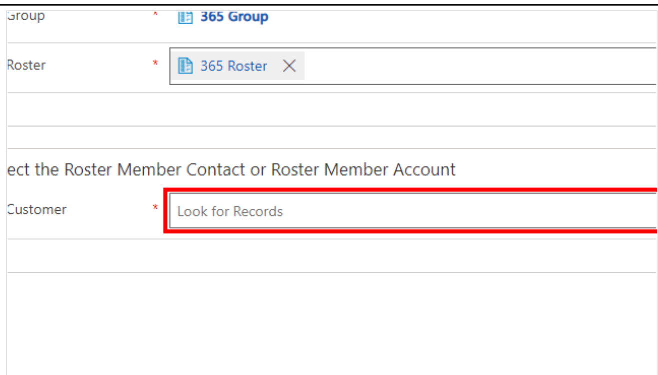
Click on the lookup field **Roster**



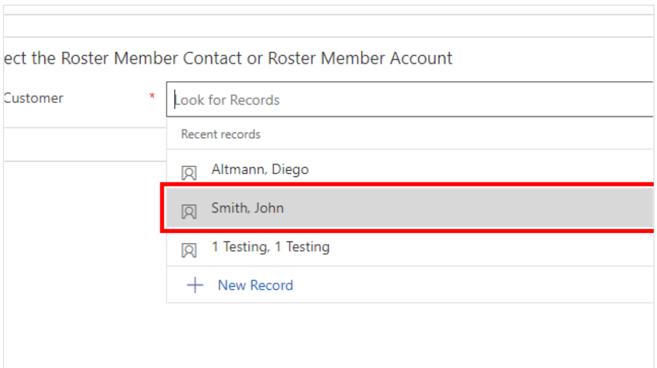
Select the Roster



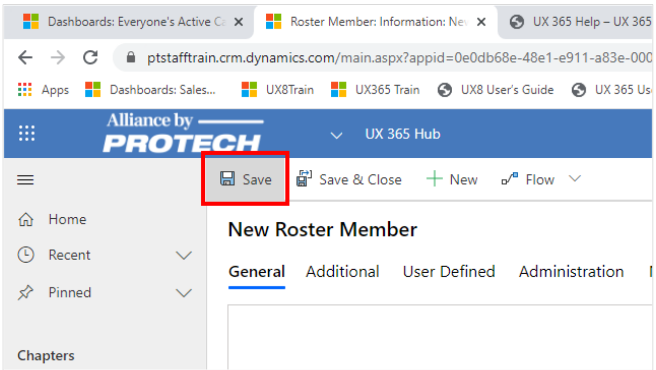
Click on the lookup field **Customer**



Select the Customer

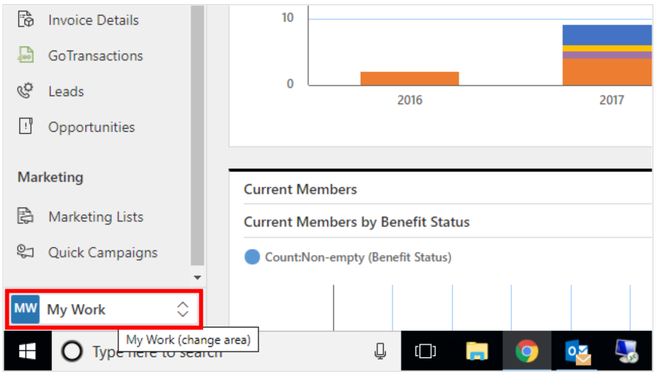


Click on the menu item Save

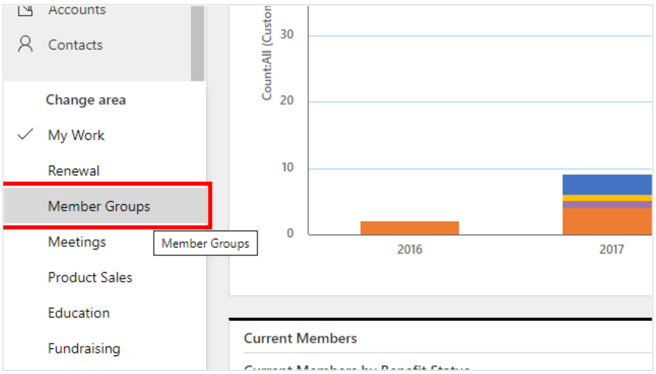


4.2.2. Adding Roster Members using the Roster record

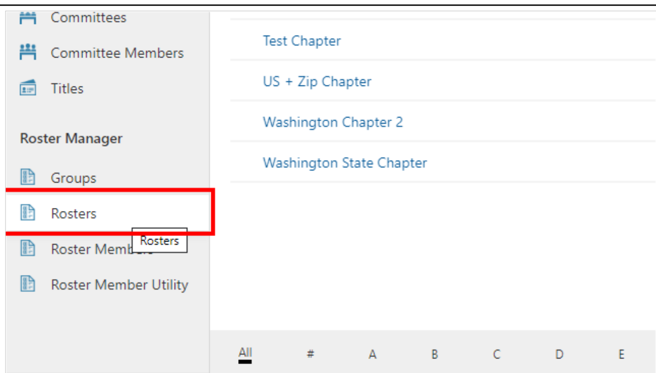
Click on the button **My Work**



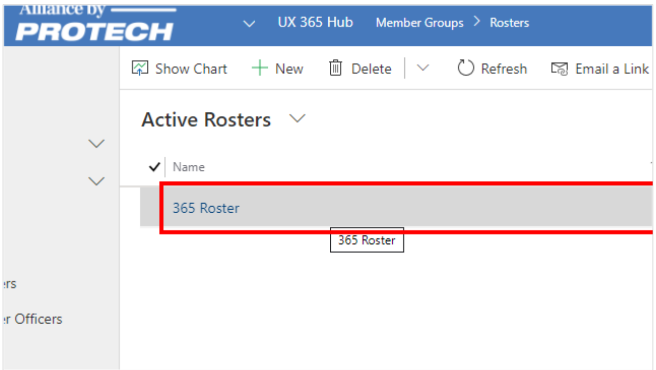
Click on the item **Member Groups**



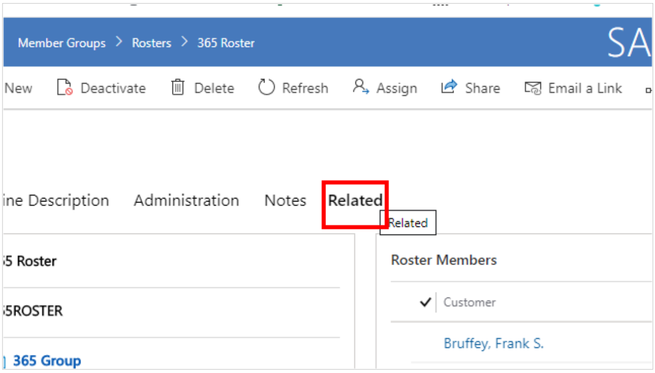
Click on the item **Rosters**



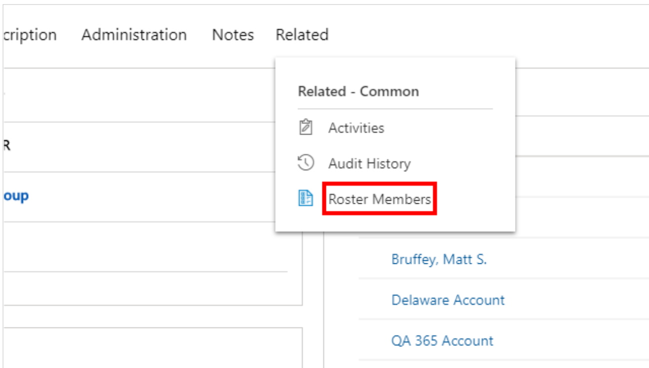
Select the Roster



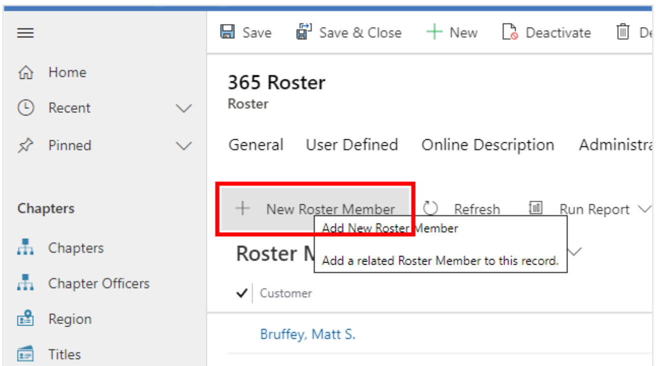
Click on the item **Related**



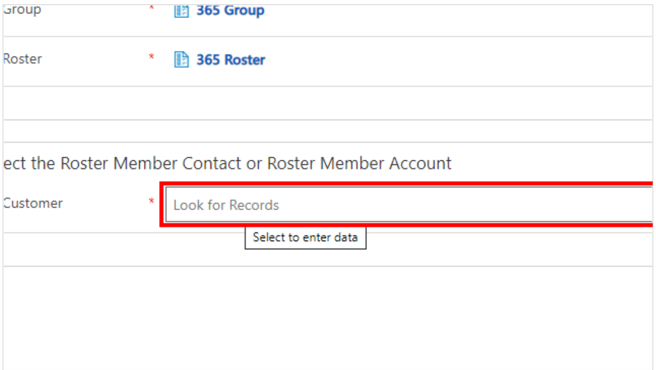
Click on the menu item **Roster Members**



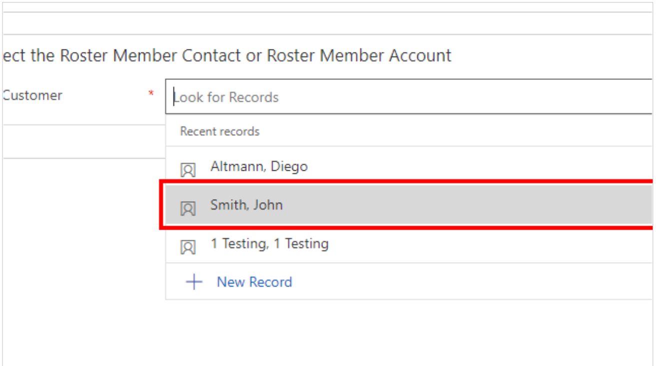
Click on the menu item **Add New Roster Member**



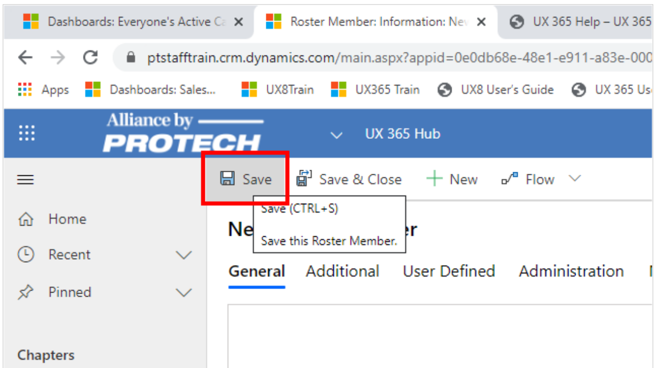
Click on the lookup field **Customer**



Select the customer

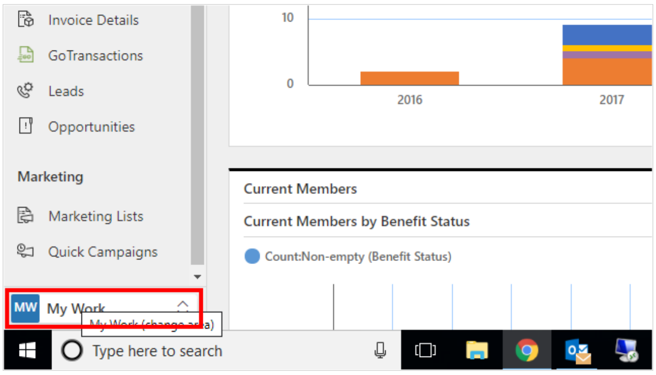


Click on the menu item Save

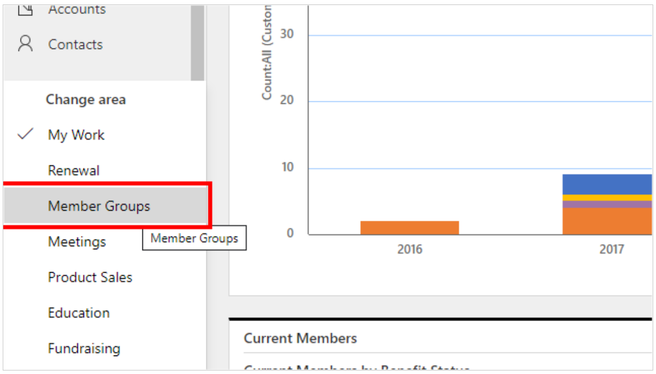


4.2.3. Adding Roster members using the Roster Members list

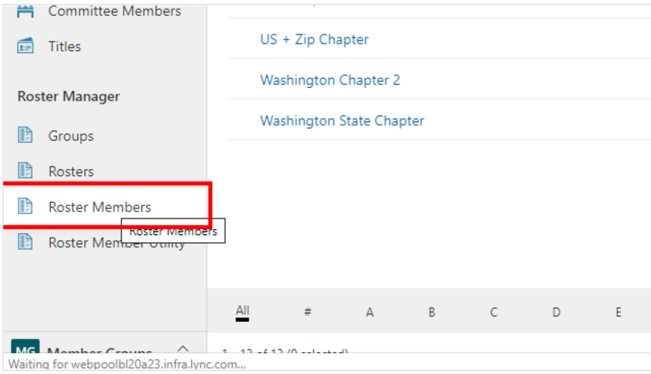
Click on the button **My Work**



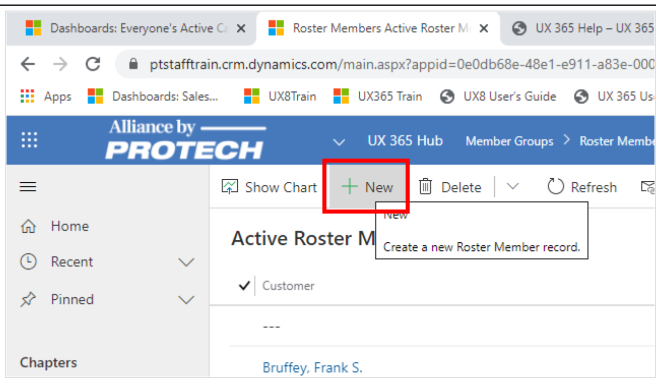
Click on the item **Member Groups**



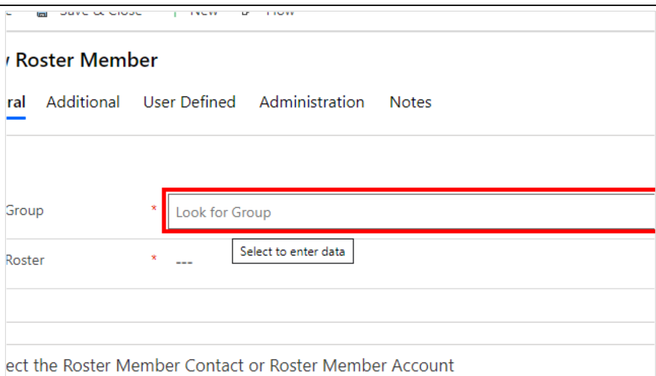
Click on the item **Roster Members**



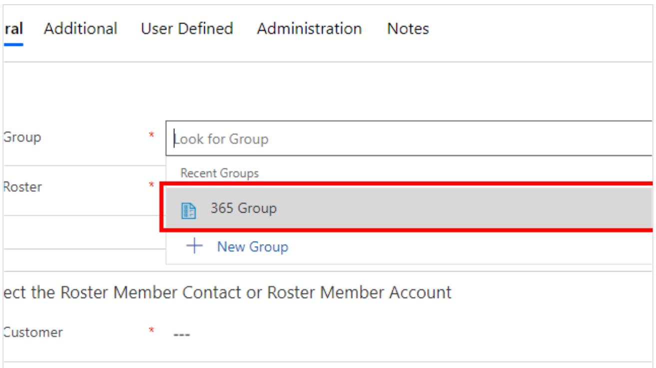
Click on the menu item **New**



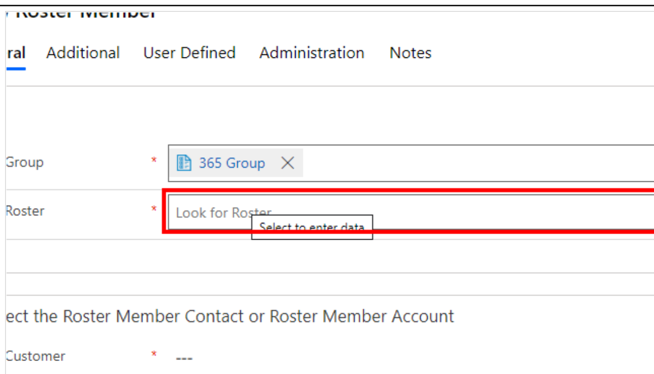
Click on the lookup field **Group**



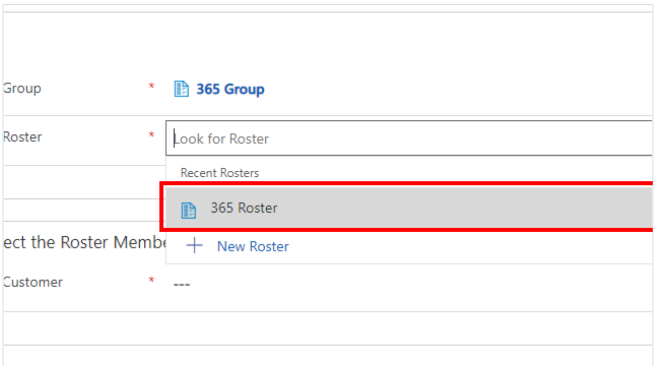
Select the Group



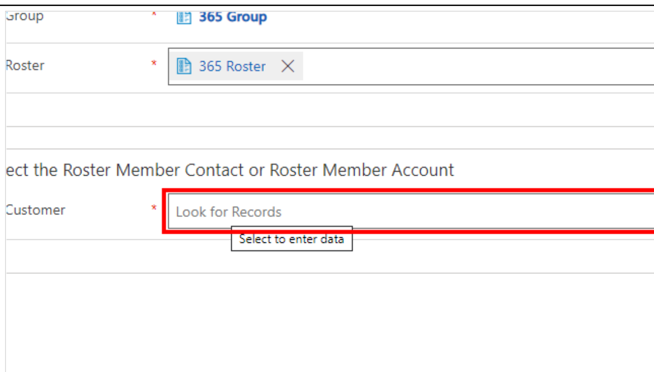
Click on the lookup field **Roster**



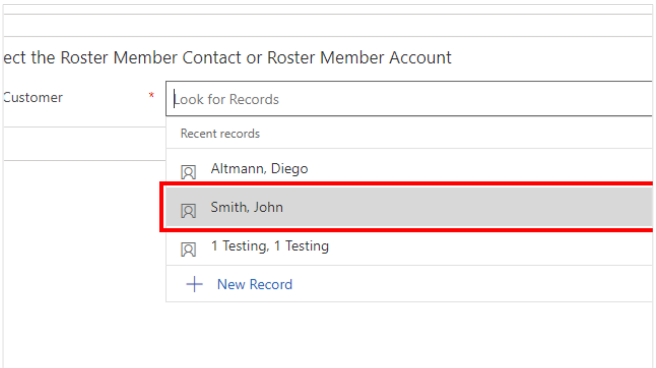
Select the Roster



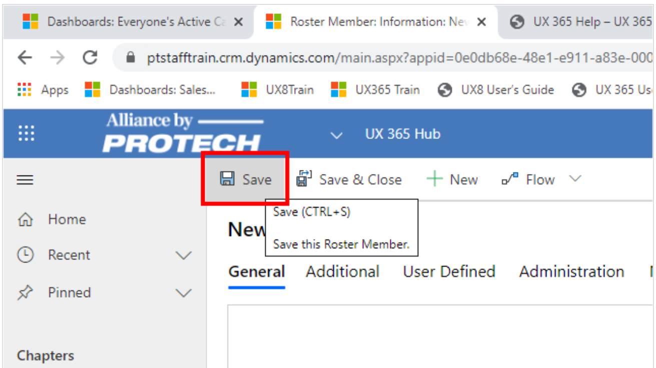
Click on the lookup field **Customer**



Select the Customer



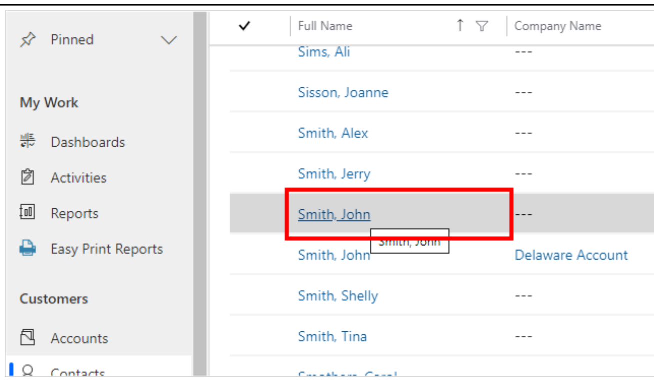
Click on the menu item Save



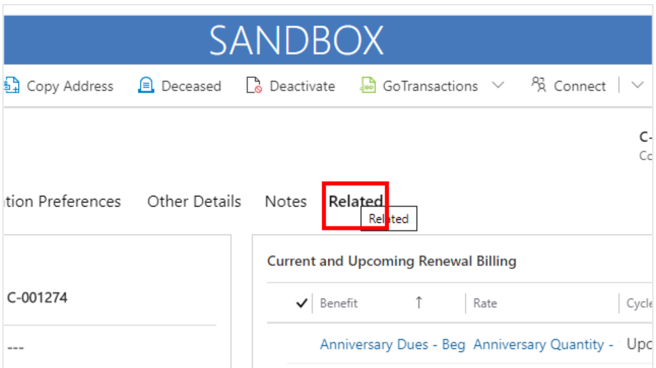
4.2.4. Adding Roster Members using the Contact or Account record

Click on the item **Contacts**

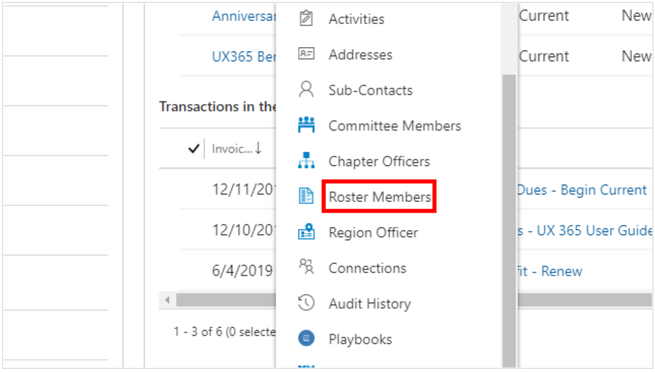
Select the Contact



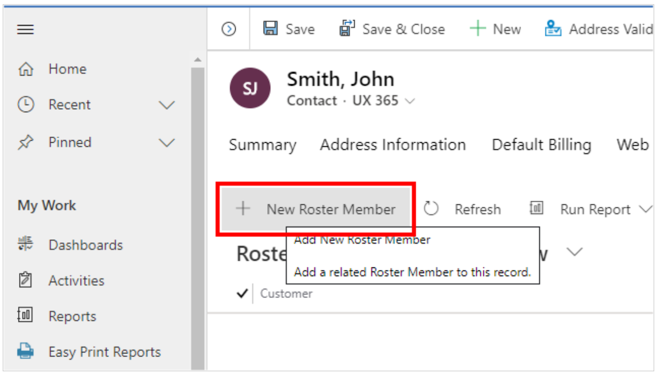
Click on the item **Related**



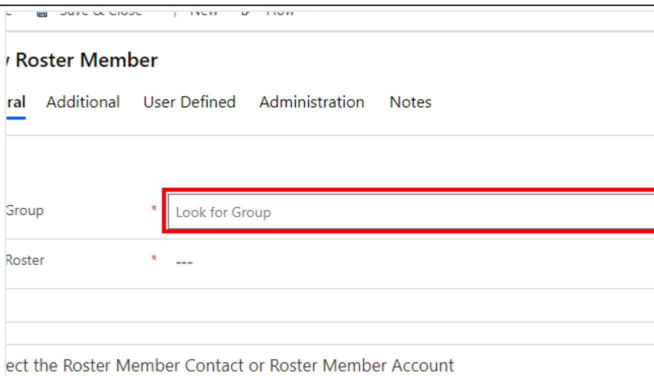
Click on the menu item **Roster Members**



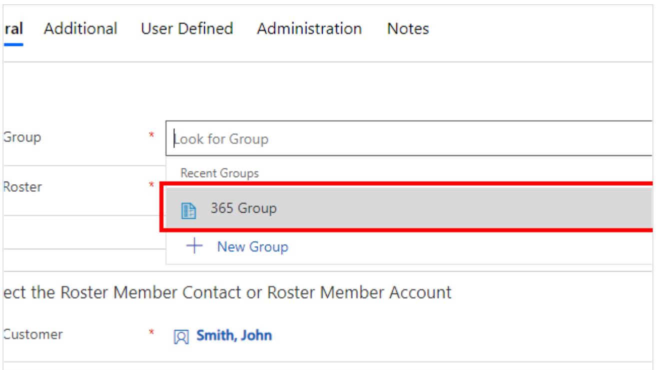
Click on the menu item **Add New Roster Member**



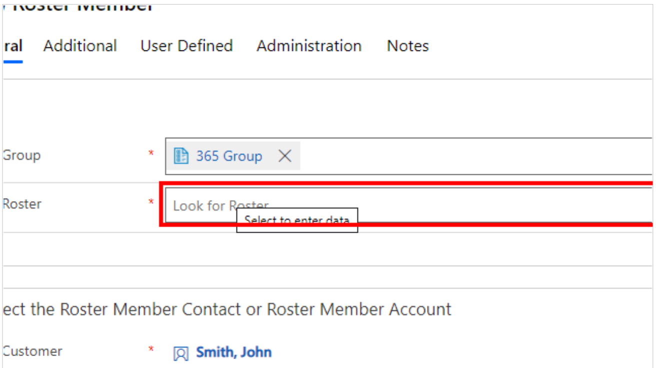
Click on the lookup field **Group**



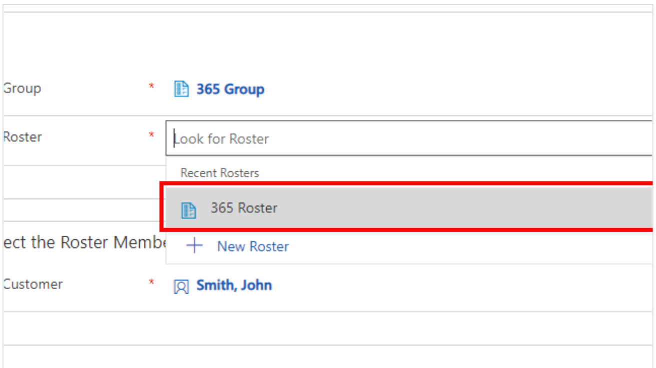
Select the Group



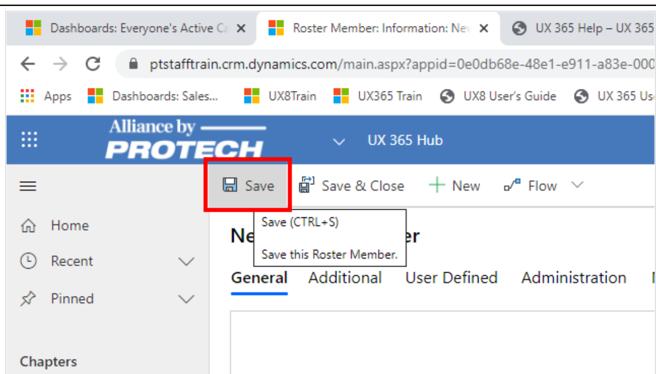
Click on the lookup field **Roster**



Select the Roster

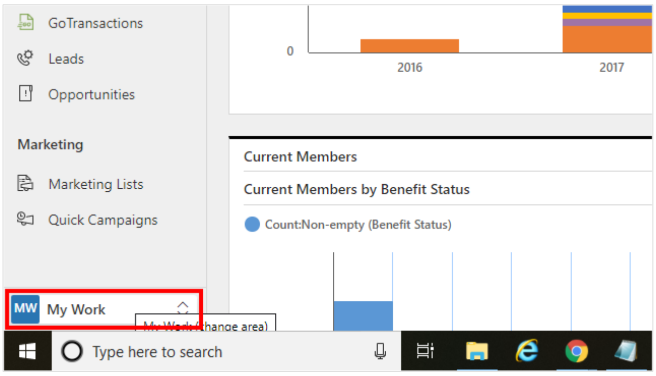


Click on the menu item Save

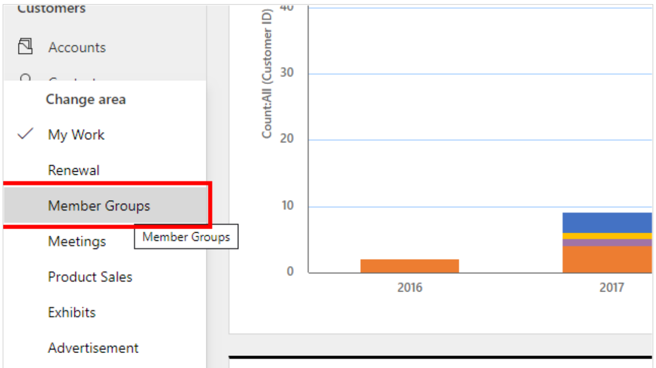


4.3. Adding Roster Members using the Roster Members Utility

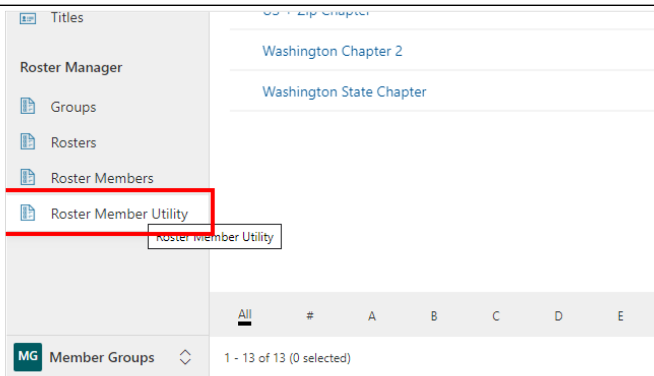
Click on the button **My Work (change area)**



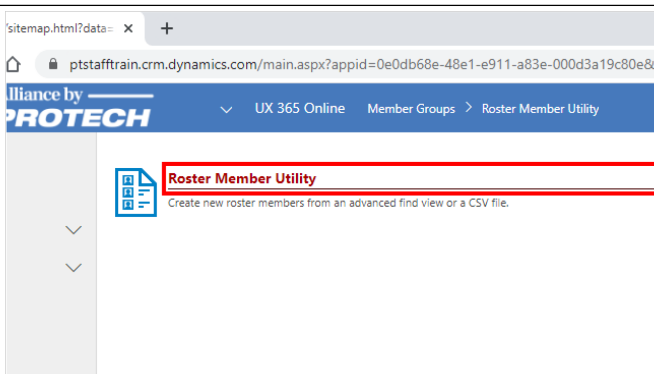
Click on the item **Member Groups**



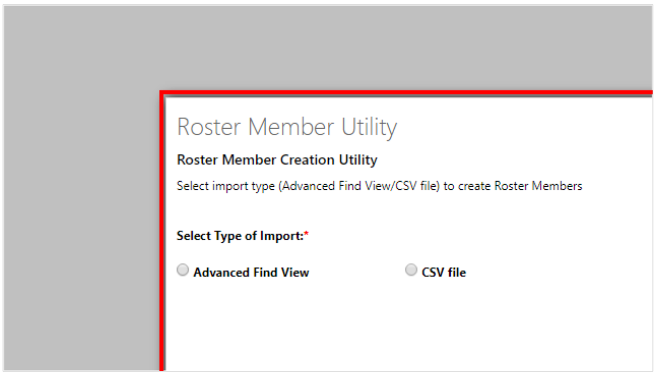
Click on the item **Roster Member Utility**



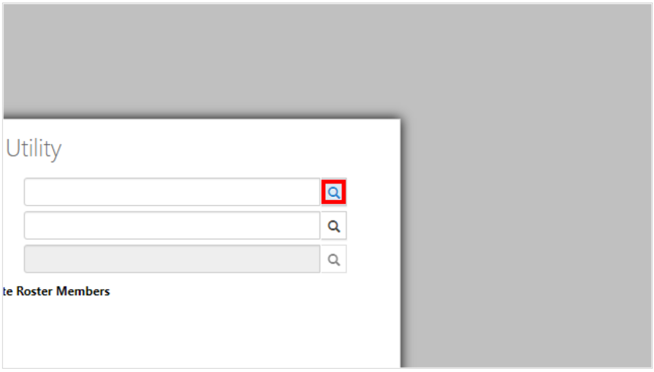
Click on **Roster Member Utility**



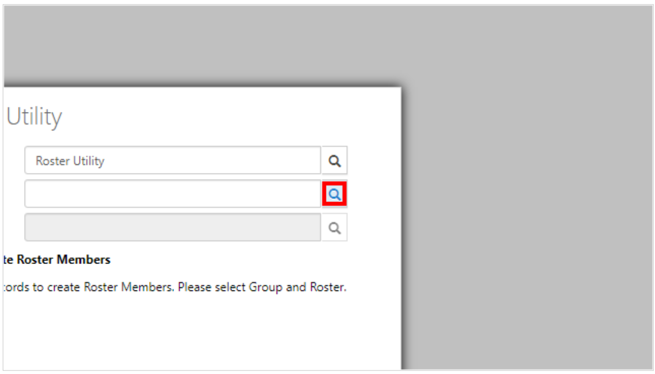
A pop up window will appear with the utility. Select the type of import youd wish to perform.
Advanced find view will have you pull an advanced find to find the members you would like to add, CSV file prompts you to upload a file.



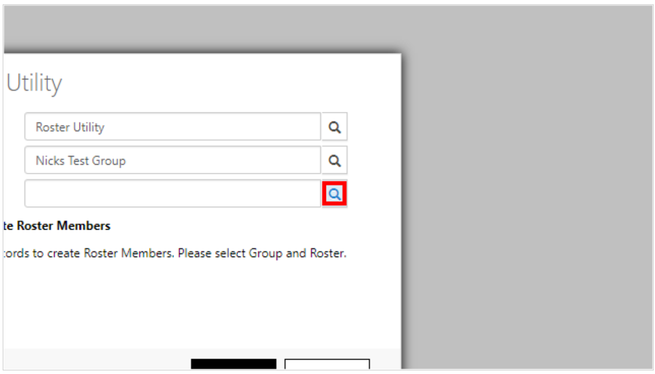
Click on the Lookup icon next to Advanced find view to pull the view of contacts into the utility.



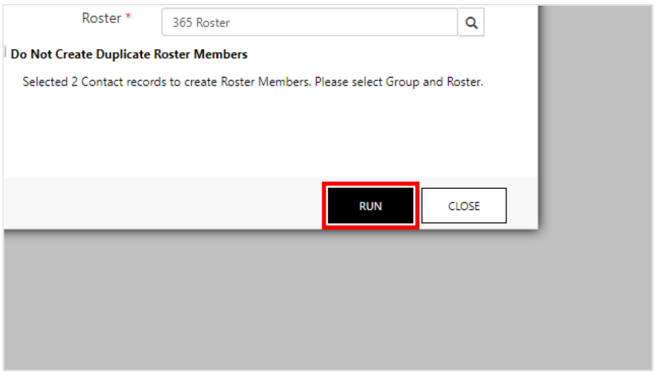
Click on the lookup icon next to group to select the group



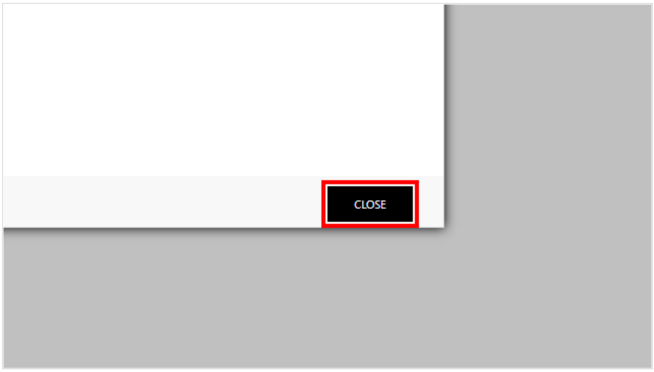
Click on the lookup icon next to roster to select the roster you wish to add the members on to



Click on the button **RUN**

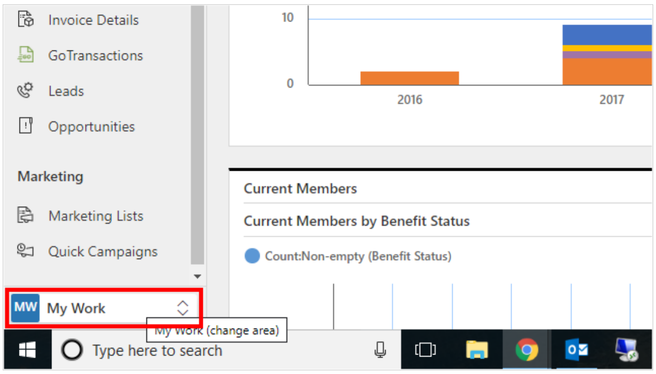


Click close when you are done with the utility

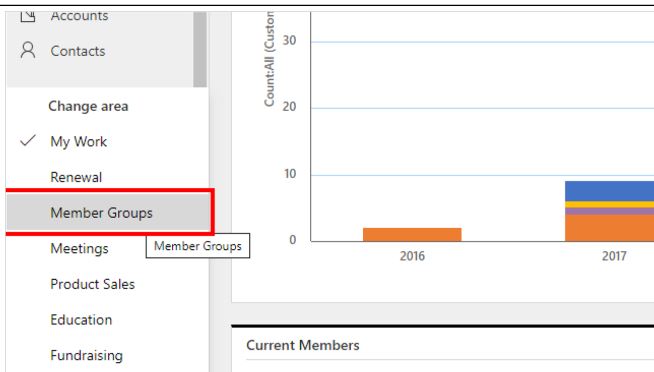


4.4. Assigning a Roster to a Different Group

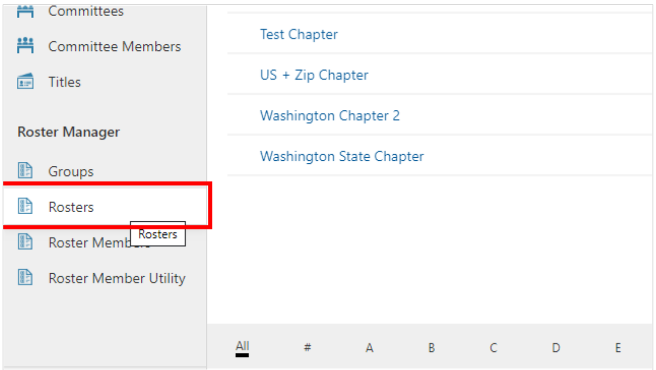
Click on the button **My Work (change area)**



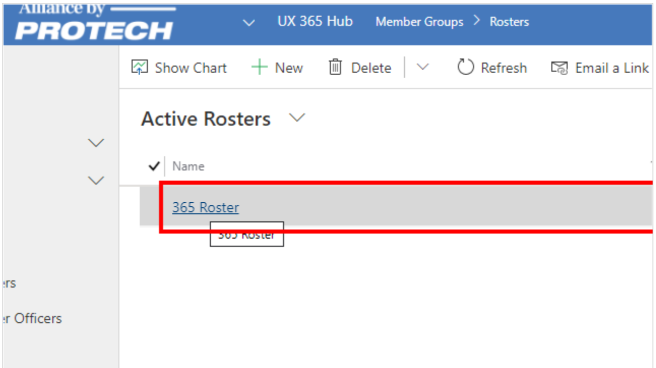
Click on the item **Member Groups**



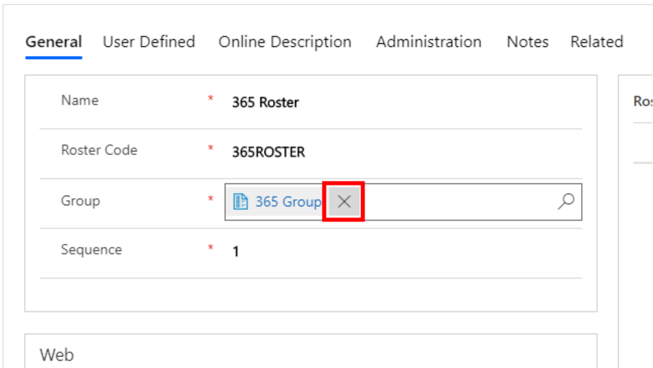
Click on the item **Rosters**



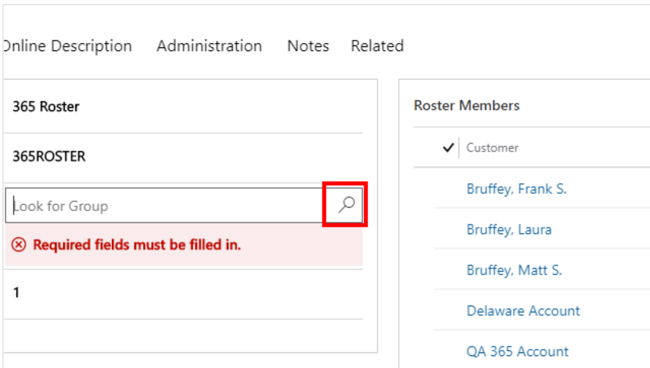
Select the roster you would like to edit

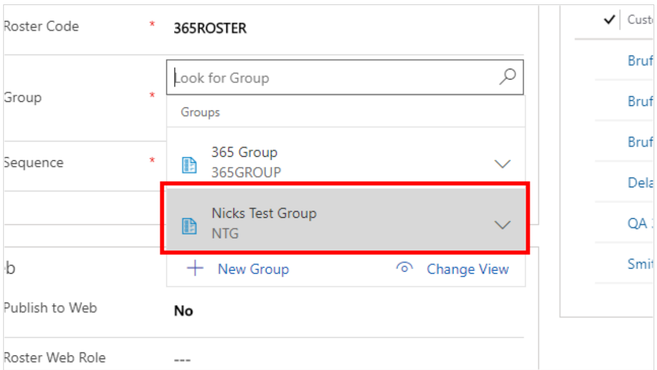
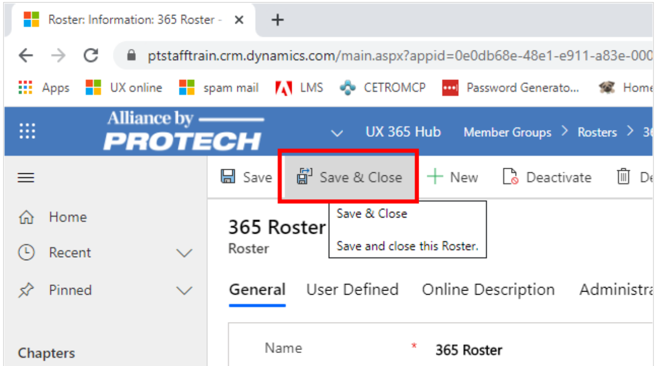
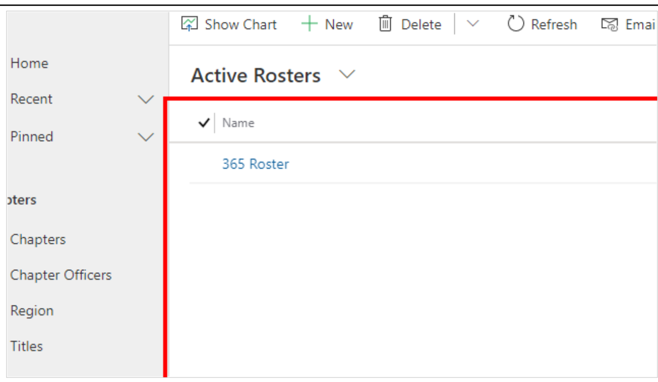


Remove the current group



Select the lookup to find new group

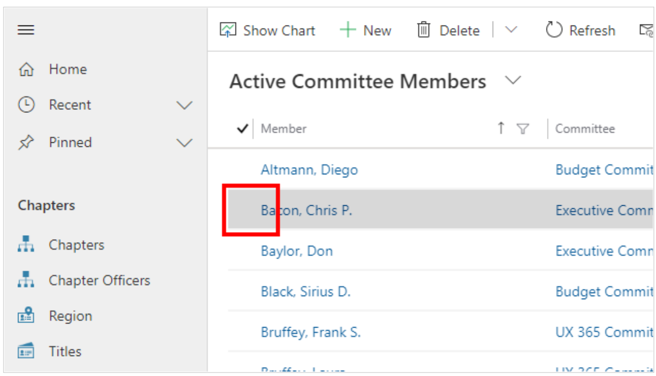


Select the desired group to be assigned to the roster	
Click on Save and Close	
You should now see your new group assigned to the Roster	

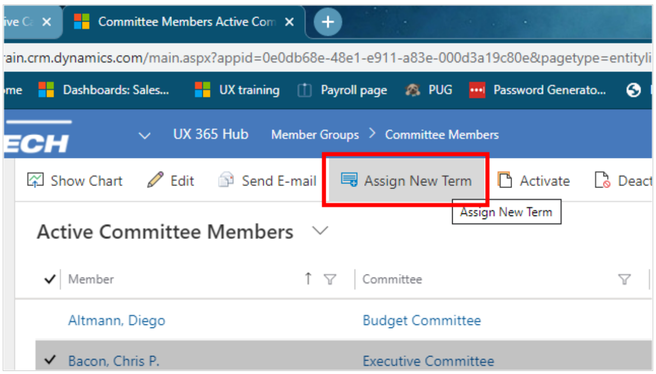
4.5. Assigning Committee Member New Terms

When you assign a new term to a committee member, each term is treated as a separate record, and a new committee member record is added to their contact record. Because of this, you can see a single committee member listed multiple times in the Committee Members list. For example, assume that Nancy Aalbers is serving a term on the Watersheds committee for the 2015 calendar year. If you use this procedure to assign her a new term on the committee for 2016, her name will appear twice in the list.

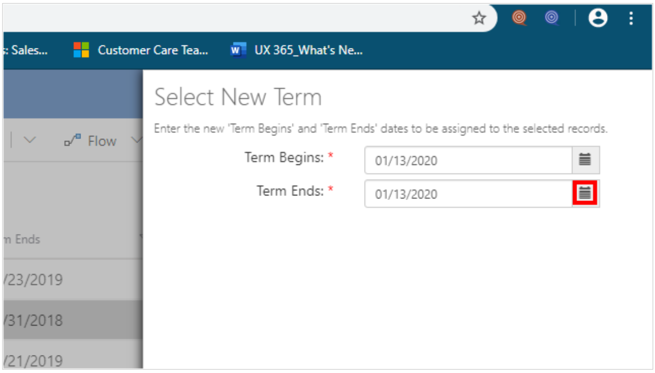
Select each committee member record that was re-elected for a new term. To select more than one committee member, press the Ctrl key as you click on each member. To select all the committee members shown, click the checkmark icon on the column heading bar.



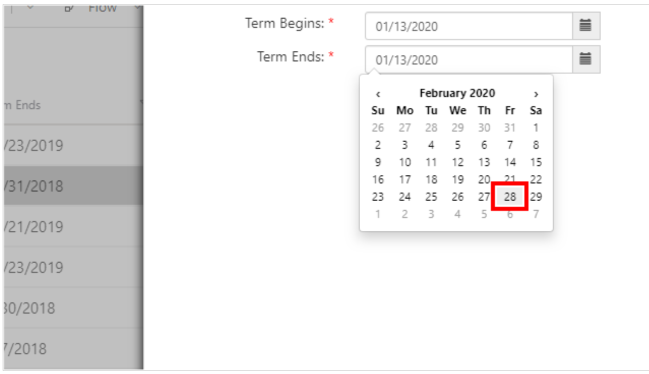
Click on the menu item **Assign New Term**



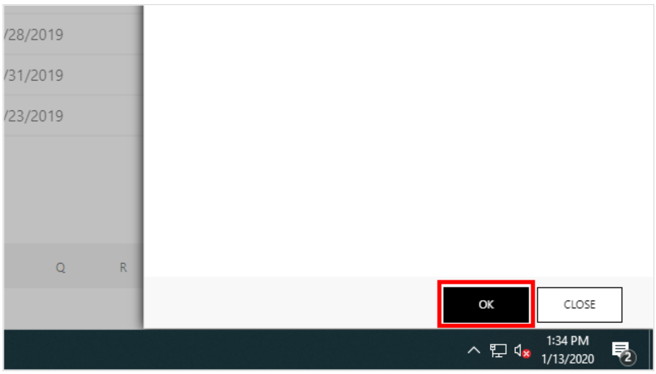
In the Select New Term dialog, enter the new term beginning and ending dates in MM/DD/YYYY format, or click the Calendar button to select the dates.



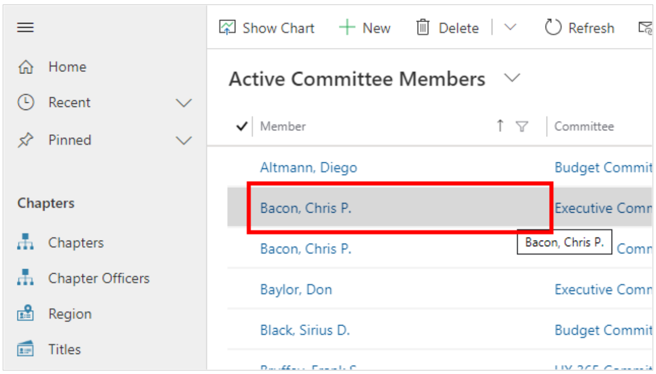
Select the desired dates.



Click on the button **OK**

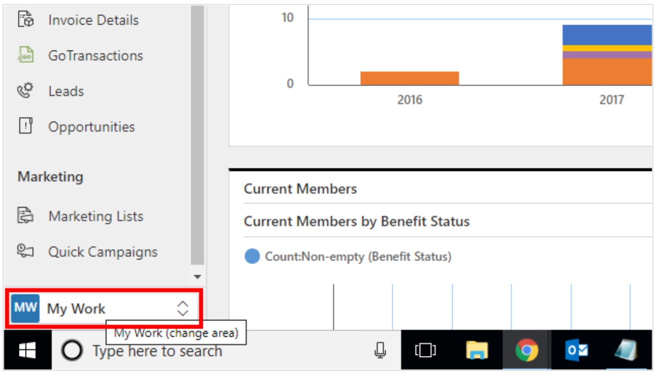


When the process is finished, the Committee Members list will appear. After refreshing the list, verify that the new terms have been added for each committee member you selected.

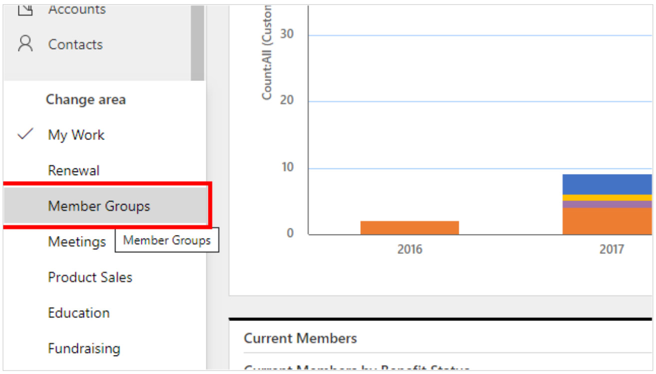


4.6. Creating a Committee

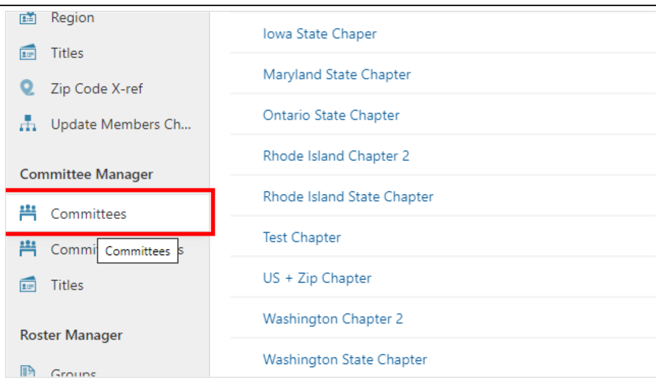
Click on the button **My Work (change area)**



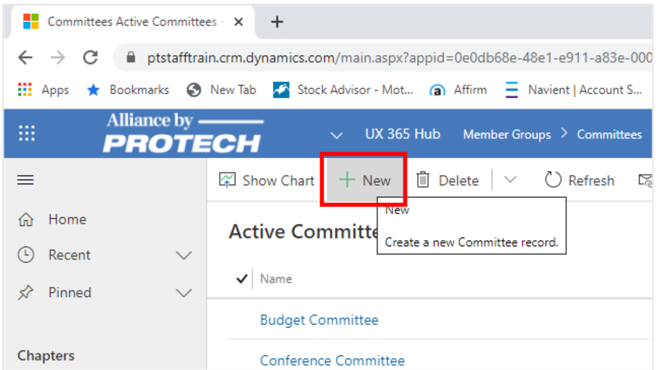
Click on the item **Member Groups**



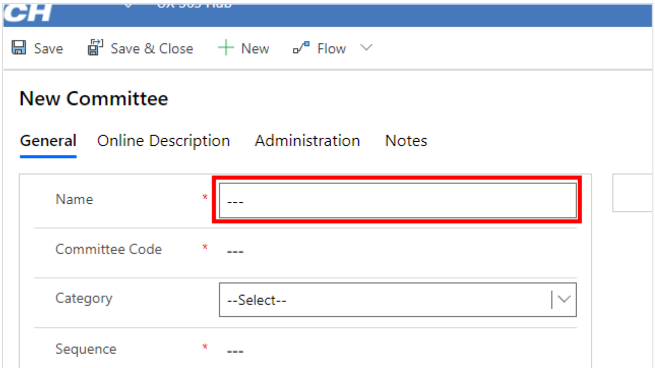
Click on the item **Committees**



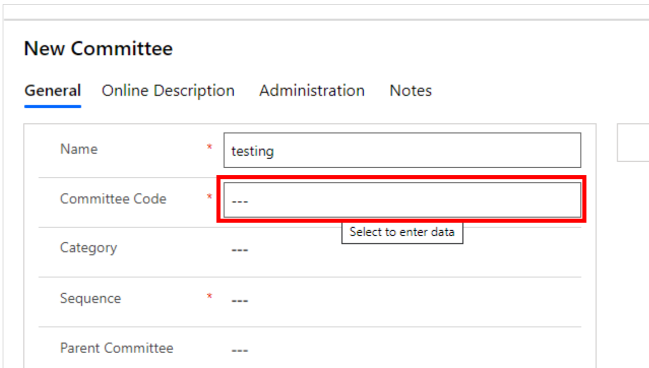
Click on the menu item **New**



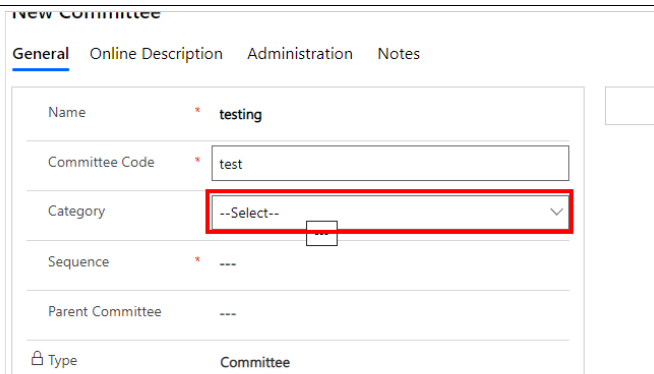
Enter the name of the committee.



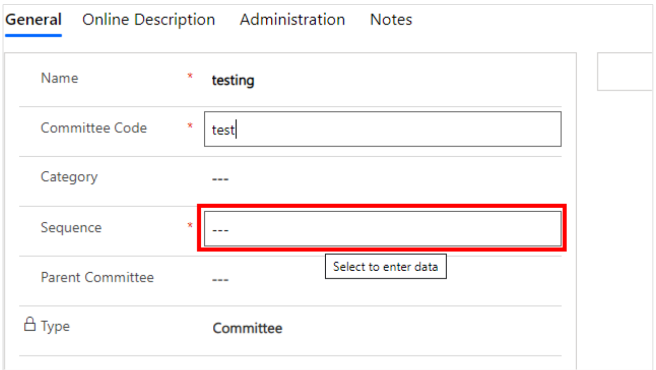
Enter a code or abbreviated name for this committee.



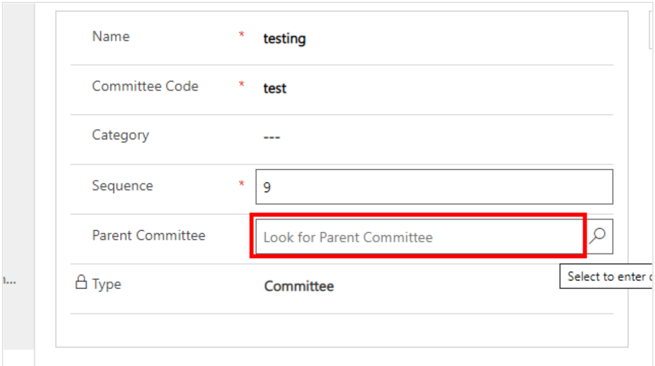
If necessary, select a committee category from the list.



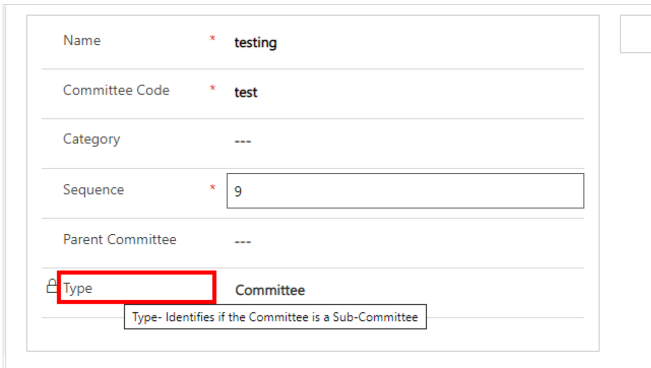
Assign a sequence number to this committee if you want to be able to sort committees on reports according to an order you choose.



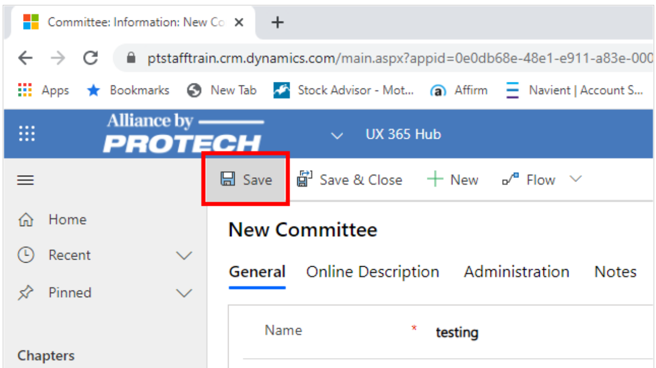
If this is a subcommittee, enter or select the parent committee.



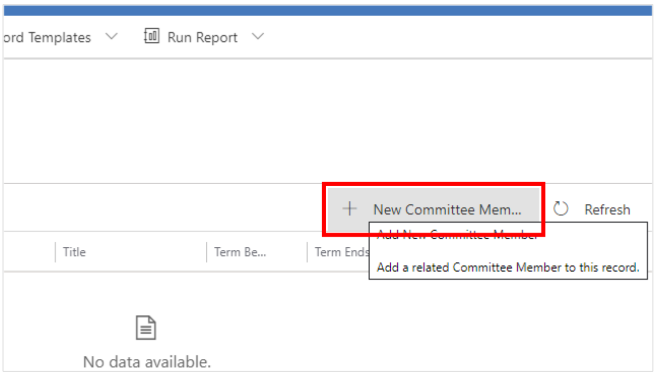
If you did not enter a parent committee, the Type field will display Committee. If you entered a parent committee, this field will display Sub-committee.



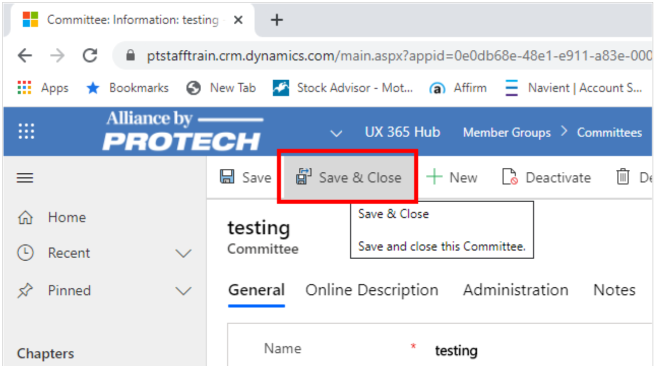
Click Save. After saving this record, other options on the navigation bar are activated.



You can click here to add members to the committee. For more information, see Adding committee members overview.



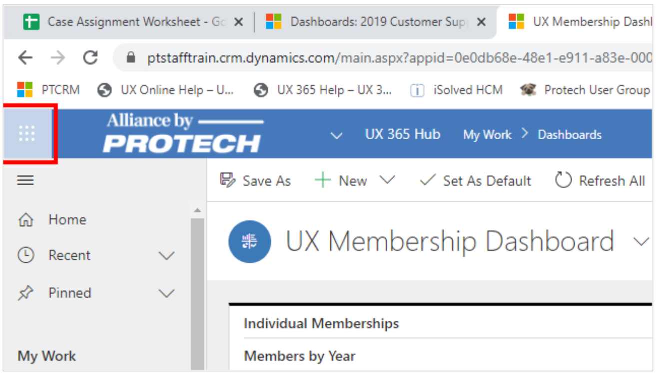
Click on the menu item **Save & Close**



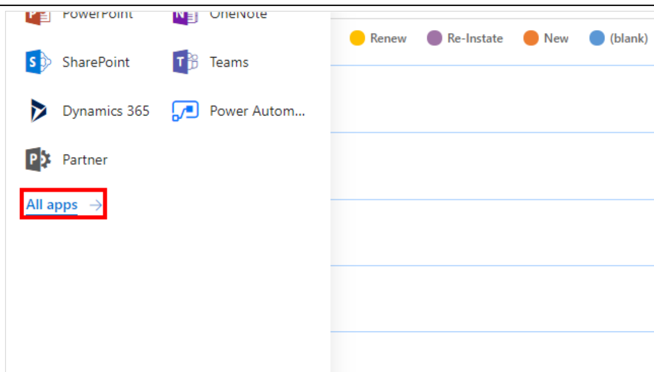
4.7. Creating a Committee Category

Please note: you must be a System Administrator or System Customizer to perform this task

Click on the waffle button

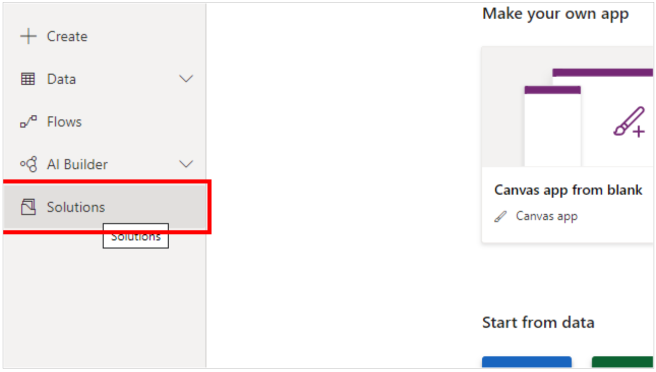


Click on the button **All apps**

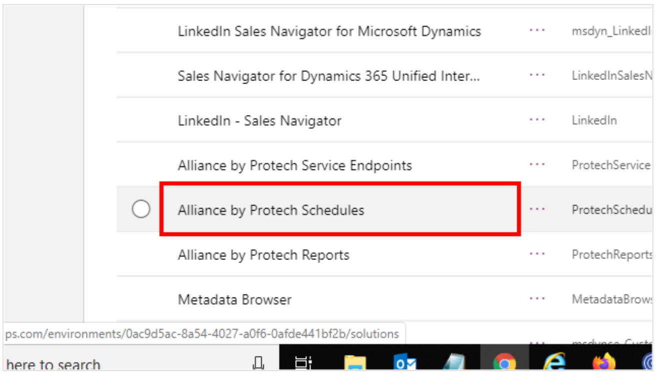


Click on the link **PowerApps**

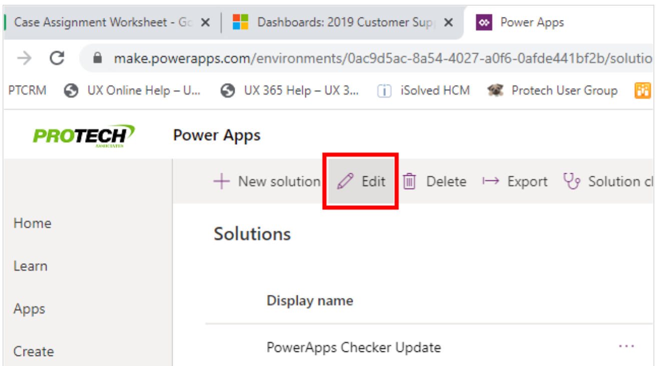
Click on the link **Solutions**



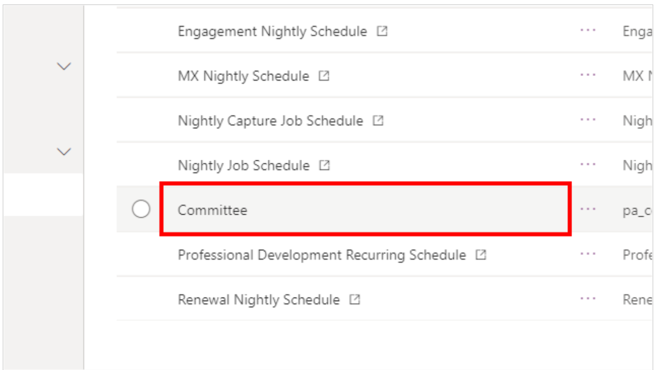
Locate and click on your organization's unmanaged solution.



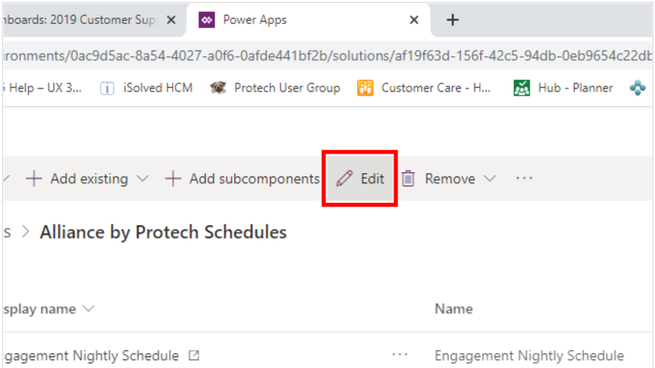
Click on the button Edit



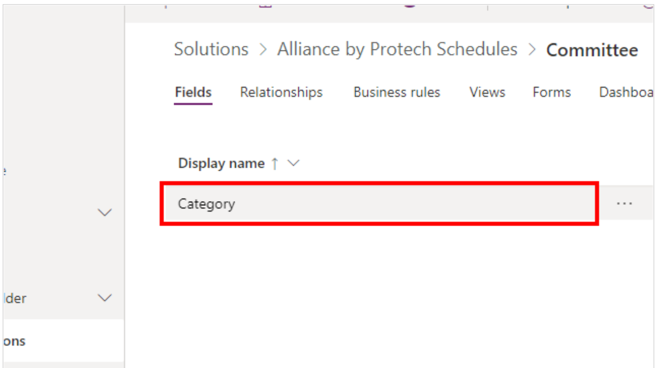
Click on **Committee**
If the committee entity is not located in your unmanaged solution add it my using the Add existing button in the toolbar.



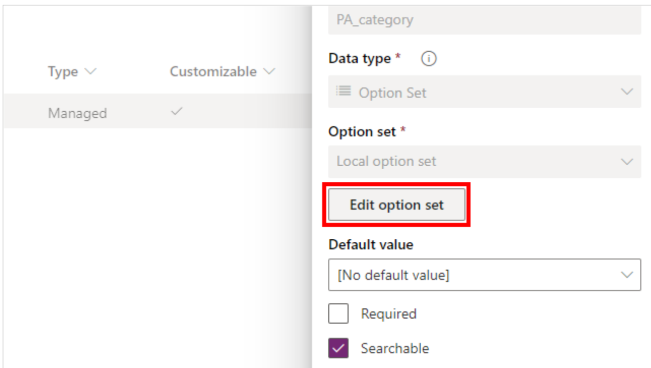
Click on the button Edit



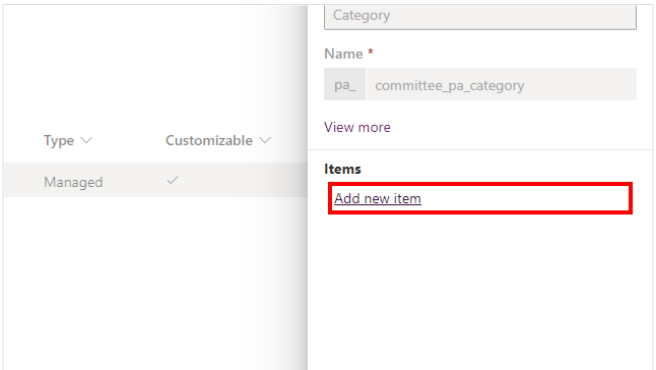
Double click on **Category**



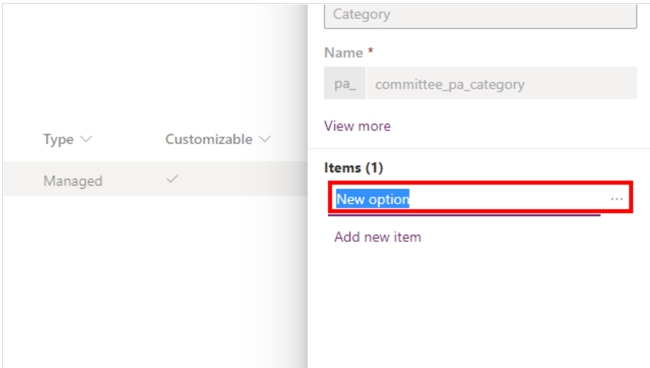
Click on the button **Edit option set**



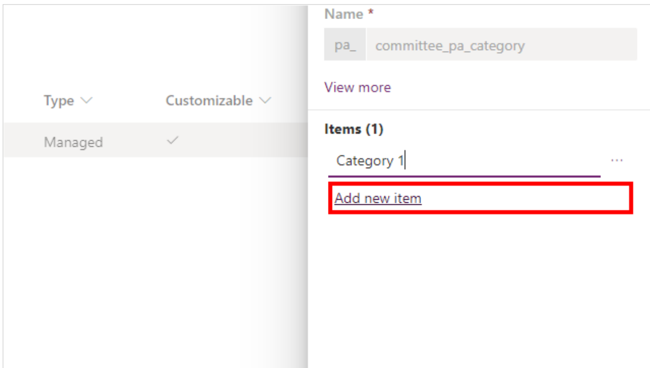
Click on the button **Add new item**



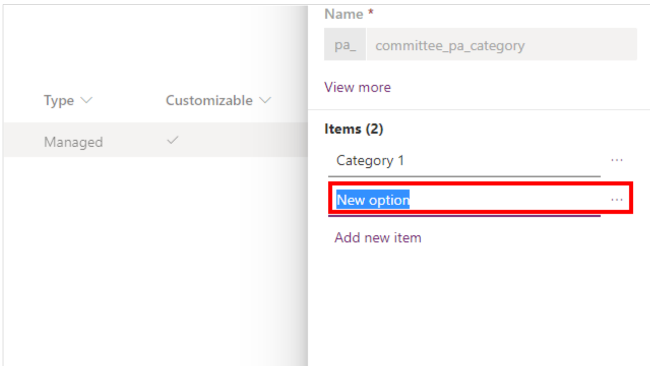
Enter the name of the category you are creating.



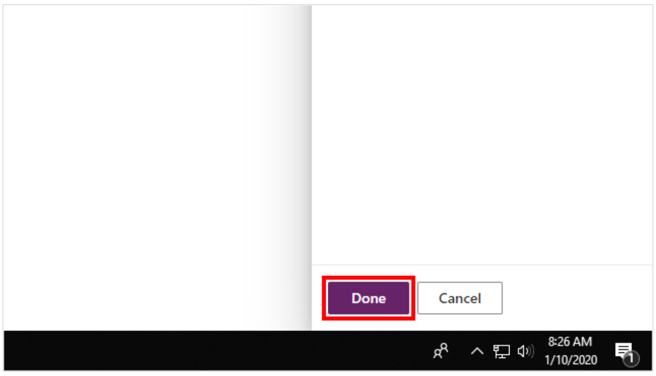
Click on the button **Add new item**



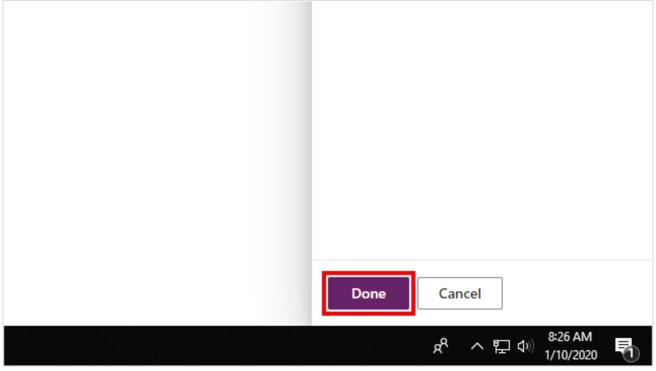
Enter the name of the category you are creating.



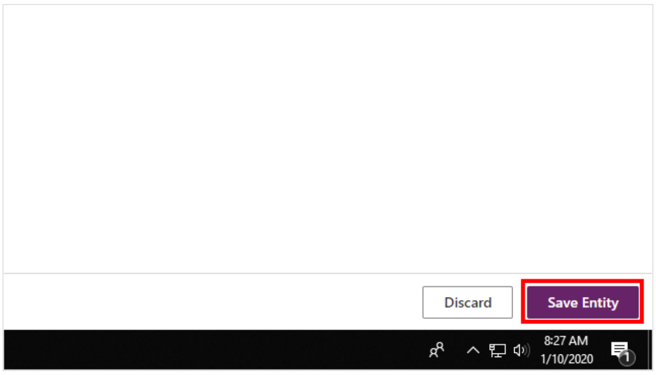
Click on the button **Done**



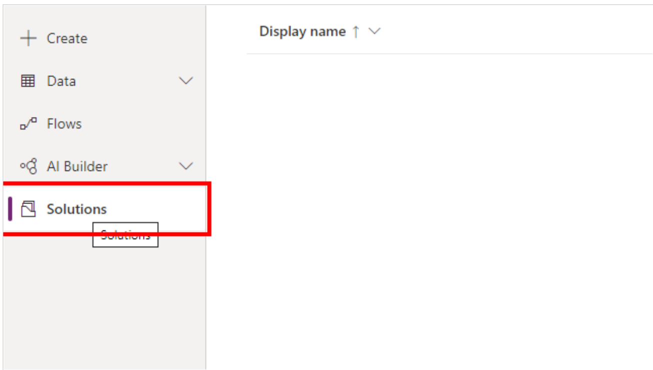
Click on the button **Done**

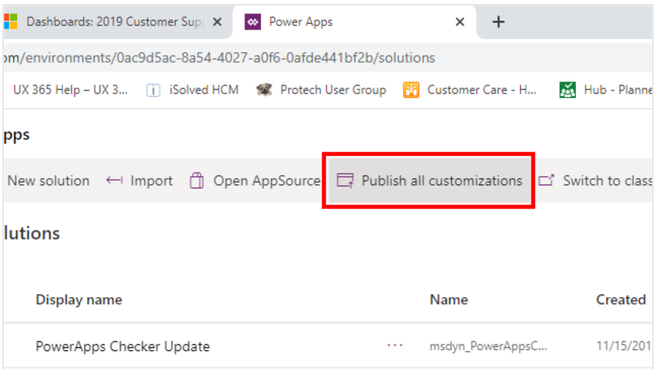
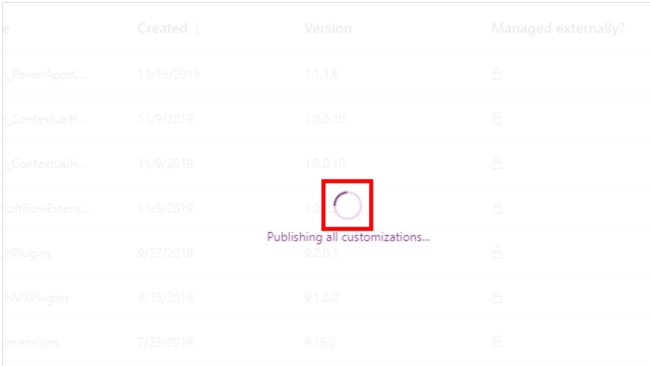
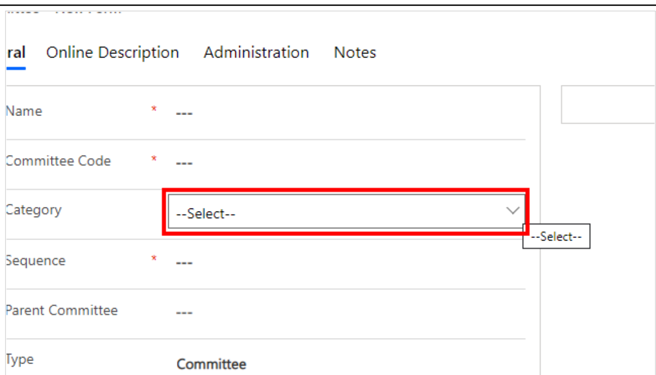
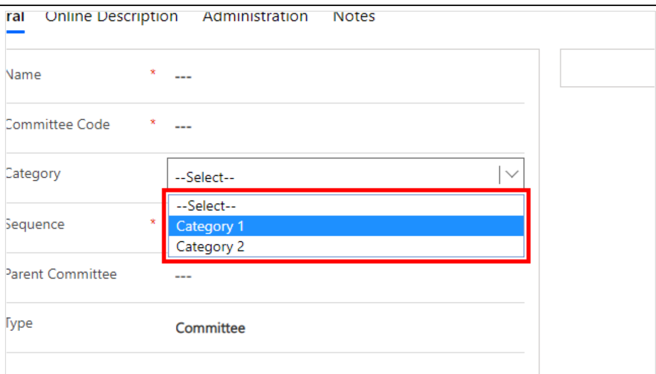


Click on the button **Save Entity**



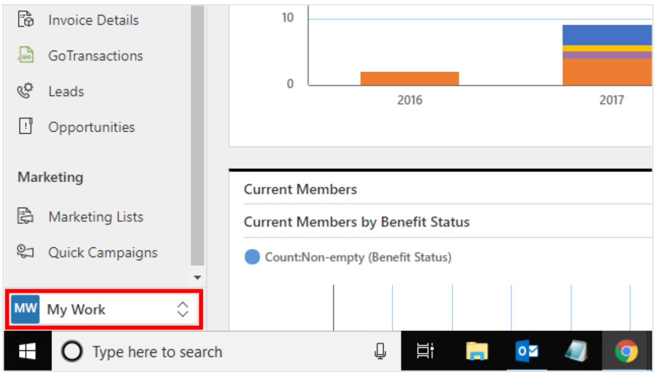
Click on the link **Solutions**



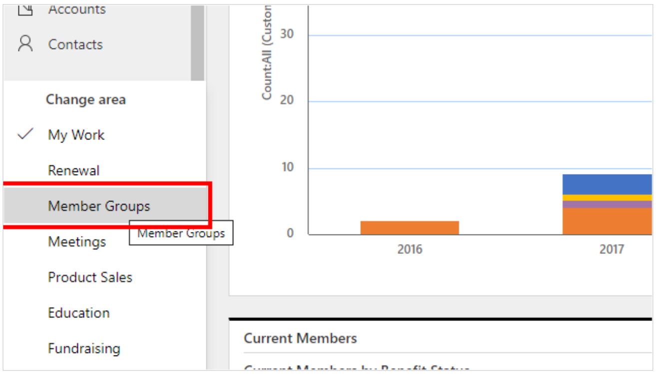
Click on the button Publish all customizations	
Wait for all customizations to be published.	
Now, when you are creating a new committee or editing an existing committee, when you click on Category	
Your credit categories will now be available.	

4.8. Creating a Roster

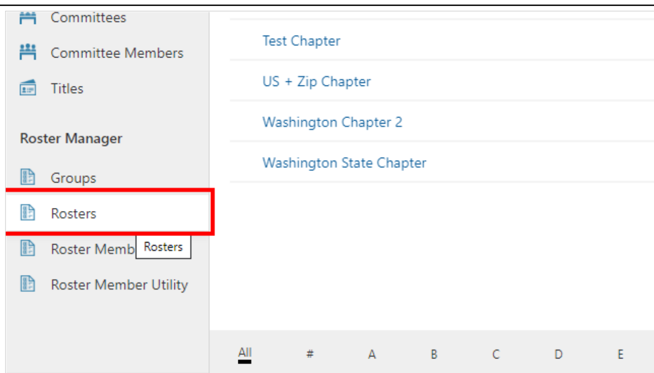
Click on the button **My Work (change area)**



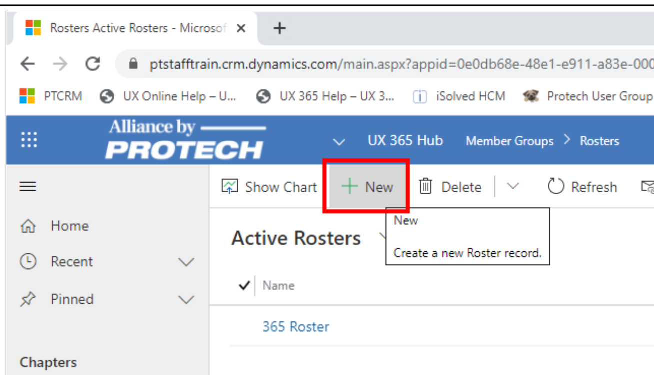
Click on the item **Member Groups**



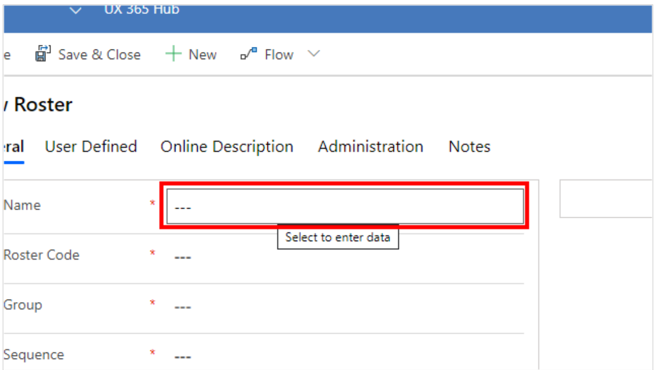
Click on the item **Rosters**



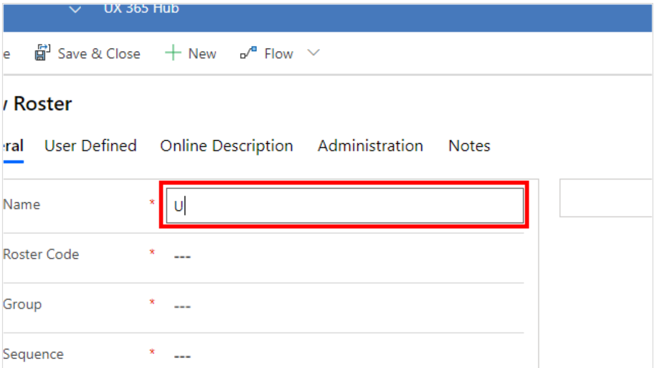
Click on the menu item **New**



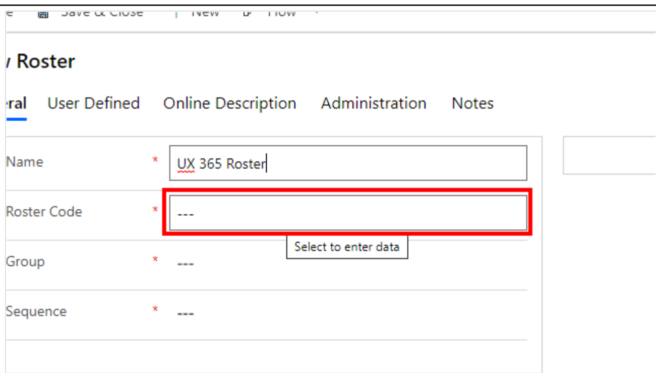
Click on the text field **Name**



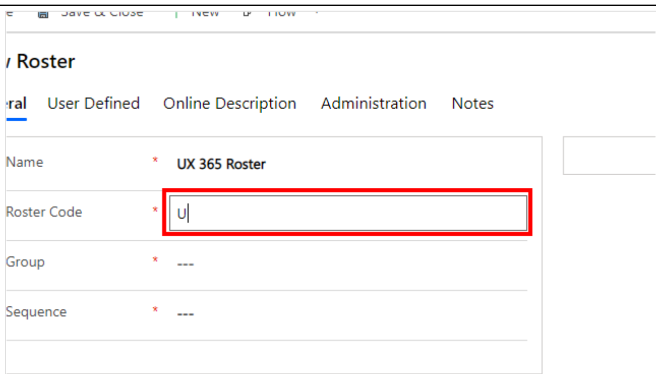
Enter **Name**.



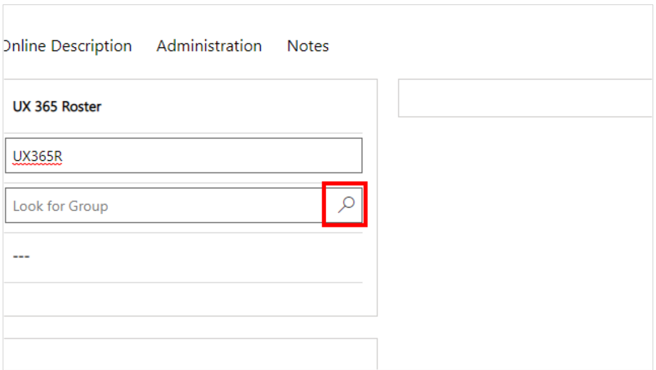
Click on the text field **Roster Code**



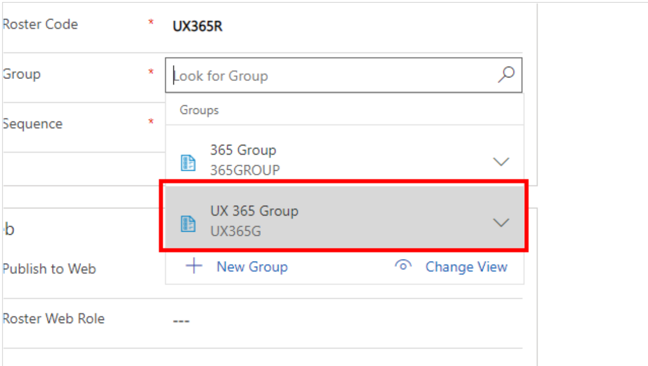
Enter a short Roster ID for your Roster.



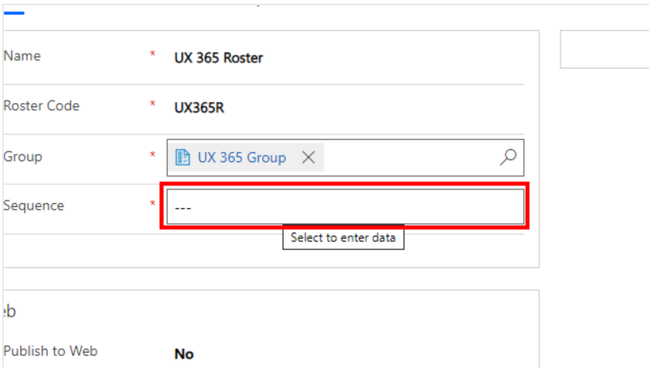
Click on the link **Group**



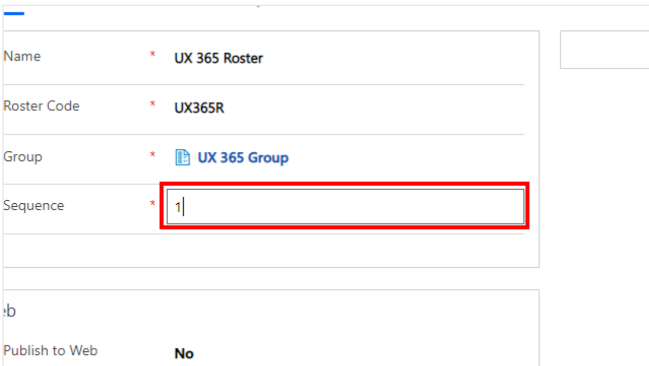
Select the appropriate group to categorize this roster.



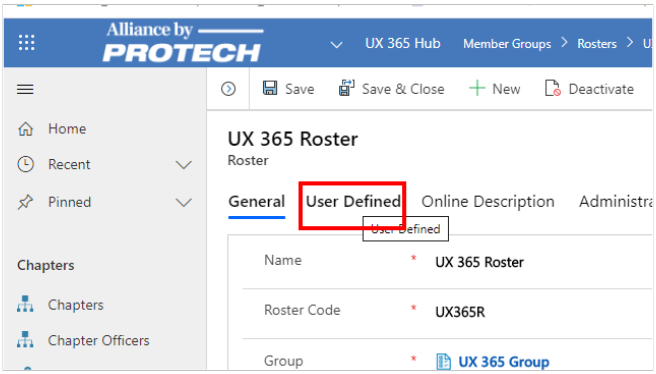
Click on the text field **Sequence**



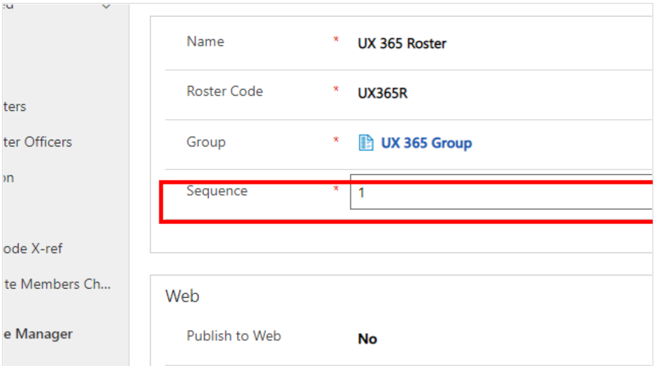
Assign a sequence number to this roster if you want to be able to sort rosters on reports according to an order you choose. For example, if you want the UX 365 Roster to appear first, assign 1 as the sequence number. If your organization does not utilize a roster sort sequence, then enter 1 for all rosters.



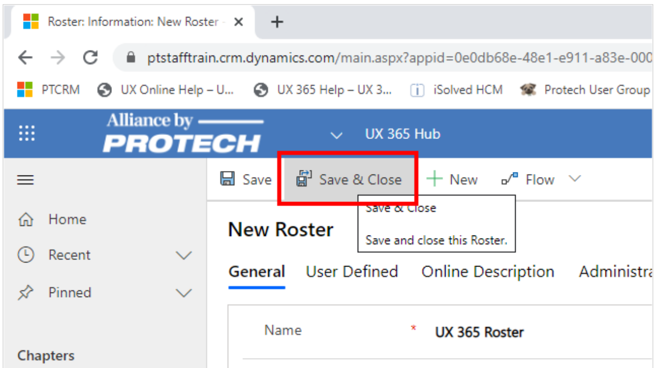
User Defined



In the User Defined section of the new roster record, enter optional information on 10 additional fields used to track roster-specific information about the members assigned to this roster. Each roster can have its own set of user-defined fields.

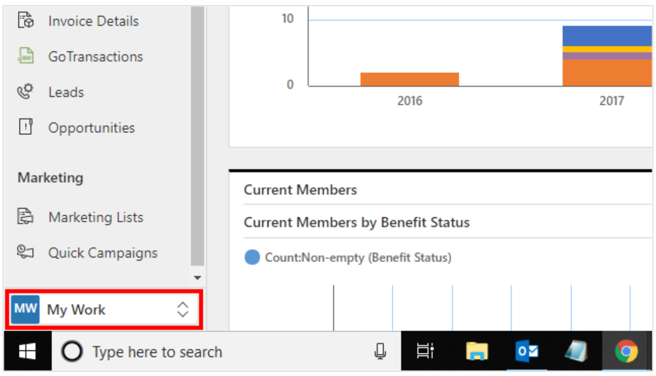


Click on the menu item **Save & Close**

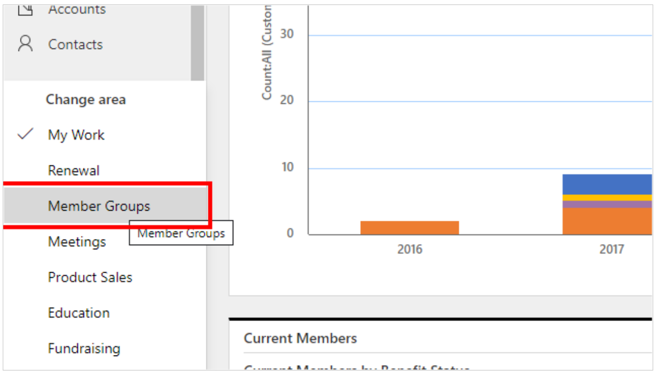


4.9. Creating a Roster Group

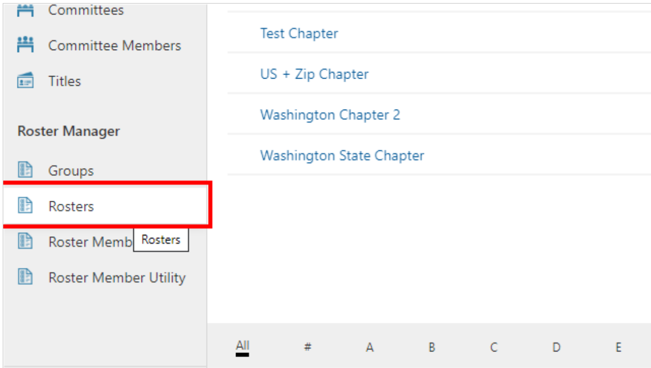
Click on the button **My Work (change area)**



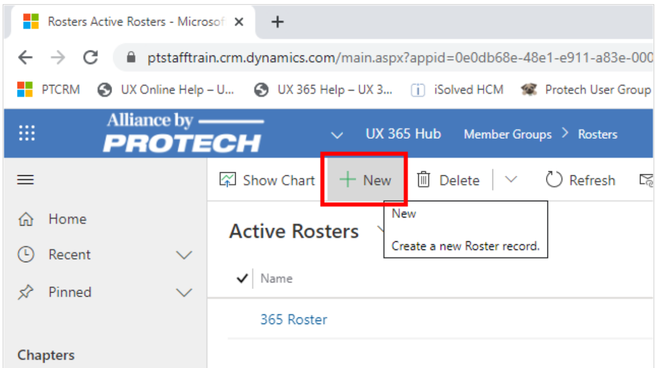
Click on the item **Member Groups**



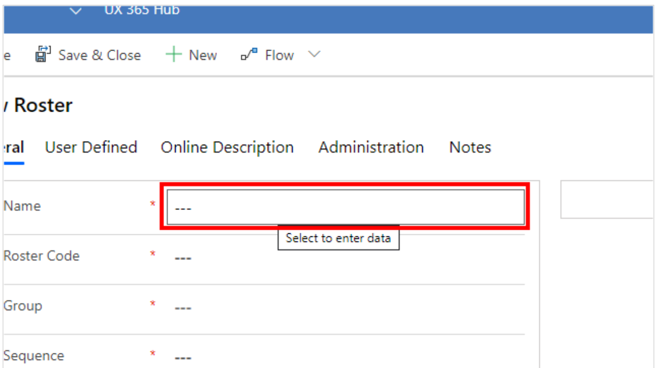
Click on the item **Rosters**



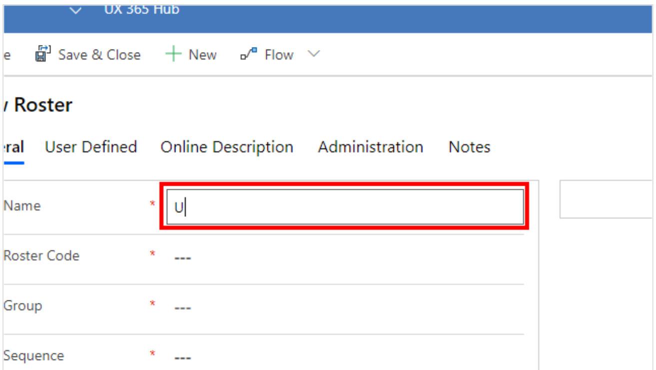
Click on the menu item **New**



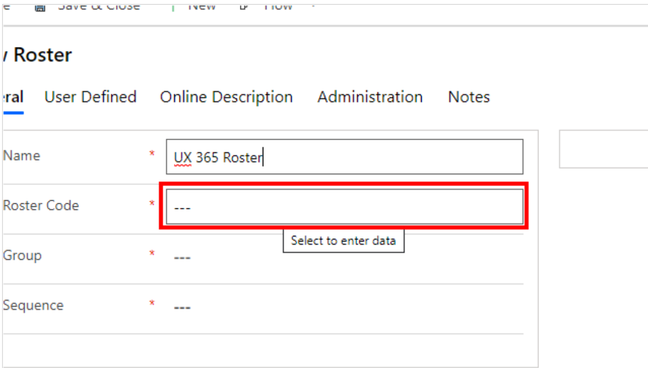
Click on the text field **Name**



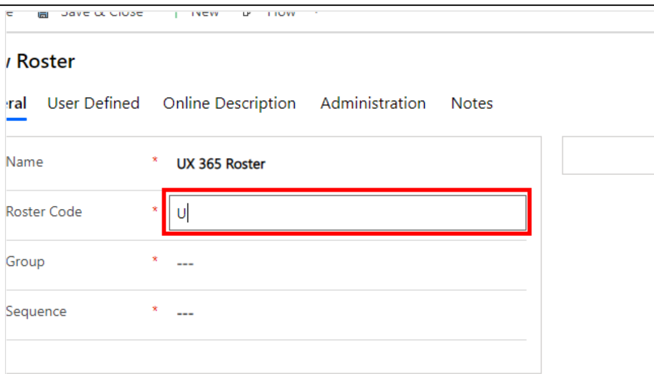
Enter **Name**.



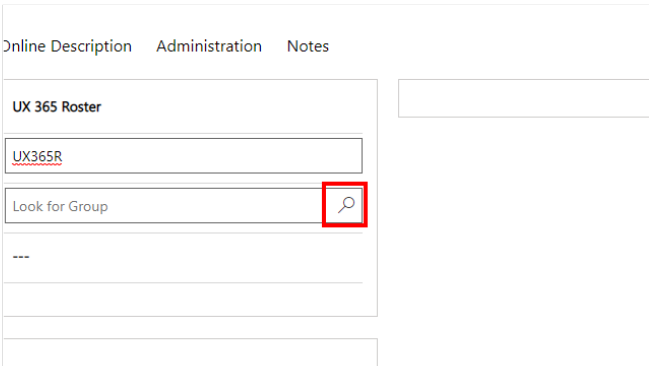
Click on the text field **Roster Code**



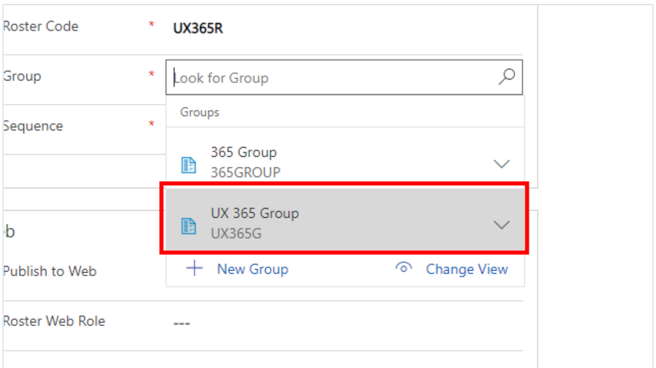
Enter a short Roster ID for your Roster. Must be unique



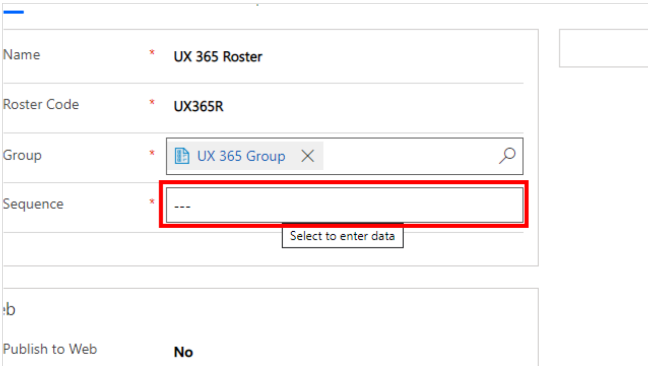
Click on the link **Group**



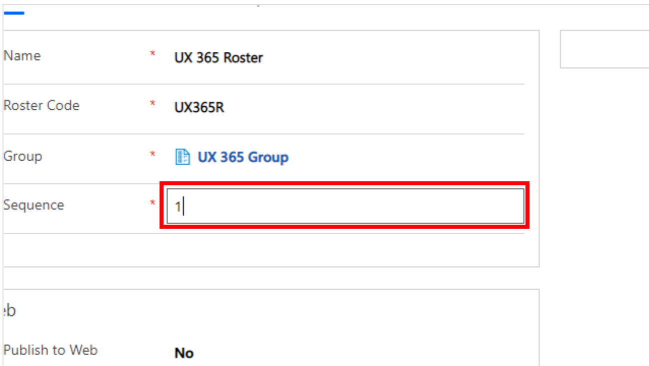
Select the appropriate group to categorize this roster.



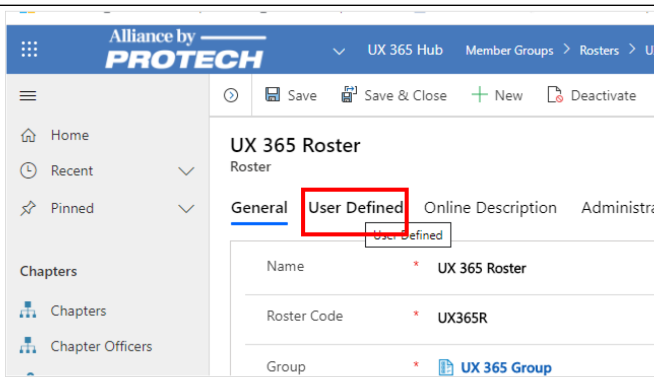
Click on the text field **Sequence**



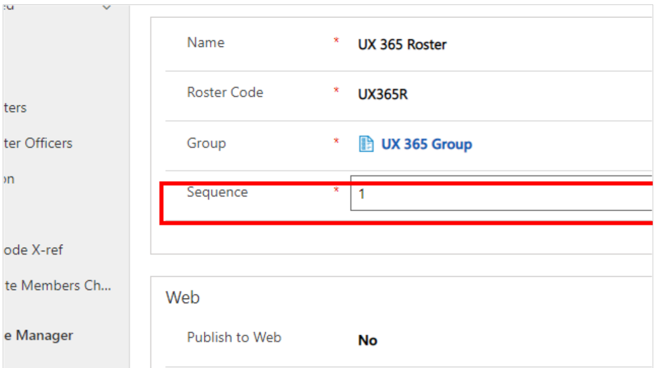
Assign a sequence number to this roster if you want to be able to sort rosters on reports according to an order you choose. For example, if you want the UX 365 Roster to appear first, assign 1 as the sequence number. If your organization does not utilize a roster sort sequence, then enter 1 for all rosters.



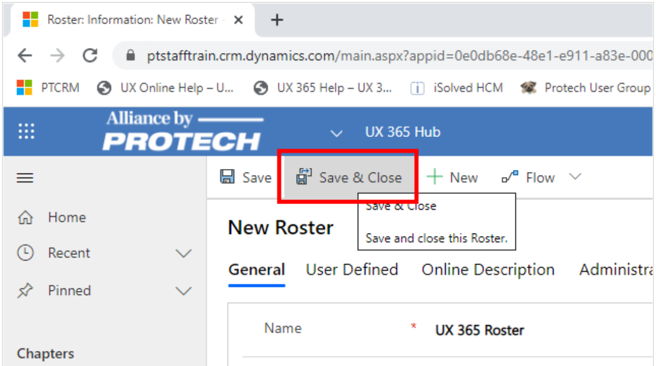
User Defined



In the User Defined section of the new roster record, enter optional information on 10 additional fields used to track roster-specific information about the members assigned to this roster. Each roster can have its own set of user-defined fields.

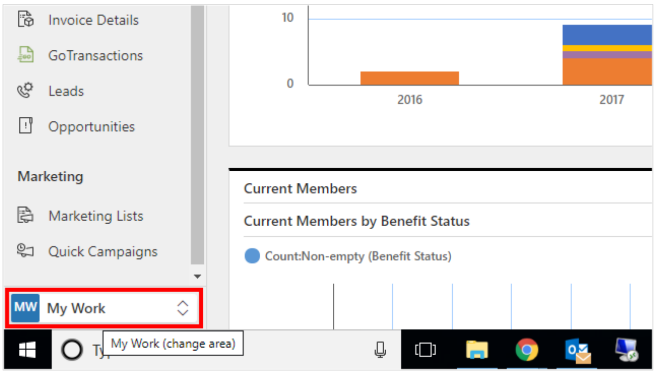


Click on the menu item **Save & Close**

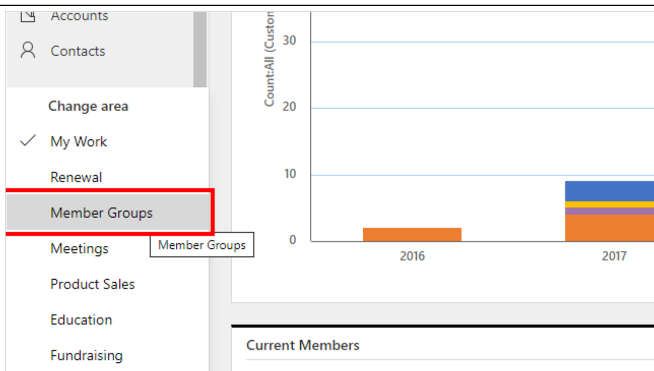


4.10. Creating Committee Member Titles

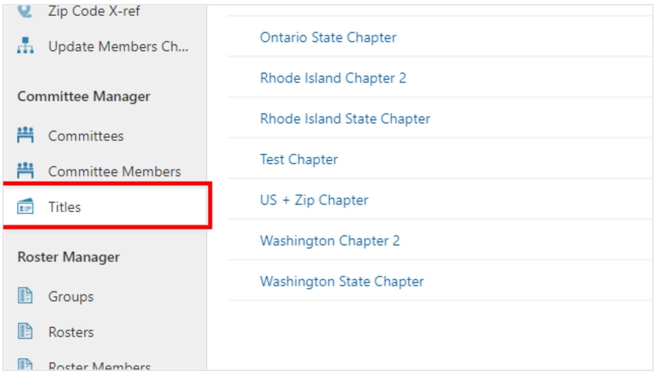
Click on the button **My Work**



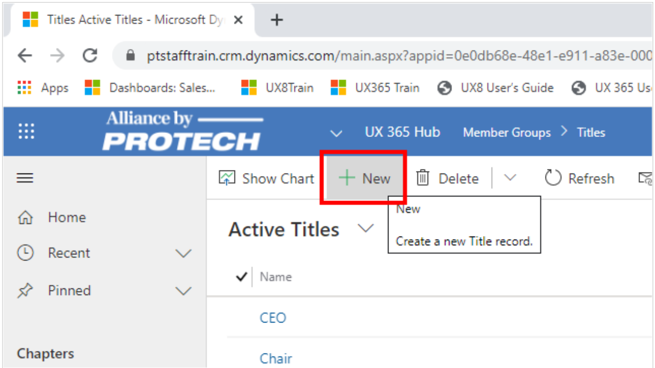
Click on the item **Member Groups**



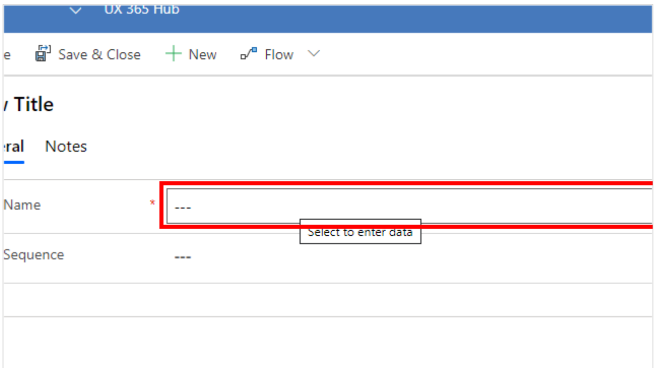
Click on the item **Titles**



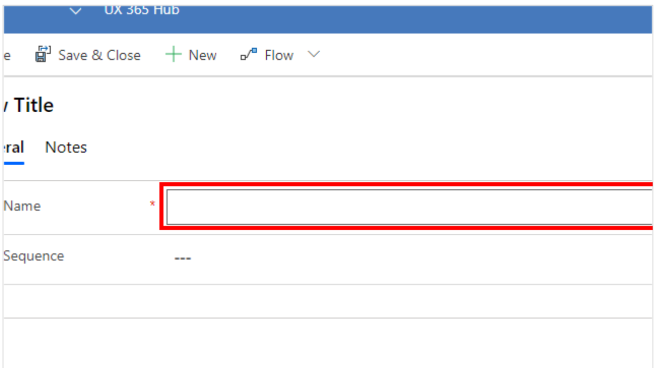
Click on the menu item **New**



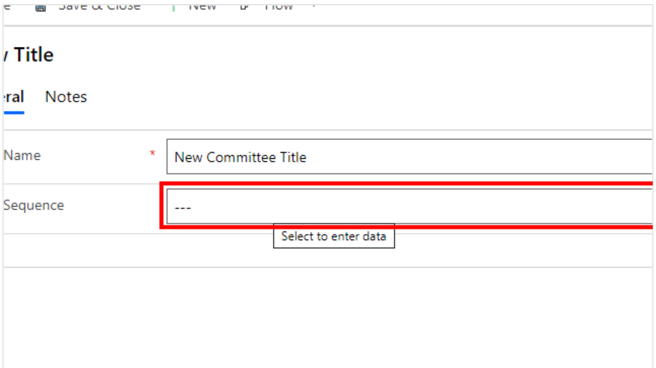
Click on the text field **Name**



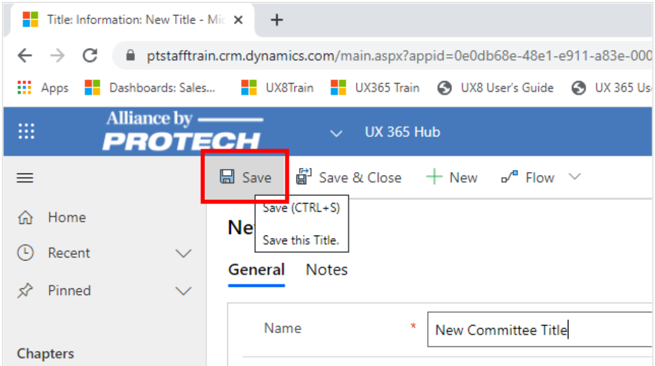
Enter **Name**.



Move the mouse to the text field **Sequence**
If you want to create a custom report that sorts committee members in order according to their title sequence, enter a title sequence number for this title. For example, if you want the committee president to be listed first, regardless of his/her last name, enter 1 as the sequence when creating the title record for president.

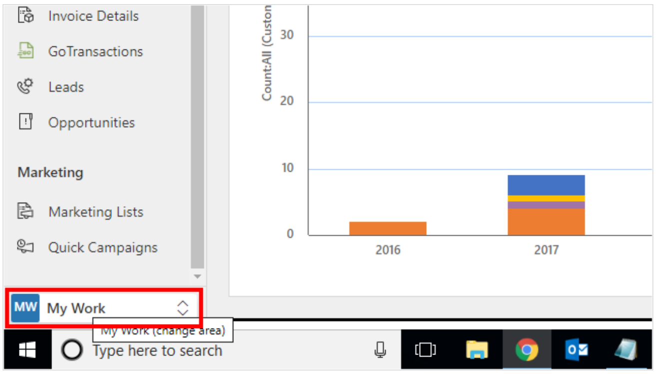


Click on the menu item Save

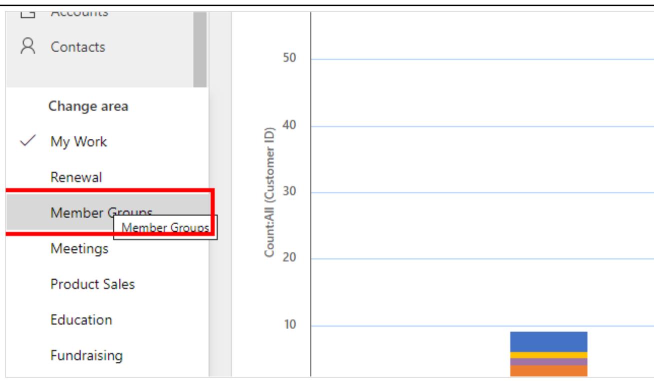


4.11. Deleting a Committee

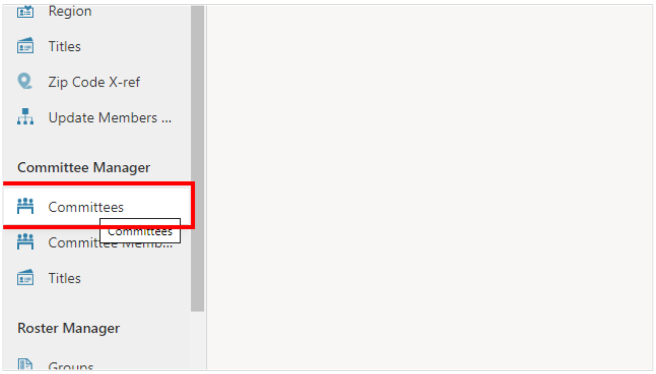
Click on the button **My Work (change area)**
Deleting committees from UX 365 is only possible from one area and only available to those users who have the rights to delete committees. Note If the committee you want to delete has committee members associated with it, you will not be able to delete it until you remove all contacts from the committee. Also, if the committee is the parent committee for another committee, you will not be able to delete it unless you assign the subcommittee to another parent committee, or delete the subcommittee.



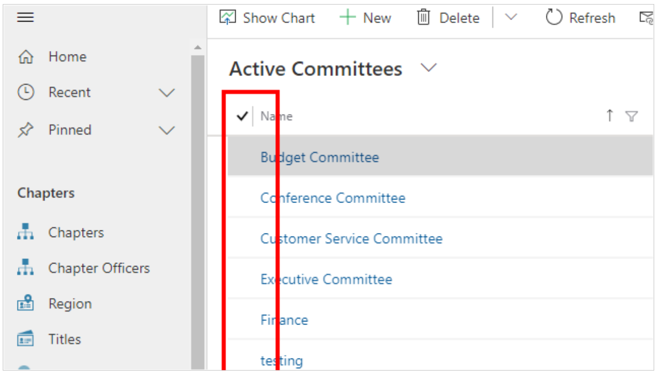
Click on the item **Member Groups**



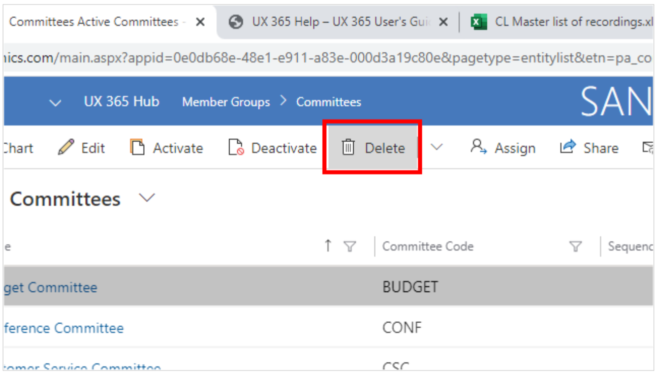
Click on the item **Committees**



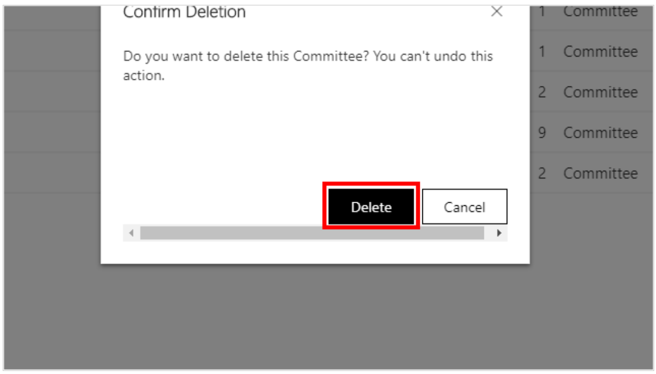
Click on the row selector on any row



Click on the button **Delete**
In the confirmation dialog, click OK to confirm or Cancel to cancel this action and return to the list. Because the list opened in a new window, click the "X" in the upper right hand corner of the window to close it.



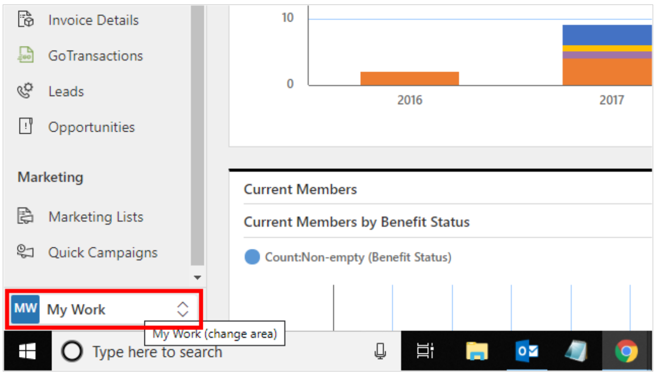
Click on the button **Delete**



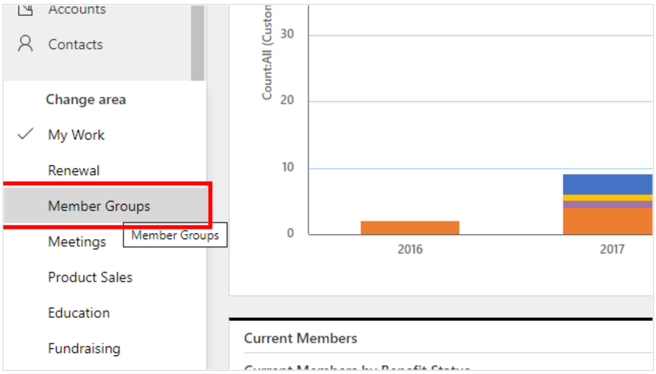
4.12. Deleting a Group

If you have any roster groups that you no longer use, you can delete them. Follow this procedure to delete a roster group. You will not be able to delete a roster group if it includes any rosters. You can assign the rosters to different groups if you want to keep using them, or you can delete the rosters if you no longer need them.

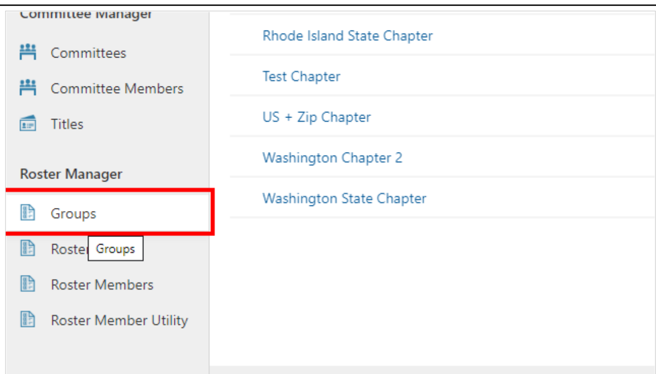
Click on the button **My Work (change area)**



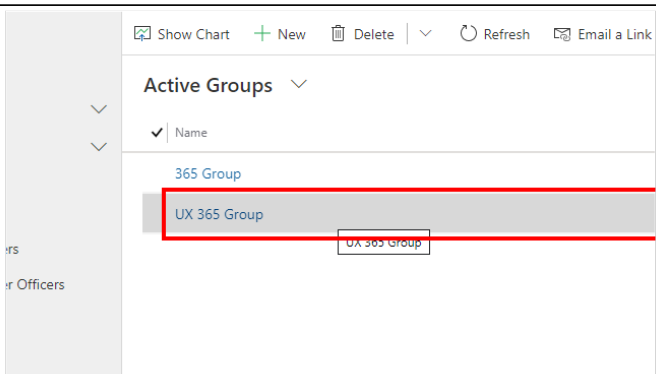
Click on the item **Member Groups**



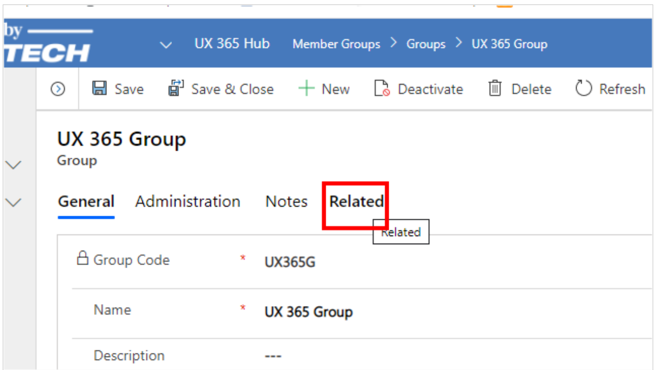
Click on the item **Groups**



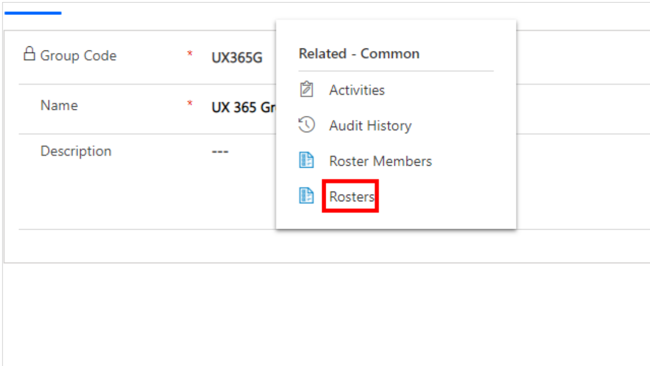
Click on the cell **Name**



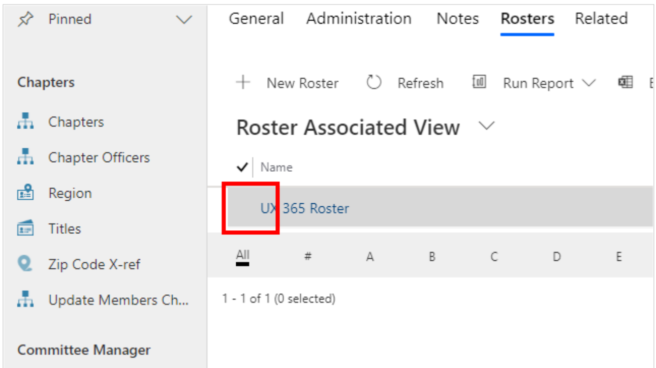
Before deleting the group you will need to verify that there are no rosters in this group. If there are, you must first delete them or assign them to a different group before you can delete this group.
Click on the item **Related**



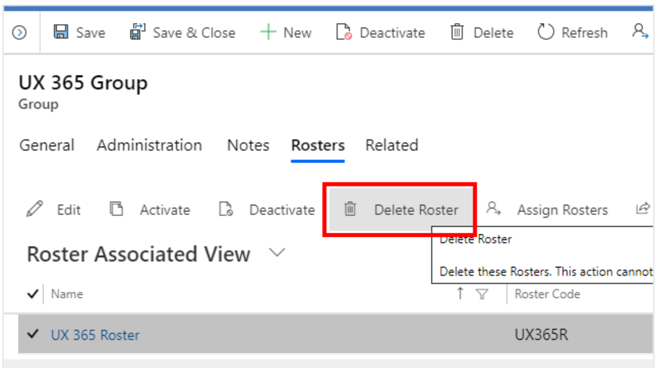
Click on the menu item **Rosters**



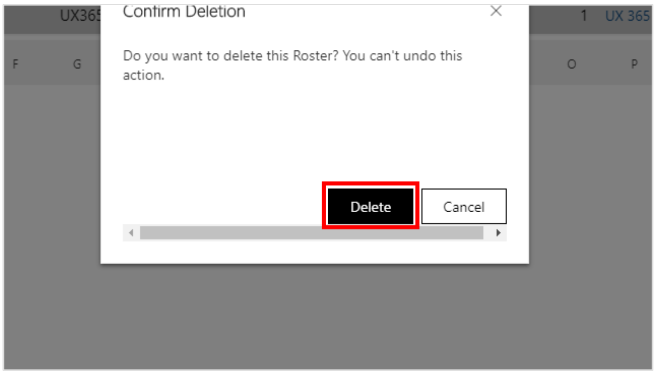
Select roster(s) to be deleted from this group.



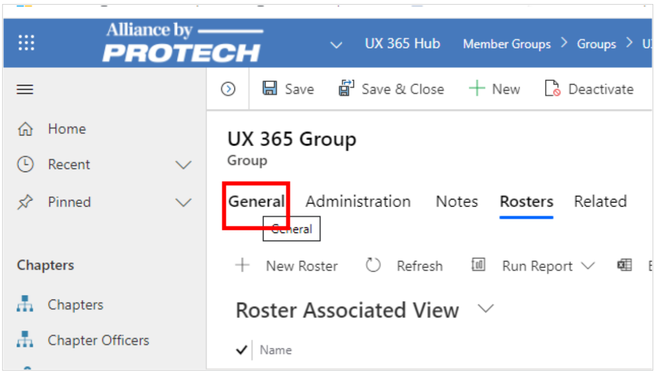
Click on the menu item **Delete Roster**



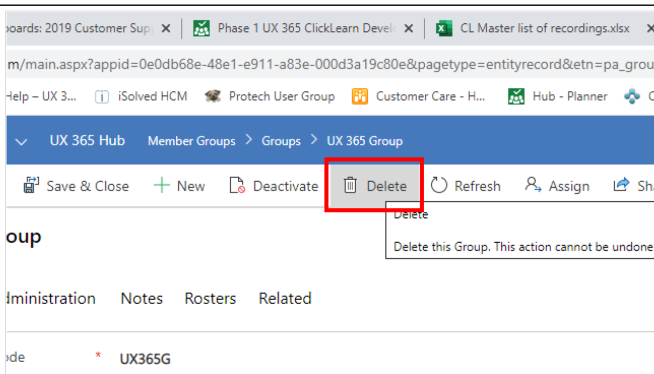
Click on the button **Delete**



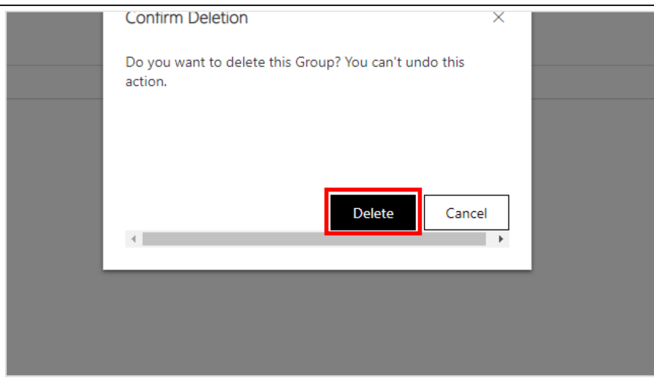
Click on the item **General**



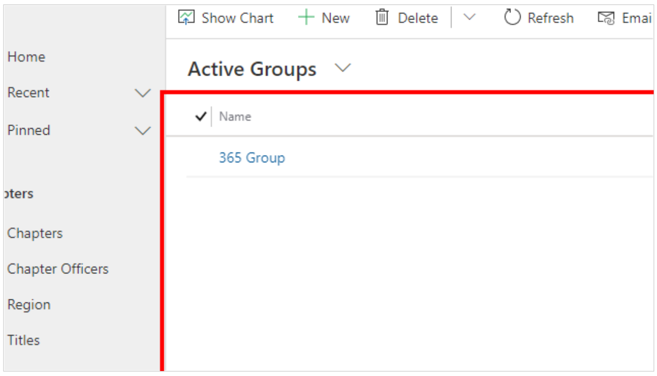
Click on the menu item **Delete**



Click on the button **Delete**

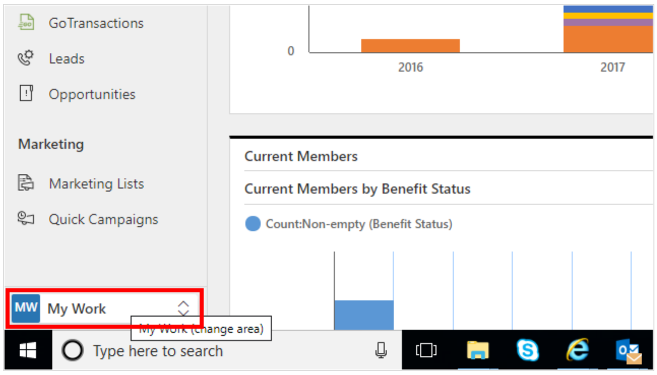


Group is deleted.

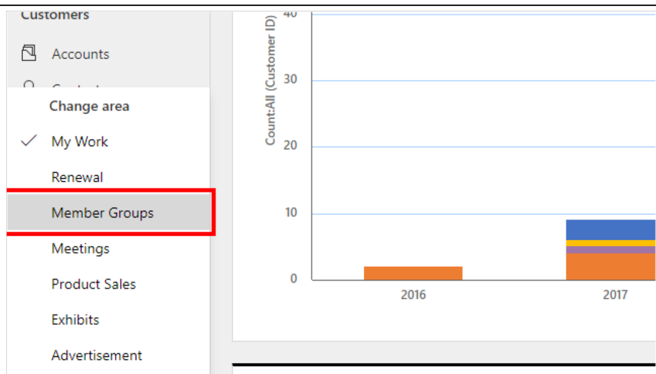


4.13. Deleting a Roster

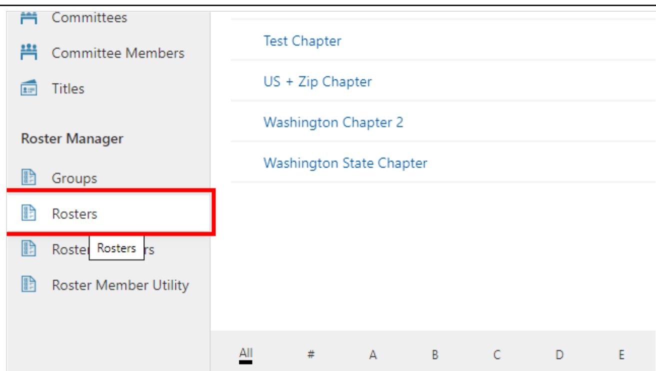
Click on the button **My Work (change area)**



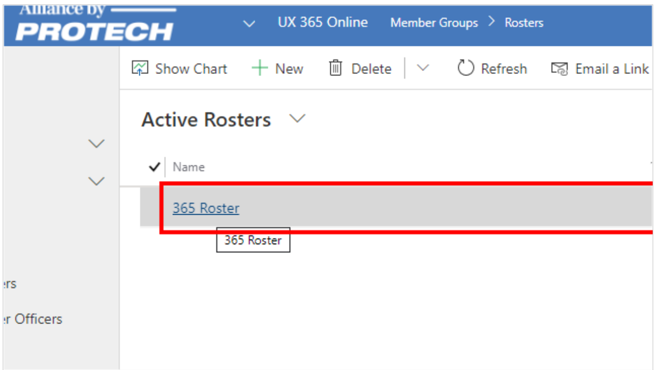
Click on the item **Member Groups**



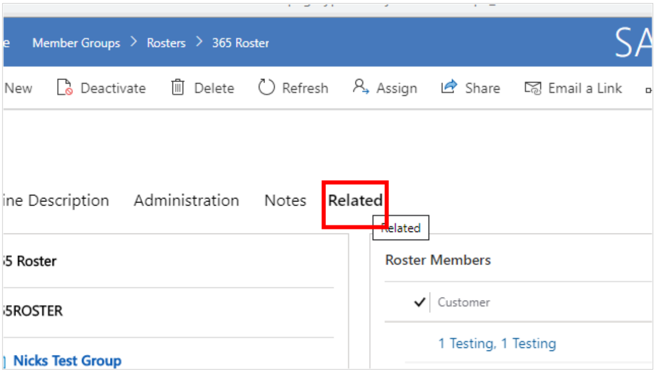
Click on the item **Rosters**
First verify, there are no Roster Members Associated with the Roster you intend to delete. If so, you must delete the Roster Members first.



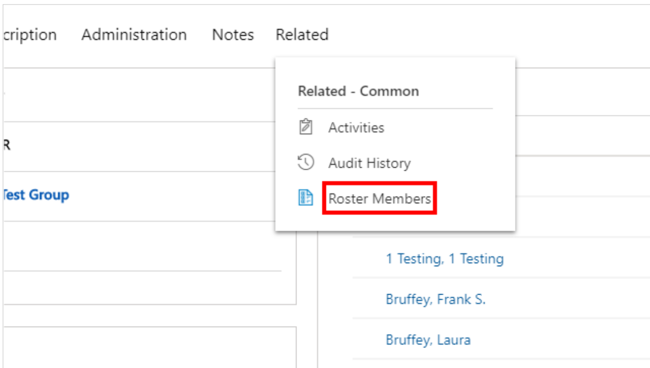
Open the Roster record you intend to delete



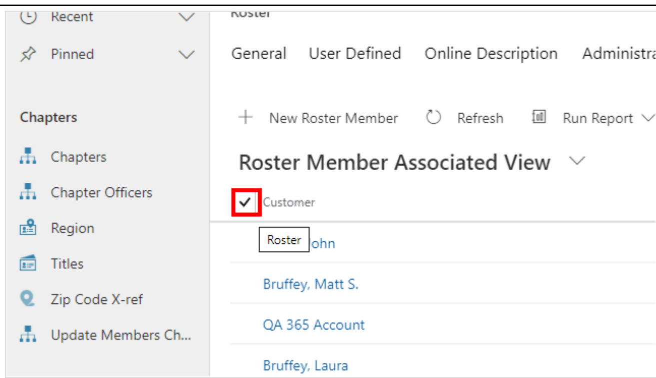
Click on the item **Related**



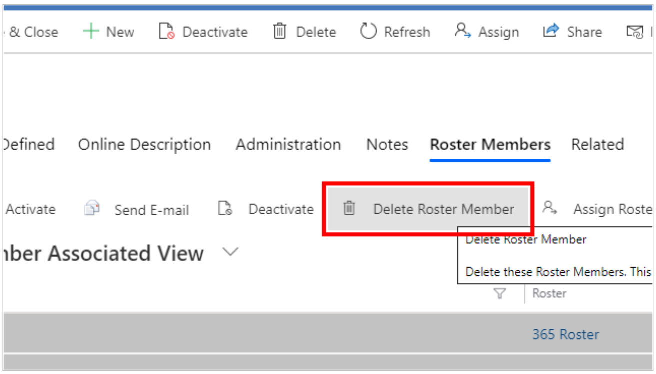
Click on the menu item **Roster Members**



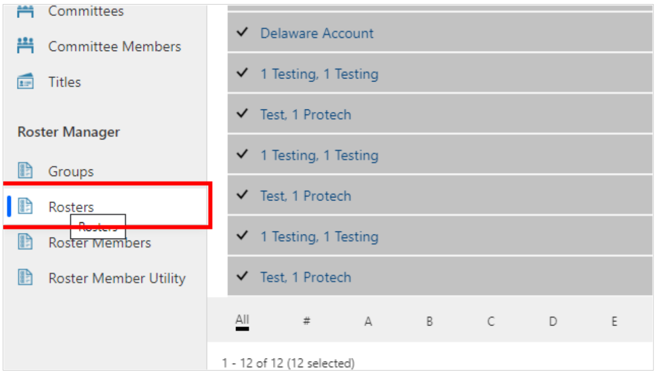
If Roster Members exist, Click on the button Select All



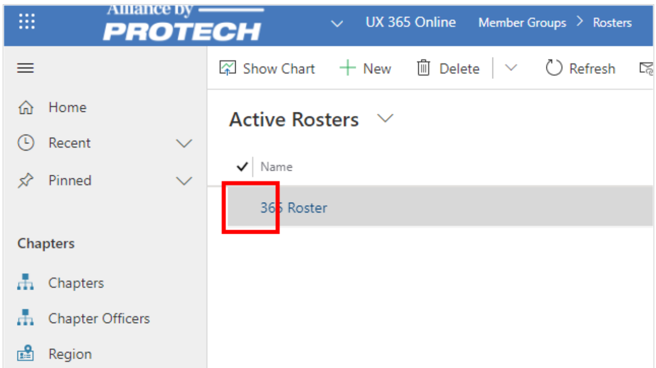
Click on the menu item **Delete Roster Member**



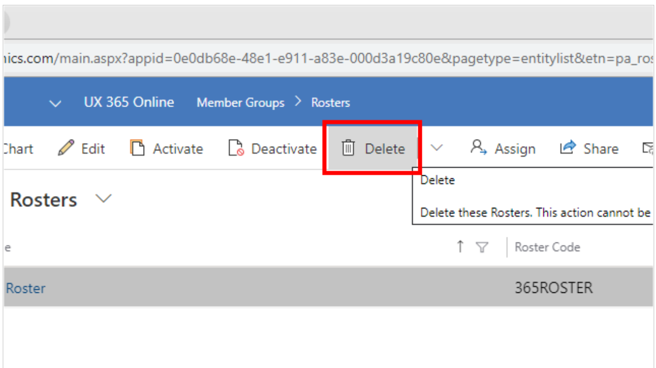
Click on the item **Rosters**
Once the Roster Members are deleted, you can now delete the Roster



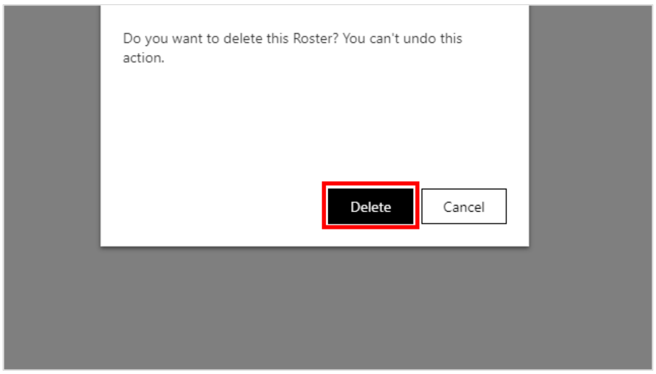
Select the Roster



Click on the button **Delete**



Confirm deletion request by clicking delete

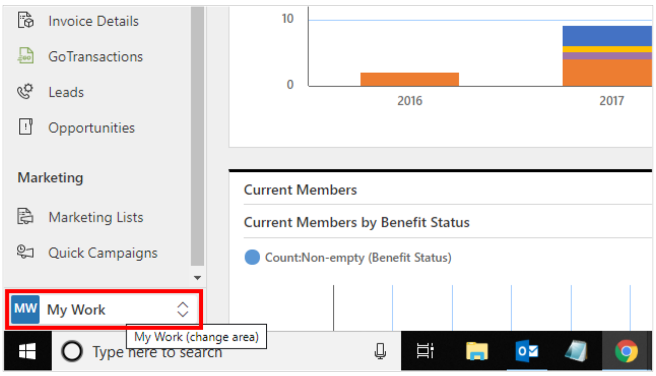


4.14. Removing a Committee Member

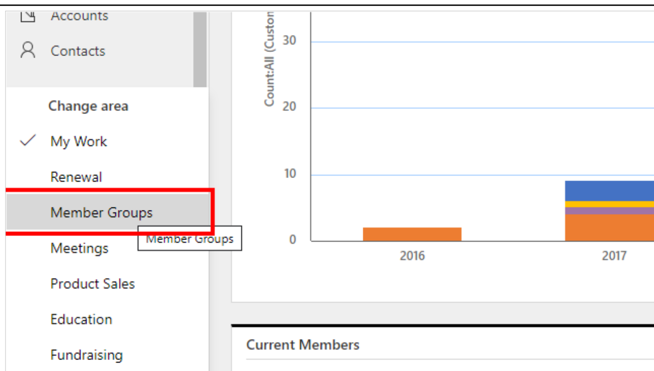
If you have rights to delete members from a committee, you can use any of these three methods: Remove members using the committee record. You can use this method if you have several contacts you want to remove from a single committee. Remove members using the Committee Members list. Use this method if you have several members you want to remove from multiple committees. Remove a member using the contact record. You can use this method if you have a single member you want to remove from one or more committees. Committee members whose terms have expired are not automatically removed from the committee; their committee assignments, showing the terms they served, will still appear in the Committee Members list if you select the Past Members view.

4.14.1. Remove members using the committee record

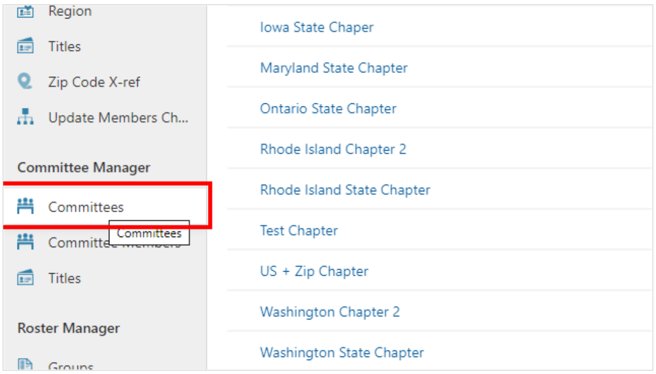
Click on the button **My Work (change area)**



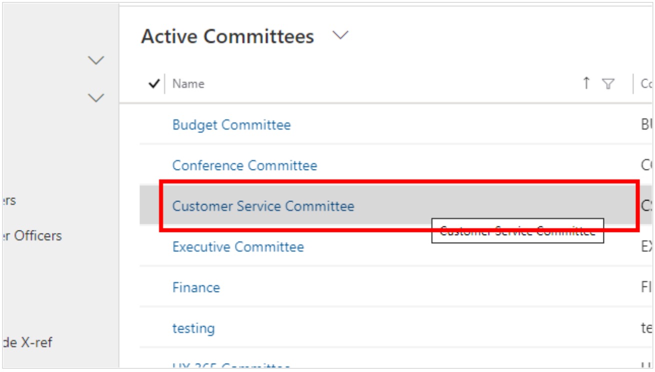
Click on the item **Member Groups**



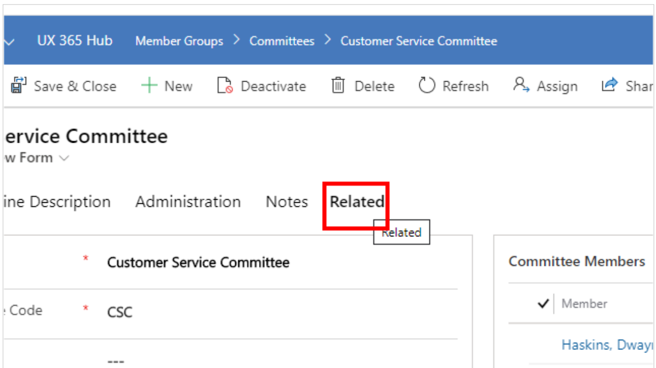
Click on the item **Committees**



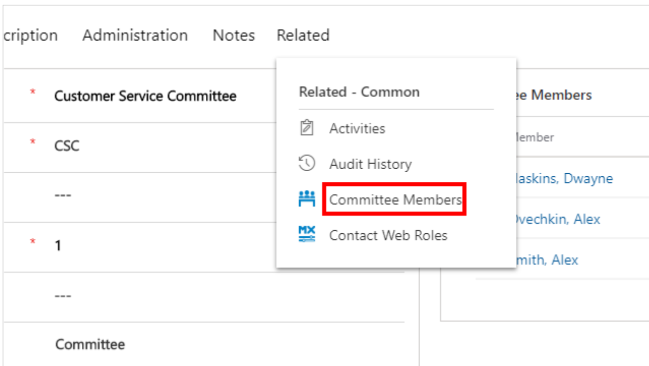
Double click on the cell **Name**



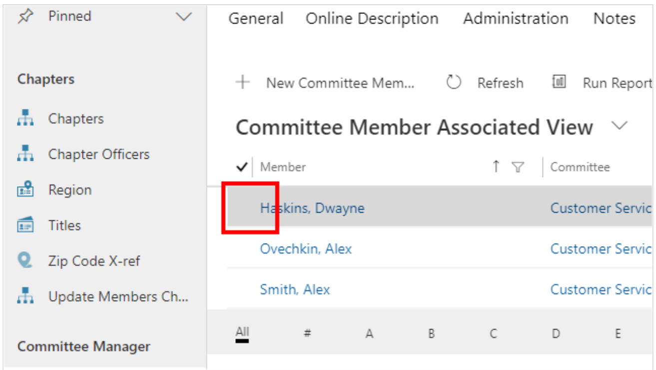
Click on the item **Related**



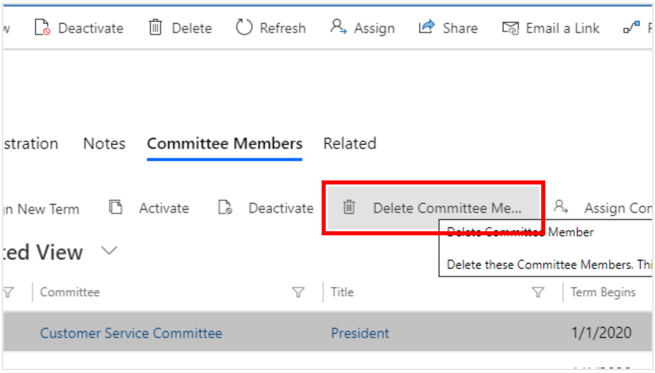
Click on the menu item **Committee Members**



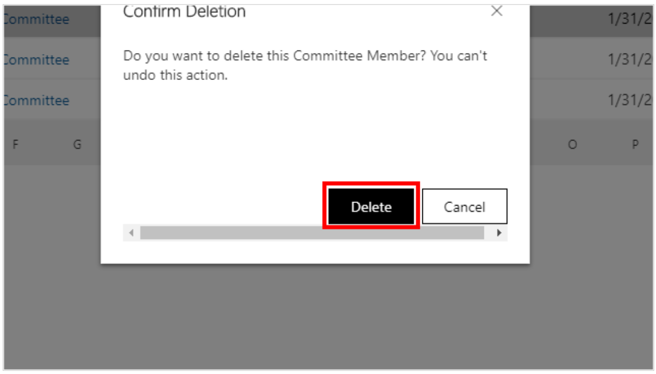
Select the member you want to remove from this committee. To select more than one member, press the Ctrl key as you click each member.



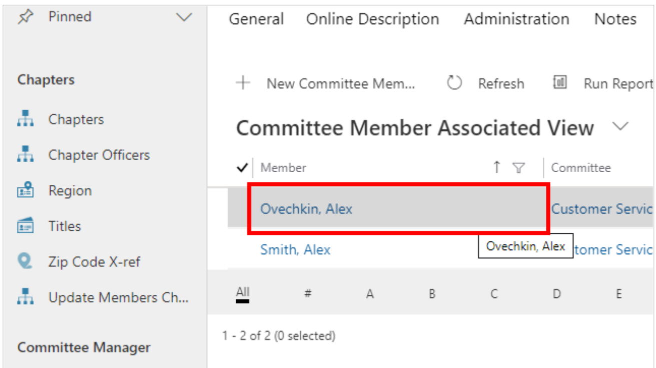
Click on the menu item **Delete Committee Member**



Click on the button **Delete**

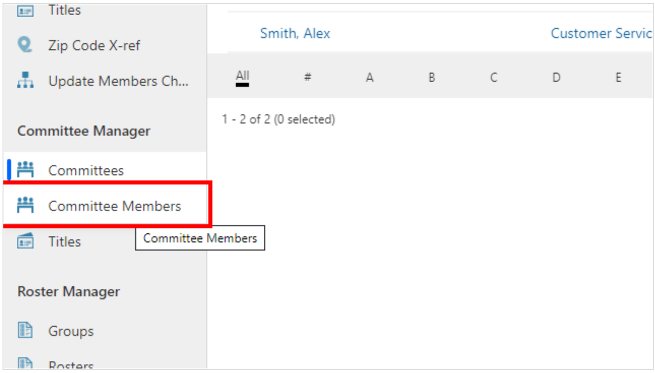


Contact no longer shows as a committee member.

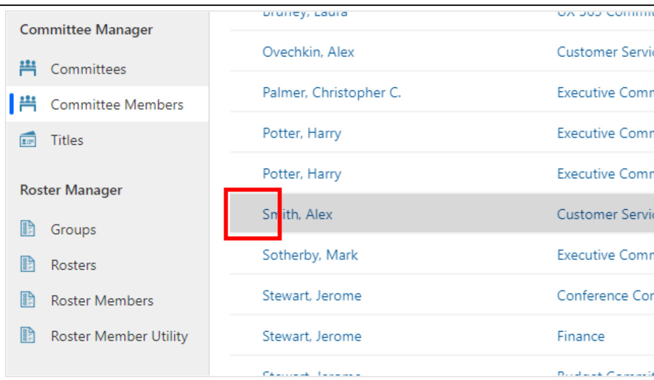


4.14.2. Remove members using the Committee Members list

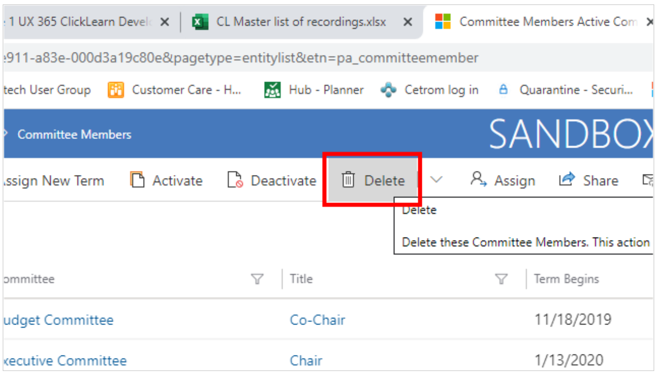
Click on the item **Committee Members**



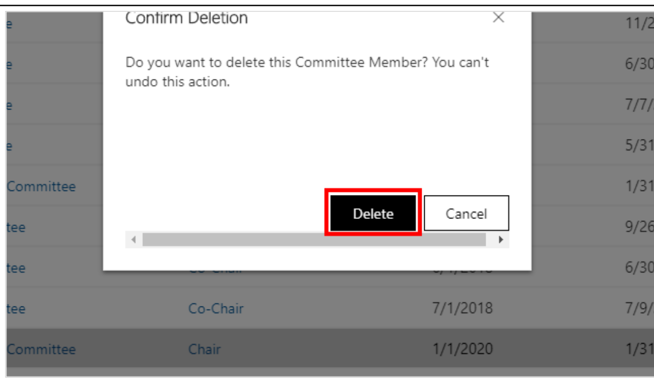
Select the member you want to remove from this committee. To select more than one member, press the Ctrl key as you click each member. Remember that a contact can appear multiple times if they are assigned to more than one committee, or more than one term for a committee. Be sure to select the correct committee assignment.



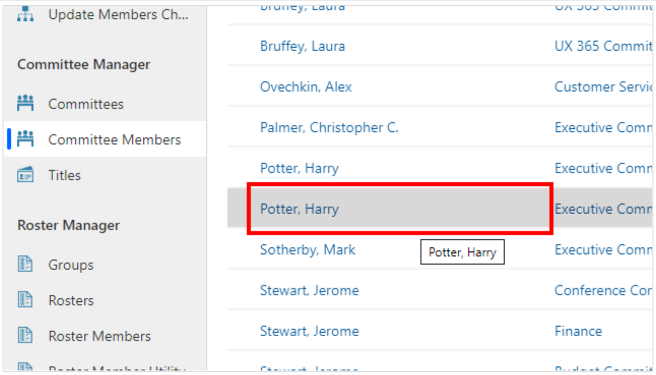
Click on the button **Delete**



Click on the button **Delete**

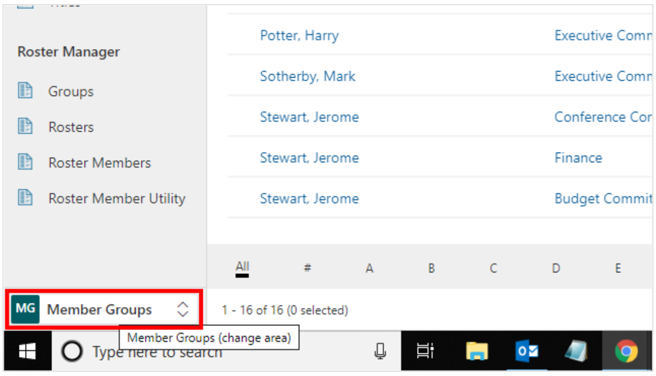


Contact no longer shows as a committee member.

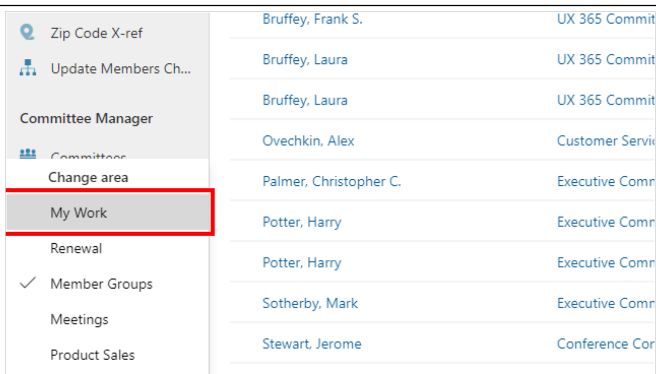


4.14.3. Remove a member using the contact record

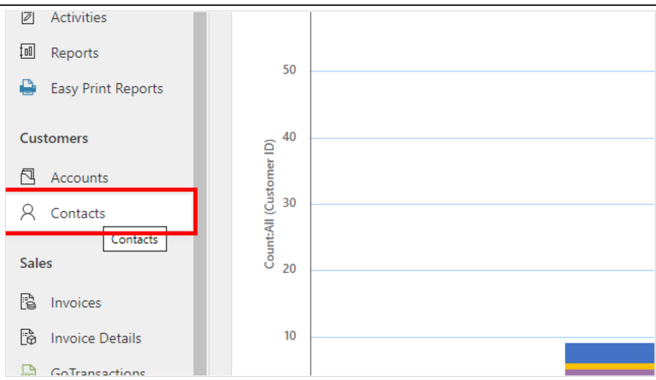
Click on the button **Member Groups (change area)**



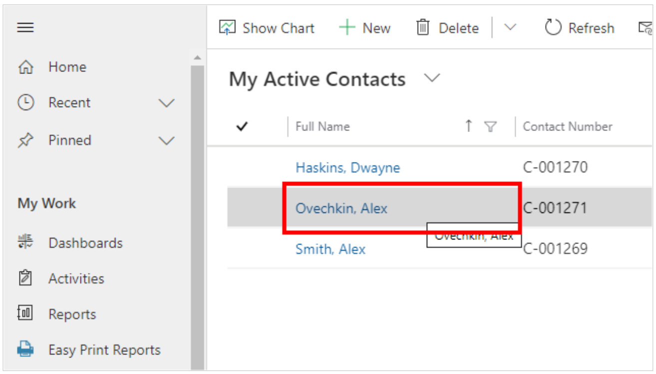
Click on the item **My Work**



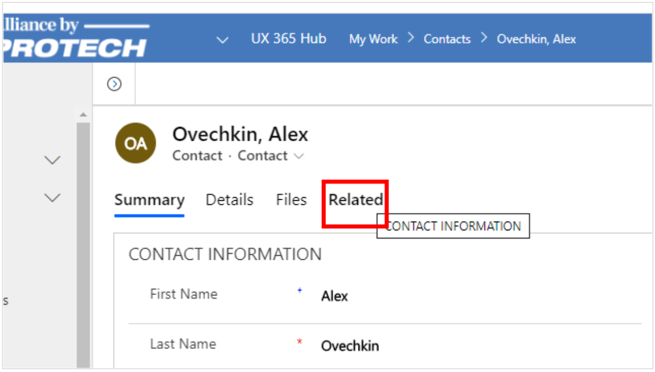
Click on the item **Contacts**



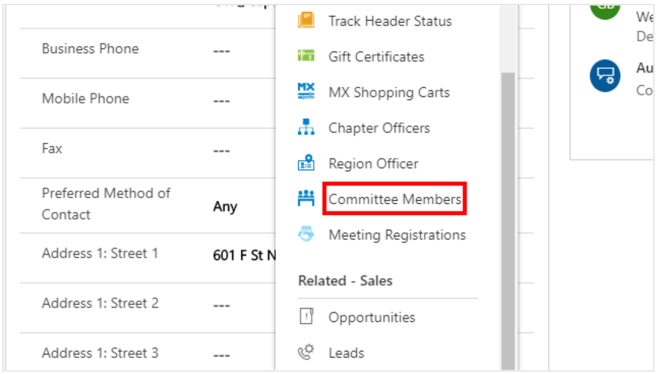
Double click on the cell **Full Name**



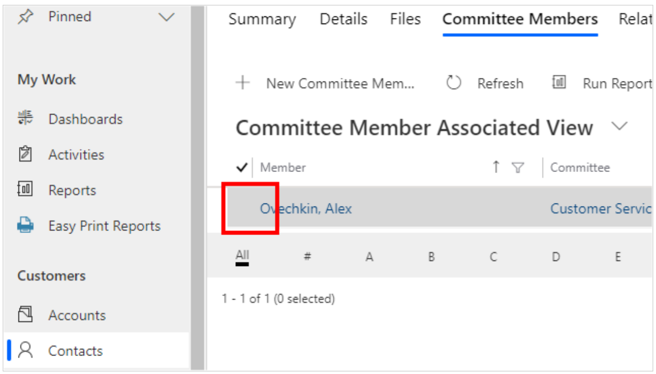
Click on the item **Related**



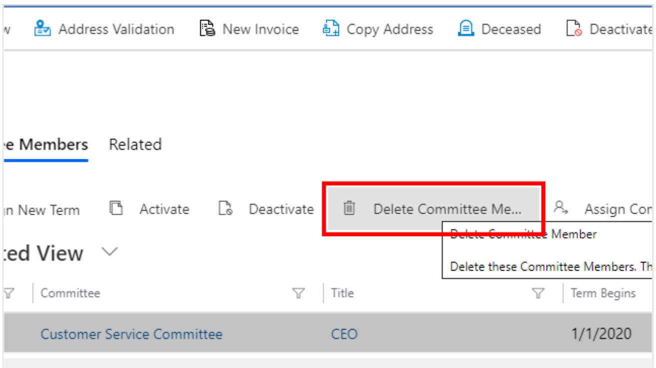
Click on the menu item **Committee Members**



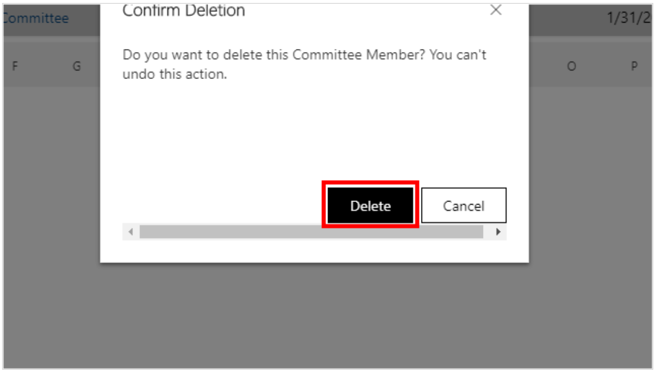
Select the committee assignment from which this contact should be removed.
To select more than one committee assignment, press the Ctrl key as you click on each committee.



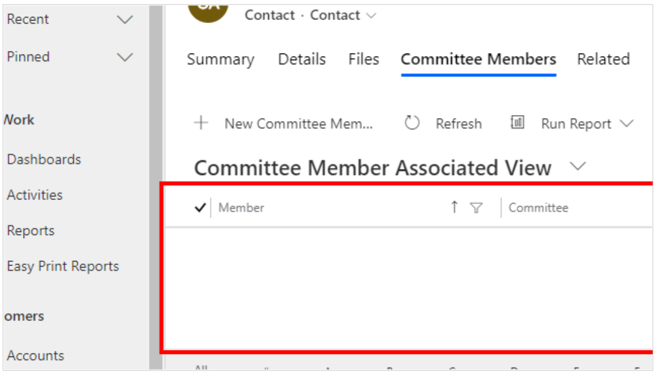
Click on the menu item **Delete Committee Member**



Click on the button **Delete**



Contact no longer shows as a committee member.



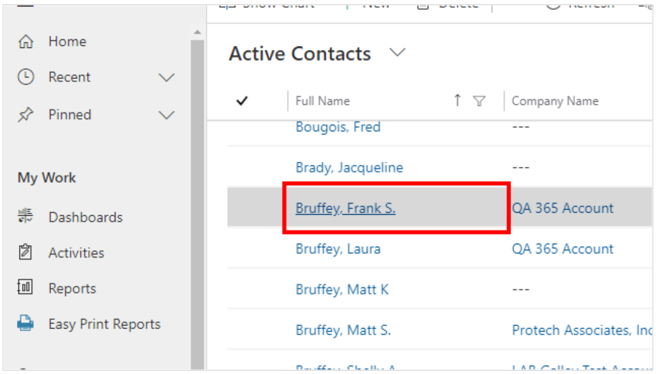
4.15. Removing a Roster Member

4.15.1.1. Using the contact record

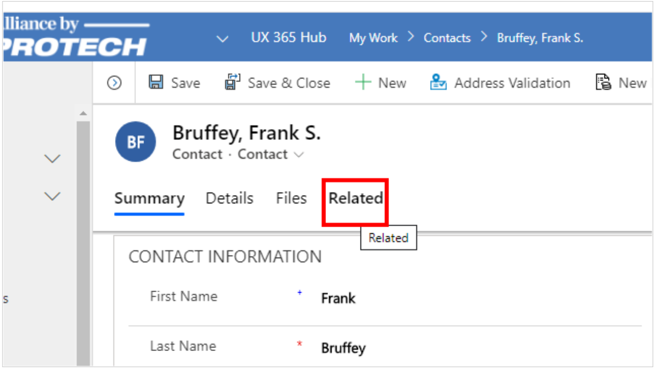
You can use this method if you have a single member you need to remove from one or more rosters.

Click on the item **Contacts**

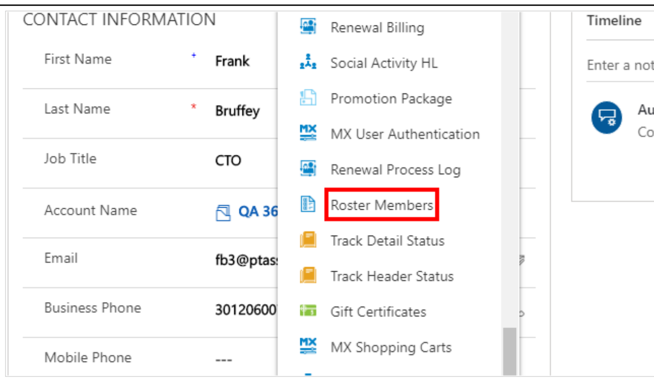
Open the contact record for who you want to remove.



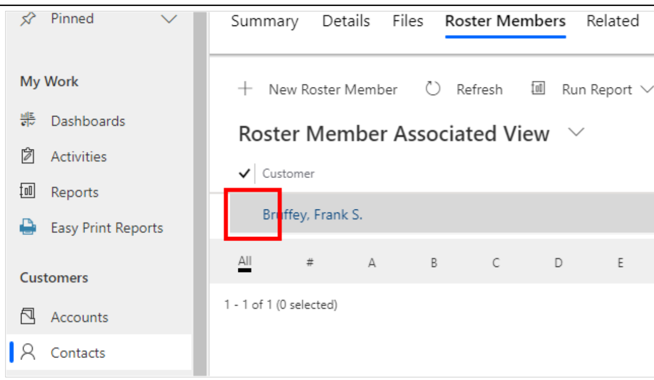
Click on the item **Related**



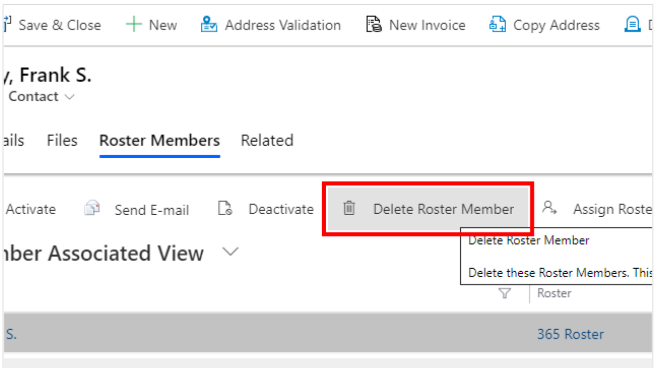
Click on the menu item **Roster Members**



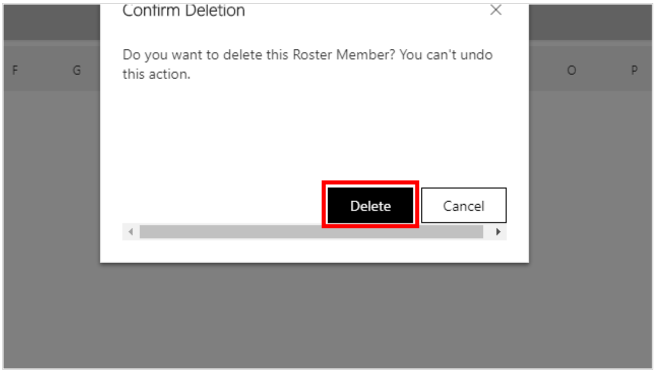
Select the roster member.



Click on the menu item **Delete Roster Member**



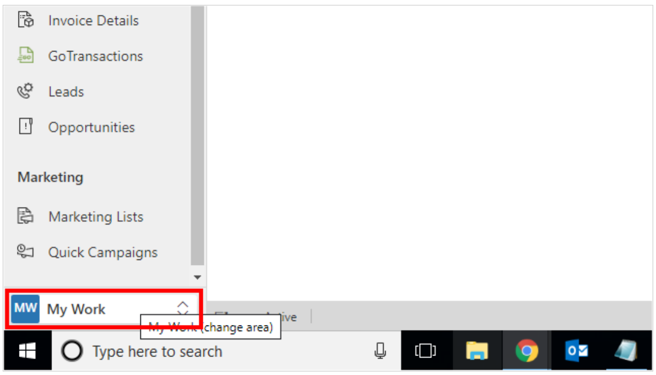
Click on Delete.



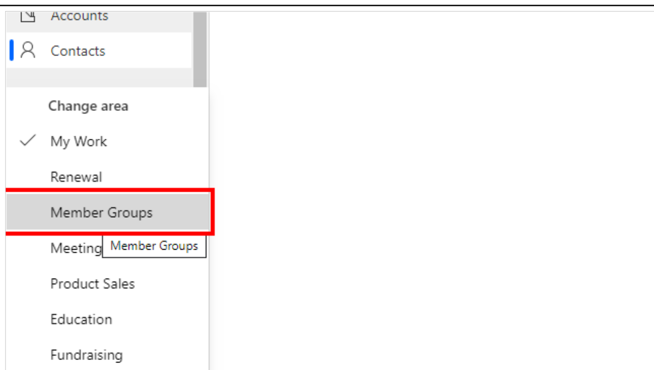
4.15.1.2. Using the roster record

You can use this method if you have multiple members you want to remove from a roster.

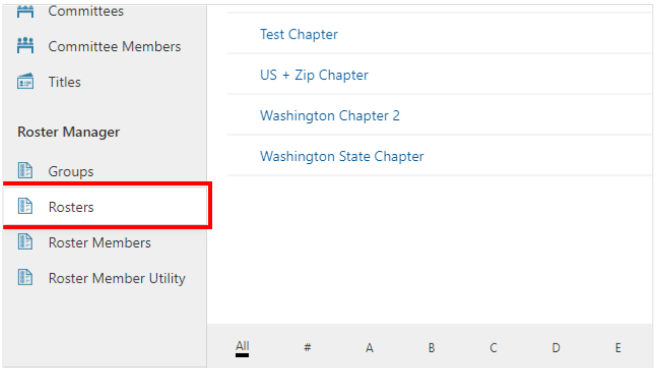
Click on the button **My Work (change area)**



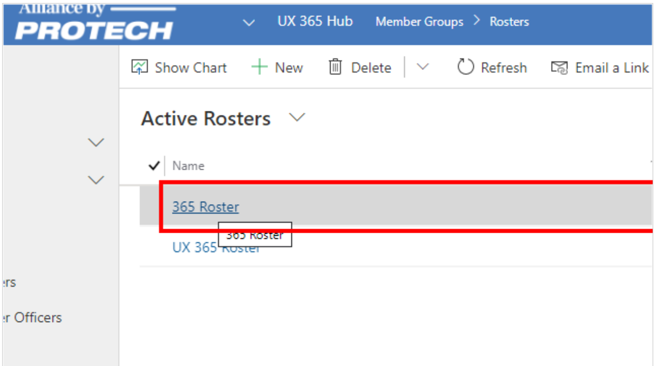
Click on the item **Member Groups**



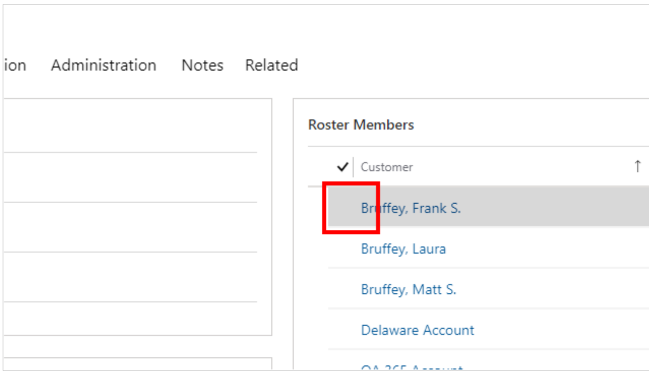
Click on the item **Rosters**



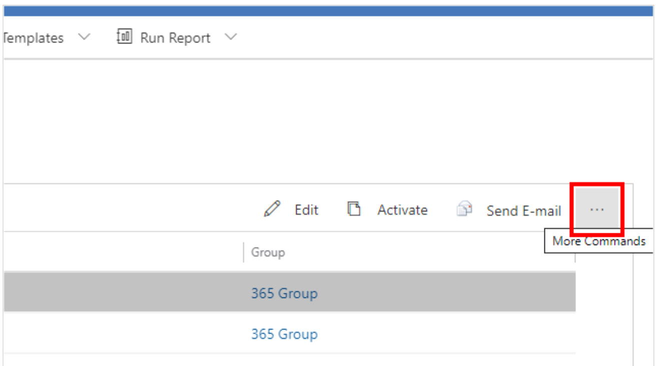
Open the appropriate roster.



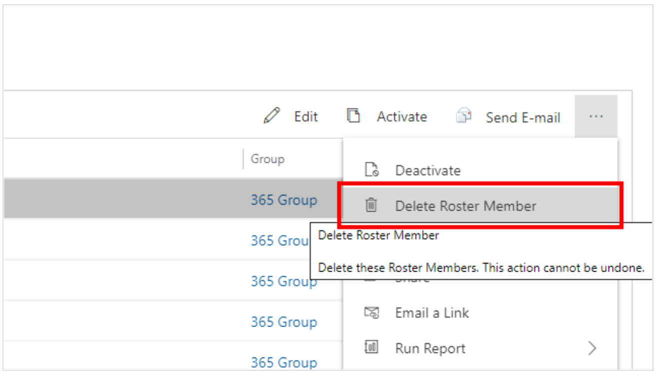
Select the roster member you wish to remove.



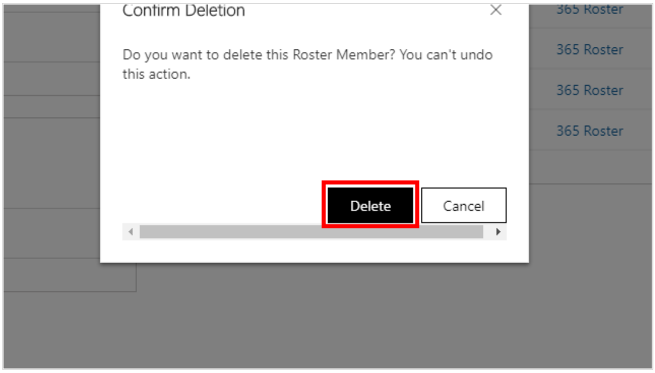
Click on the menu item **More Commands**



Click on the menu item **Delete Roster Member**



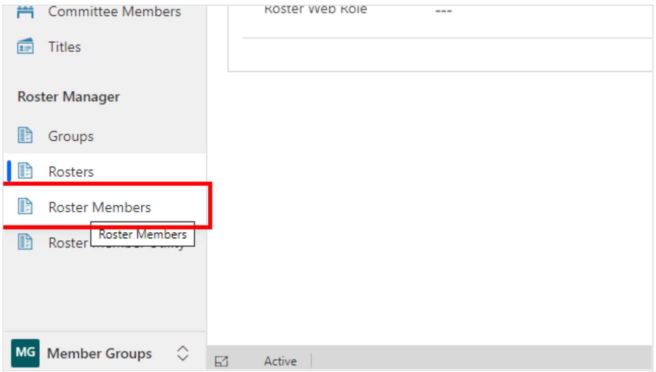
Click on Delete.



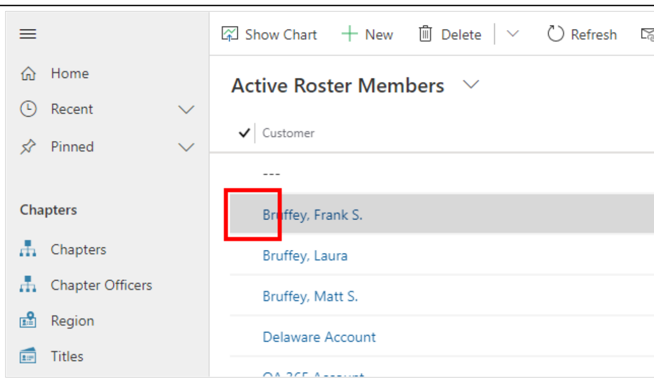
4.15.1.3. Using the roster members list

This method works well if you have multiple members you want to remove from multiple rosters.

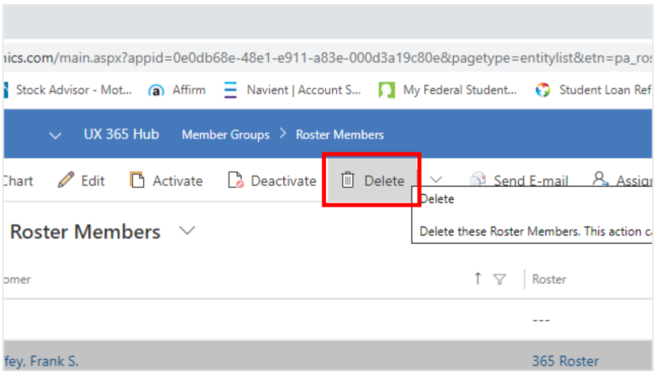
Click on the item **Roster Members**



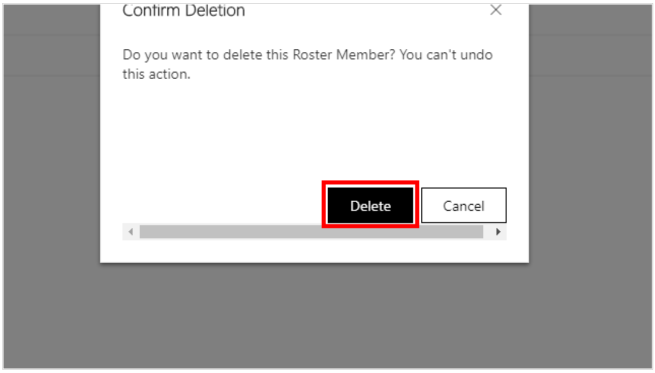
Select the roster member you wish to remove.



Click on the button **Delete**



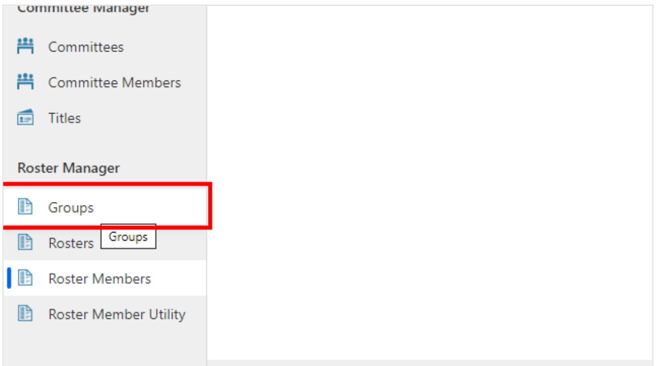
Click on Delete.



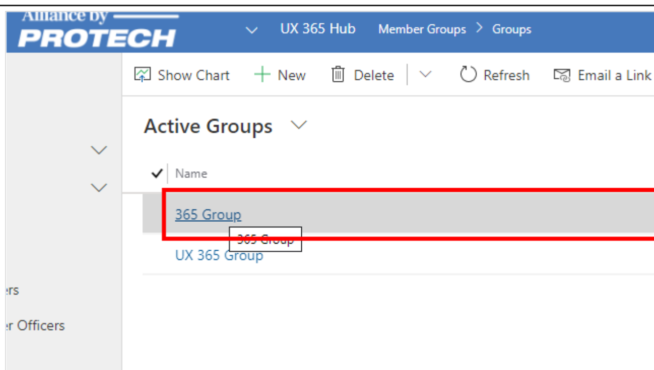
4.15.1.4. Using the group record

This method works well if you have multiple members you want to remove from multiple rosters.

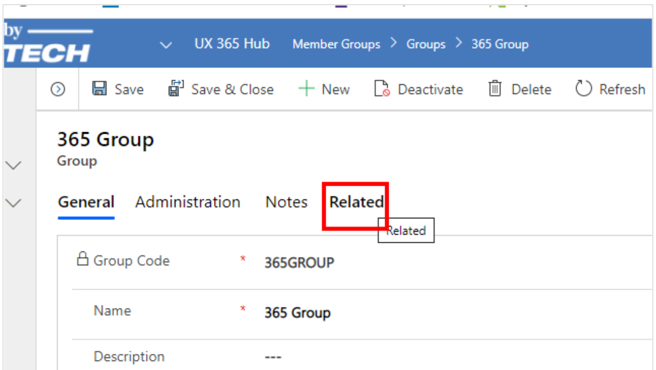
Click on the item **Groups**



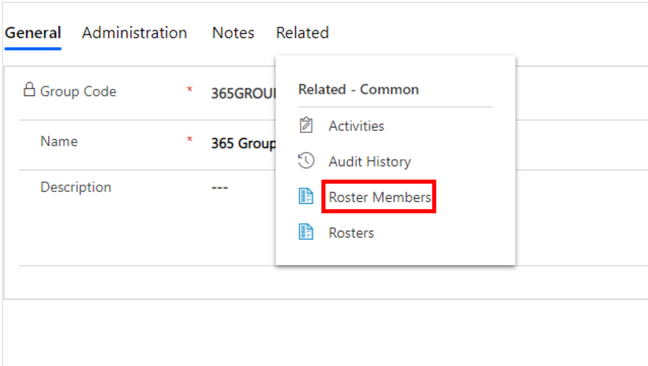
Open the appropriate group.



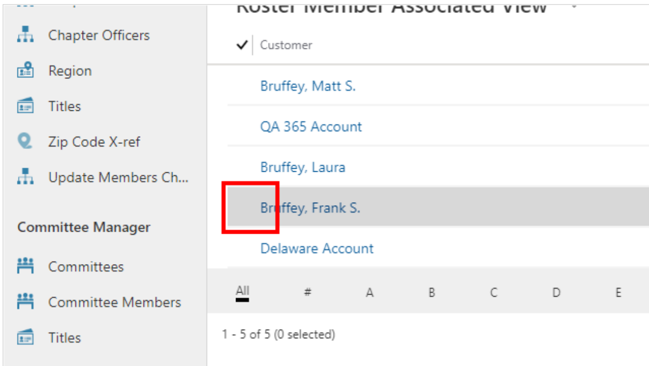
Click on the item **Related**



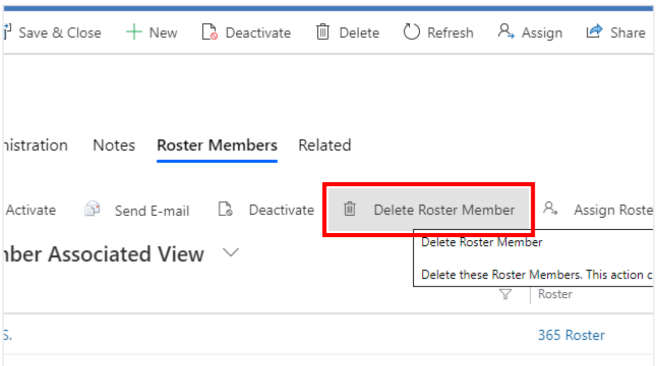
Click on the menu item **Roster Members**



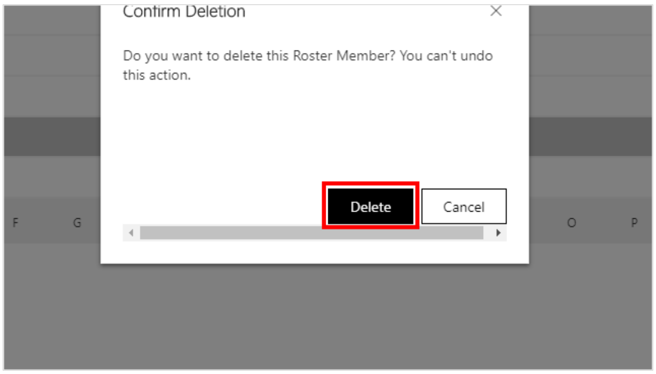
Select the roster member you wish to remove.



Click on the menu item **Delete Roster Member**



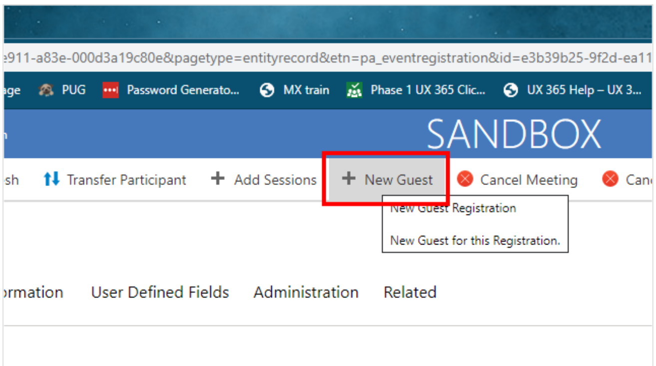
Click on Delete.



5. Meetings

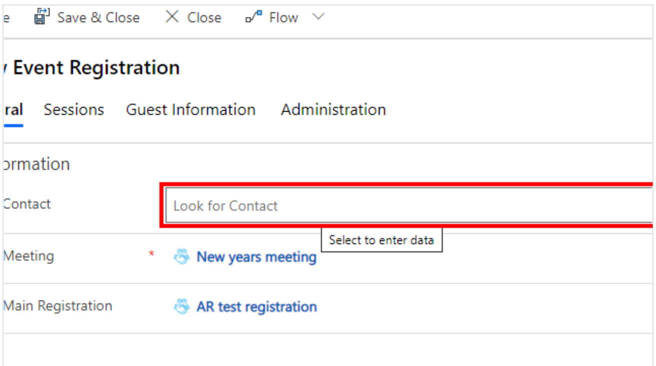
5.1. Adding a Guest Registration

Within the Meetings Invoice, open the Primary Registration line item, then, click on the menu item New Guest Registration

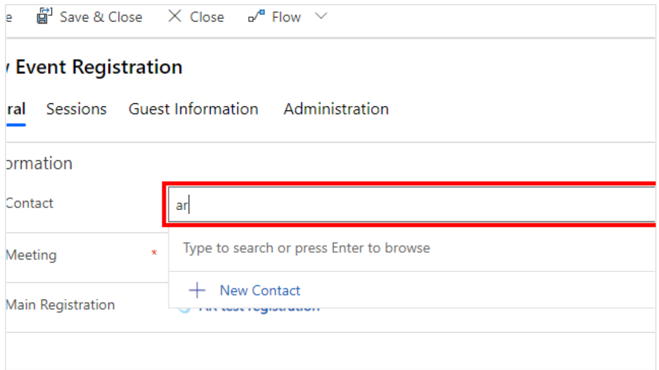


If this guest is a contact that exists in the database, click the Lookup button to select the contact. If the guest is not a contact in the database, leave this field blank.

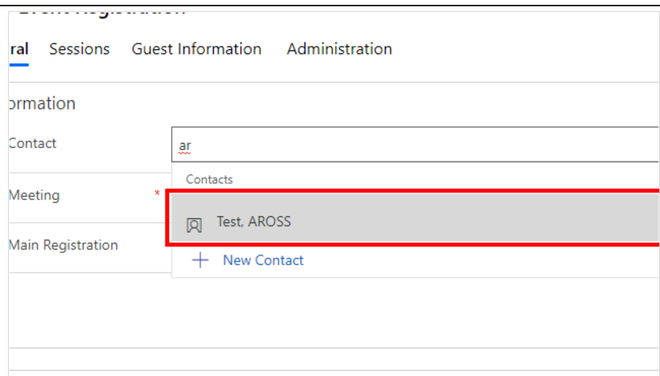
Click on the lookup field **Contact**



Enter **Contact**.

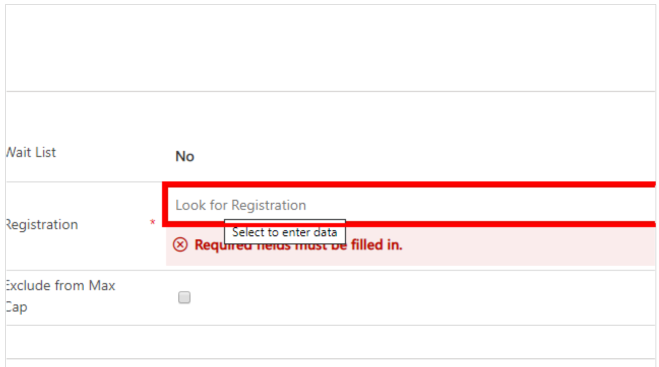


Choose the guest contact.

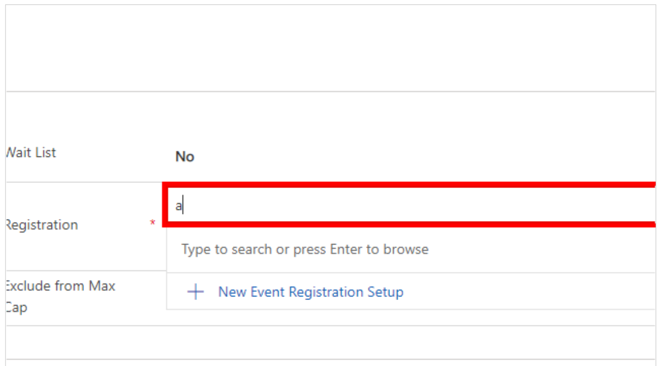


Meeting – Displays the meeting for this registration. Waitlist – Indicates whether this guest is on the meeting registration waitlist. Registration – Click the Lookup button to select the appropriate registration for this guest. Only those registration setup records where Main is not selected in the setup will be available.

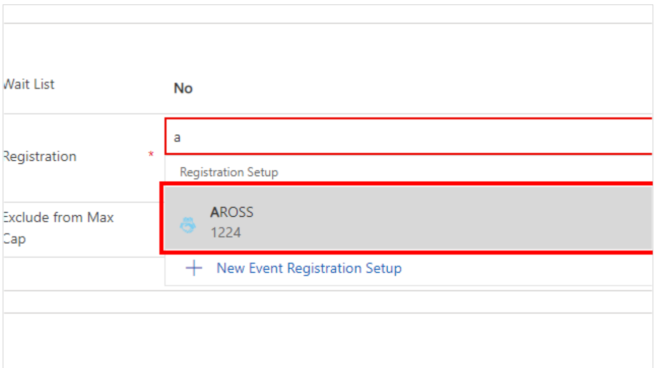
Click on the lookup field **Registration**



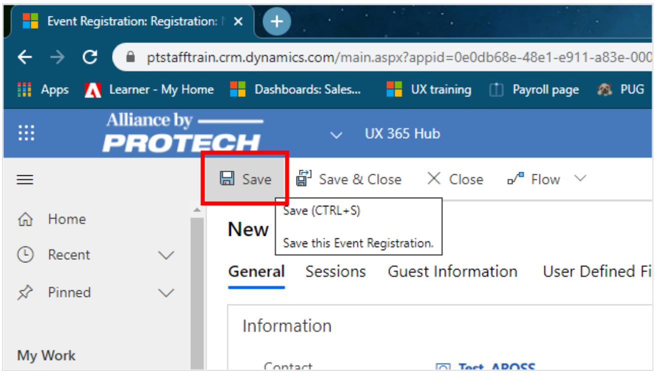
Enter **Registration**.



Click on the registration or set one up.



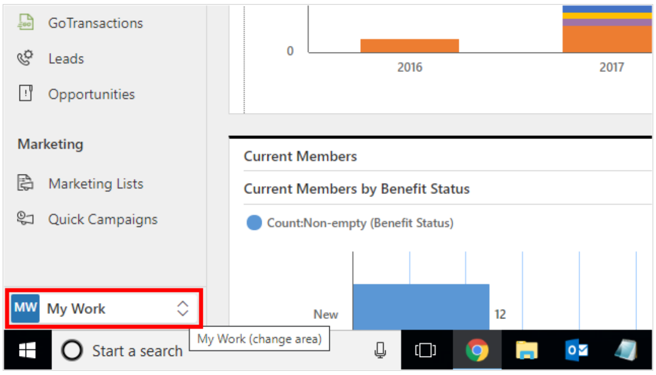
Click on the menu item **Save (CTRL+S)**



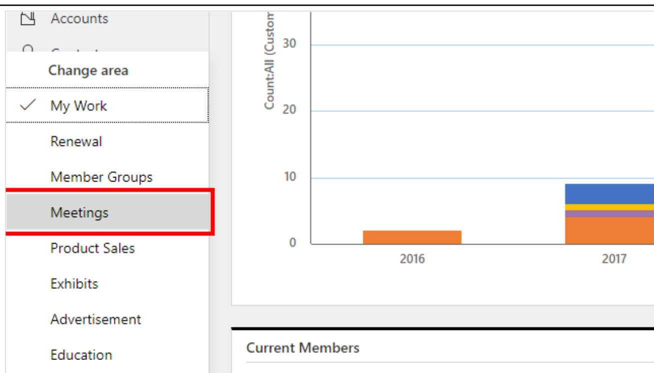
5.2. Adding Session Speakers

5.2.1. Adding Session Speakers

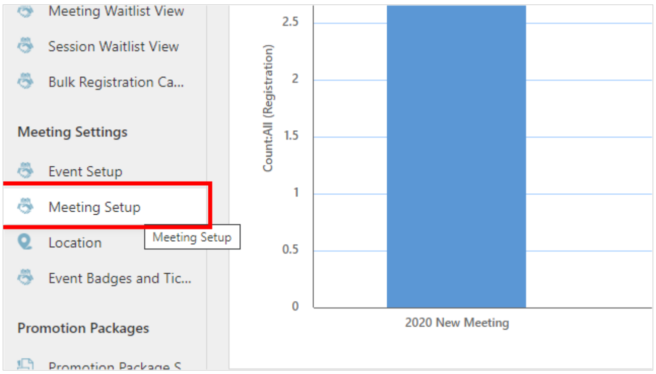
Click on the button **My Work (change area)**



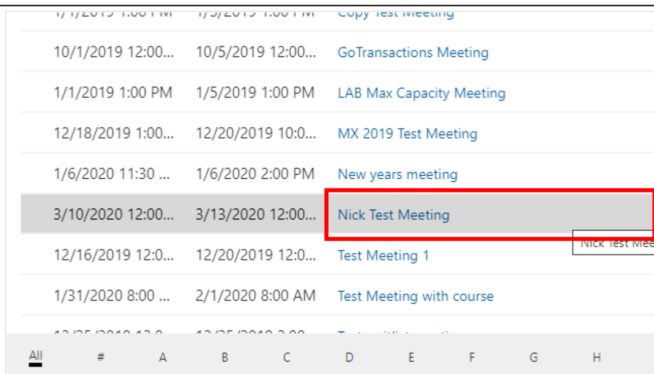
Click on the item **Meetings**



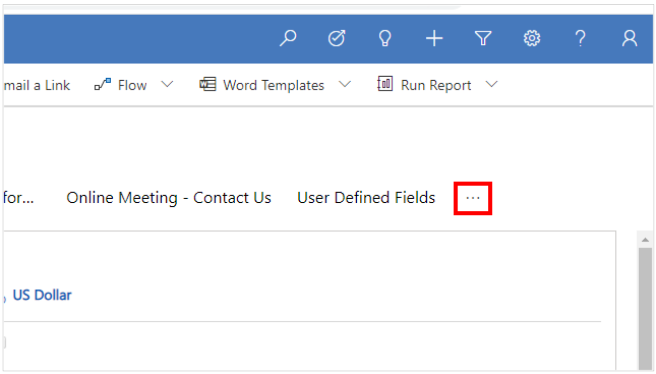
Click on the item **Meeting Setup**



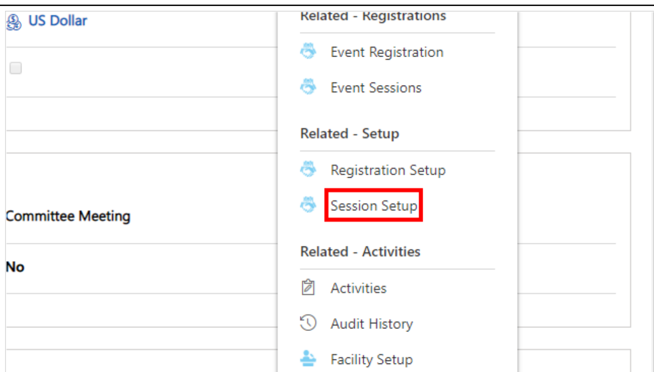
Click on the Meeting name



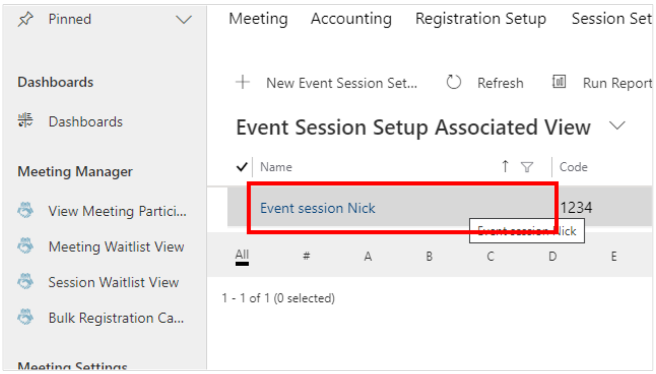
Click on the ellipses button



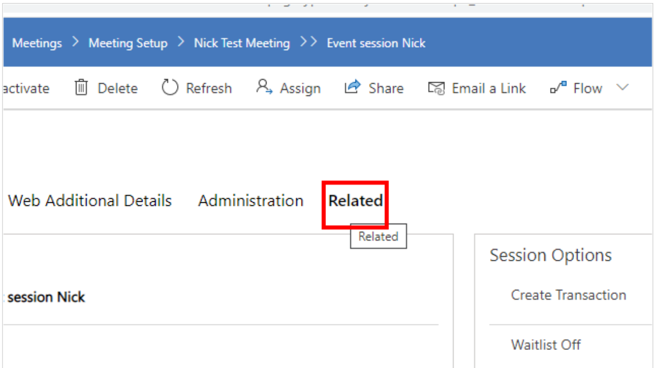
Click on the menu item **Session Setup**



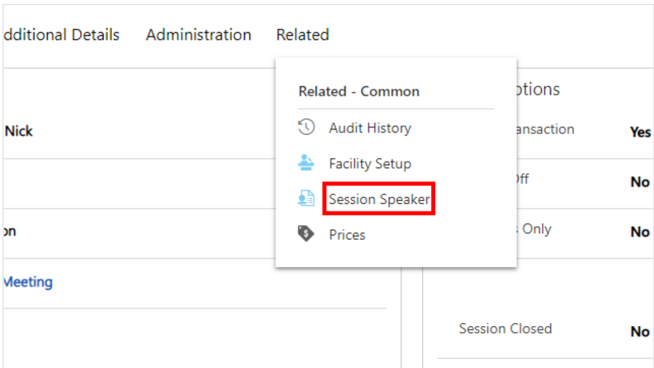
Click on the Event Session Name



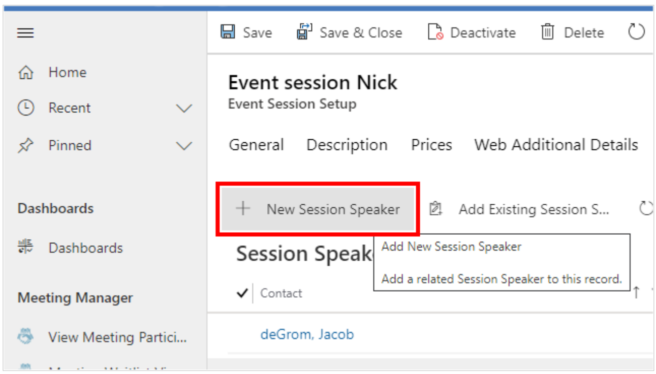
Click on the item **Related**



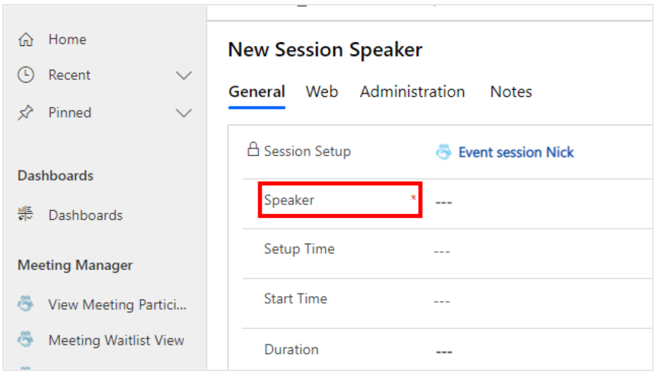
Click on the menu item **Session Speaker**



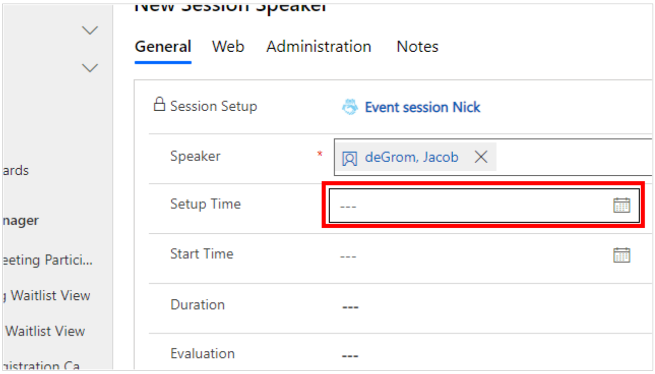
Click on the menu item **Add New Session Speaker**



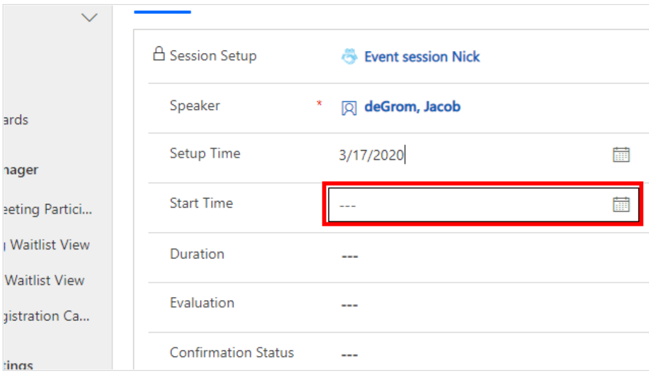
Speaker – You can lookup speakers by speaker specialty or by speaker profile by using the Speaker Specialty Lookup or the Speaker Profile Lookup buttons on the Record toolbar. Click either Lookup button to select the speaker for this session.



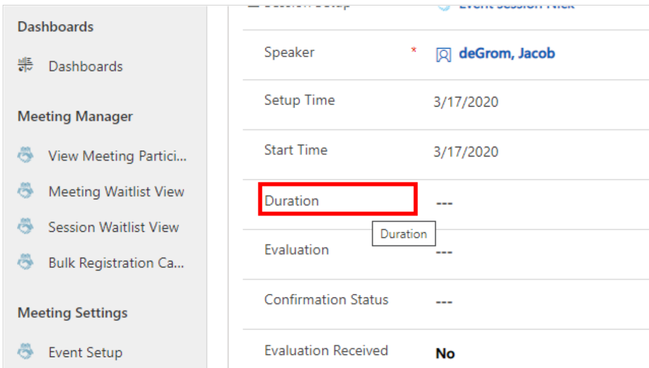
Setup Time – Enter the date and time the speaker needs to begin setting up.



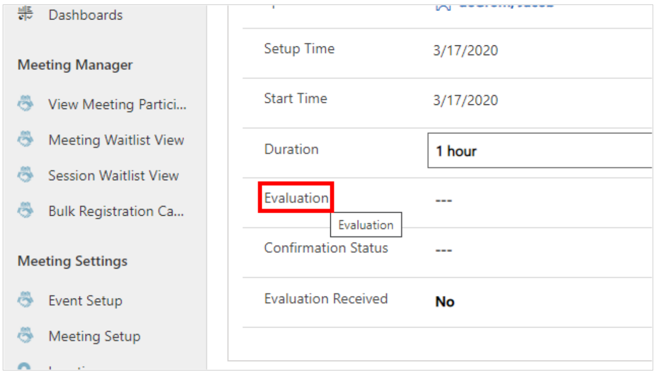
Start Time – Enter the date and time for the speaker's presentation is scheduled to begin.



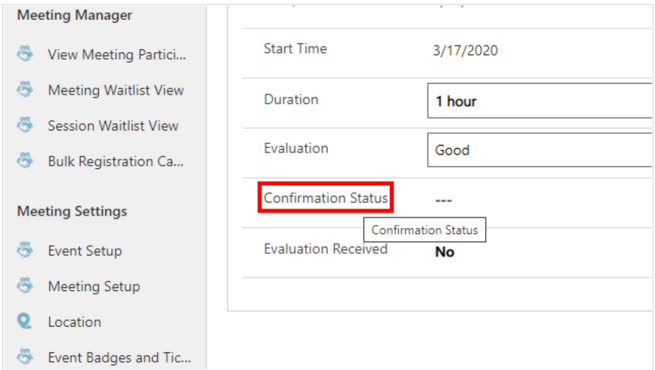
Duration – Select the length of the speaker's presentation from the list, if desired.



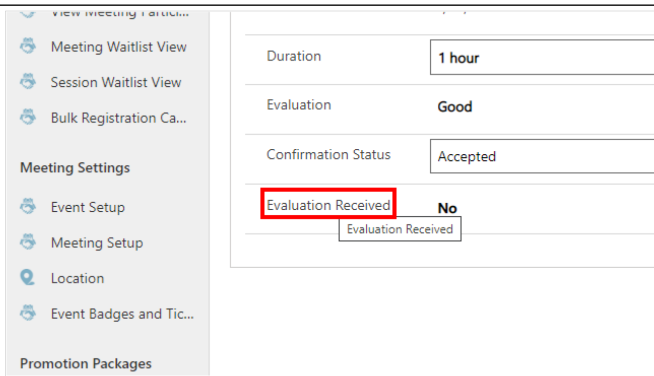
Evaluation – After the presentation, select the appropriate evaluation of the speaker from the list, if desired. Default values deployed with your system include Excellent, Good, Fair, and Poor. Depending upon your organization’s business rules, you can modify these values or add new values by customizing the evaluation attribute in the session speaker entity.



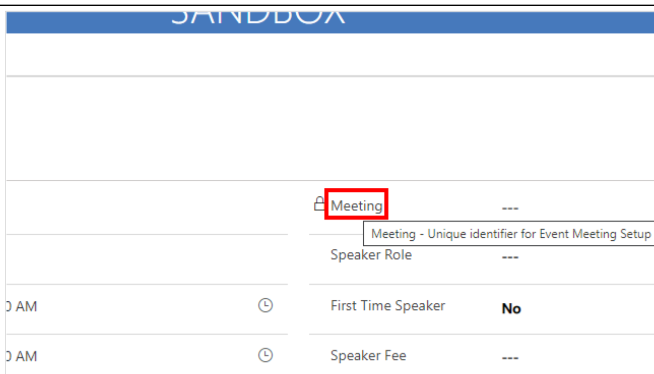
Confirmation Status – Select the status of the speaker from the list, if desired. Default values deployed with your system include Accepted, Declined, and Cancelled. Depending upon your organization’s business rules, you can modify these values or add new values by customizing the confirmation status attribute in the session speaker entity.



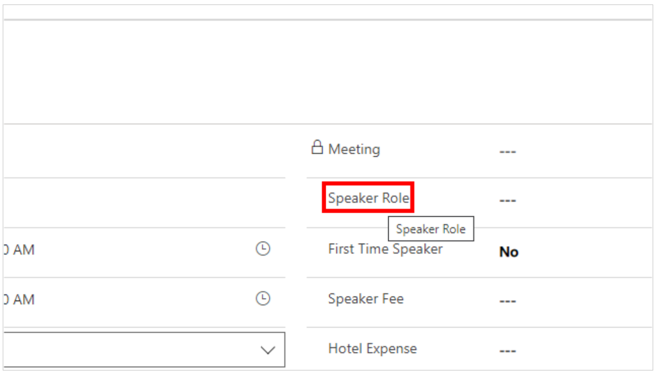
Evaluation Received – If the speaker has received an evaluation for the presentation, click to select Yes.



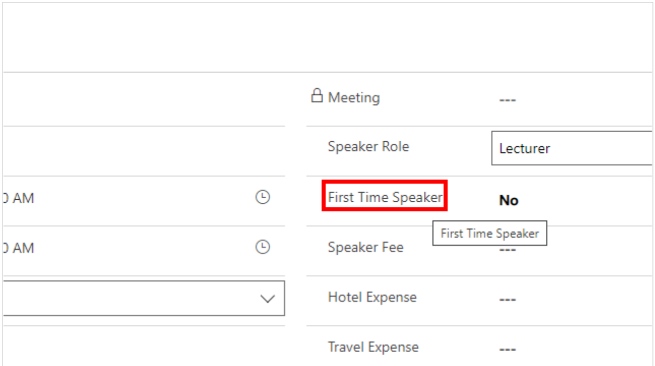
Meeting – Displays the meeting the session is associated with.



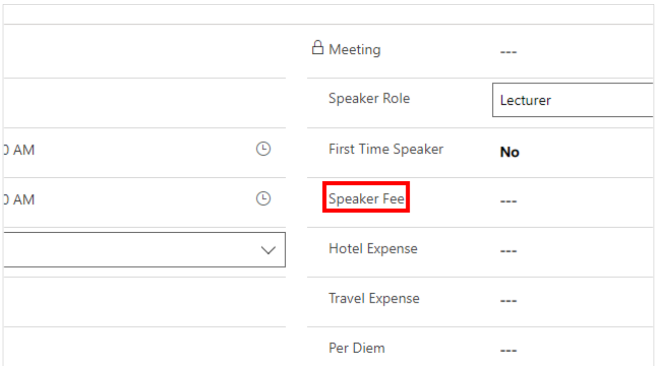
Speaker Role – Select the speaker's role in this session from the list. Default values deployed with your system include Instructor, Moderator, and Lecturer. Depending upon your organization's business rules, you can modify these values or add new values by customizing the speaker role field in the session speaker entity.



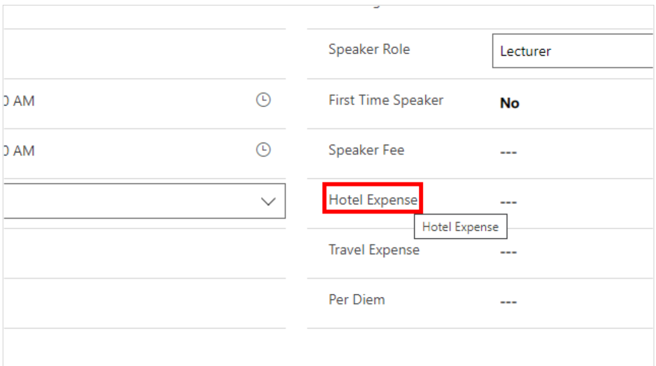
First Time Speaker – If this is the first time this speaker has presented for your organization, click to select Yes



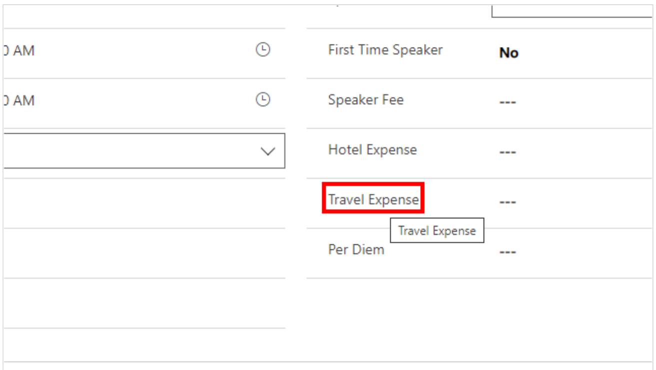
Speaker Fee – Enter the speaker's fee, if any.



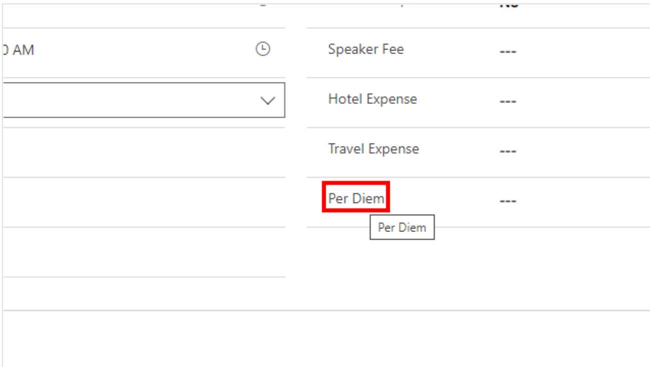
Hotel Expense – Enter the hotel expense for the speaker, if any.



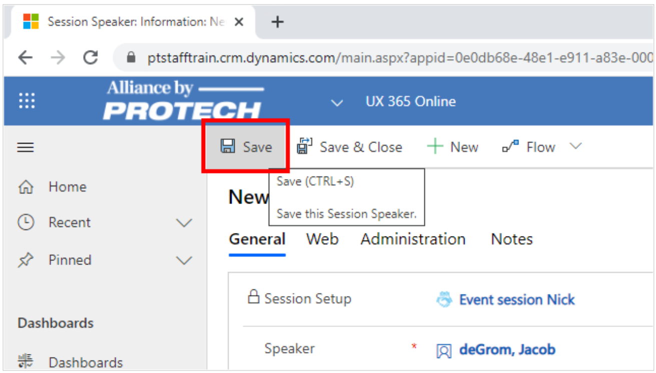
Travel Expense – Enter the travel expense for the speaker, if any.



Per Diem – Enter the per diem fee for the speaker, if any.



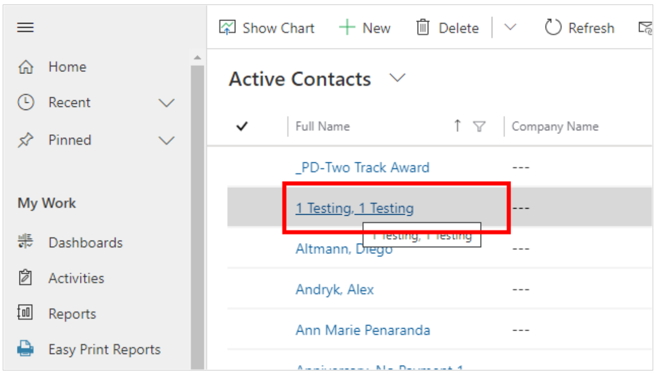
Click on the menu item Save to complete the Speaker setup



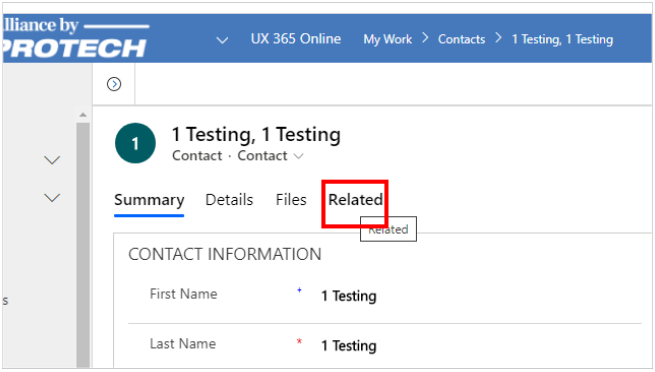
5.3. Adding Specialty Information to a Speaker Profile

Click on the item **Contacts**

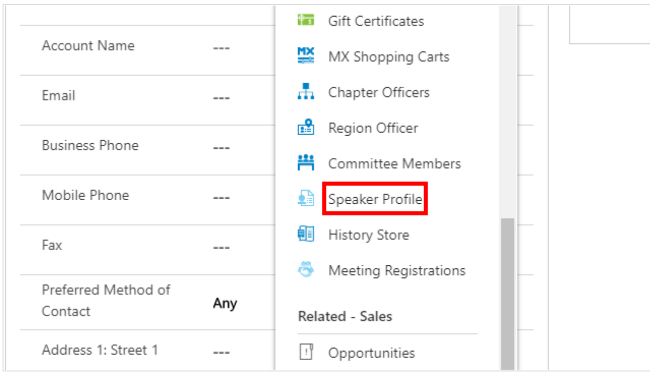
Click on the Contact you wish to add specialty information to within their speaker profile



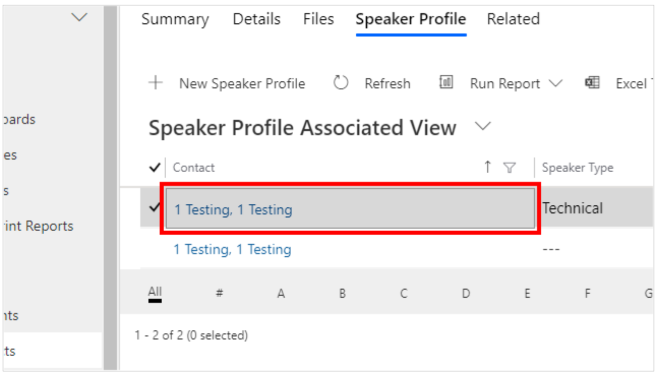
Click on the item **Related**



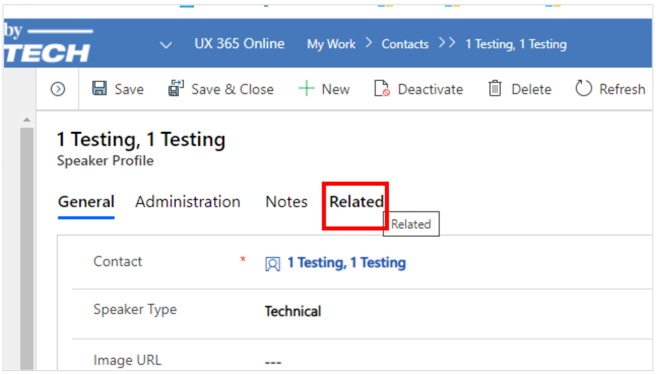
Click on the menu item **Speaker Profile**



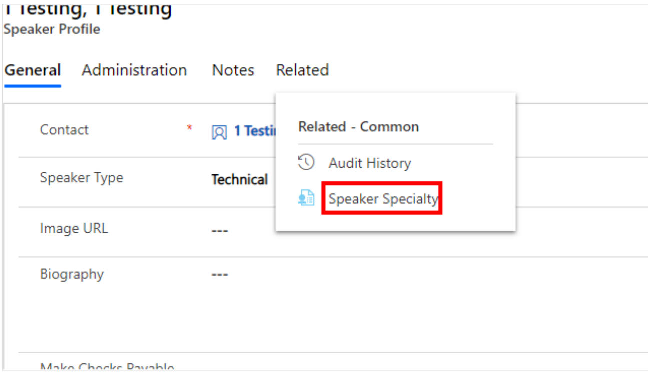
click into the speaker profile



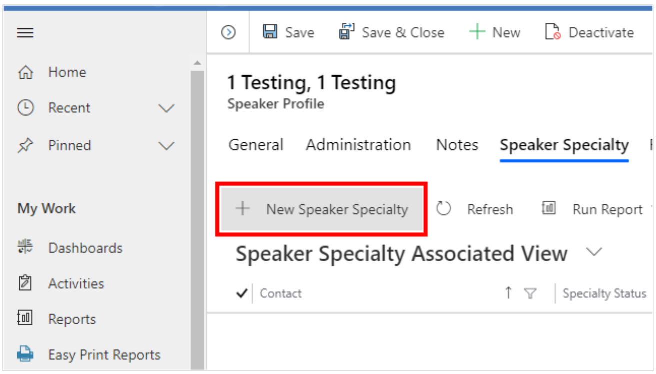
Click on the item **Related**



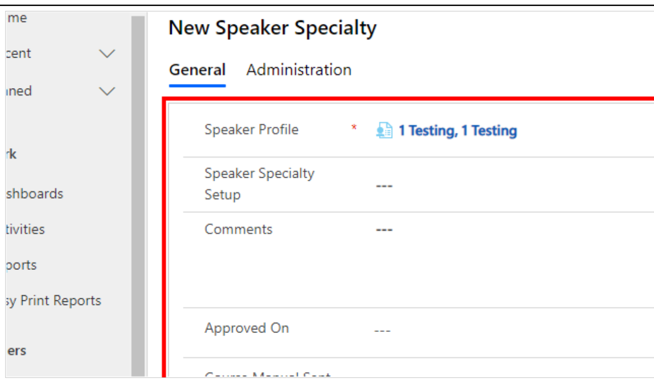
Click on the menu item **Speaker Specialty**



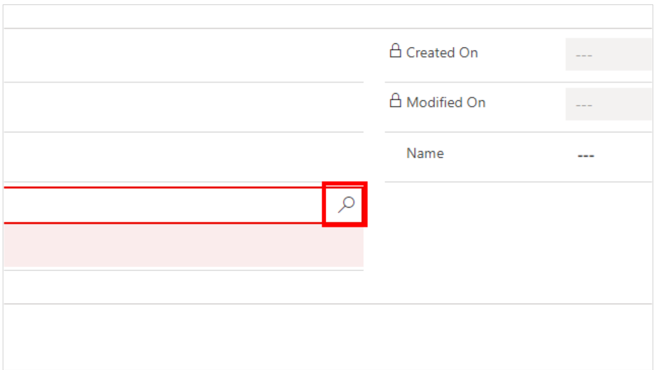
Click on the menu item **Add New Speaker Specialty**



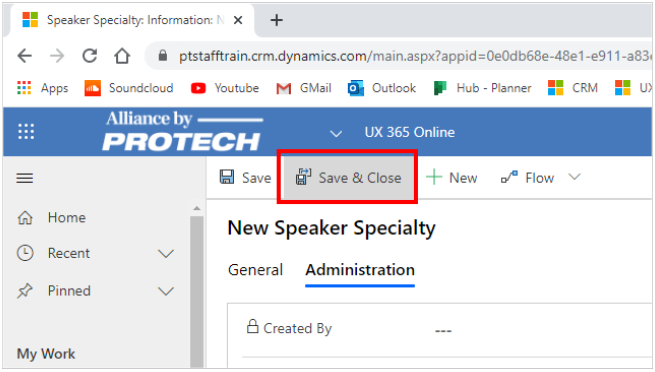
This is where you enter in the general speaker specialty info.



To save the record, you must select a contact for the speaker profile in the administration tab

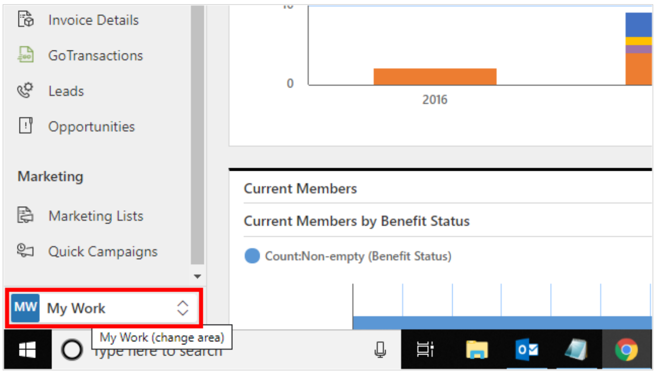


Click on the menu item Save and Close to complete the update

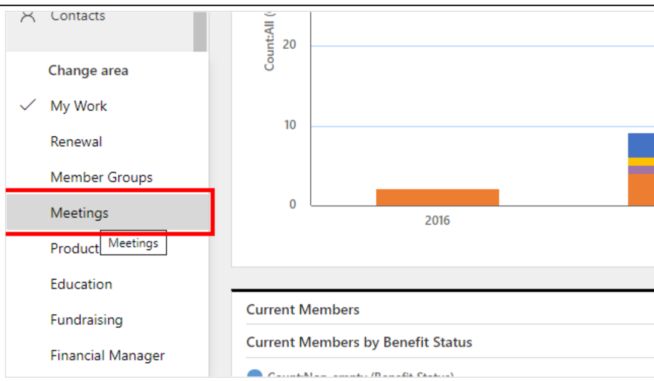


5.4. Bulk Meeting Registration Cancellation

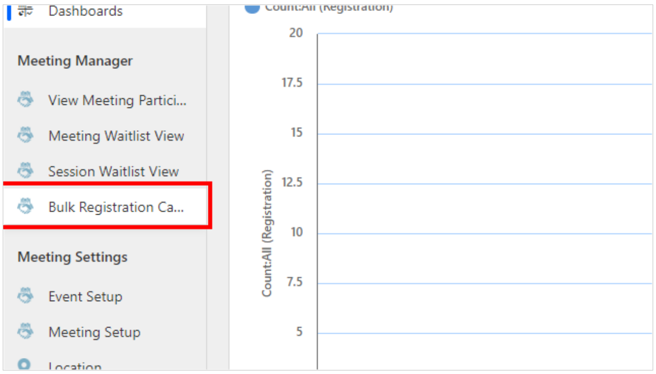
Click on the button **My Work (change area)**



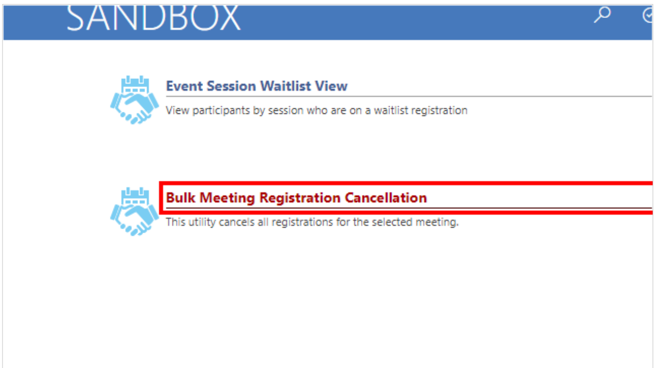
Click on the item **Meetings**



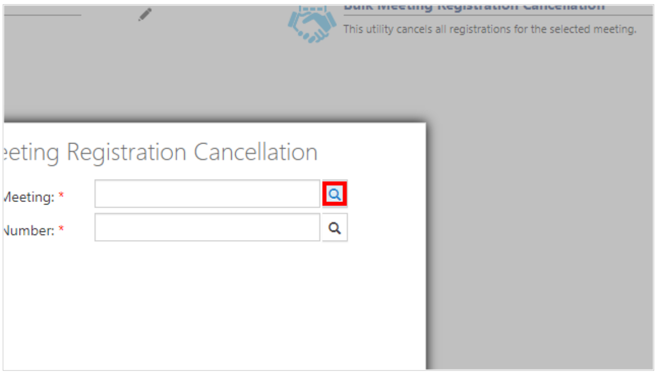
Click on the item **Bulk Registration Cancellation**



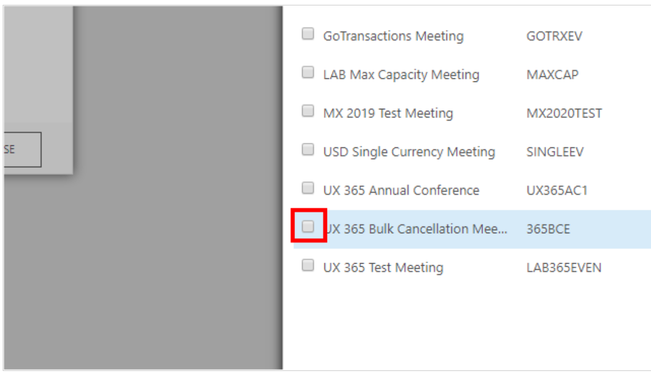
Click on **Bulk Meeting Registration Cancellation**



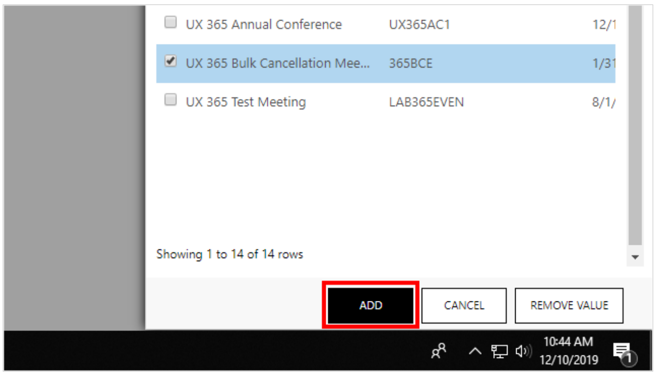
Click the Meeting Lookup button to select the meeting that you want to cancel registrations for.



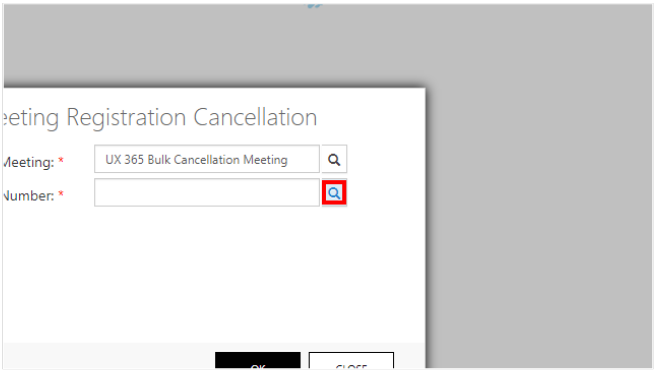
Click on the checkbox for the meeting you would like to cancel.



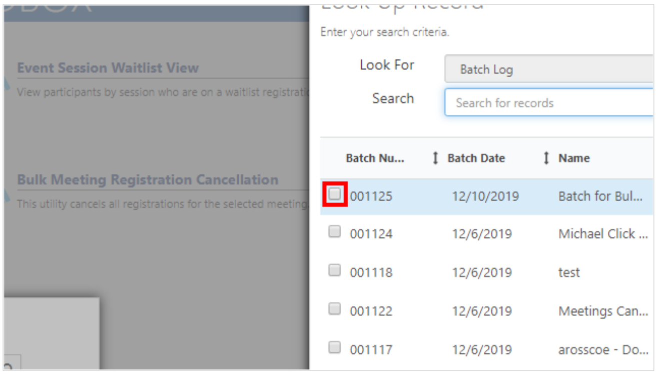
Click on the button **ADD**



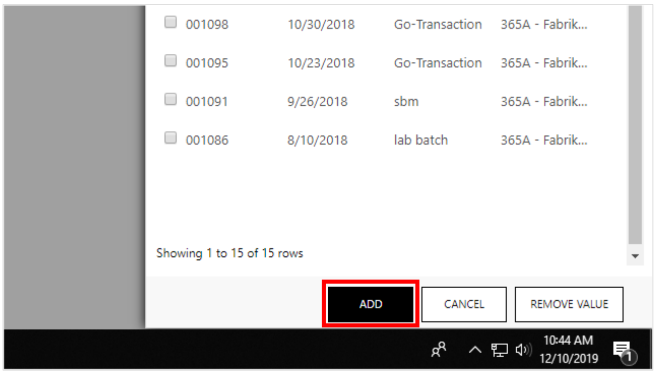
Click the Batch Lookup button to select the batch to use for this process.
We recommend using a separate batch for this process.



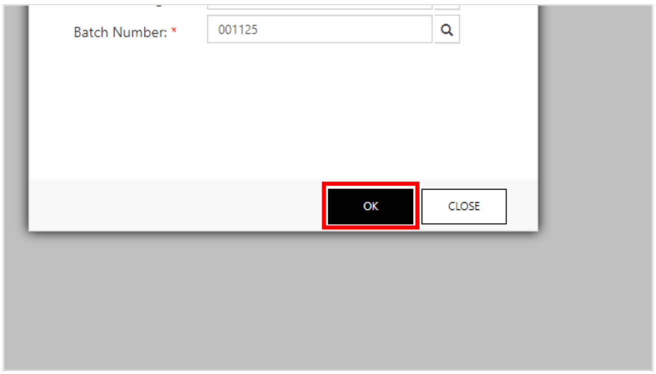
Click on the checkbox for the batch you will use to process the cancellations in.



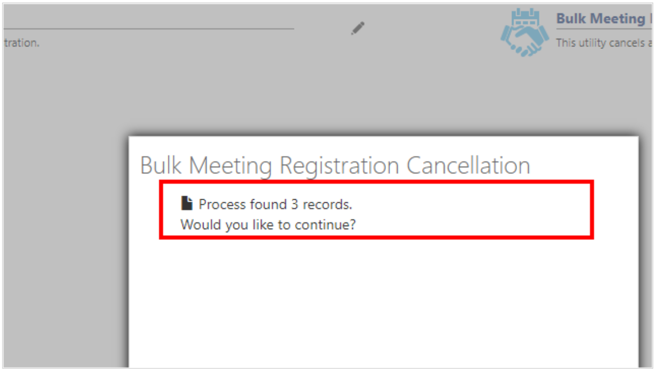
Click on the button **ADD**



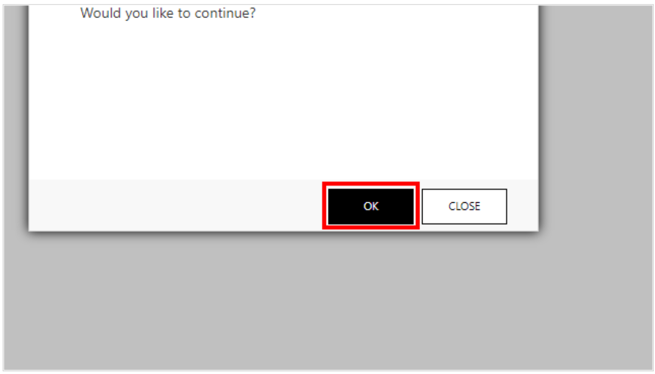
Click on the button **OK**



A confirmation message will appear showing the number of registrations that will be canceled.



Click OK to cancel the registrations. This process cannot be undone.

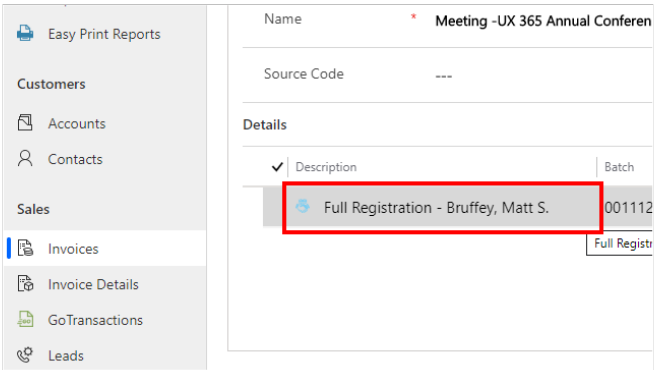


5.5. Cancelling a Meeting Registration

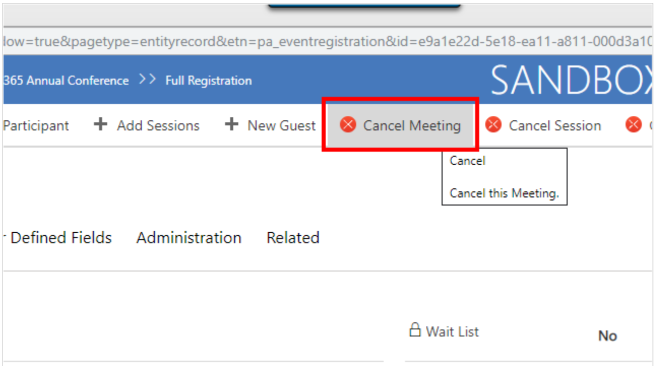
5.5.1. Cancelling a meeting registration using Cancel Meeting

Overview: When you cancel a meeting registration, UX 365 can automatically generate the cancellation fee based on the cancellation fee information you set up for the meeting and add it to the invoice as a line item. If the batch in which original entry was created is open, the line item for the canceled registration will be deleted, and the cancellation fee line item will be added. If the batch in which original entry was created is closed, the line item for the canceled registration will be canceled, and the cancellation fee line item will be added. The item will remain visible and will be marked with a red X. Any dollars associated with the item will be removed, and the invoice balance will be adjusted accordingly. Important Note: All related sessions and guest registrations associated with the main participant will be automatically cancelled as well.

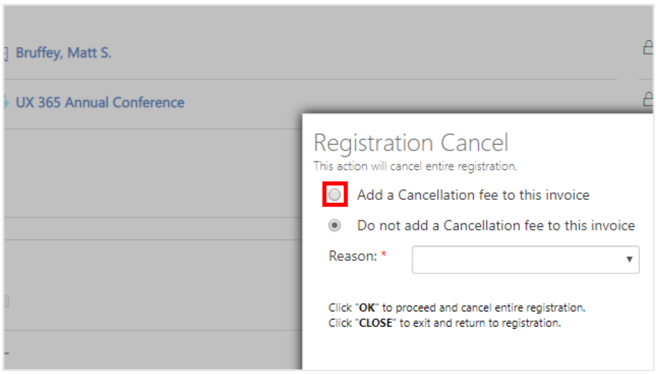
Open the Invoice Registration line item



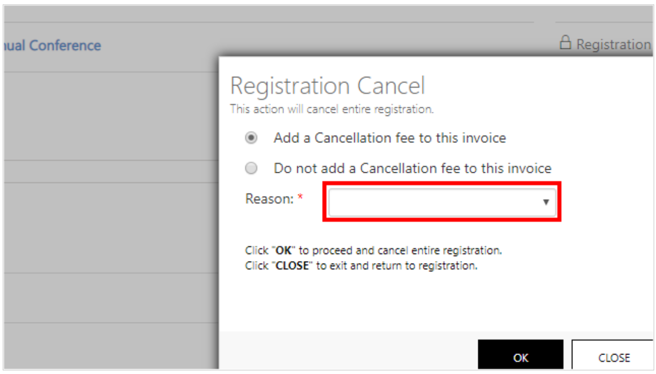
Click on the button, Cancel Meeting



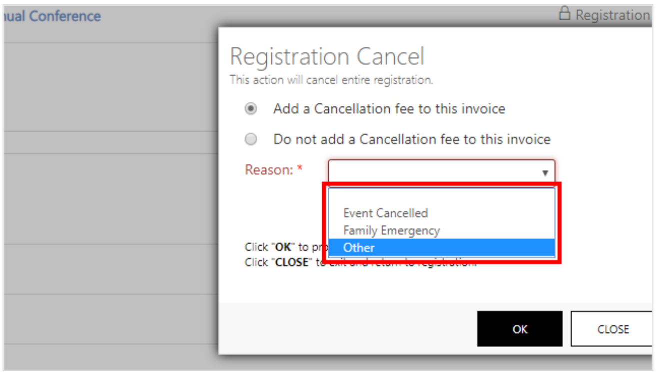
Check, Add a Cancellation fee to this invoice



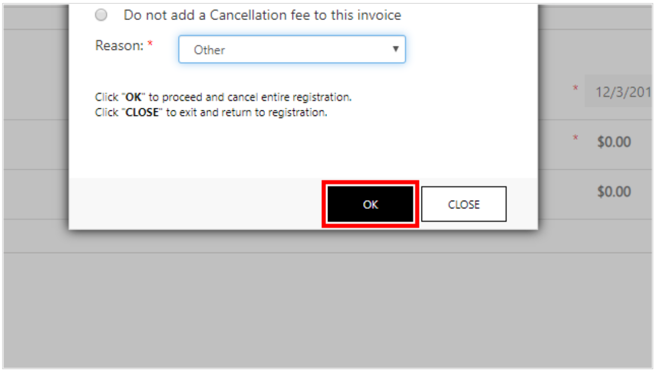
Select a Reason



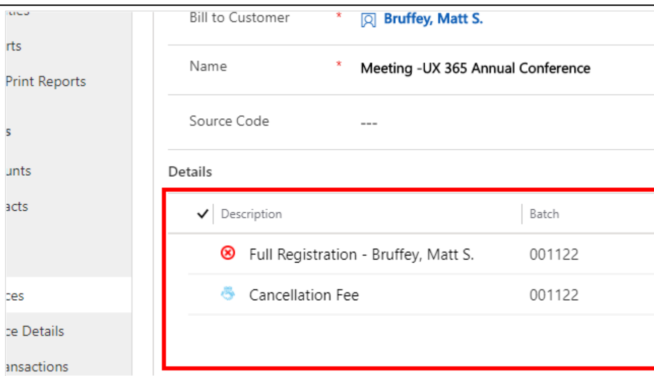
Click on an option from the list



Click on the button **OK**



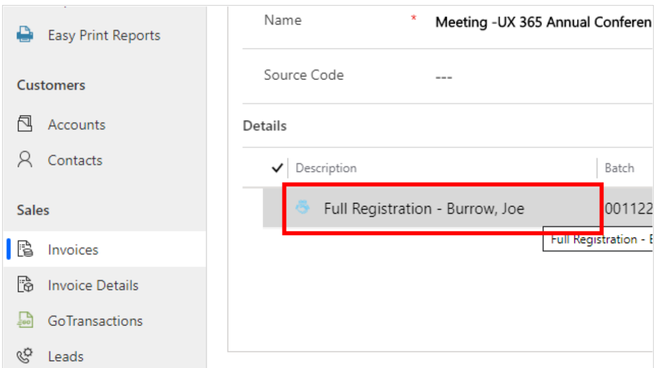
You have successfully cancelled the registration and added the cancellation fee



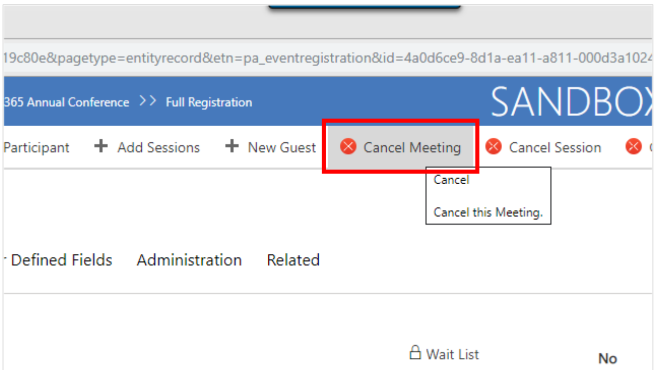
5.5.2. Cancelling a meeting registration by deleting the invoice line item

Overview: If you do not want to charge a cancellation fee, you can simply cancel the main participant registration line item on the invoice to cancel a meeting registration. Then, if you need to replace the cancelled participant, you can create a new meeting registration.

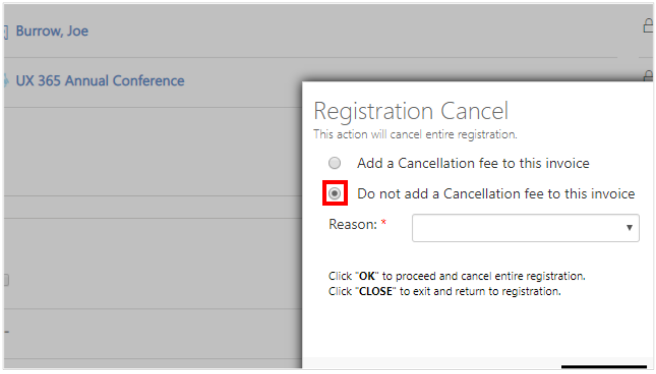
Open the Invoice Registration Detail Line Item



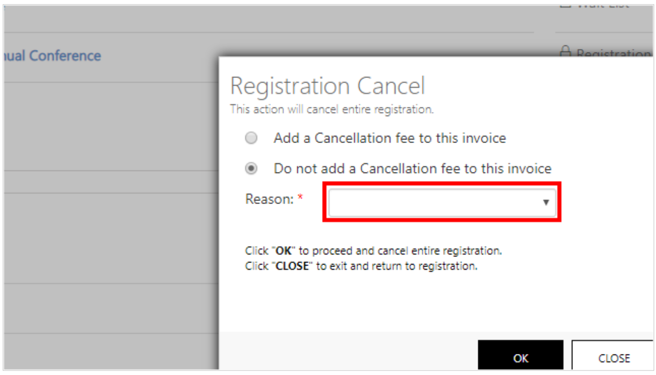
Click on the button Cancel Meeting



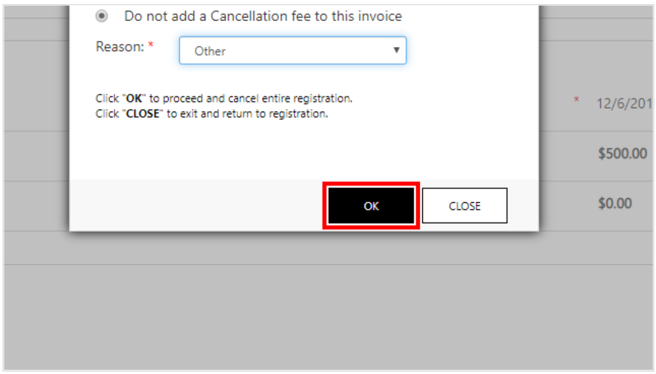
Select, Do not add a Cancellation fee to this invoice



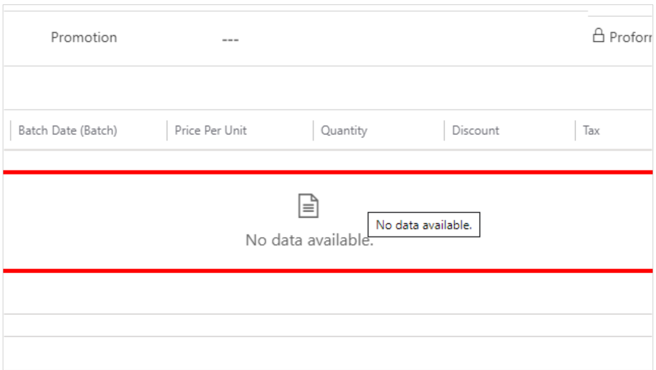
Select, a Reason



Click on the button **OK**



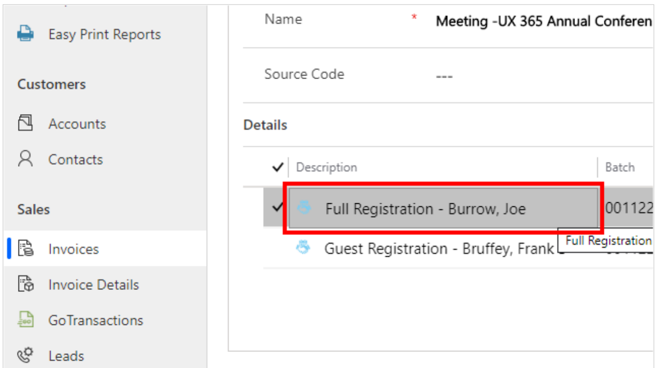
Registration has been removed



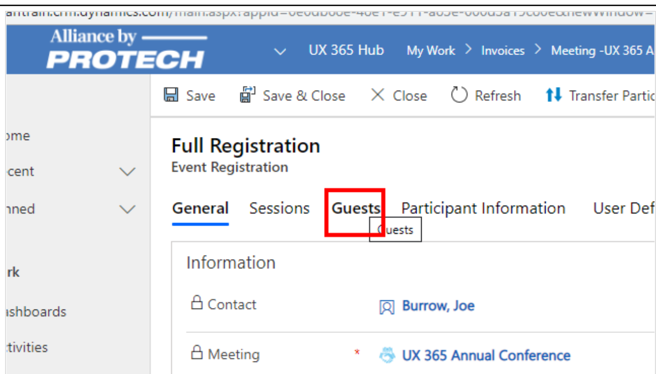
5.5.3. Cancelling a guest meeting registration

Overview: If you need to cancel a guest registration and do not want to cancel the primary registration for the main participant, you can simply cancel the guest registration line item in the invoice Important Note: All related sessions associated with the guest registration will be automatically cancelled/deleted as well.

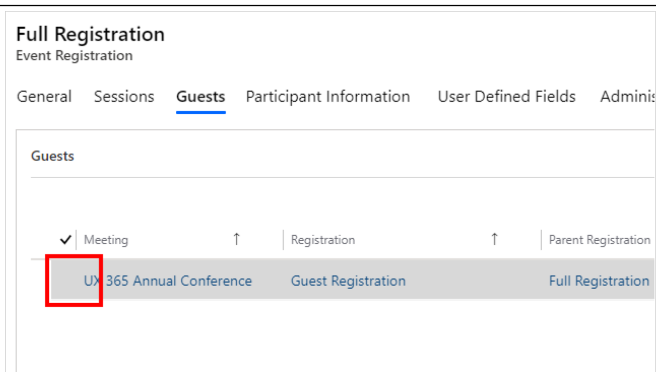
Open Primary Meeting Registration



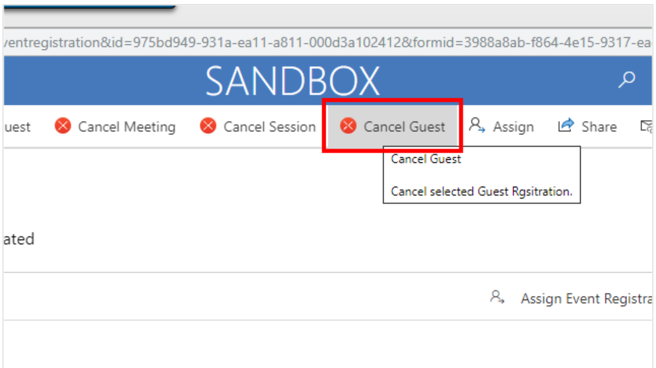
Click on, the Guest tab



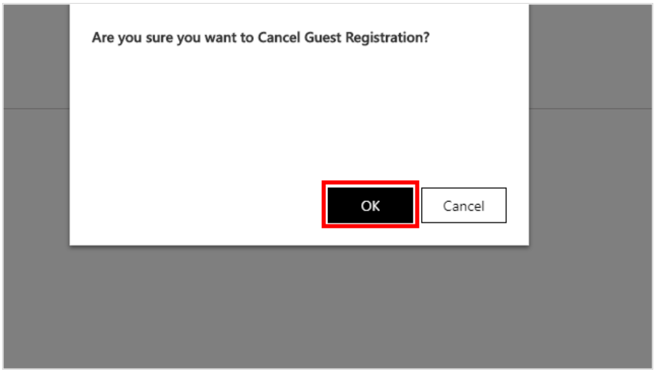
Check mark the Guest you would like to cancel



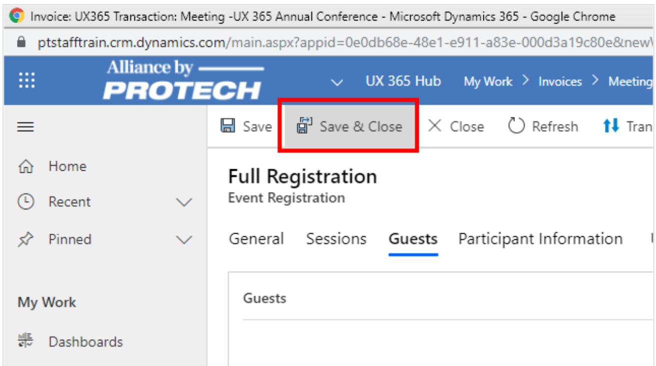
Click on the menu item **Cancel Guest**



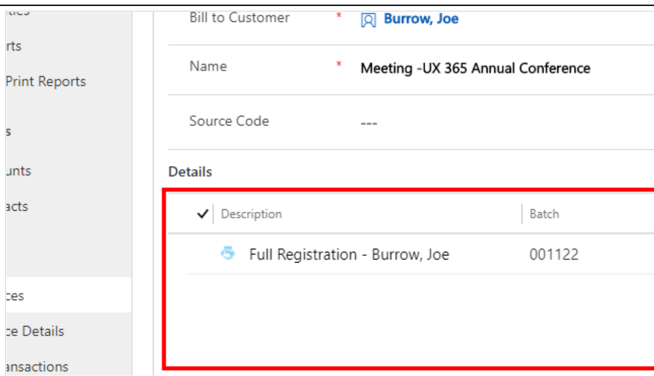
Click on the button **OK**



click on the menu item, save and close



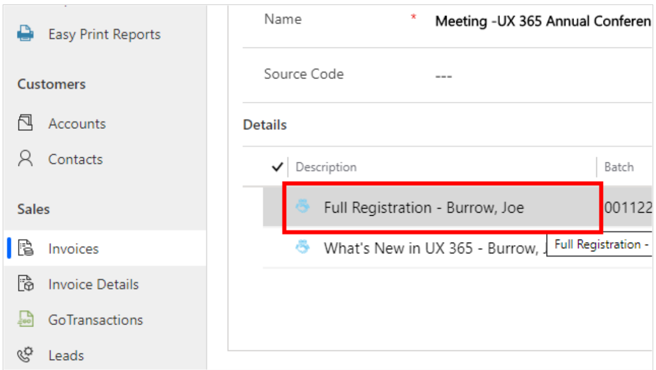
You have successfully removed the Guest Registration



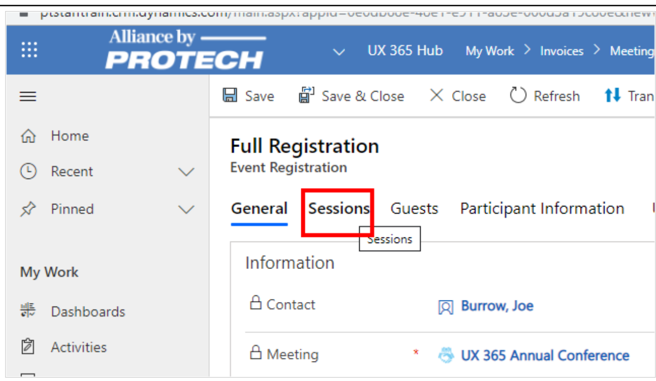
5.5.4. Cancelling a session registration

Overview: If you need to cancel a session registration and do not want to cancel the meeting registration for either the main participant or the guest participant, you can simply cancel the session registration line item in the invoice. This will cancel the selected session.

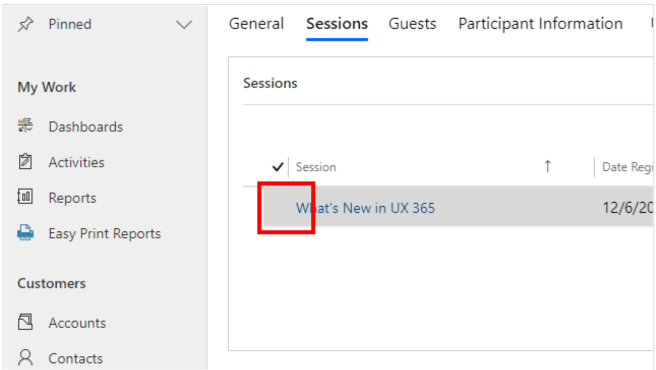
Open the Primary Meeting Registration



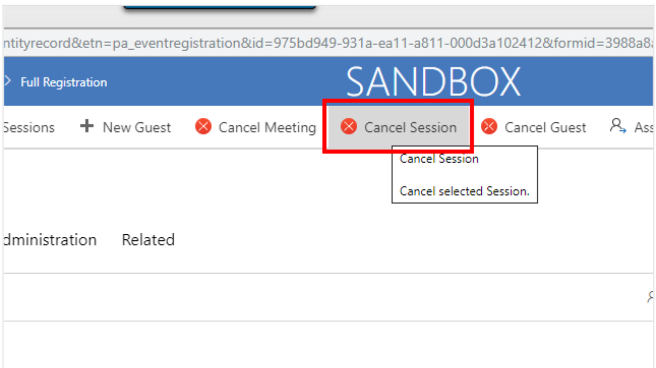
Click on, the Sessions tab



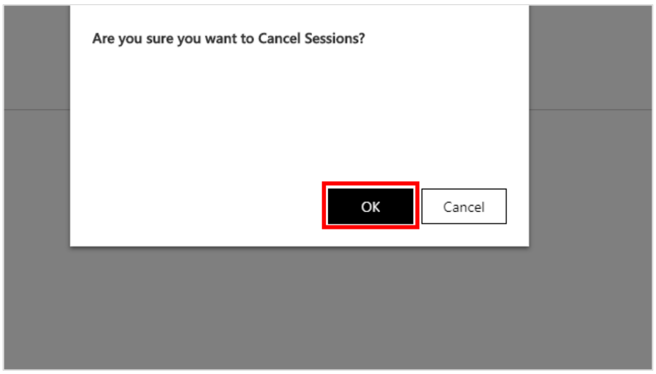
Check mark the Session you would like to Cancel



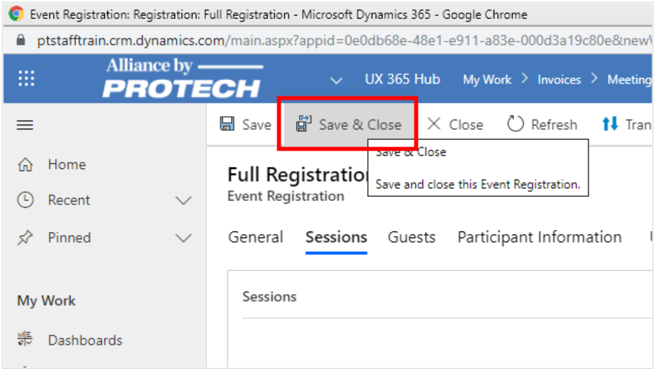
Click on the menu item **Cancel Session**



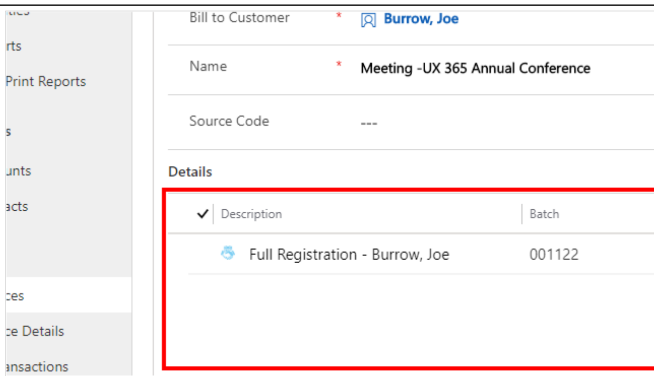
Click on the button **OK**



Click on the menu item Save and Close



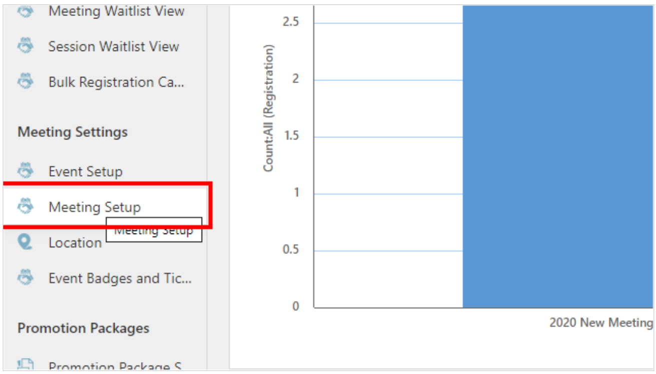
You have successfully removed the Session



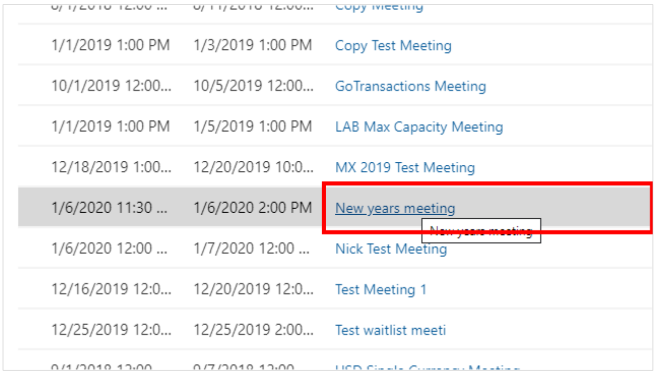
5.6. Closing a Meeting

Access the meeting setup from the event sub-grid or click Meeting Setup in the Navigation Pane of the event record.

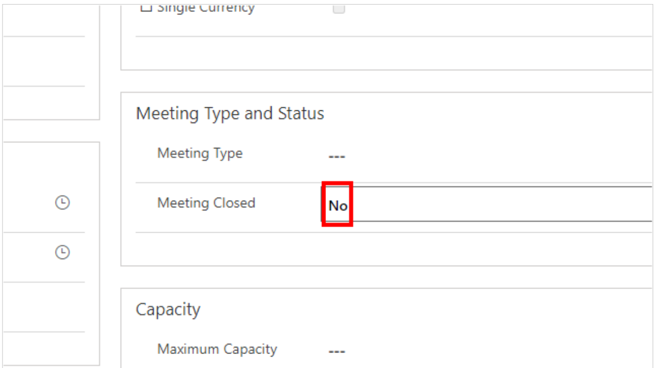
Click on the item **Meeting Setup**



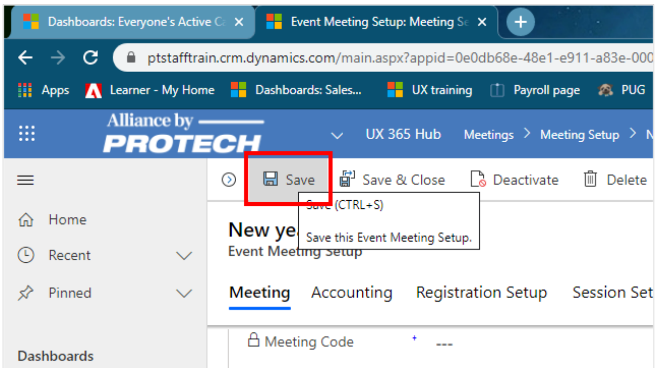
Open the meeting that you set up for this event.



Click to select Yes on the Meeting Closed field.

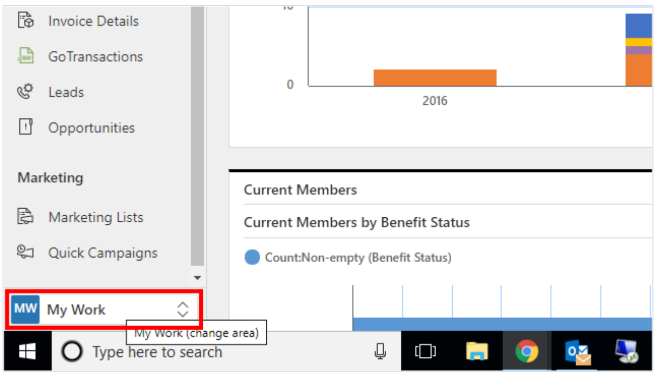


Click on the menu item **Save (CTRL+S)**

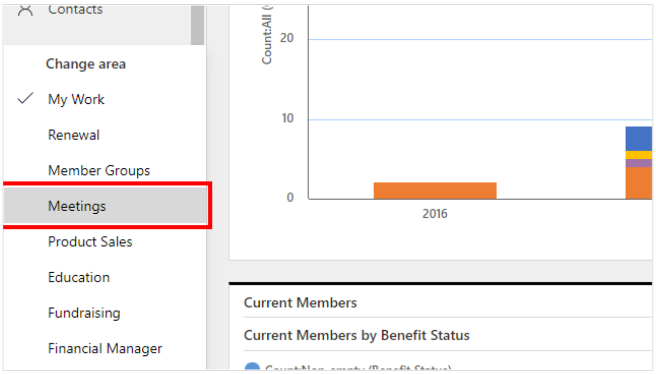


5.7. Copying a Meeting

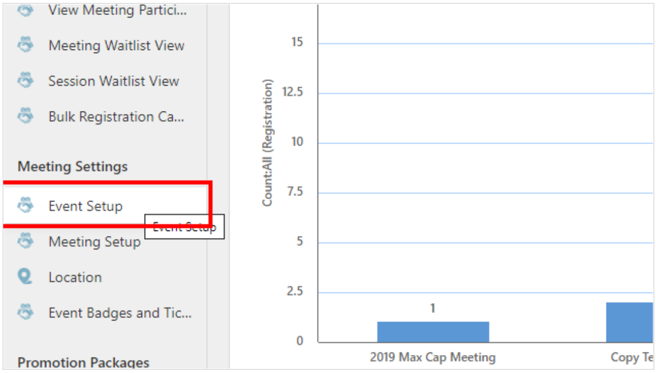
Click on the button **My Work**



Click on the item **Meetings**

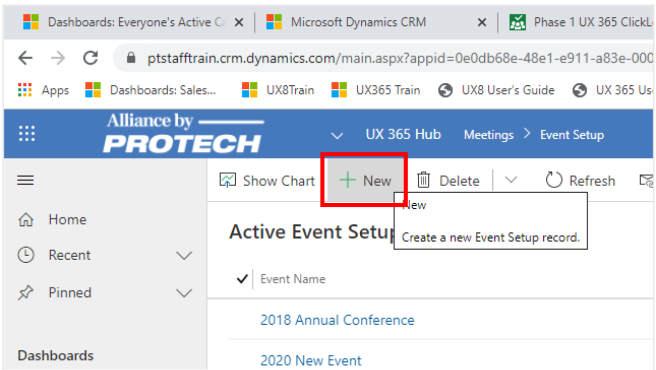


Click on the item **Event Setup**

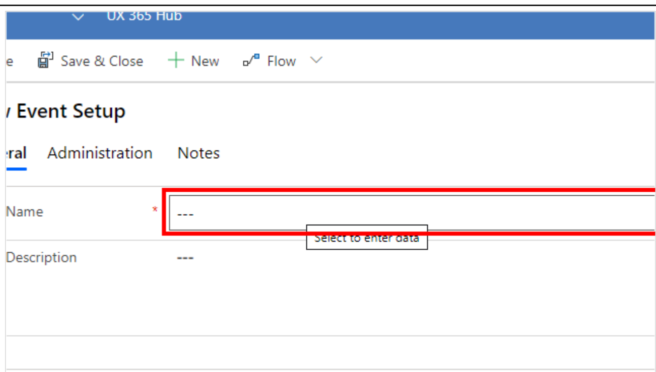


There is a one-to-one relationship between an event and its meeting, and you can create only a single meeting under an event. Therefore, to copy a meeting's details into a new meeting, you must first create the shell—that is, set up the basic information—of the new meeting by creating a new event and a new meeting.

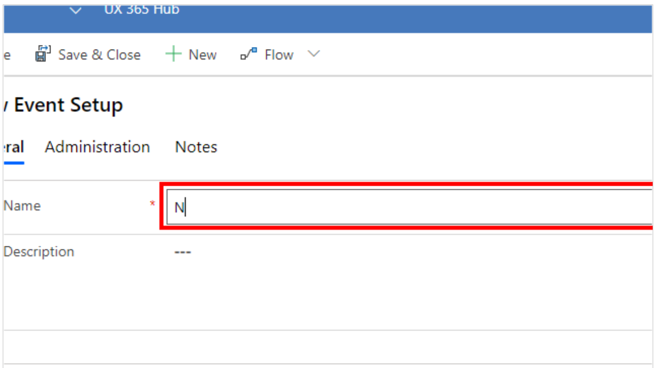
Click on the menu item **New**



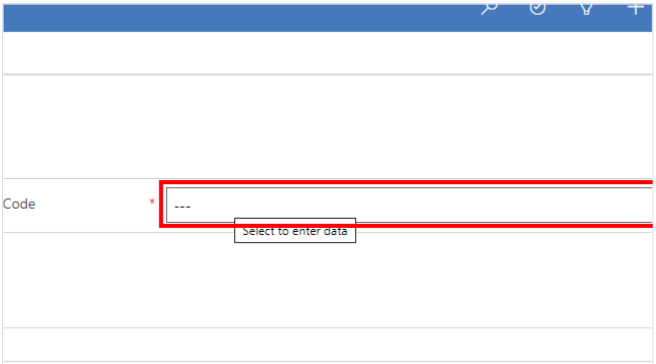
Click on the text field **Name**



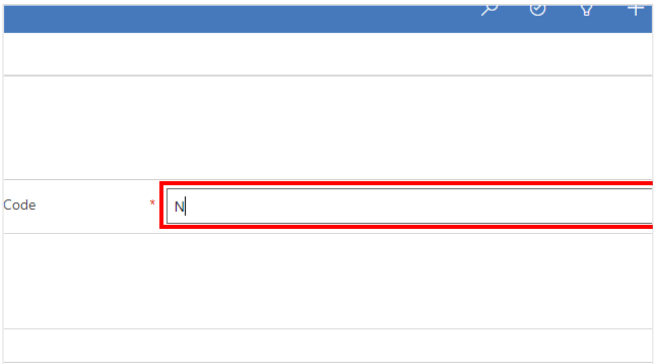
Enter **the Event Name**.



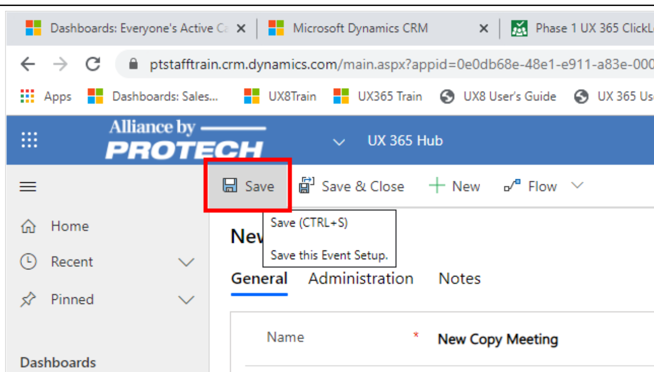
Click on the text field **Code**



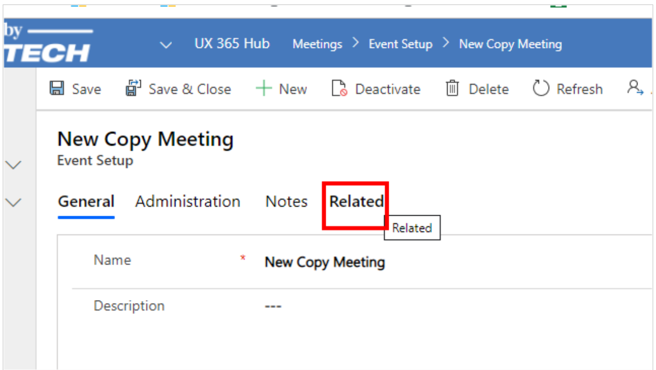
Enter **the Event Code**.



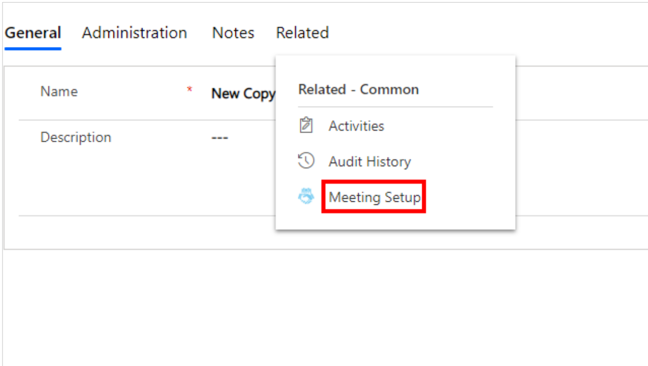
Click on the menu item **Save**



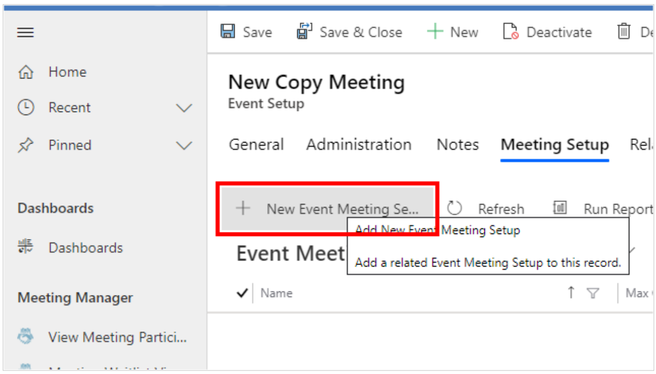
Click on the item **Related**



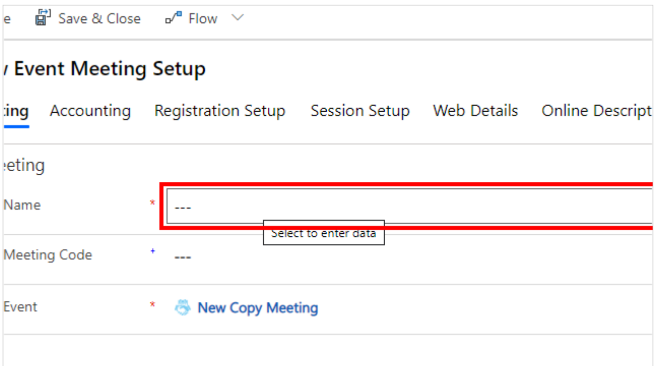
Click on the menu item **Meeting Setup**



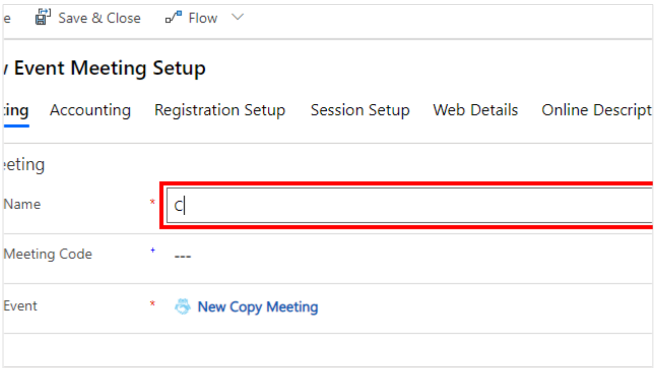
Click on the menu item **Add New Event Meeting Setup**



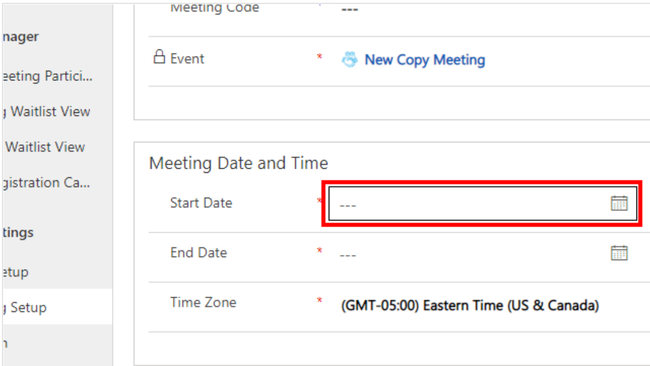
Click on the text field **Name**



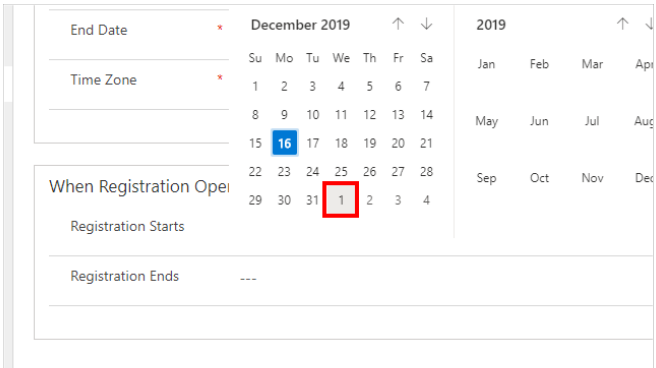
Enter **the Meeting Name**.



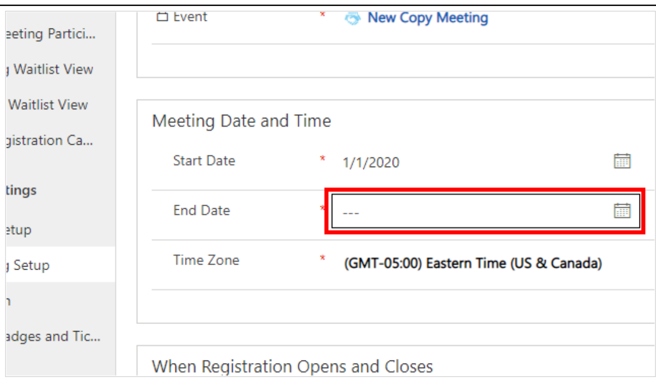
Click on the field **Start Date**



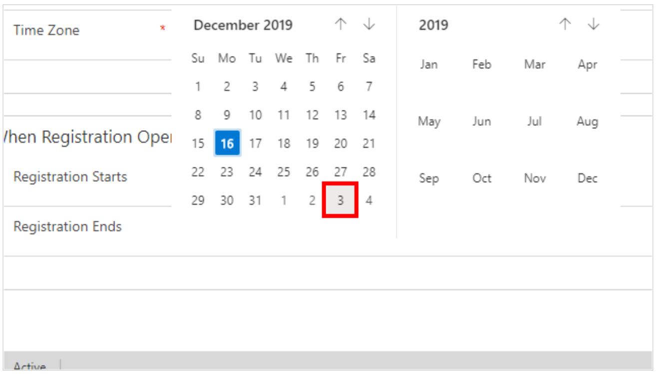
Choose your Meeting Start Date



Click on the field **End Date**

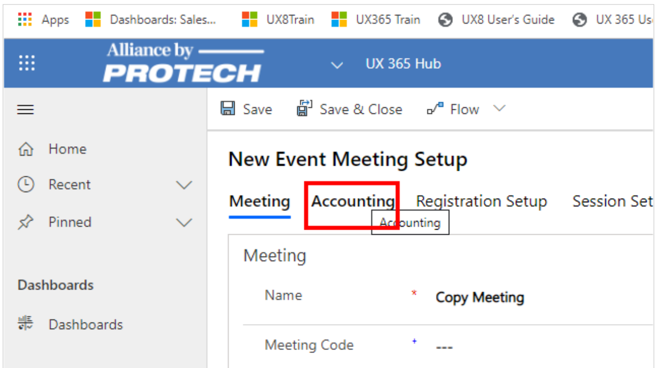


Choose your Meeting End Date

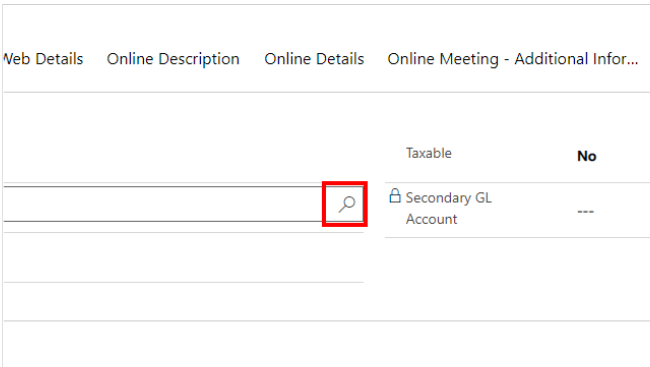


Enter the required general and accounting information for this meeting.

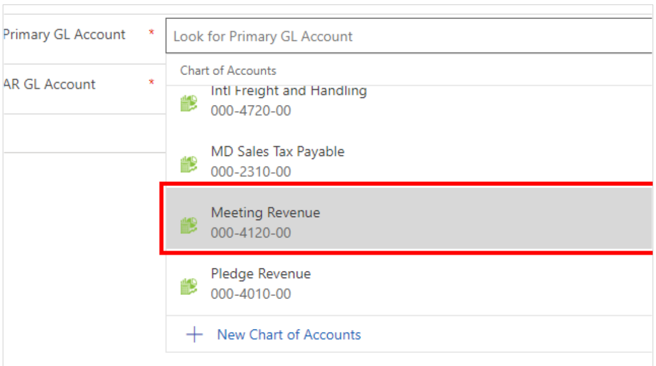
Click on the item **Accounting**



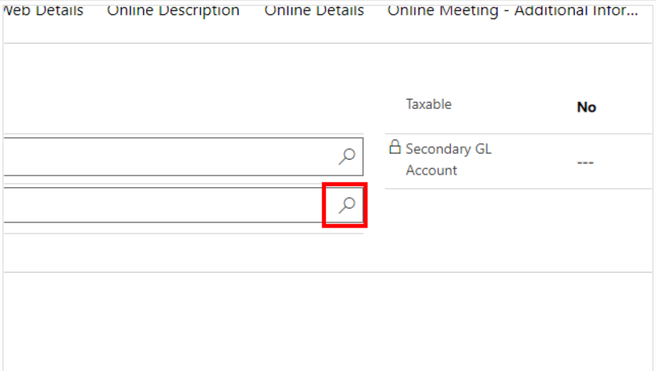
Click on the link **Primary GL Account**



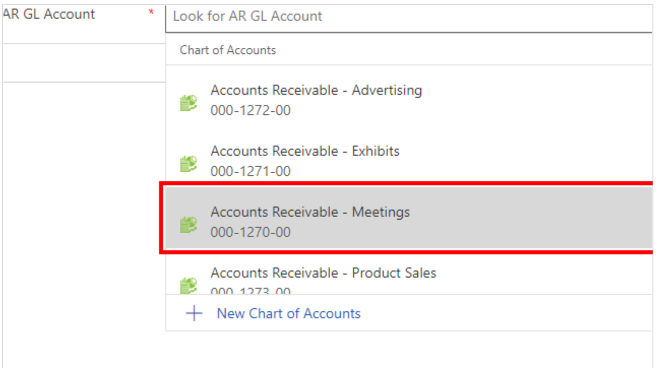
Choose your Primary GL Account



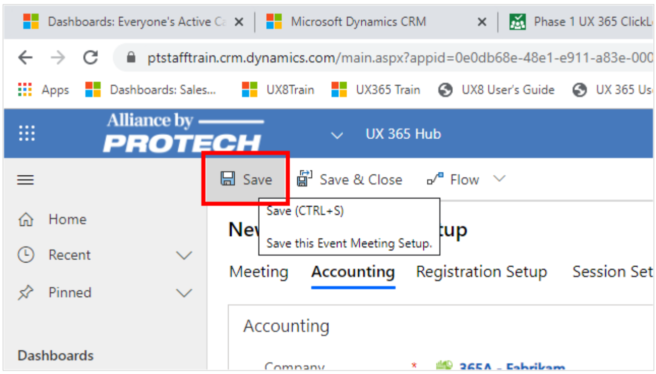
Click on the link **AR GL Account**



Choose your AR GL Account

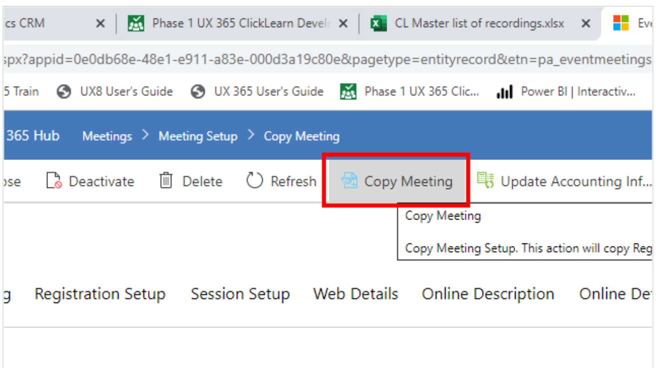


Click on the menu item **Save**

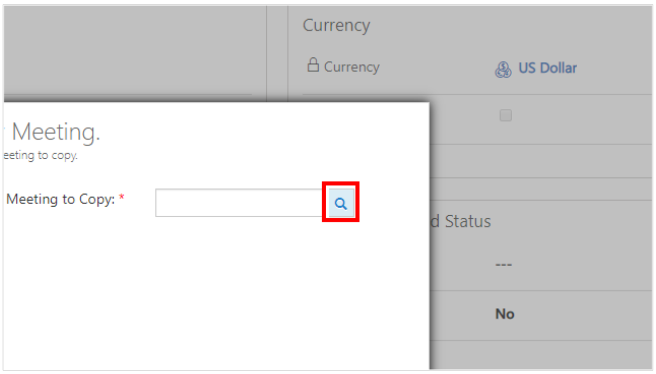


Copy Meeting includes copying the User Defined Fields setup from the source meeting to the target meeting setup. The copied registrations and sessions will inherit the accounting information you enter when you set up the new meeting.

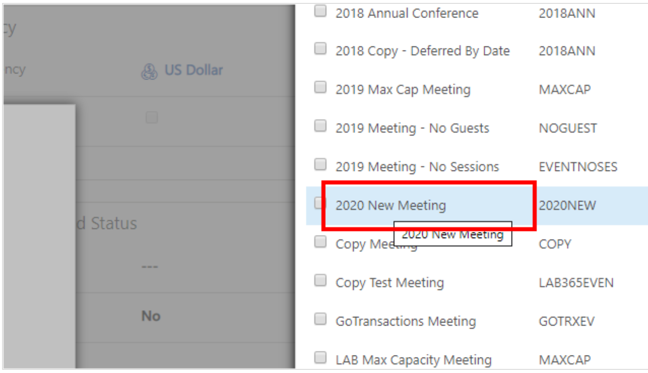
Click on the menu item **Copy Meeting**



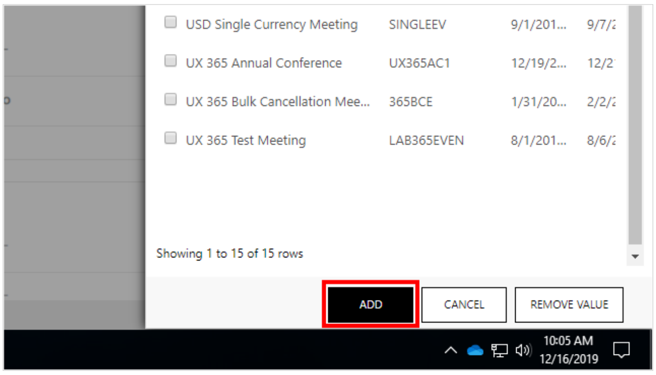
Click on **the Lookup button**



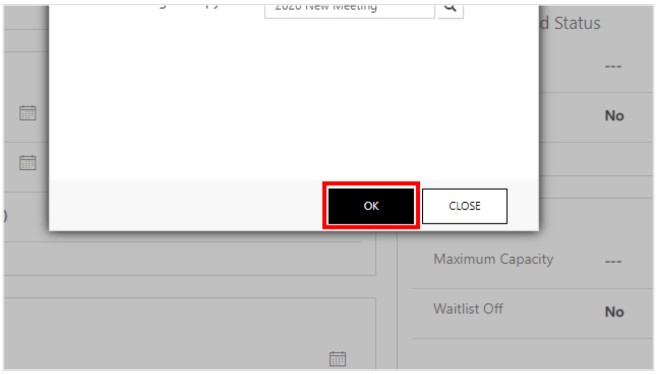
Click on **the source meeting you want to copy**



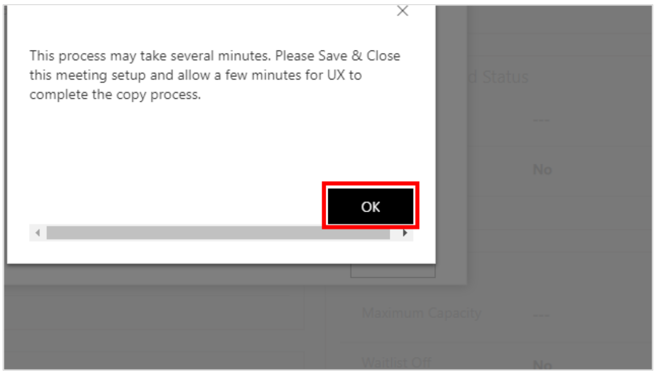
Click on the button **ADD**



Click on the button **OK**

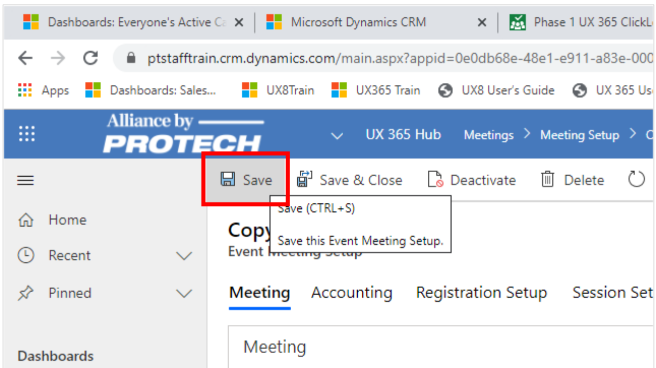


Click on the button **OK**



The copy meeting process also copies existing price records for registrations and sessions from the selected source meeting, including the price level, price (amount) and calculation method. However, it does not copy the start and end dates for these price records. This results in overlapping price records, as they will all share the same start and end date range. You must review these price records and update them as necessary for the new meeting, with a particular emphasis of eliminating price records for the same price level with overlapping or duplicate date ranges. Multiple price records that share the same price level must have distinct and consecutive date ranges.

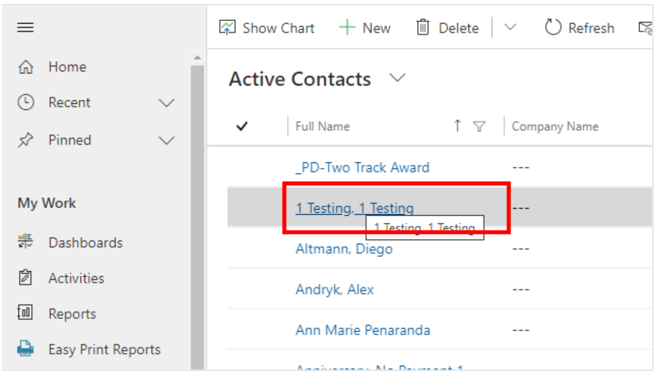
Click on the menu item **Save**



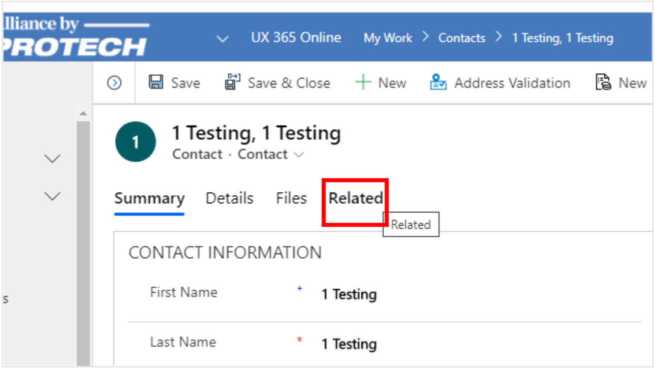
5.8. Creating a Speaker Profile

Click on the item **Contacts**

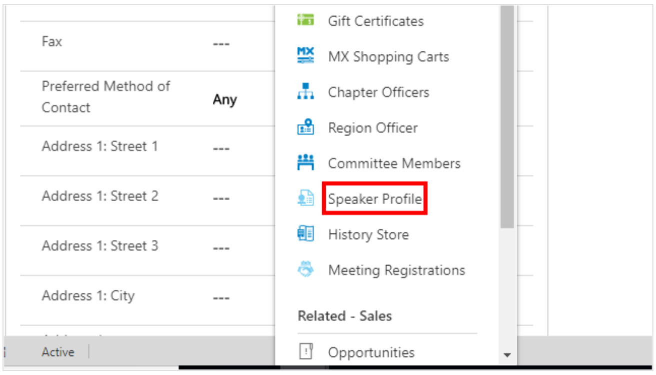
Select the contact you are creating a speaker profile for.



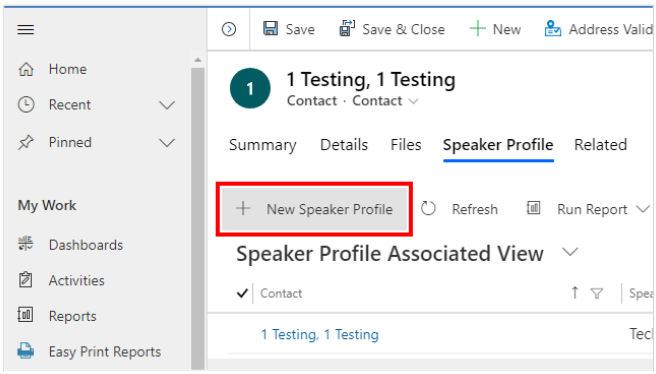
Click on the item **Related**



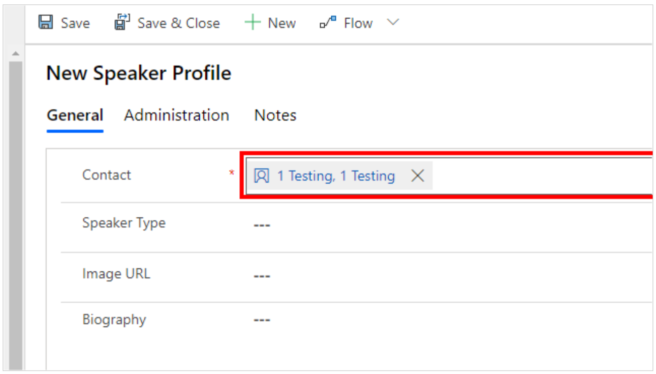
Click on the menu item **Speaker Profile**



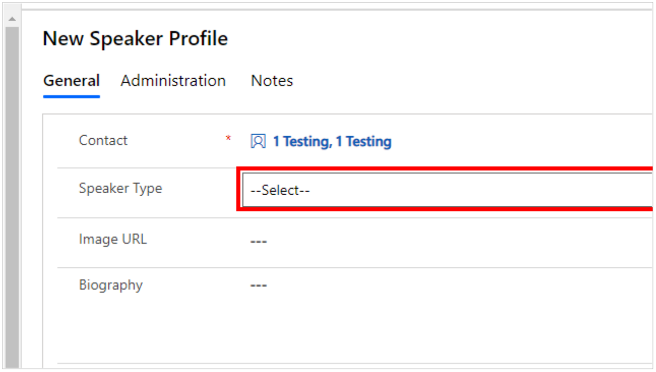
Click on the menu item **Add New Speaker Profile**



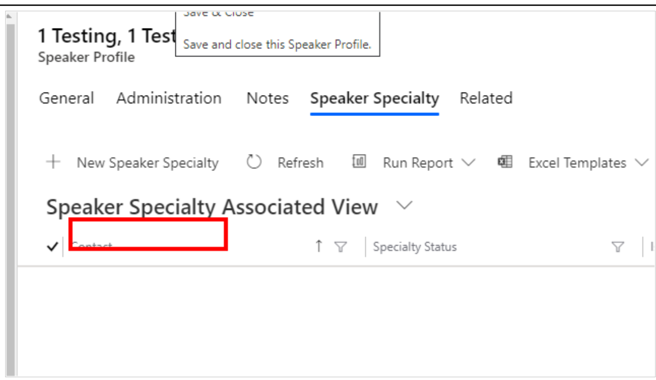
The Contact field shows the contact you are creating the speaker profile for.



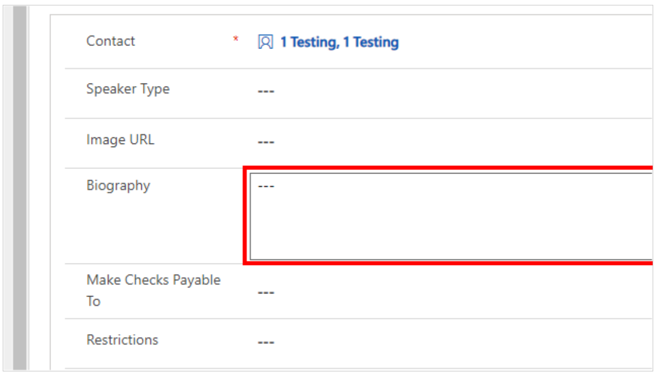
Select a speaker type if needed. There are no default options for this field.
If options for this field are required by your organization, contact your Protech representative or your System Administrator for customizing the PA_SpeakerProfile.pa_speakertype field in your organization's custom solution.



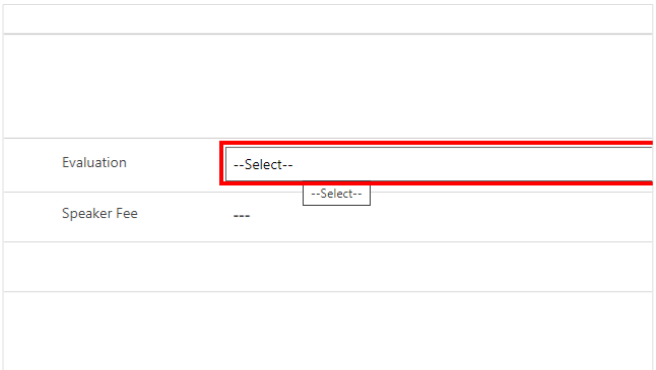
For Image URL, enter a link to the speaker's picture, if desired.



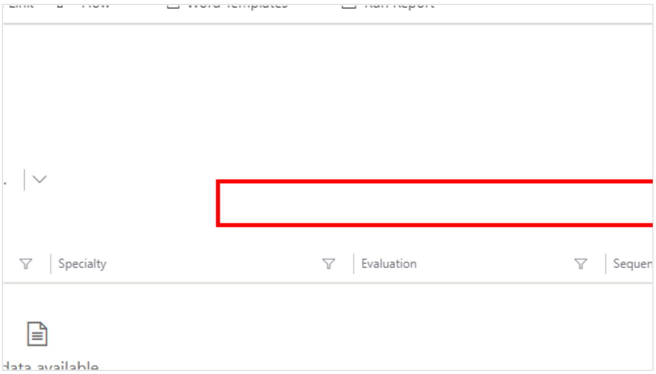
Biography - Enter biographical information for this speaker. This information can be used in catalogues.



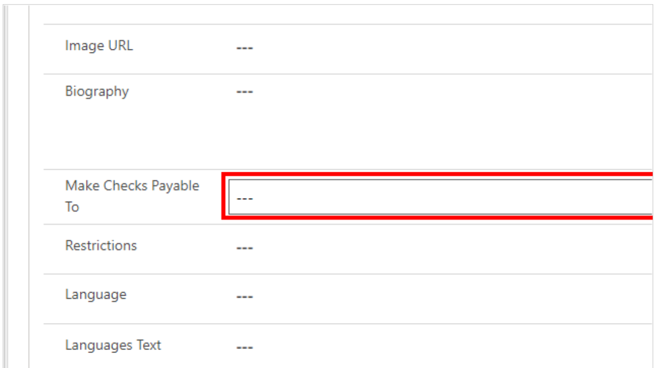
Select an evaluation from the drop down if needed. There are no default options for this field.
If options for this field are required by your organization, contact your Protech representative or your System Administrator for customizing this field in your organization's custom solution so that users can select an evaluation rating from the list, if desired.



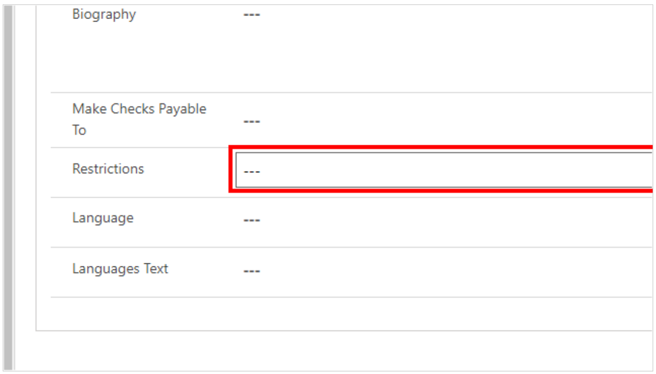
Speaker Fee – Enter the speaker's standard fee, if desired.



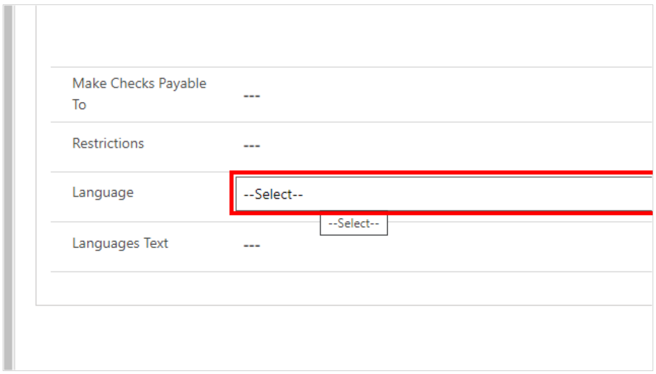
Make Checks Payable To – Change if necessary to provide a name of the payee for checks.



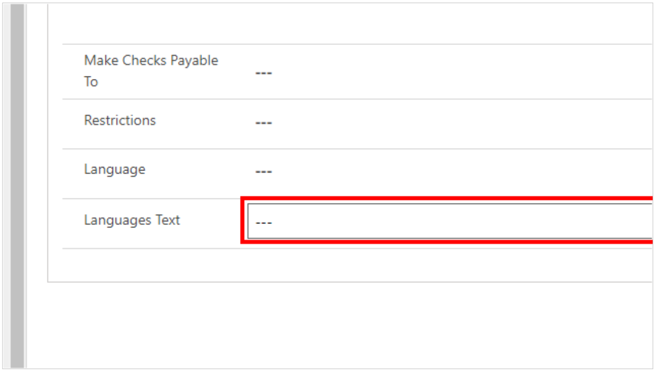
Restrictions – Enter any of this speaker's limitations on engagements.



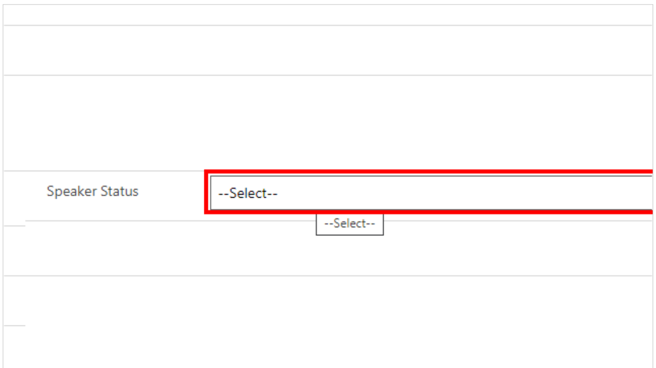
Language – If your organization presents sessions in multiple languages, contact your Protech representative or your System Administrator for customizing this field.



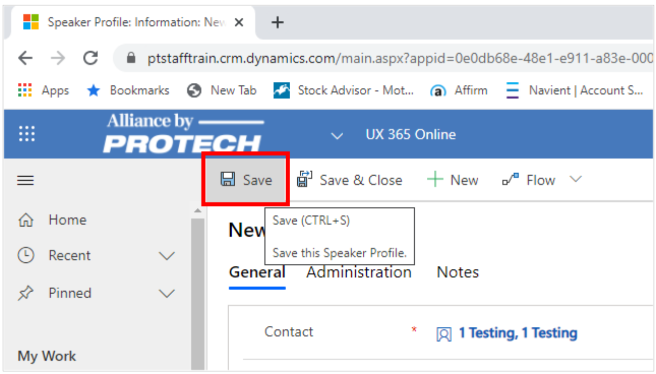
Languages Text – Displays your selections from the Language list.



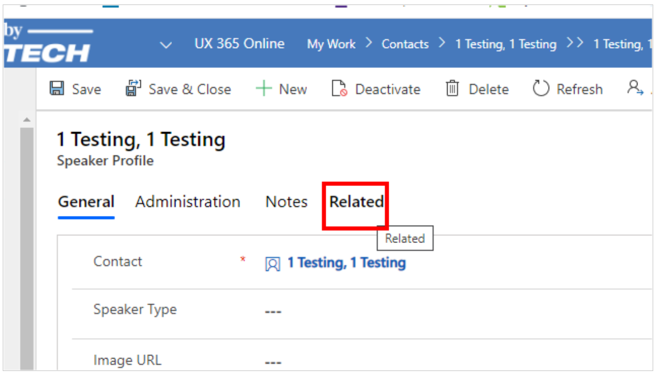
Speaker Status – Select the status from the list. There are no default values. You can create new values in the speaker profile entity.



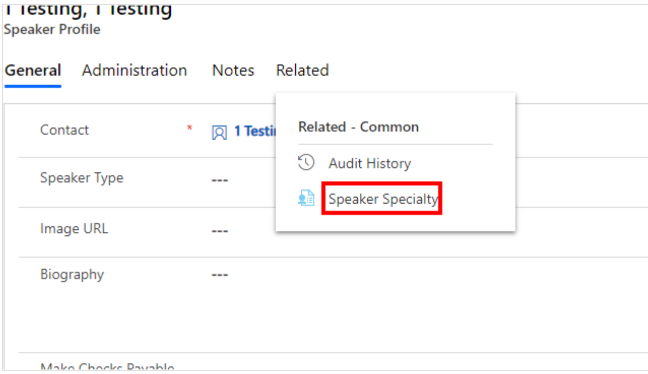
Click on the menu item Save



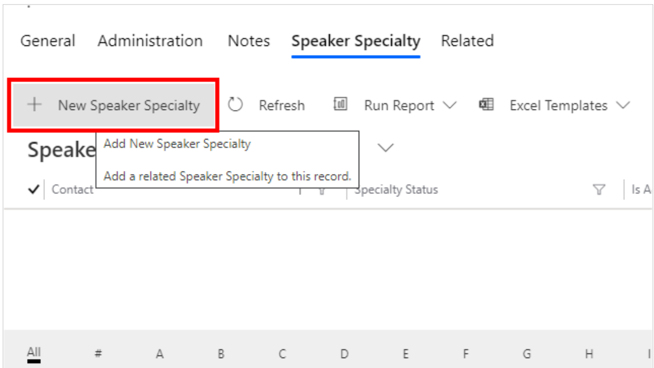
Click on the item **Related**



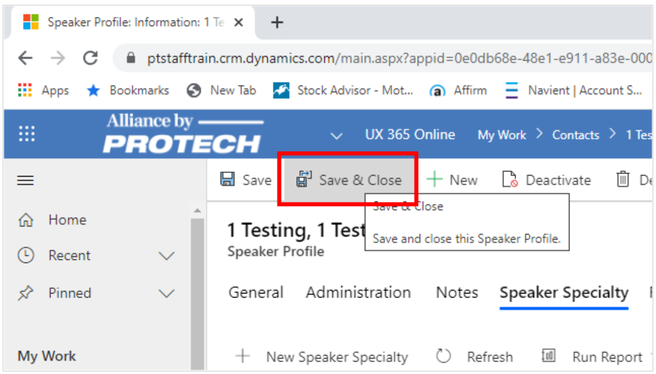
Click on the menu item **Speaker Specialty**



Displays speaker specialty records to this speaker profile. If no records have been created yet, you can begin that process here. For more information, see Adding specialty information to a speaker profile.



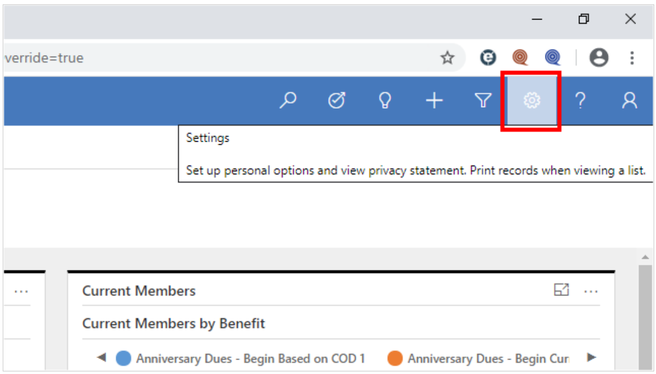
Click on the menu item Save and Close



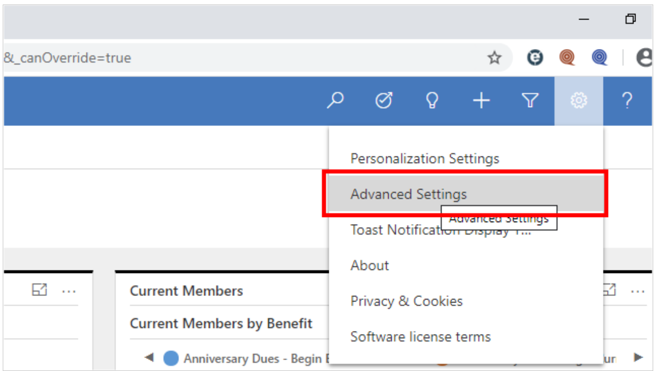
5.9. Creating Location Types

5.9.1. Creating Location Types

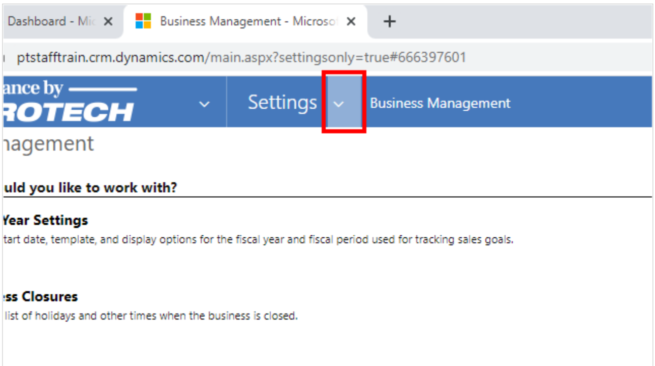
Click on the menu item **Settings**



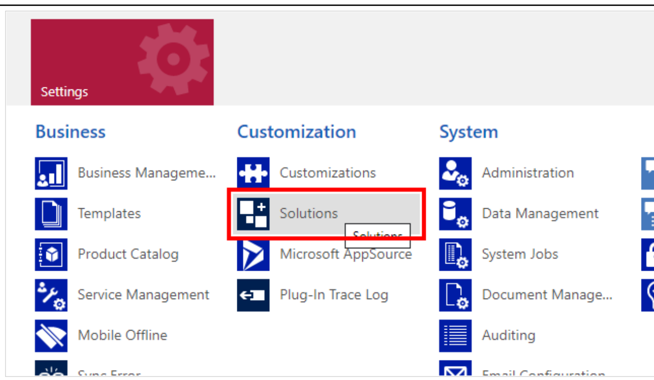
Click on the menu item **Advanced Settings**



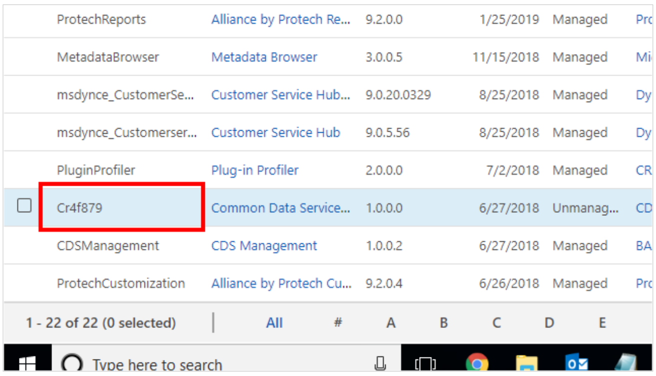
Click on the navigation button **Settings**



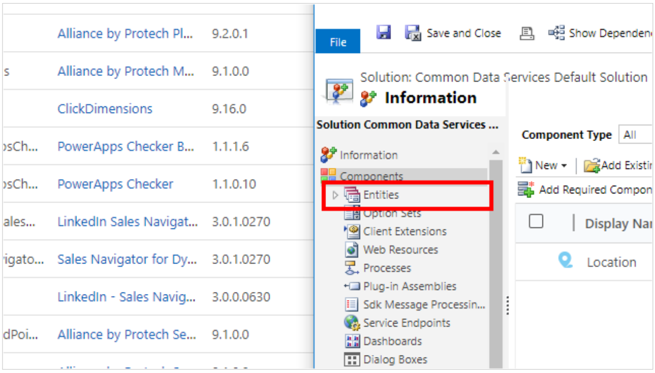
Click on the link **Solutions**



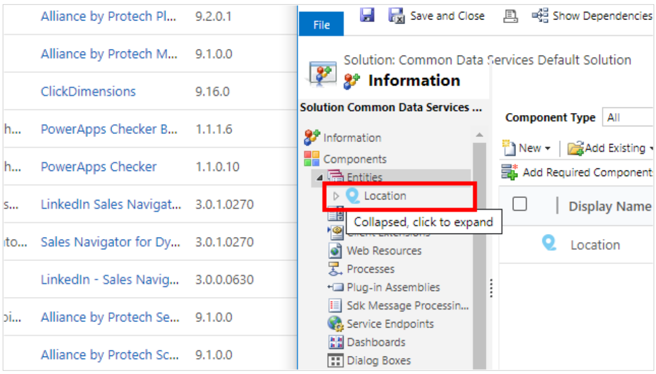
Select your organization's custom solution



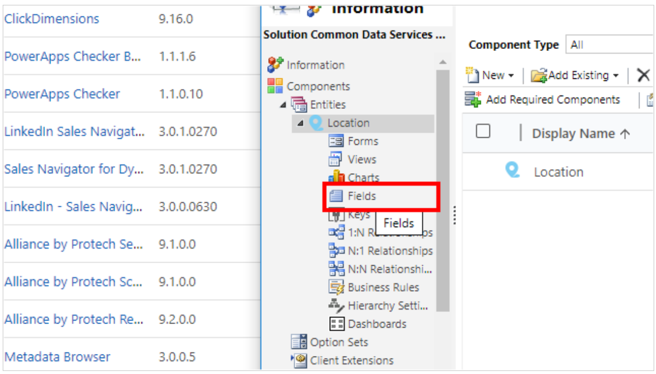
Click the expand caret next to Entities



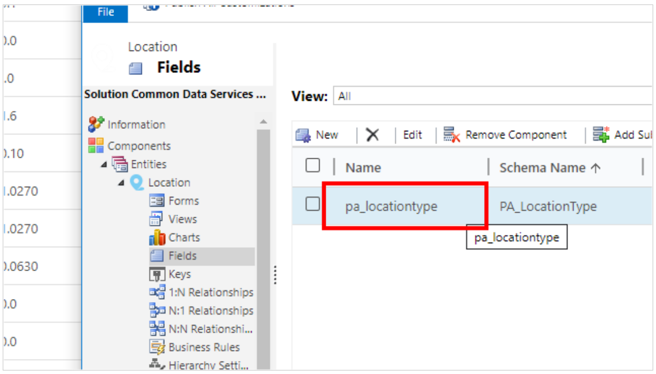
Click the expand caret next to the Location entity to display entity assets



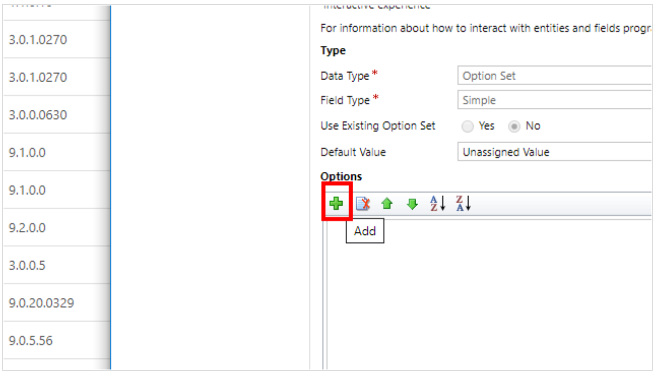
Select Fields to display a list of entity fields.



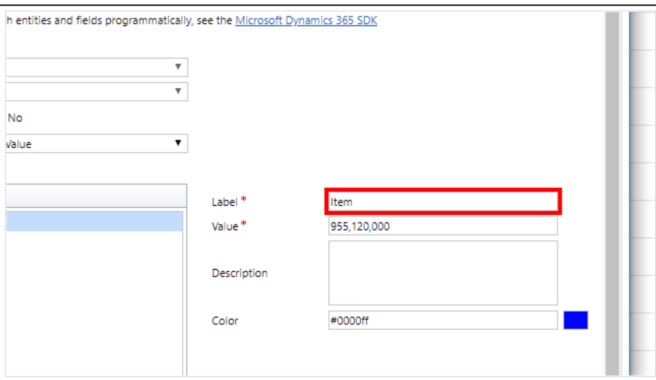
Locate and double-click to open the pa_locationtype field.



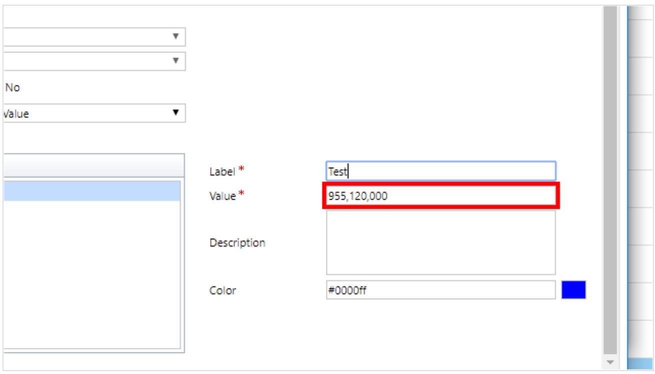
In the Options area at the bottom of the Field: Location Type window, you will see a list of existing items (location types). Click Add to create a new item



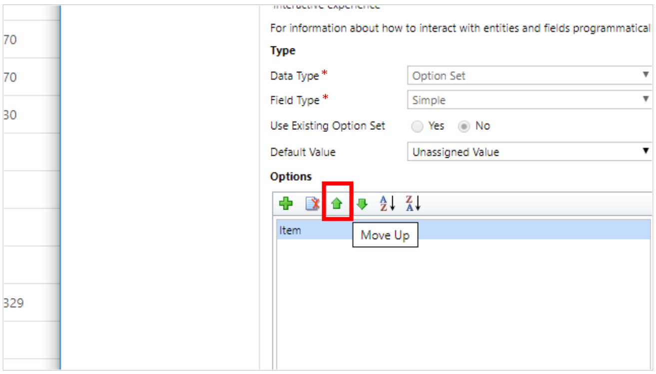
On the right side of the Options area, the system defaults the Label name of the new item to "Item" and assigned an option value. Override the default label with the name of the new location type you wish to add.



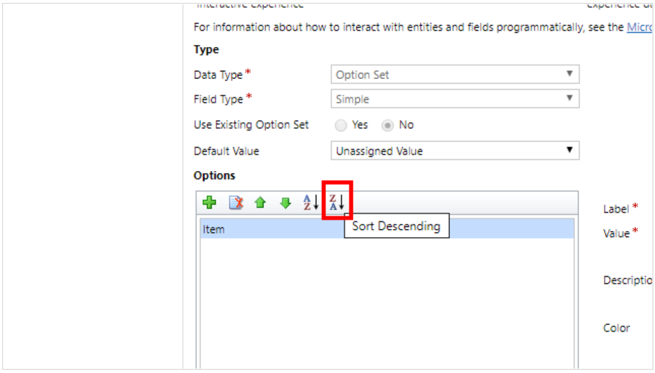
Override the option value with a unique value greater than 1000 so that custom options are readily recognizable. They will be preserved during the upgrade process.



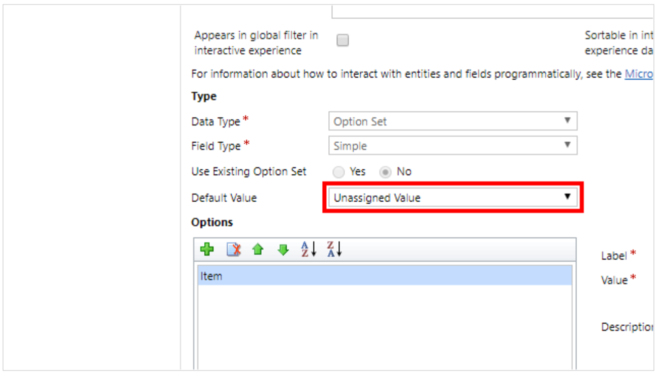
Use the Move Up and Move Down buttons located along the right side of this window to re-order the location types you created.



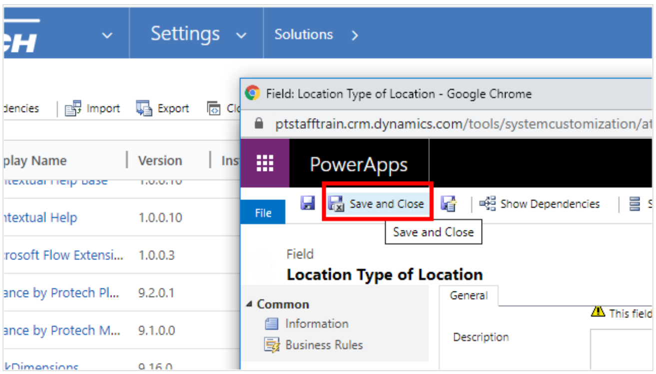
You also can use the Sort Ascending button to sort the location types in ascending alphanumeric order or select the Sort Descending button to sort in descending alphanumeric order. The location types will appear in this order in the Location Type list on the location record.



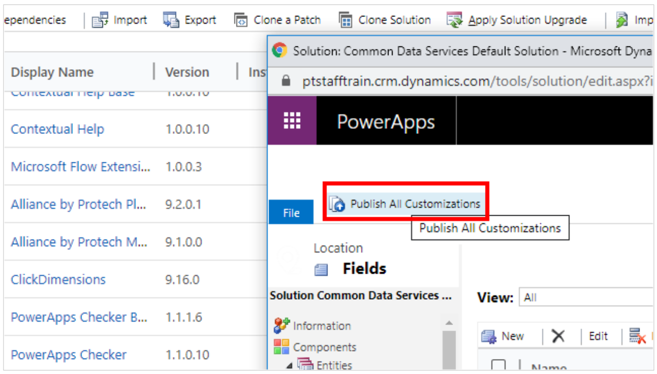
To define a default location type to be used when creating a new location, select the location type in the Default Value field.



Click on the link **Save and Close**



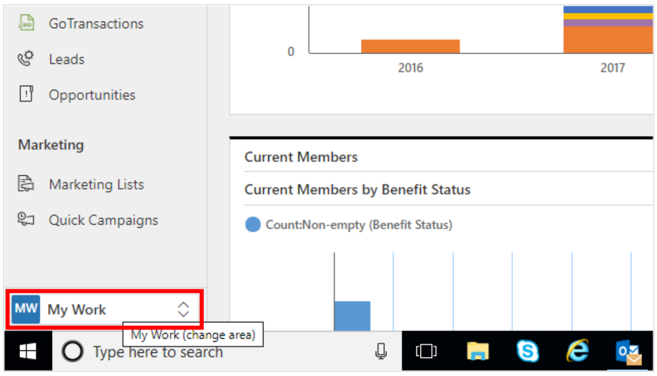
Select Publish All Customizations on the toolbar. This will update the database to include the new location types.



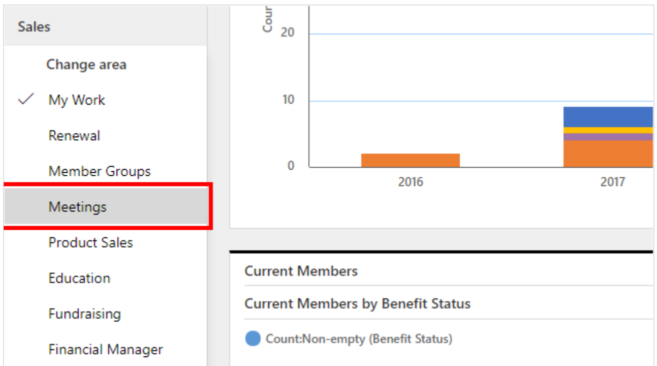
5.10. Creating Locations

You can create location records for the places your organization holds events and meetings, such as hotels or convention centers. Location records are required if you need to calculate tax on meeting registrations as the tax is based on the meeting location address.

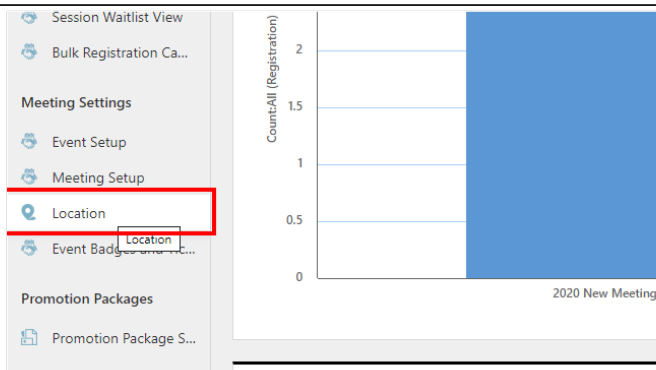
Click on the button **My Work (change area)**



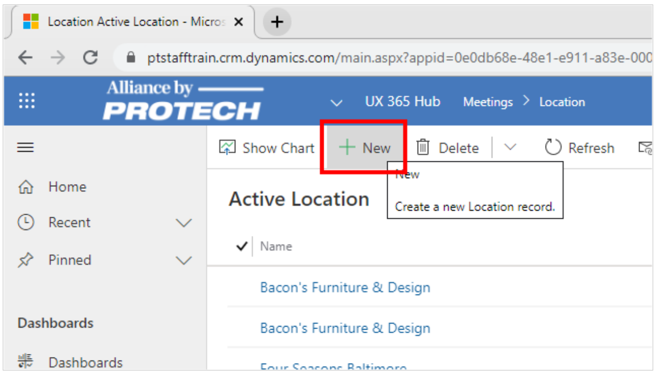
Click on the item **Meetings**



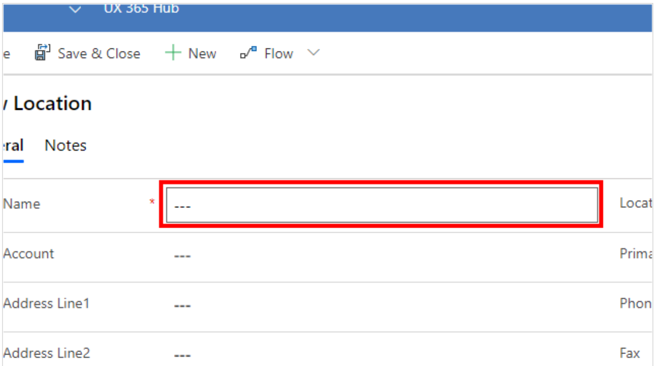
Click on the item **Location**



Click on the menu item **New**

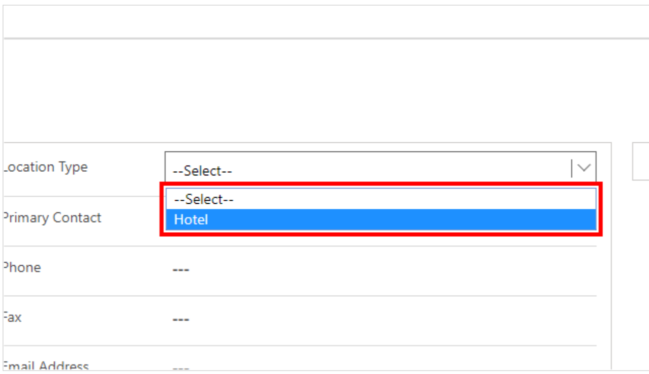


Enter the location name

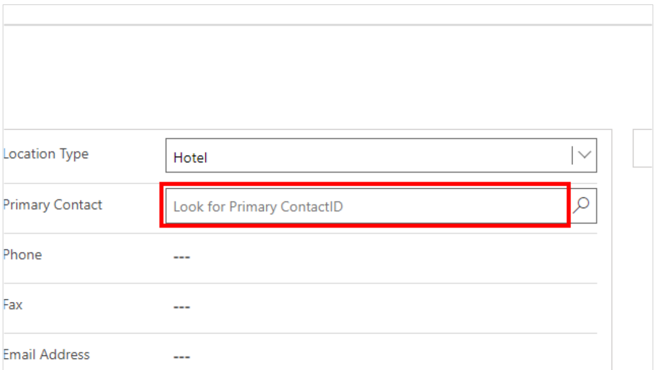


Click on the field **Location Type**

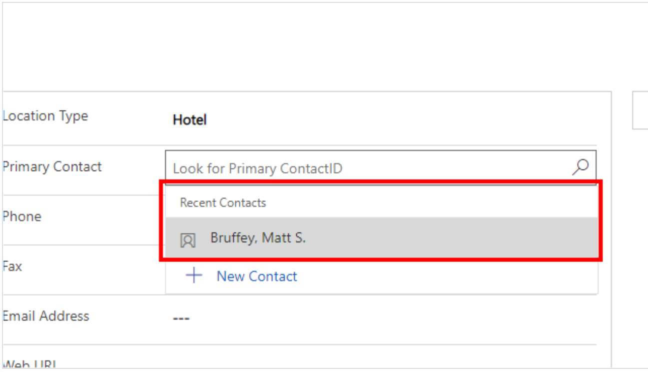
Click on an option from the list



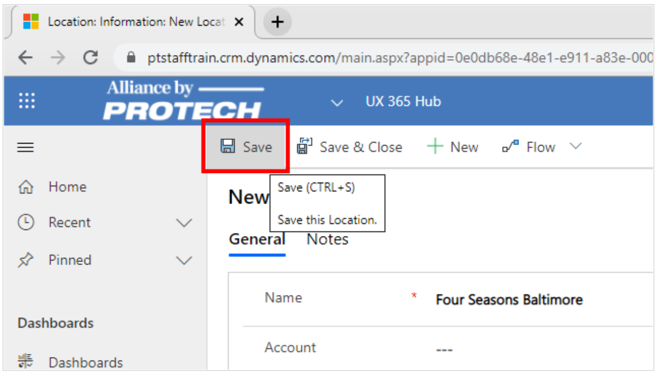
If there is a contact at the location, enter the primary contact here



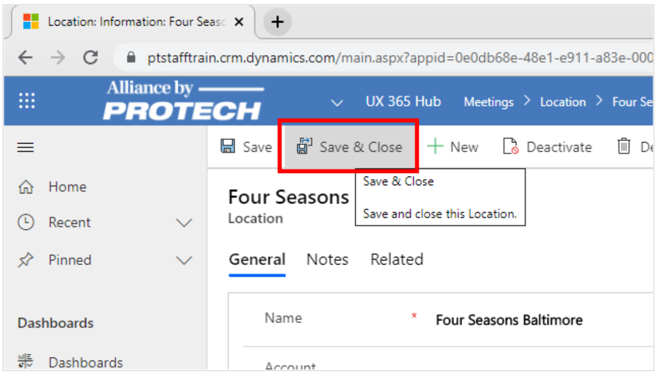
Click on an option from the list



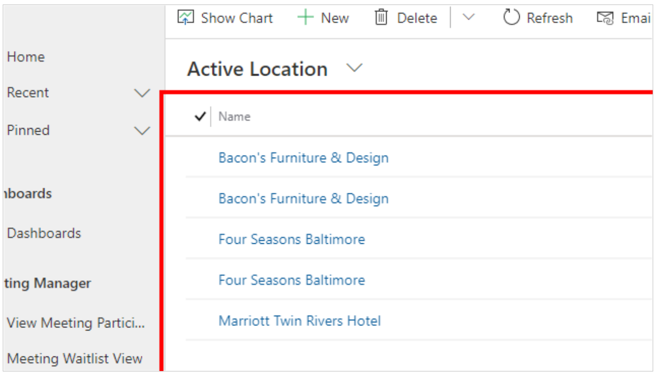
Click on the menu item Save



Return to the list of active locations by clicking save and close



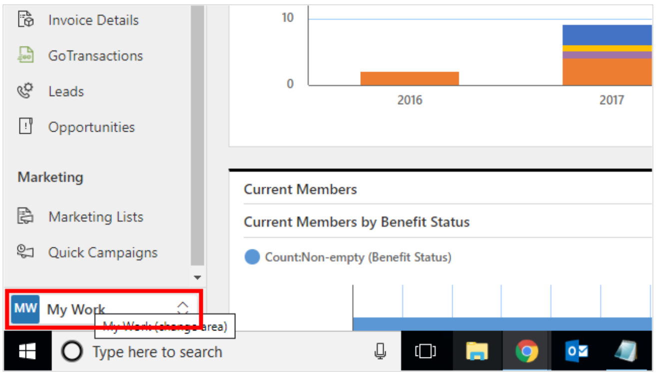
You have completed your location setup. All other active locations are listed here



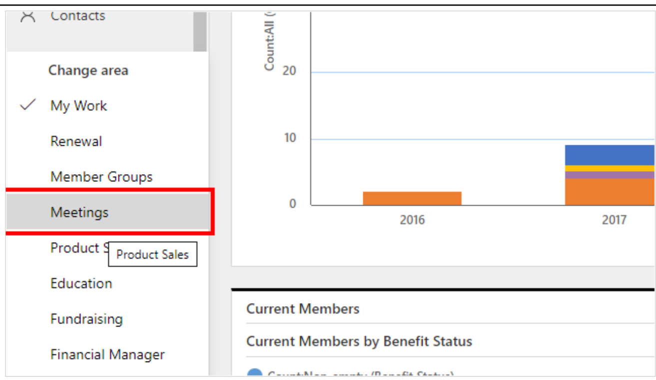
5.11. Event Meeting Waitlist View

As registrants are added to an event meeting waitlist, registrants appear on the Event Meeting Waitlist View in ascending order by registration time and date. Once meeting space becomes available, you can select registrants from this view to remove them from the waitlist and complete their meeting registration. See Registering an individual who is on the event meeting waitlist for more information.

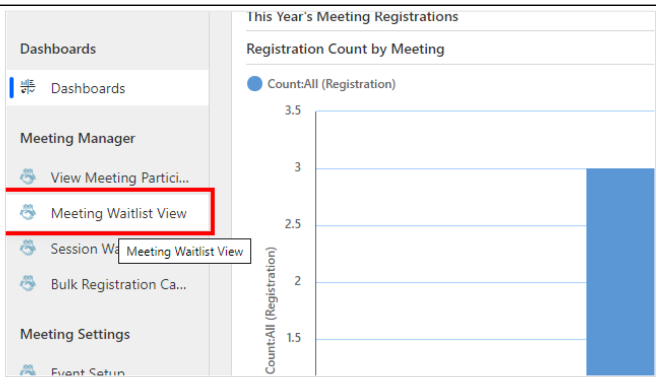
Click on the button **My Work (change area)**



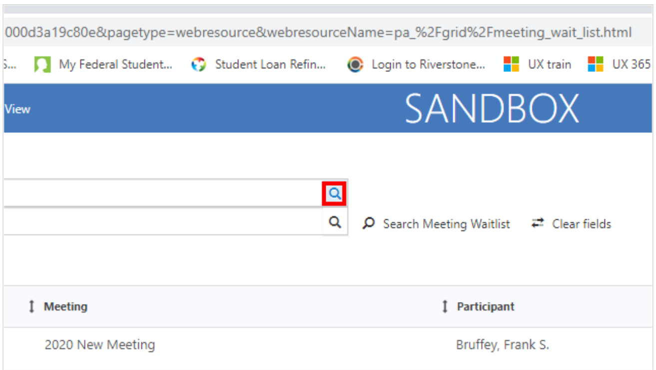
Click on the item **Meetings**



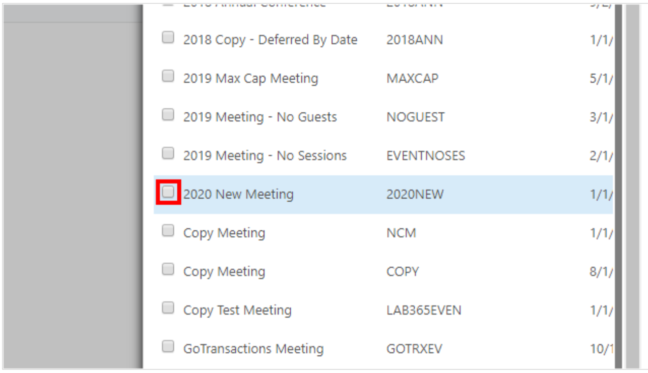
Click on the item **Meeting Waitlist View**



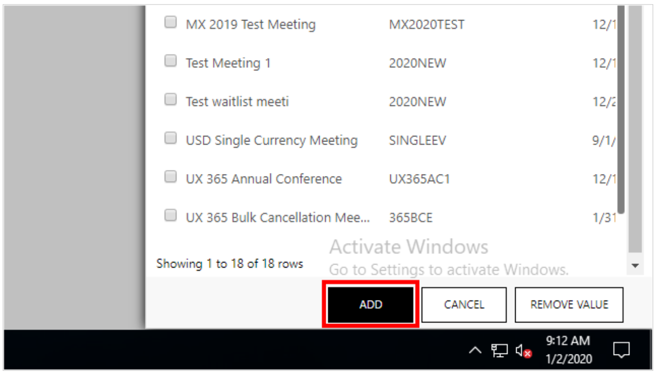
Use the lookup function to select the meeting you are searching for.



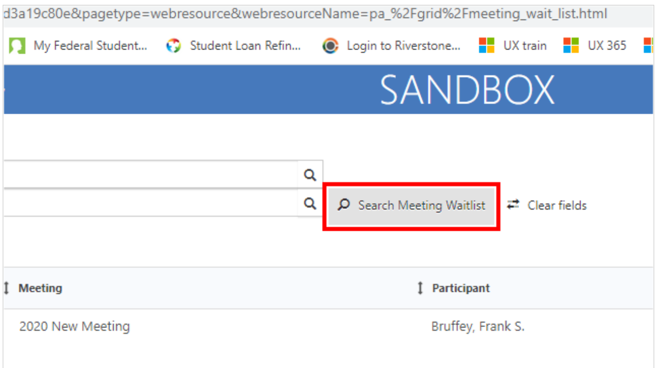
Select the meeting.



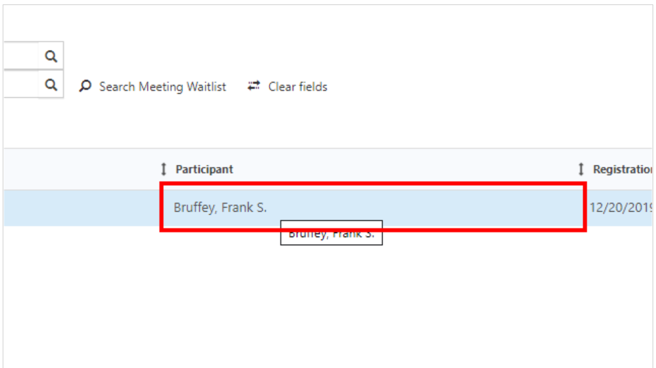
Click on the button **ADD**



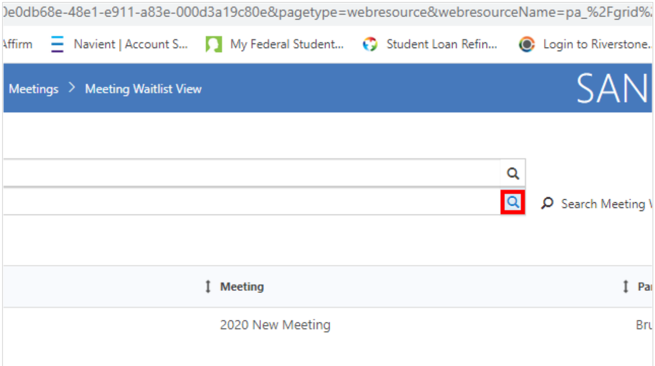
Click on **Search Meeting Waitlist**



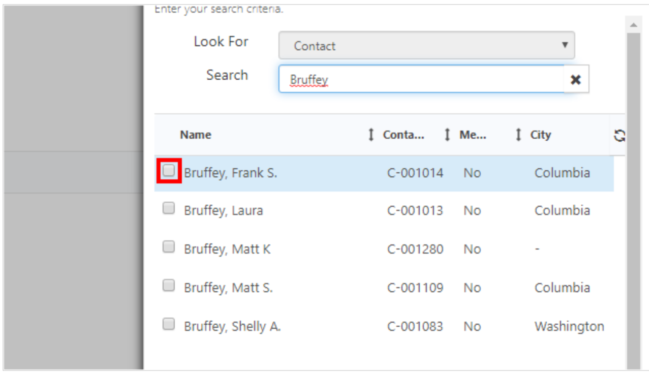
Here a list of waitlist participants will be shown.



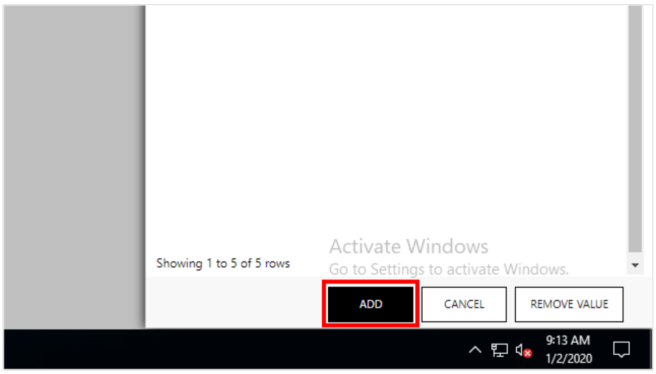
You can also search by participants to find all of the meetings they are waitlisted for.



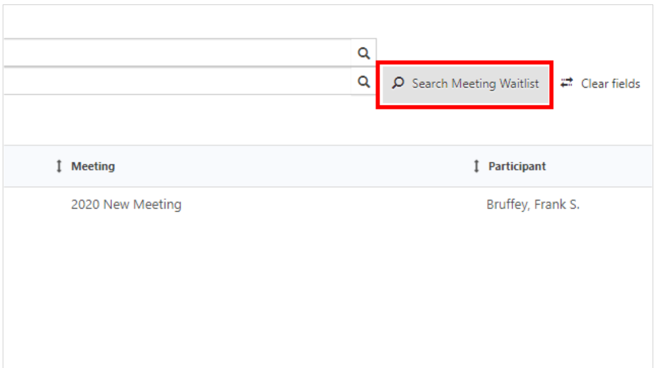
Select the participant.



Click on the button **ADD**

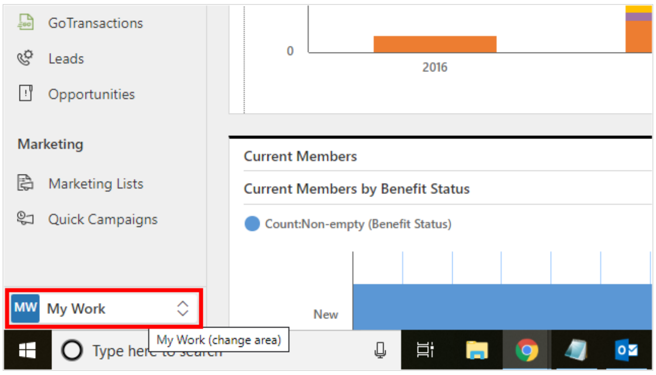


A list of all the meetings this person is waitlisted for will be shown.

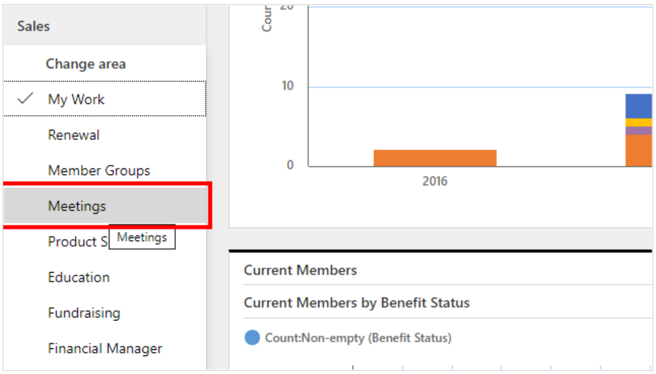


5.12. Registering an Individual on the Meeting Waitlist

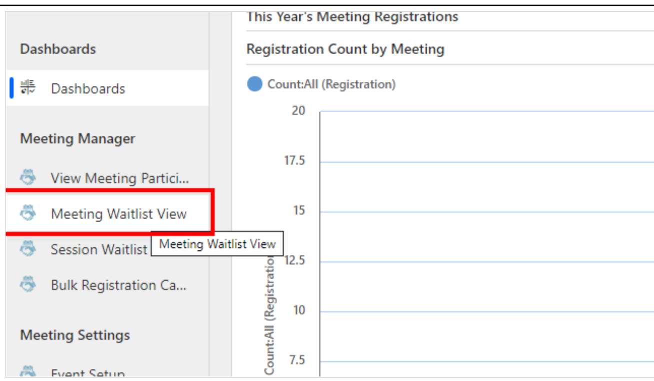
To navigate to the event meeting waitlist view, first click on the buttom 'my work'



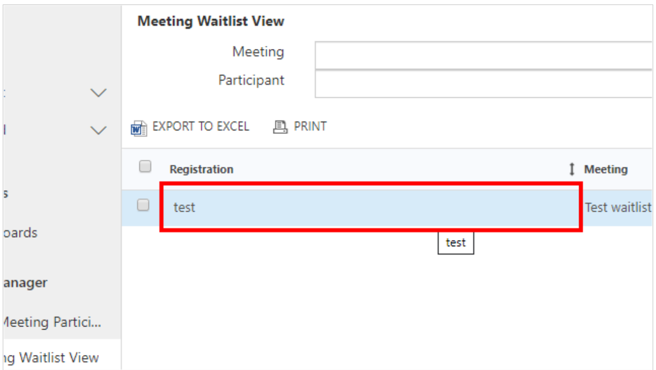
Click on the item **Meetings**



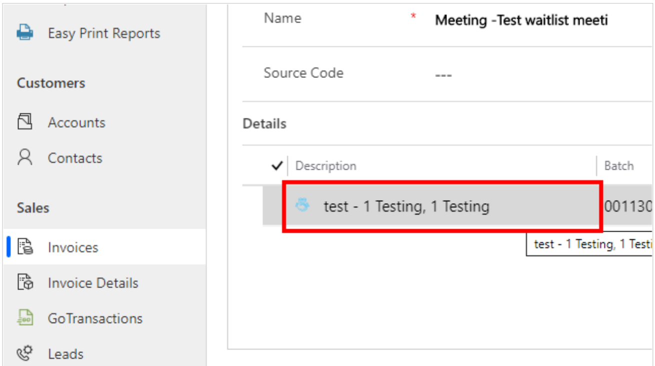
Click on the item **Meeting Waitlist View**



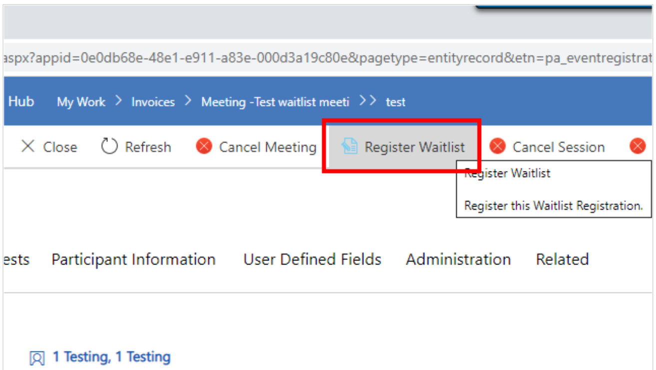
Locate and double click into the waitlisted registrant line item to open up the meeting registration invoice.



double click on the invoice line item for the meeting registration

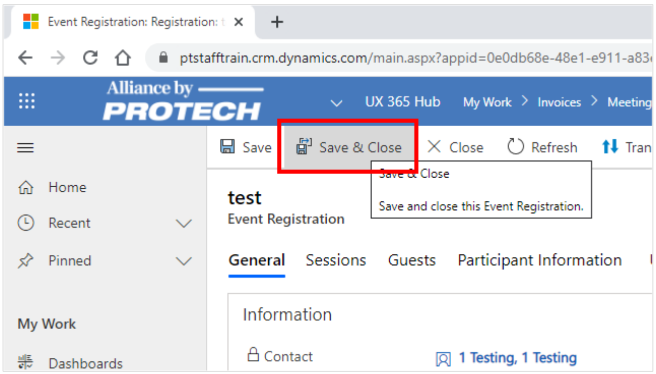


Click on the menu item 'Register Waitlist'

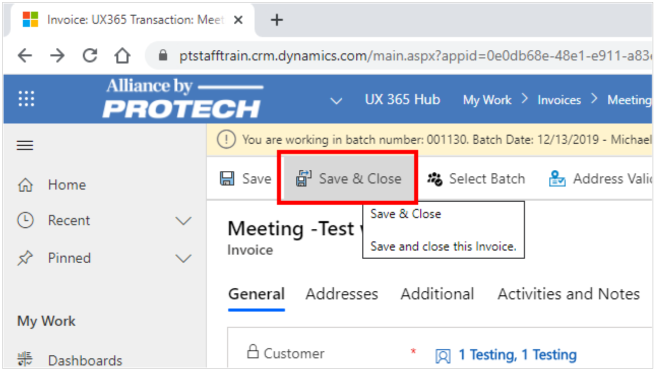


Click on the button **OK**

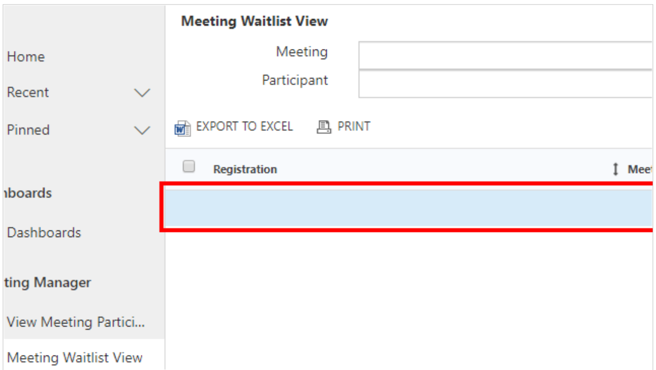
Click on the menu item **Save & Close**



Click on the menu item **Save & Close**

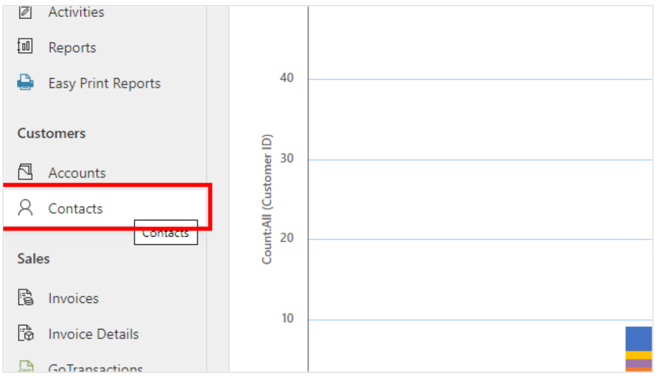


You can see that the contact was taken off the waitlist view because it was registered for the meeting.

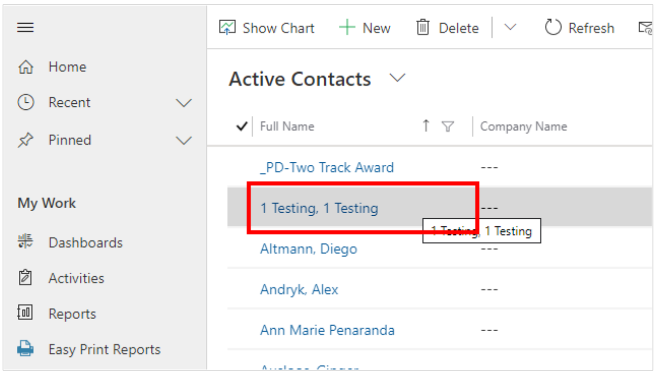


5.13. Registering Individuals for Meetings

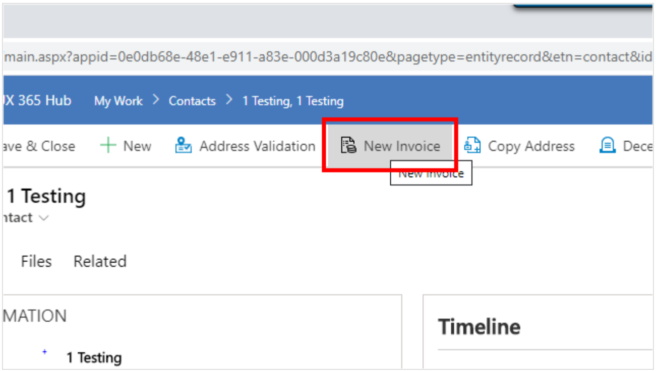
From any of the UX work areas on the Navigation Tile Bar, click Contacts



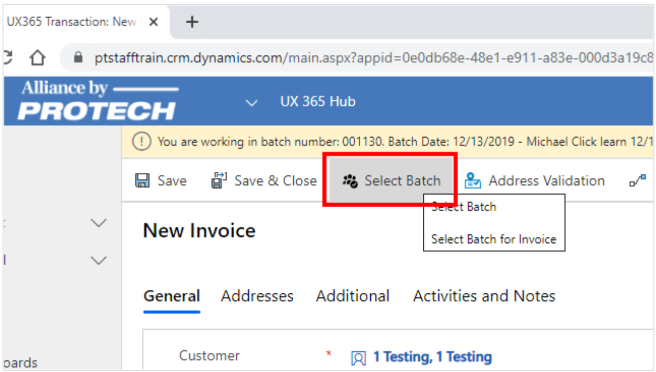
Locate and click into the contact you would like to register for a meeting.



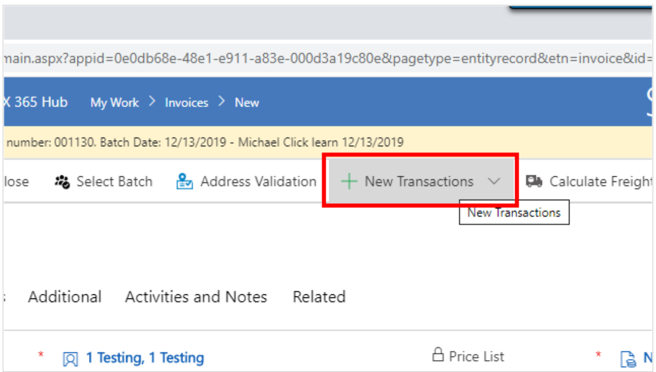
Once in the contact, click the button 'New Invoice' on the toolbar at the top.



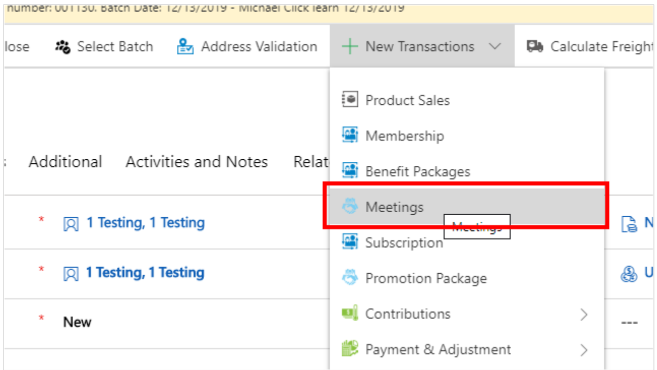
If you are not working in a batch already, be sure to select one.



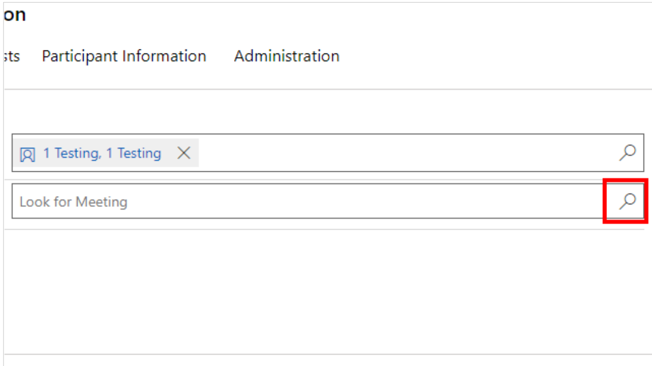
Click on the button "New Transactions"



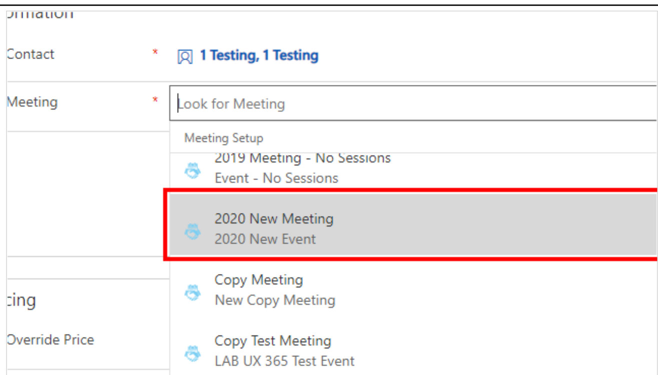
When a dropdown menu appears, click 'Meetings'



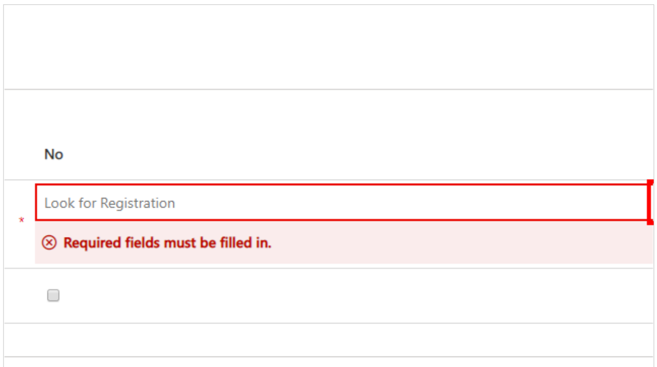
Click on the lookup icon next to 'Meeting' to lookup and select the meeting you would like to register the contact for.



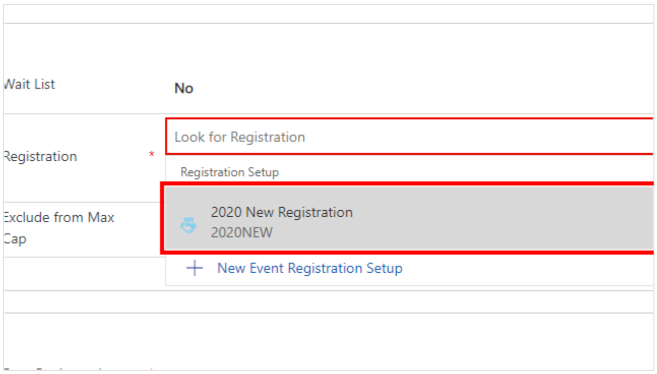
Select the meeting.



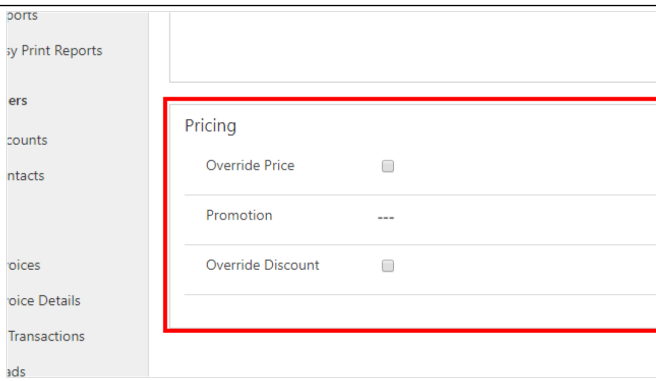
Once you have selected the meeting, click on the lookup icon to the right of 'Registration' to lookup and select the desired registration



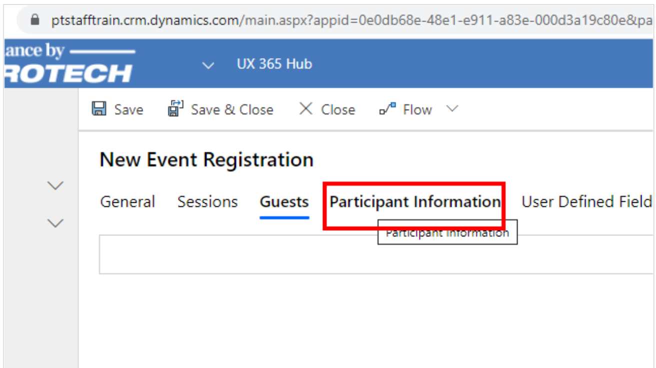
Select the registration



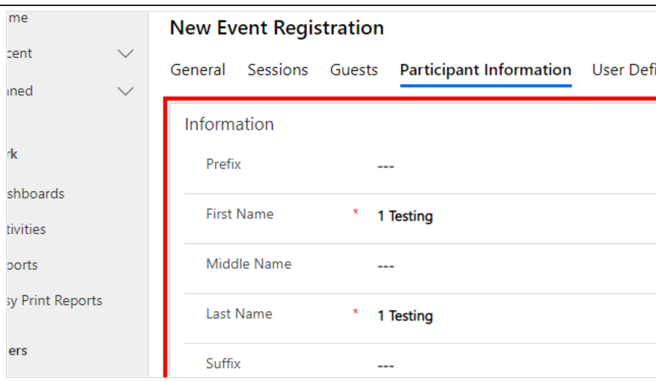
If you would like to Override the Price or Discount, this is where to do so. You can also add a promotion.



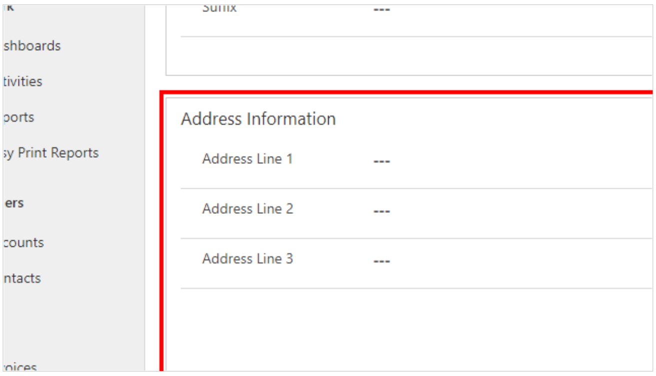
To add more information about the contact, click 'Participant Information'



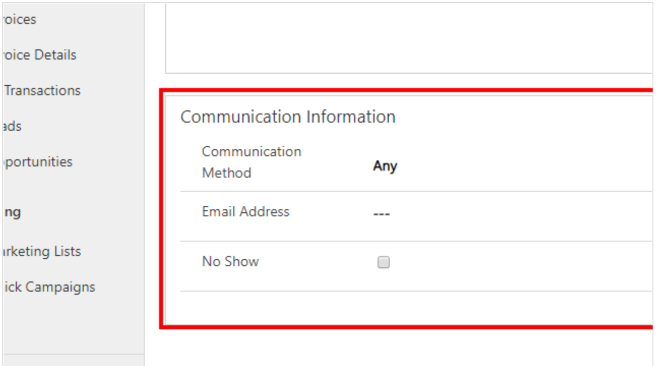
The information section is where you can add more info such as Company Represented.



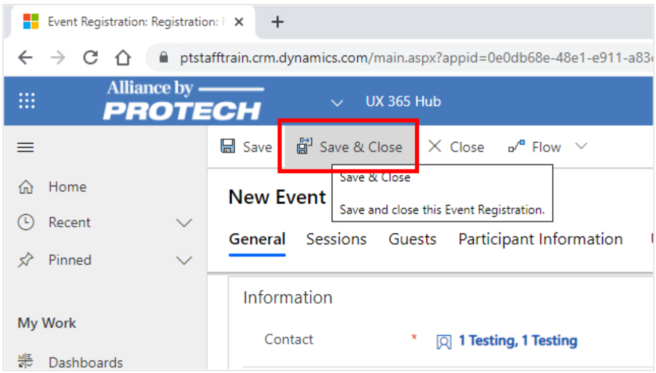
Address information is where you can add more info such as City, State, and Postal code.



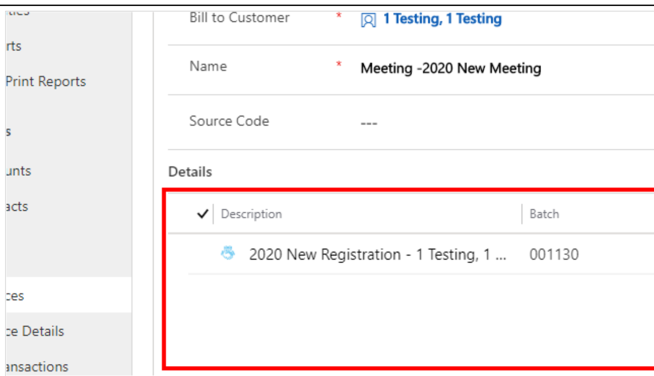
Communication Information is where you can add an email address, phone number, website, etc.



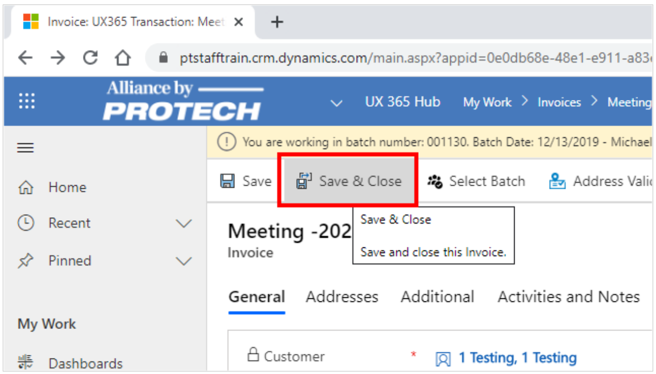
Click Save or Save & Close to save the new event registration



When saved, a line item for the meeting will automatically populate in the invoice. If the registration costs money, the registration will be completed when the invoice is paid.



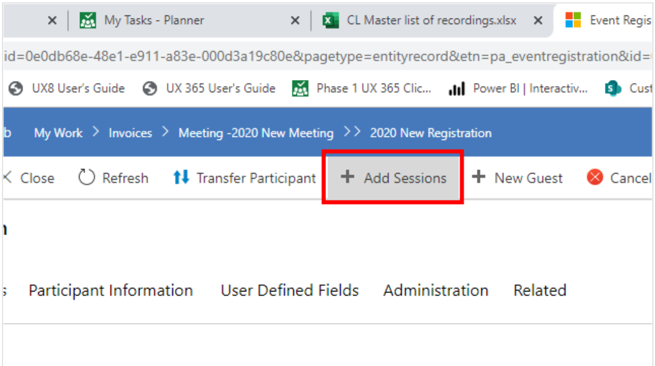
Now you can apply payment and Click Save or Save & Close to finish the process of registering an individual for a meeting.



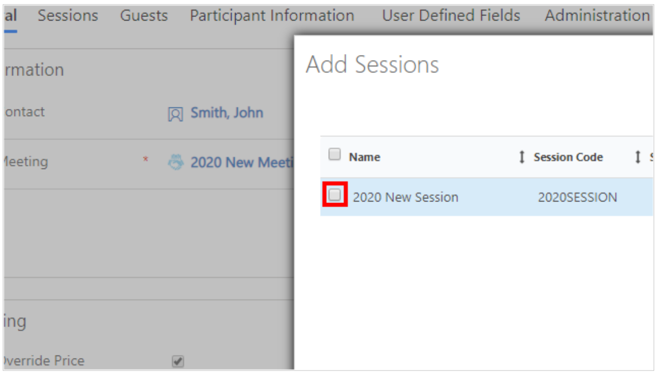
5.14. Registering Individuals for Sessions

First, create the basic meeting registration record, then you will be able to register the individual for sessions.

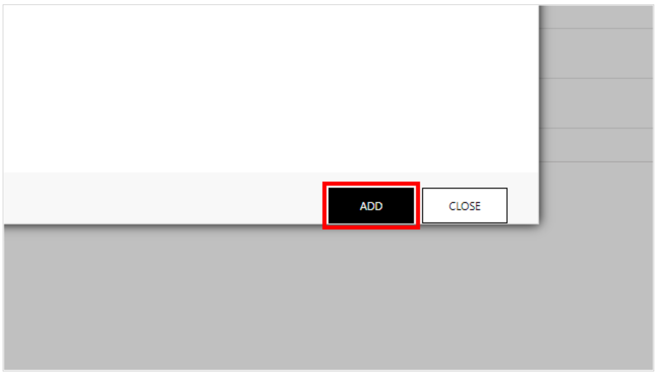
Click on the menu item **Add Sessions for Registration**



Select the session records you wish to add for this participant.

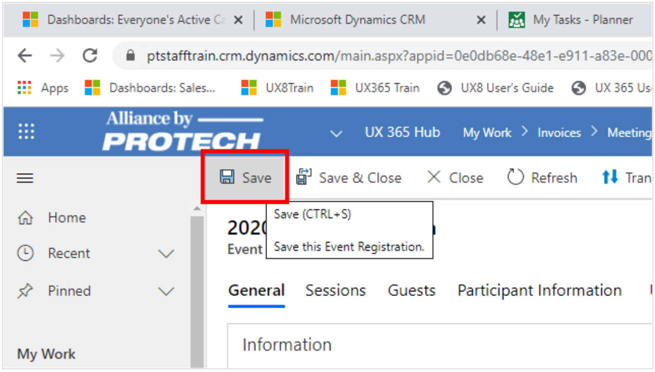


Click on the button **ADD**



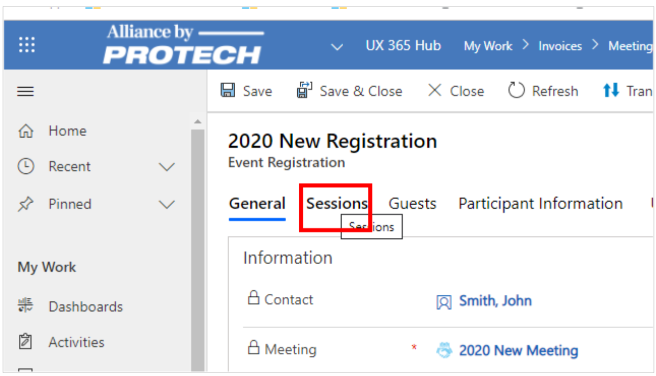
Click on the button **CLOSE**

Click on the menu item **Save**

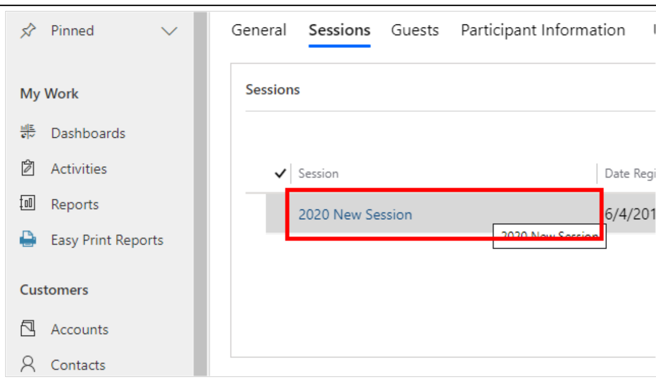


After saving the registration record, you can view detailed information about a session, by double-clicking it in the sub-grid list of sessions. The session registration record will open.

The sessions will be available in the registration Sessions sub-grid or in the Navigation Pane option for Sessions.

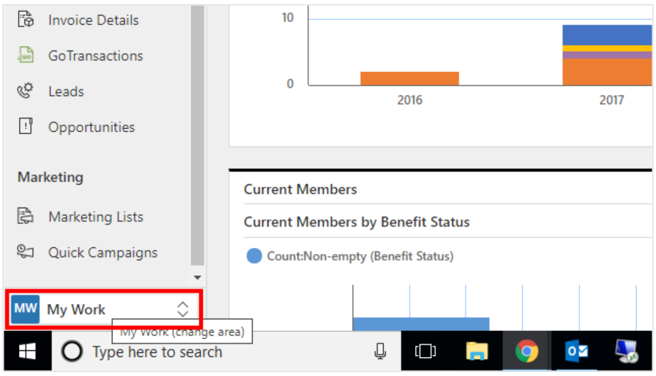


In this menu, you can view and edit this participant's sessions

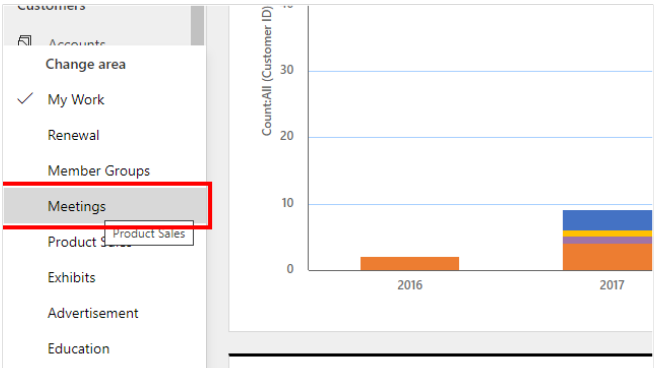


5.15. Setting up a Facility for Meetings

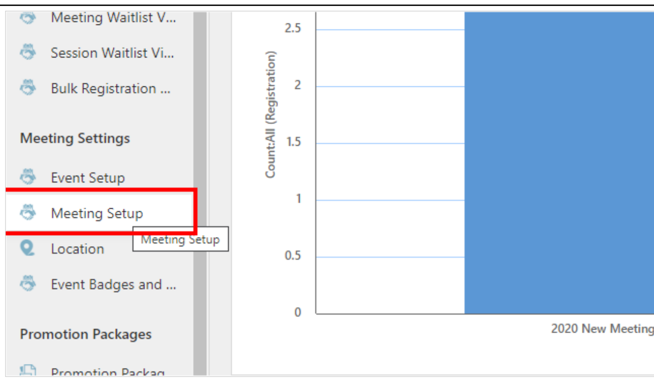
Click on the button My Work



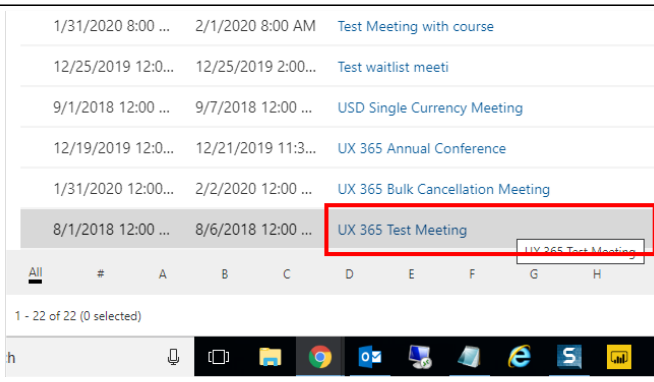
Click on the item **Meetings**



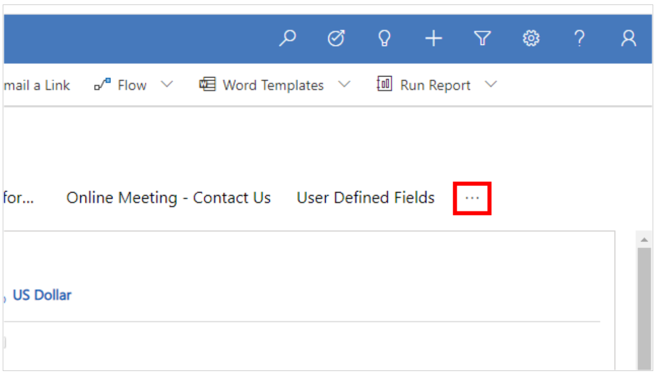
Click on the item **Meeting Setup**



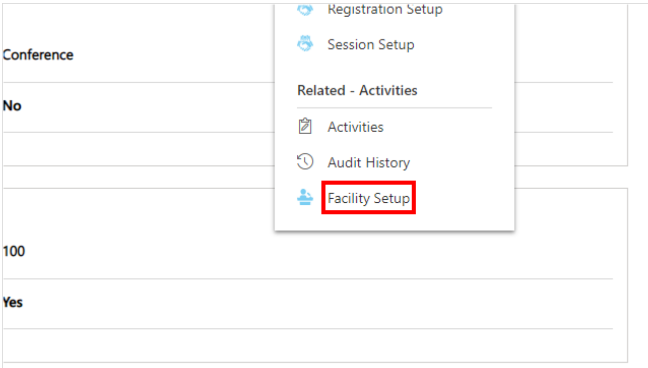
Select the Meeting



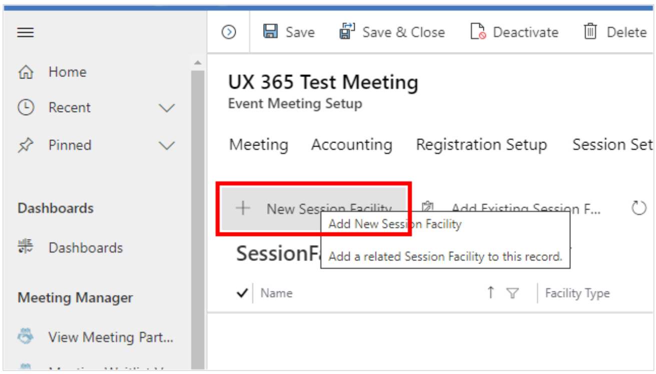
Click on the elipses



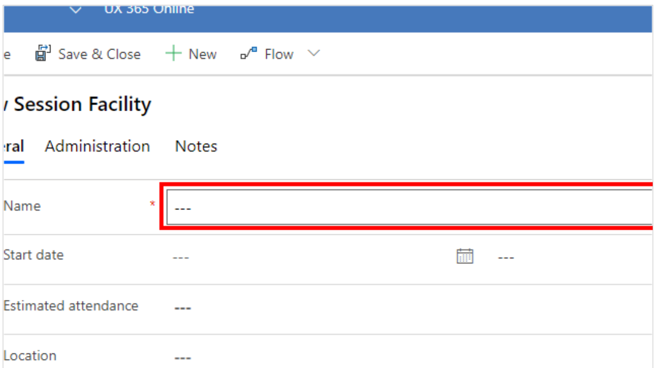
Click on the menu item **Facility Setup**



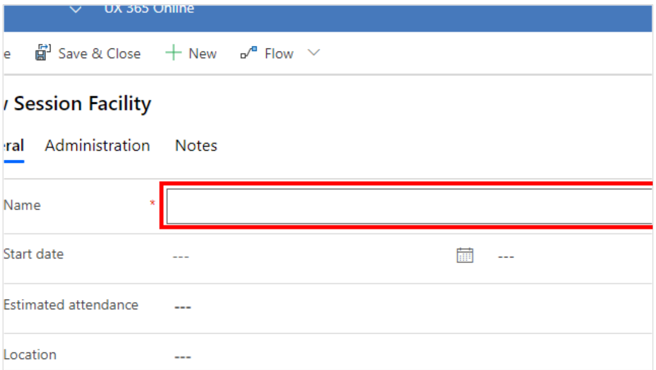
Click on the menu item **Add New Session Facility**



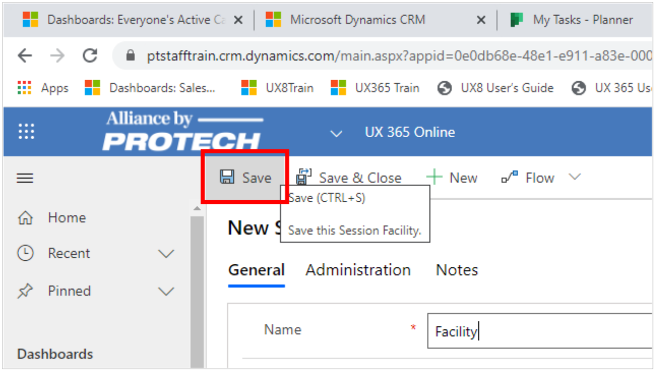
Click on the text field **Name**



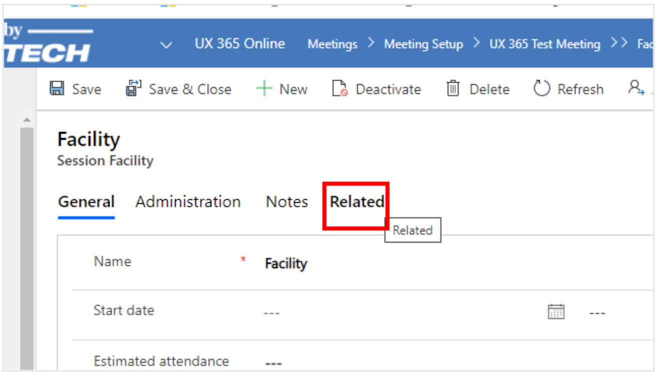
Enter **Enter the Facility Name**.



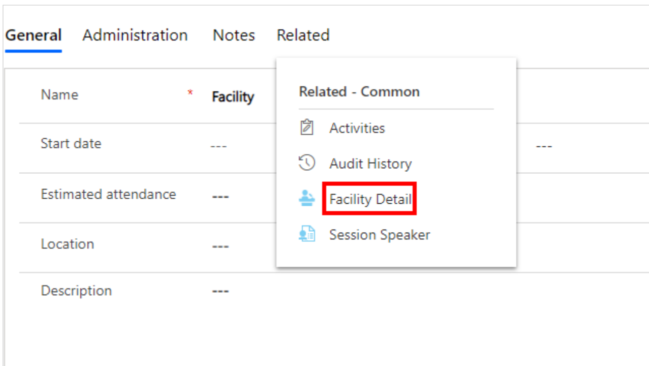
Click on the menu item Save



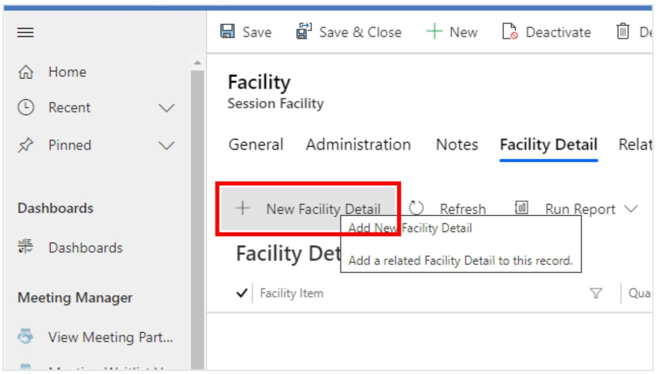
Click on the item **Related**



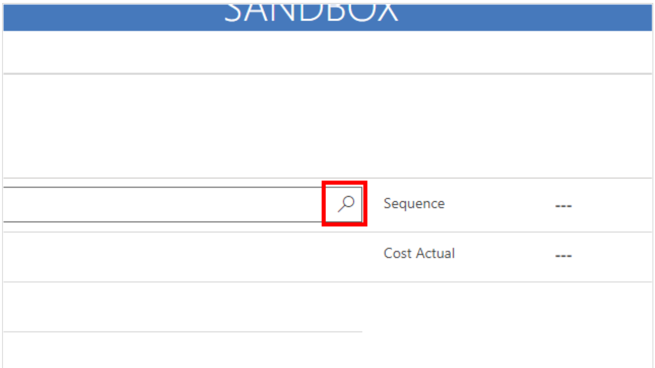
Click on the menu item **Facility Detail**



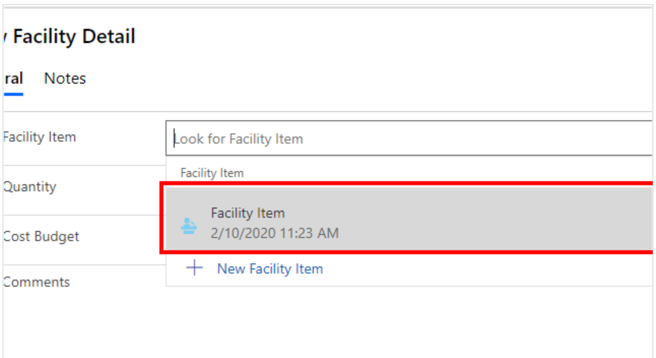
Click on the menu item **Add New Facility Detail**



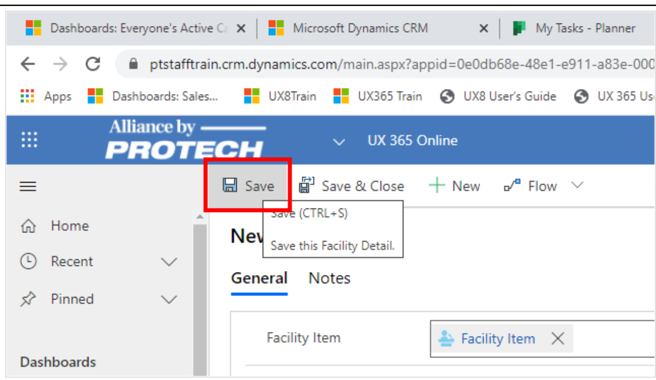
Click on the link **Facility Item**



Select the Facility Item



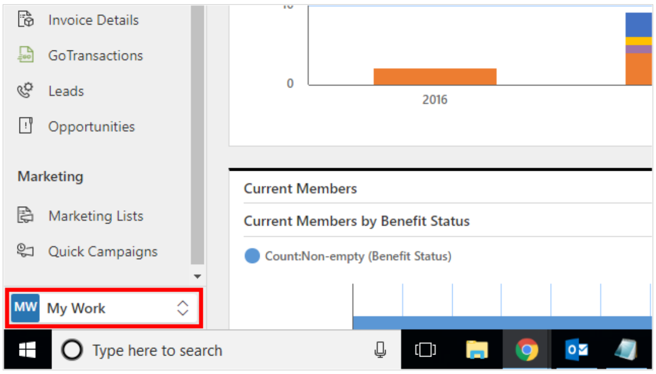
Click on the menu item Save



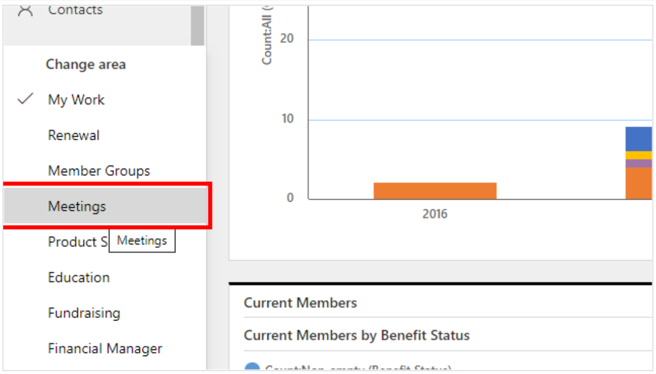
5.16. Setting up Complimentary Registrations and Sessions

5.16.1.1. Complimentary Registration

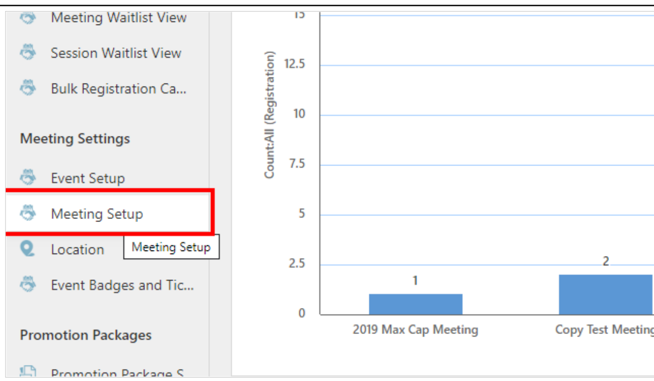
Click on the button **My Work (change area)**



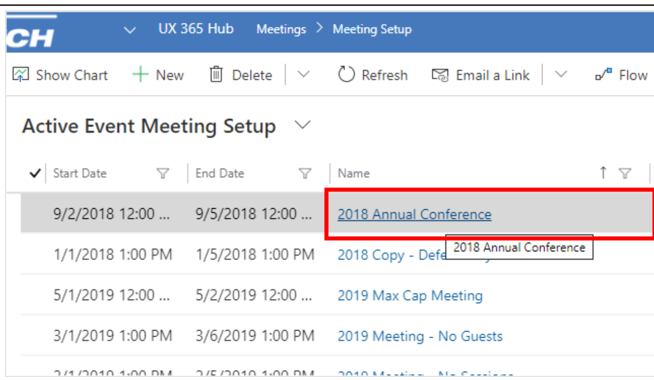
Click on the item **Meetings**



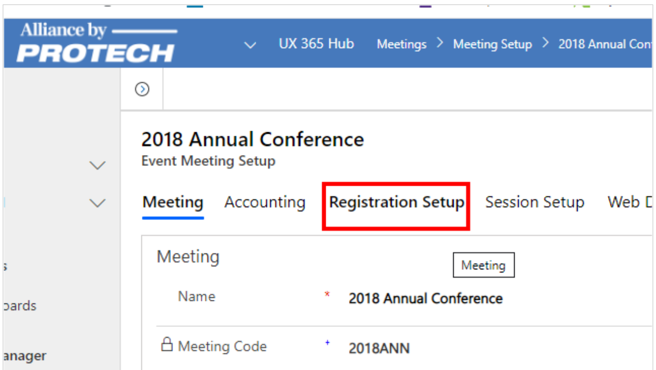
Click on the item **Meeting Setup**



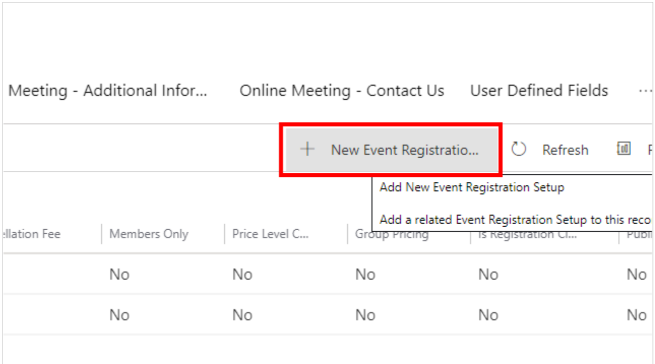
Select the Meeting you would like to add a complimentary registration to.



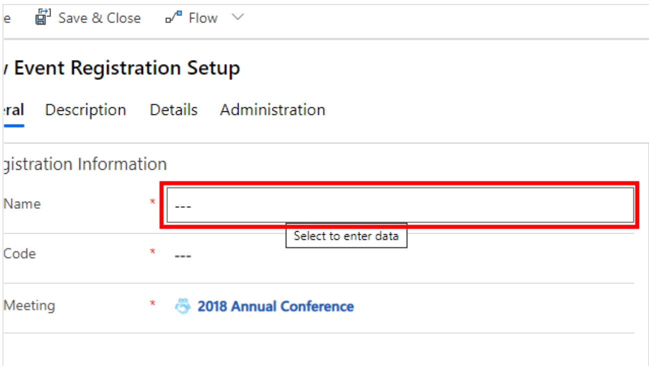
Click on the item **Registration Setup**



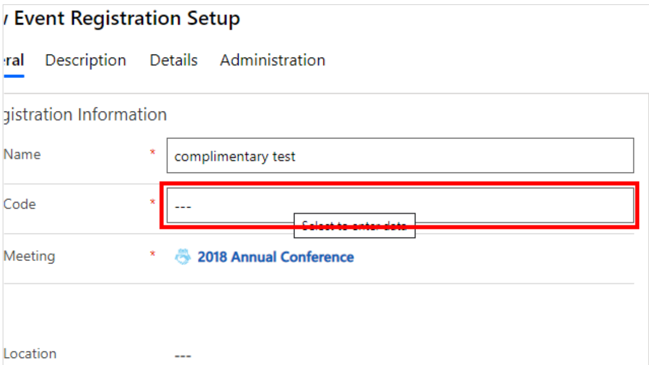
Click on the menu item **Add New Event Registration Setup**



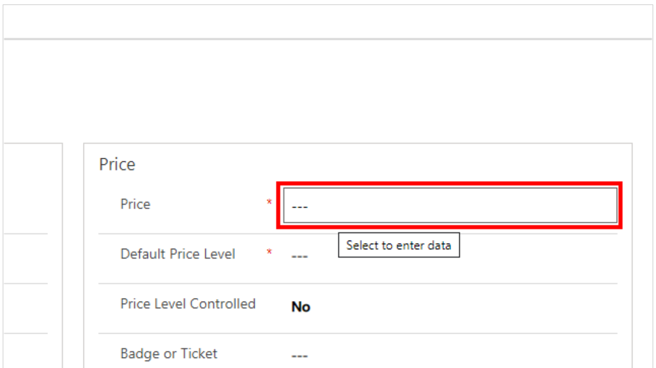
Enter a Name for the Registration.



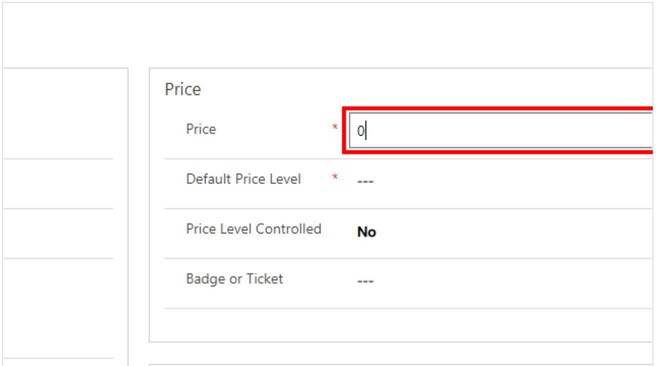
Enter a Code for the Registration.



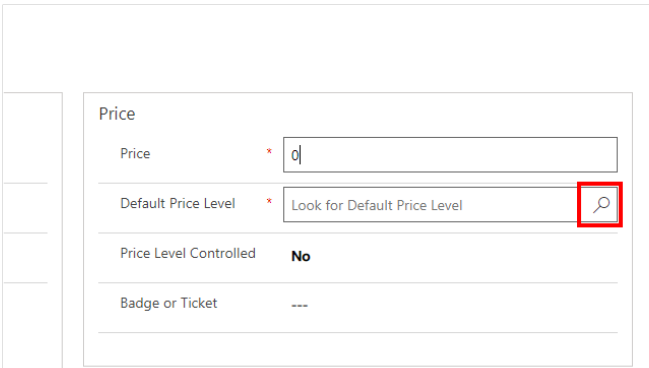
Click on the text field **Price**



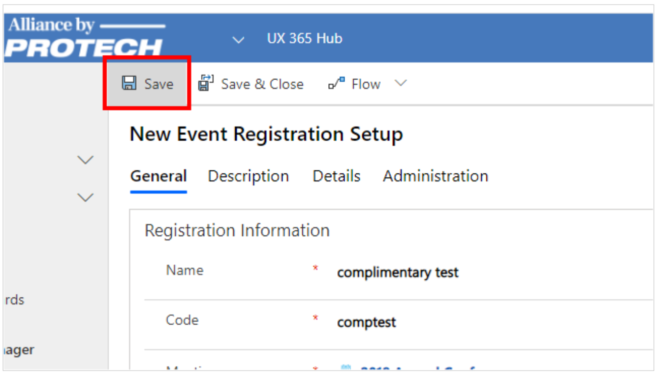
Enter **Price**.
If all registrants will receive the registration or session at no cost, enter "0" in the Price field. Upon Save, UX will create all requisite price records at $0.00. If some registrants will receive the registration or session at a cost and some will receive it at no cost, enter the cost in the Price field, and then modify the appropriate price record to reflect no charge for the price levels where registration is complimentary. For more information, see Setting up session and registration prices.



Select a price level.

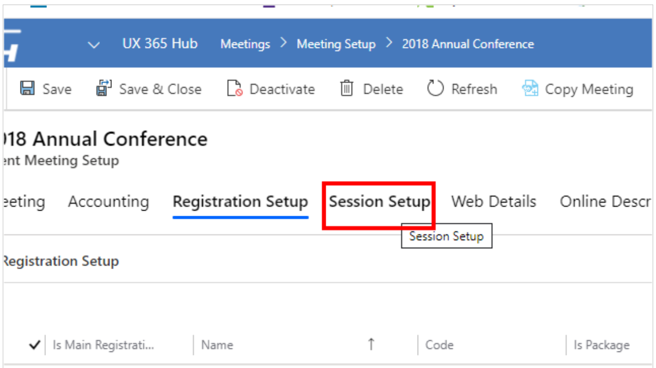


Click on the menu item **Save (CTRL+S)**

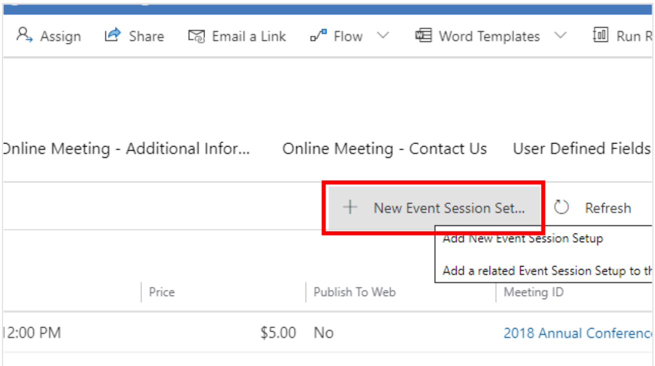


5.16.1.2. Complimentary Session

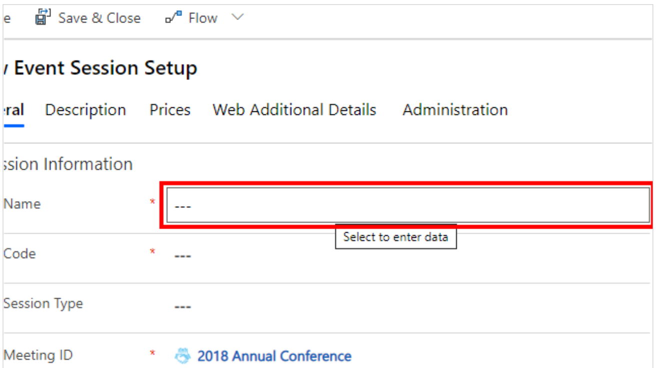
In the navigation menu of the meeting record, select session setup.



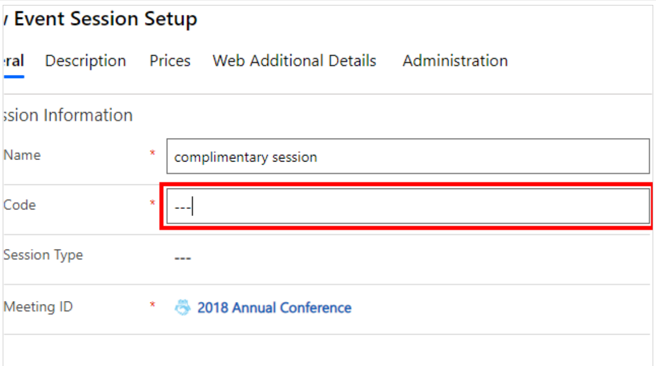
Click on the menu item **Add New Event Session Setup**



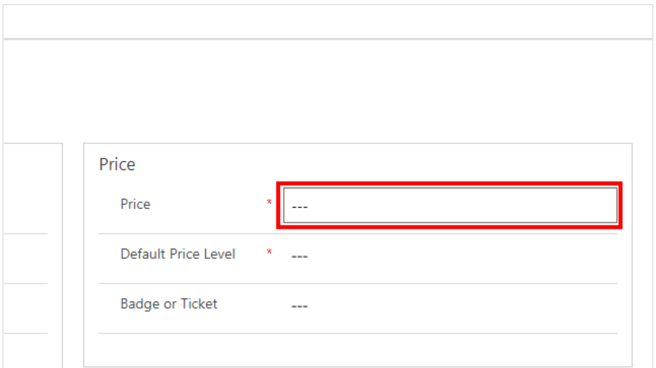
Enter a Name for the Session.



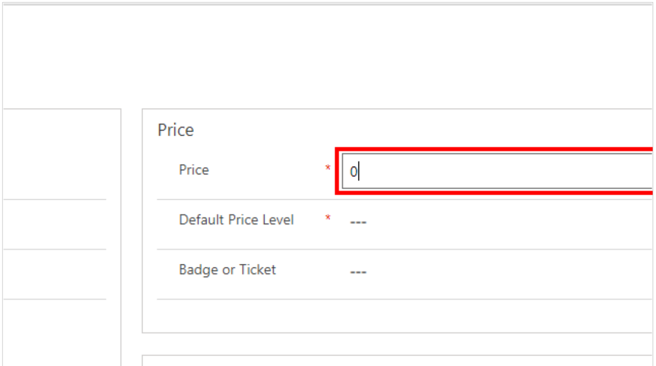
Enter a Code for the Session.



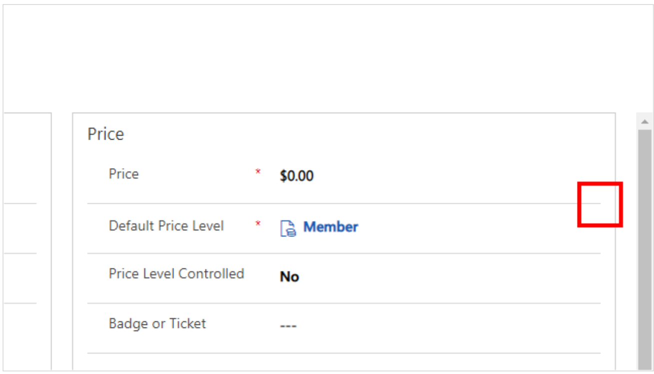
Click on the text field **Price**



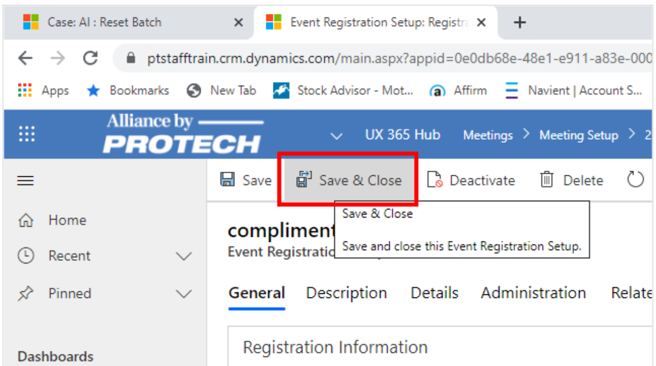
Enter **Price**.
If all registrants will receive the registration or session at no cost, enter "0" in the Price field. Upon Save, UX will create all requisite price records at $0.00.



Select a price level.

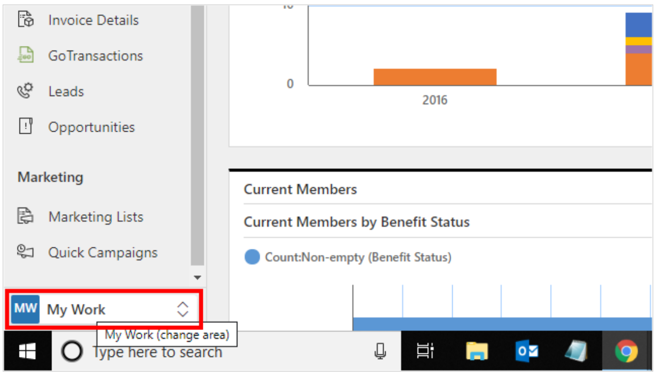


Click on the menu item **Save & Close**

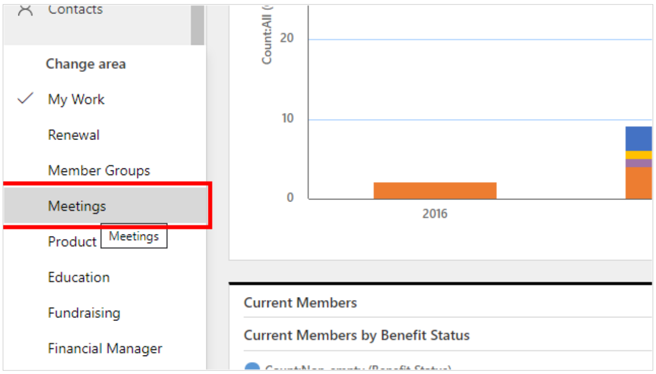


5.17. Setting up Event Badges and Tickets

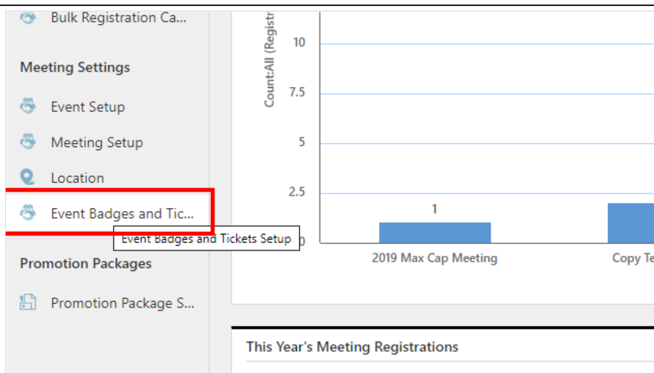
Click on the button **My Work (change area)**



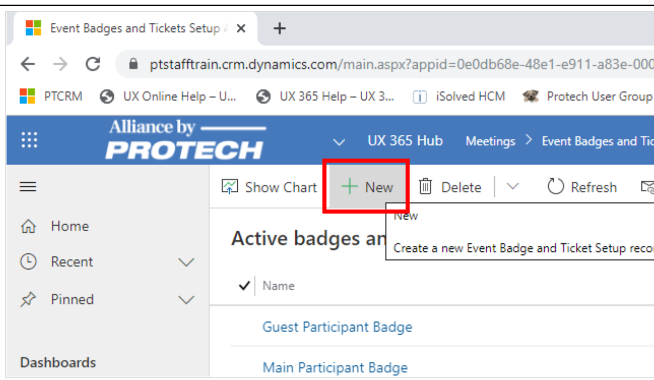
Click on the item **Meetings**



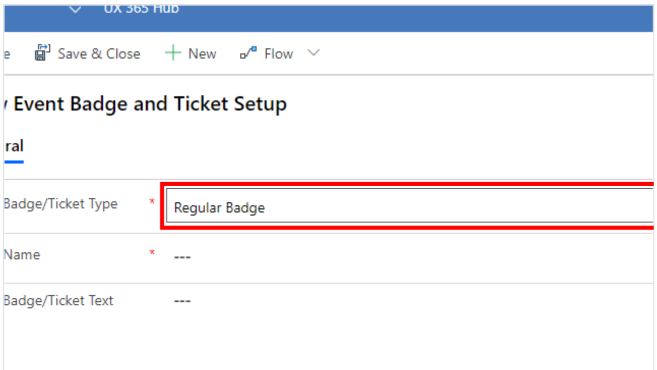
Click on the item **Event Badges and Tickets Setup**



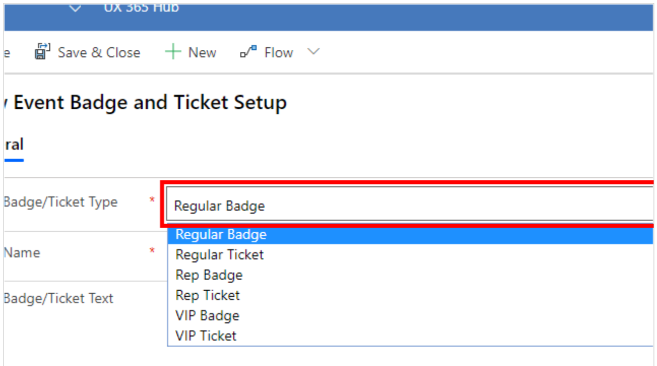
Click on the menu item **New**



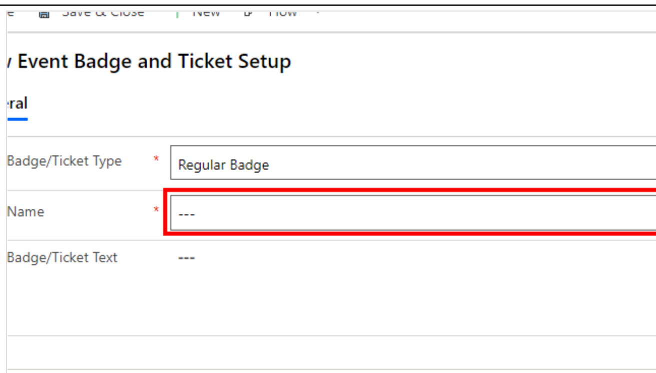
Click on the field **Badge/Ticket Type**



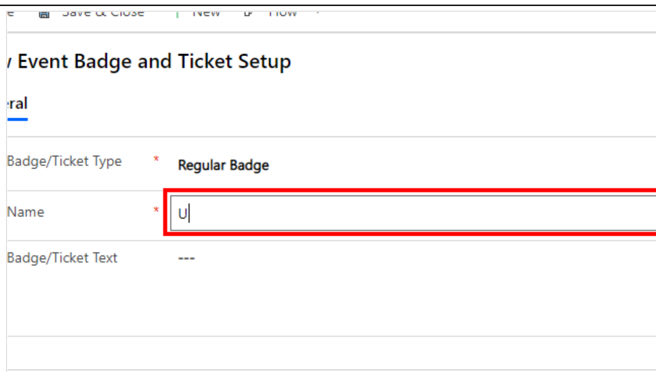
Select the badge or ticket type for this record.



Click on the text field **Name**

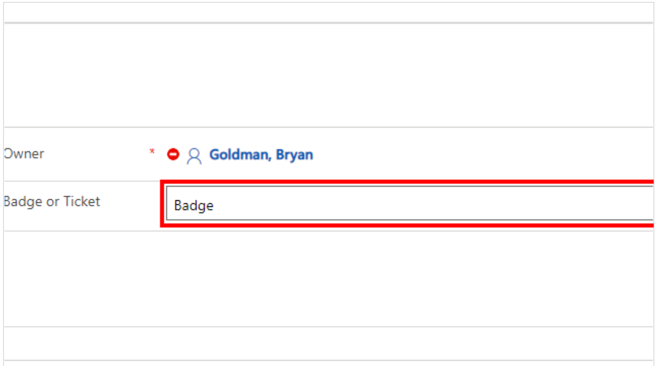


Enter a name for this badge or ticket record.

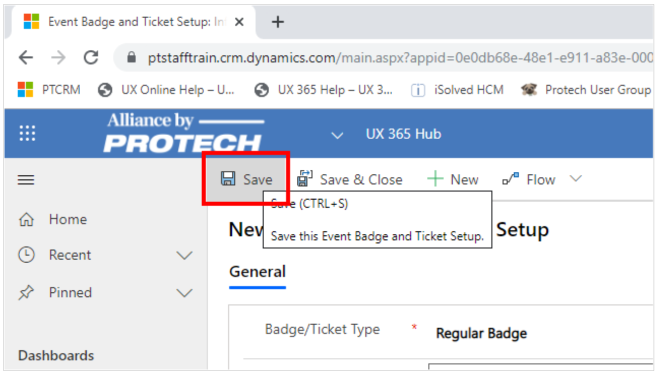


Badge/Ticket Text
Enter the text that you want to appear on the badge or ticket. This text is optional and is used for reporting purposes only.

Badge or Ticket
Select whether this is to be a record for a badge or a ticket. This field is used for reporting.



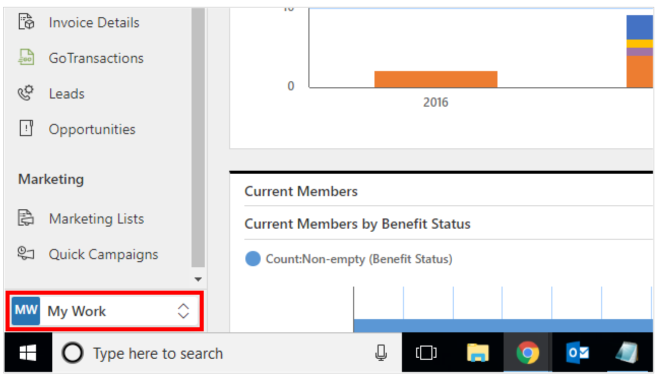
Click on the menu item Save



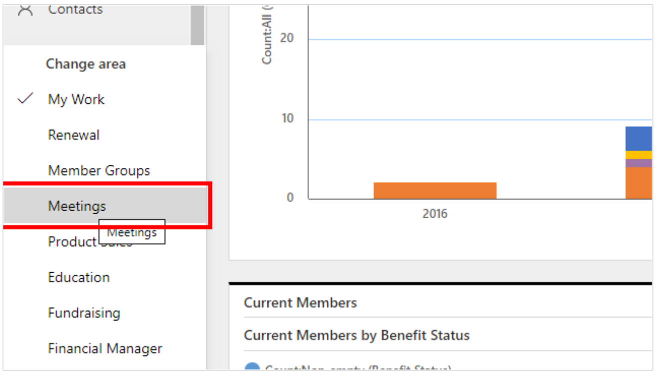
5.18. Setting up Events

Setting up events To set up a meeting in UX 365, you must first create an event record. Event records are the “master” records for any event your organization holds.

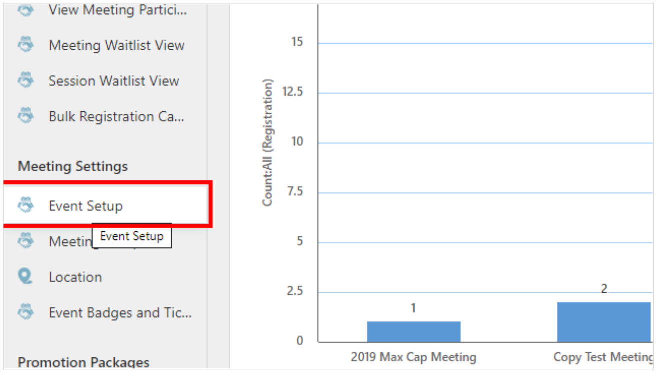
Click on the button **My Work (change area)**



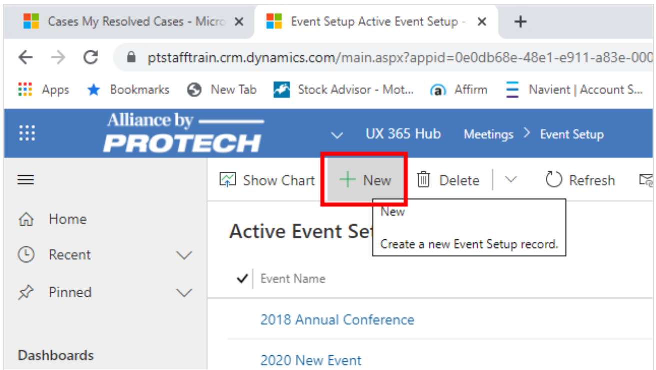
Click on the item **Meetings**



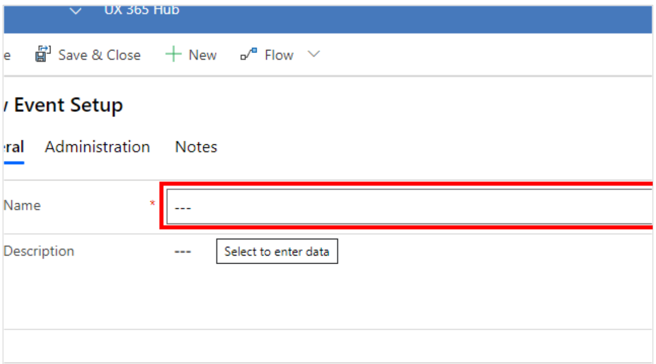
Click on the item **Event Setup**



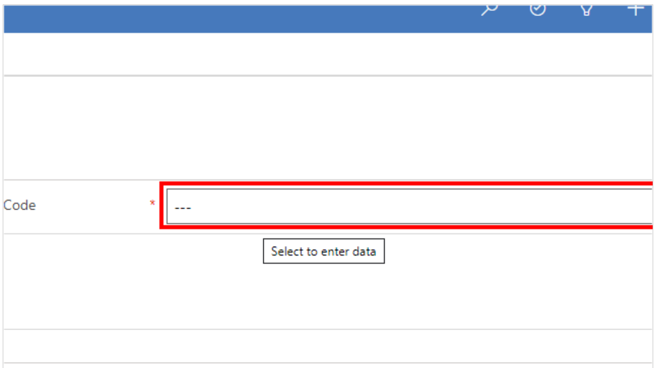
Click on the menu item **New**



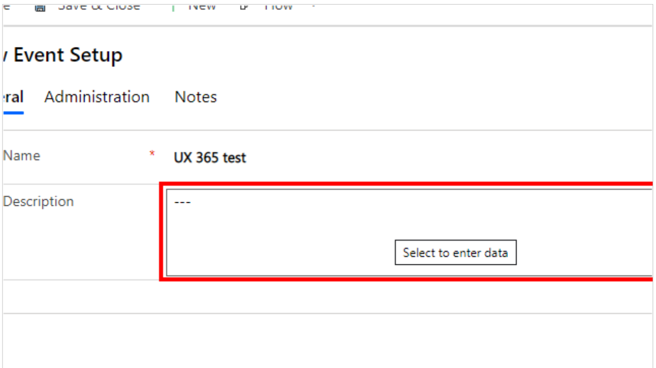
Enter in a name for your Event.



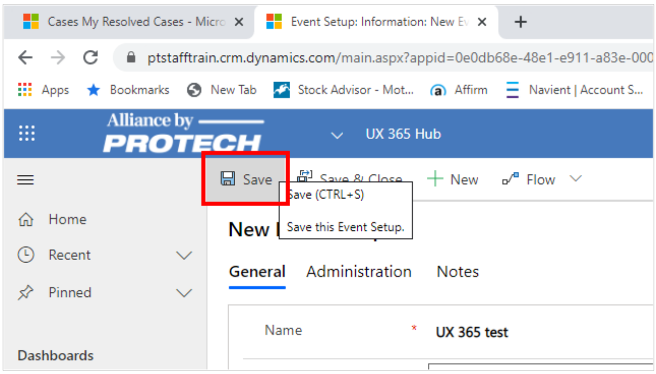
Enter in a Code for your event.
This code will be appended to all activity codes associated with this event, so we recommend keeping the code simple and short – for example, 2016ANNUAL. Use only numbers and letters. Do not use spaces, symbols or other special characters



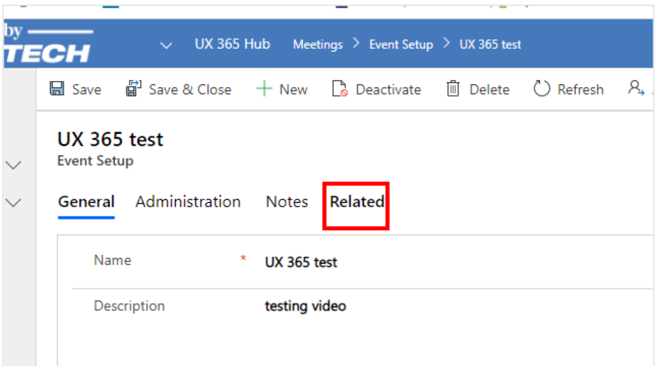
If desired, enter a description of the event. This text can be used for reporting.



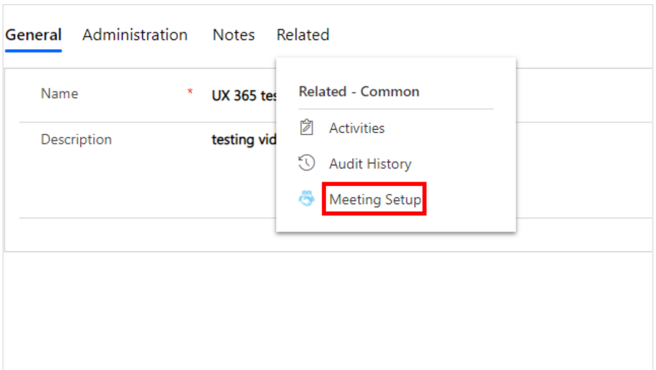
Click on the menu item **Save (CTRL+S)**



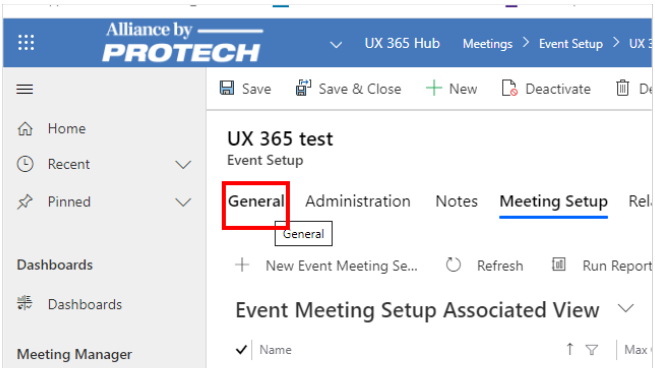
Click on the item **Related**



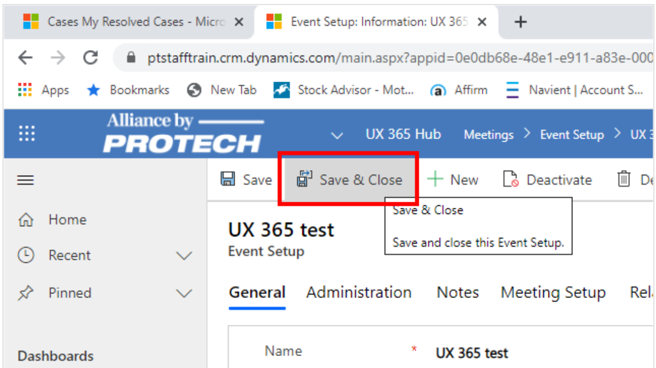
Click on the menu item **Meeting Setup**
This displays the meeting associated with this event. If one has not been created yet, you can begin that process here. For more information, see Setting up meetings.



Click on the item **General**



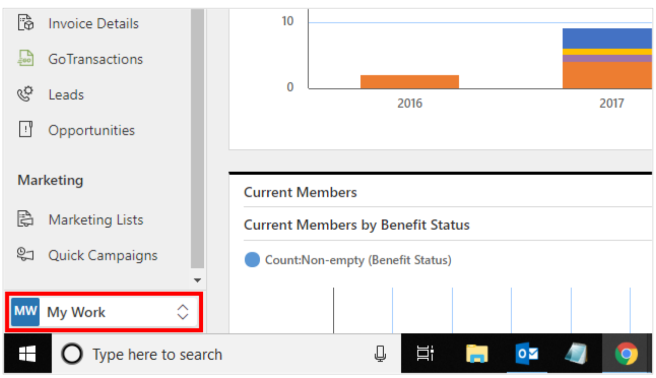
Click on the menu item **Save & Close**



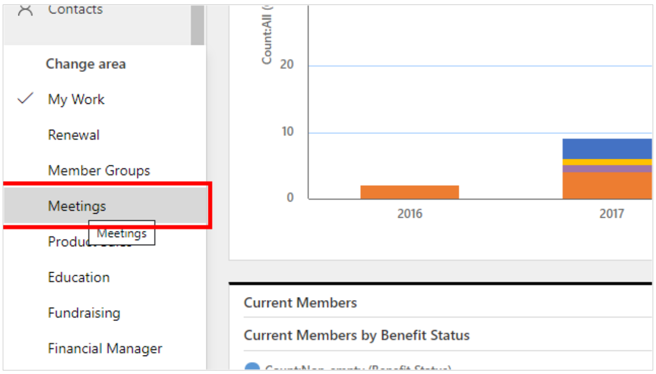
5.19. Setting up Location Detail

Location Detail allows you to enter the names of rooms, banquet halls, or other areas at the location. You can assign these to meeting activities in order to support output such as tickets, registrant rosters, etc.

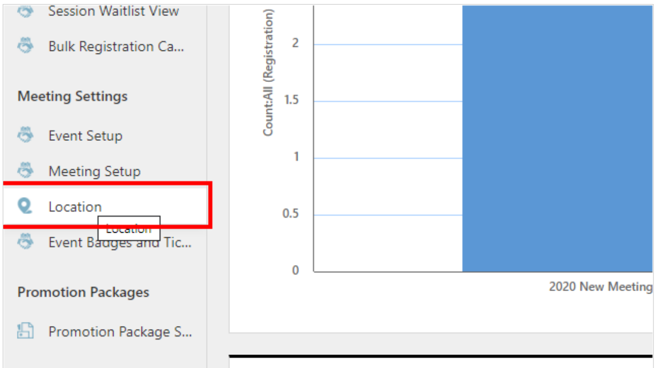
Click on the button **My Work (change area)**



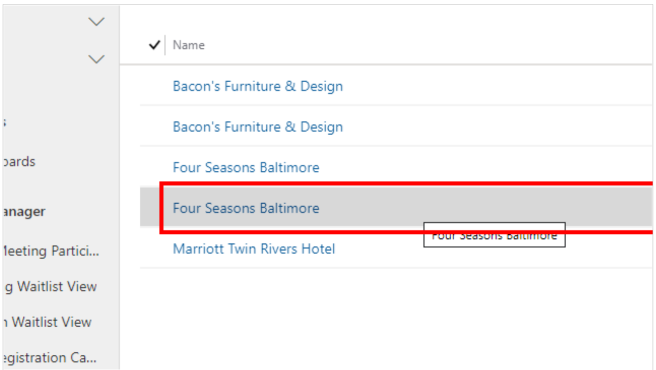
Click on the item **Meetings**



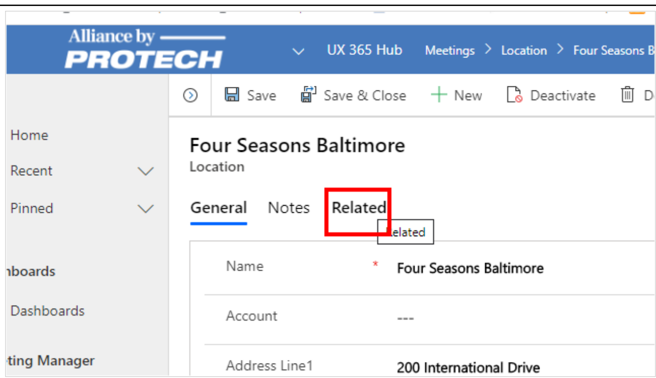
Click on the item **Location**



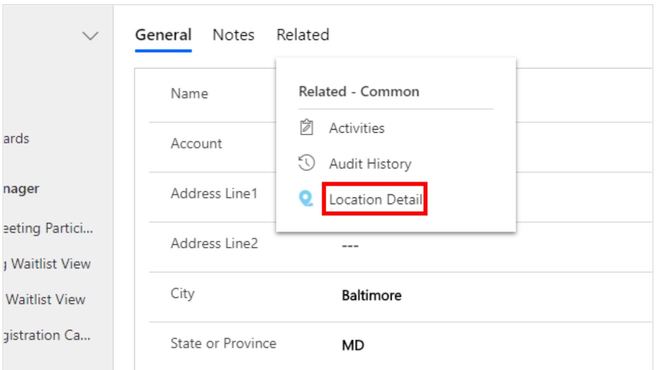
Double click on the location where you wish to add location detail to.



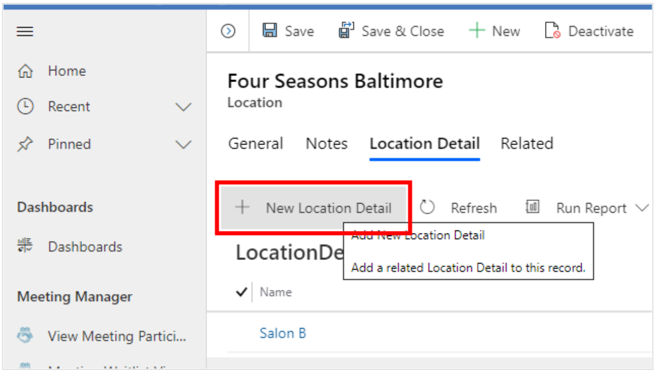
Click on the item **Related**



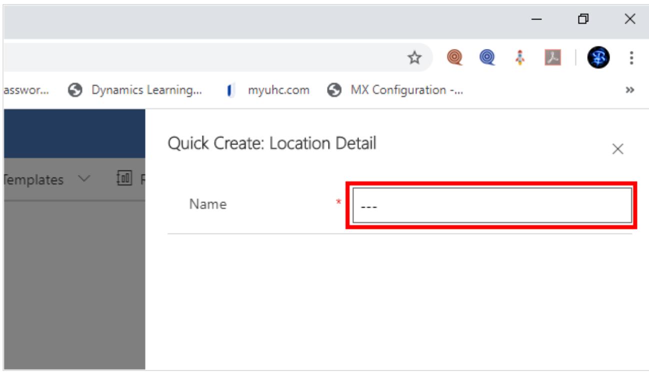
Click on the menu item **Location Detail**



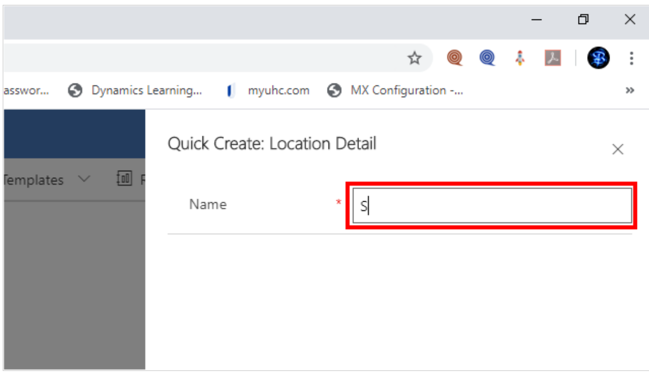
Click on the menu item **Add New Location Detail**



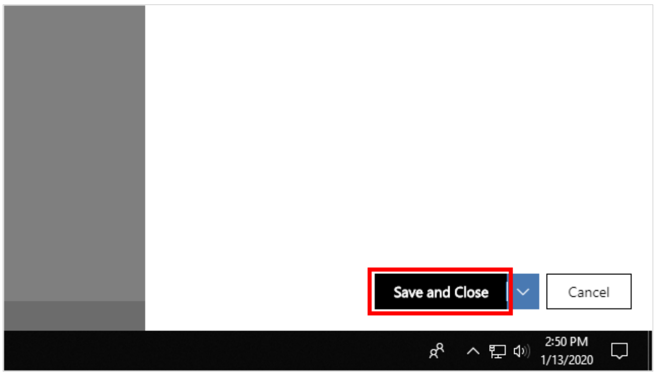
Click on the text field **Name**



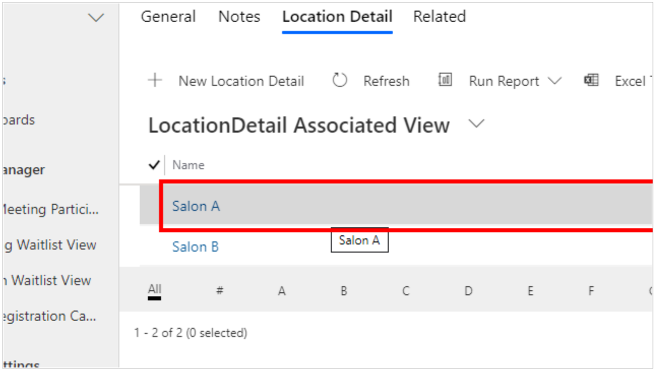
Enter **Name**.



Click on the button **Save and Close**



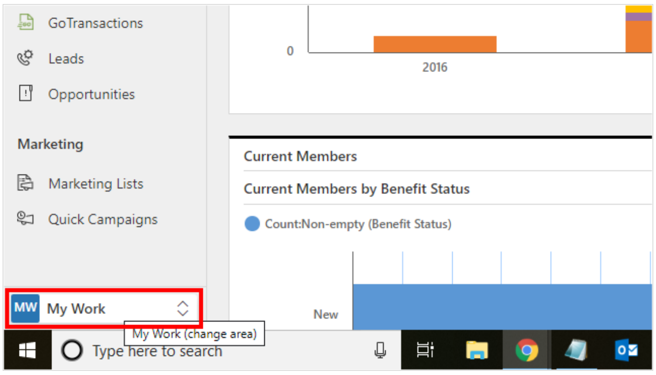
The new location detail will now appear in the Location Detail associated view and be available when setting up meetings and sessions.



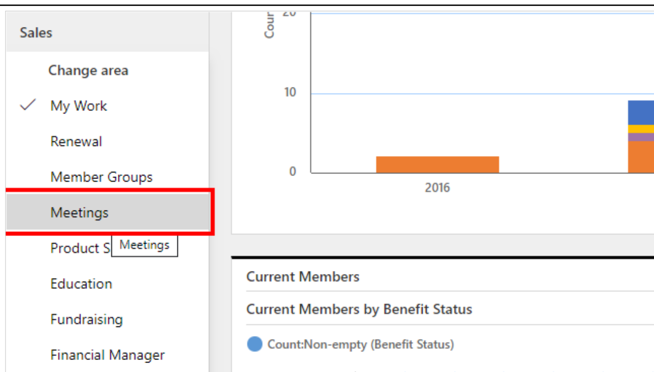
5.20. Setting up Meetings

5.20.1. Setting Up A Meeting

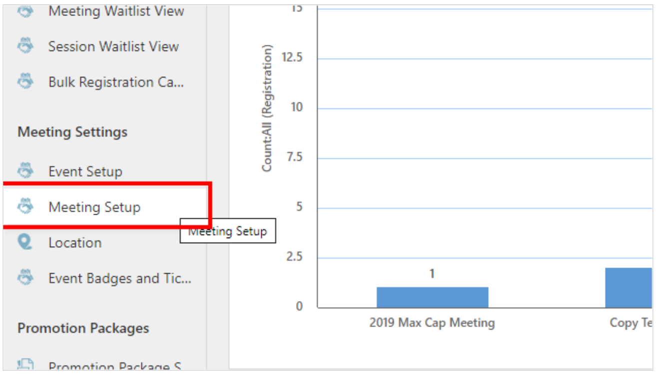
To set up a meeting... First click the button 'my work' to change area



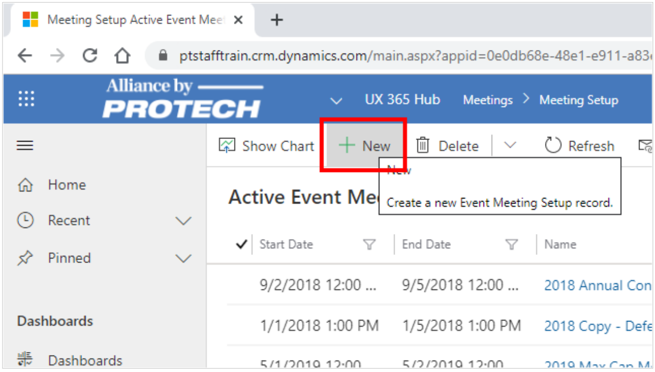
Click on the item **Meetings**



Click on the item **Meeting Setup**

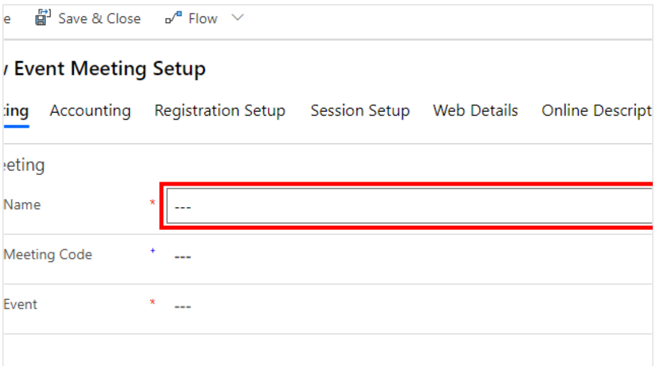


Click 'New' to create and set up a new meeting.

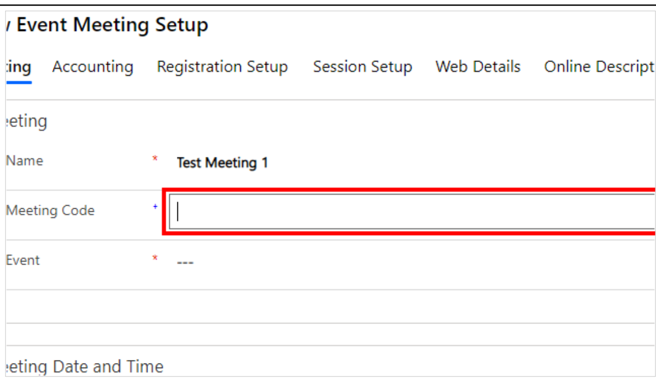


5.20.2. Setting Up A Meeting: General Details

Click in the text field 'Name' and enter a name for your meeting.



Click on the text field 'Meeting Code' and enter in a code. You cannot use spaces, symbols, or special characters.



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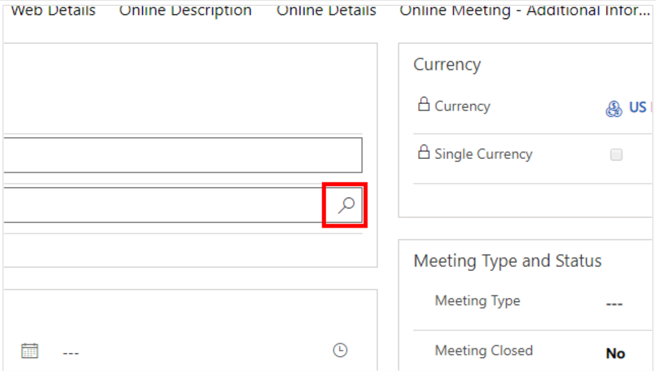
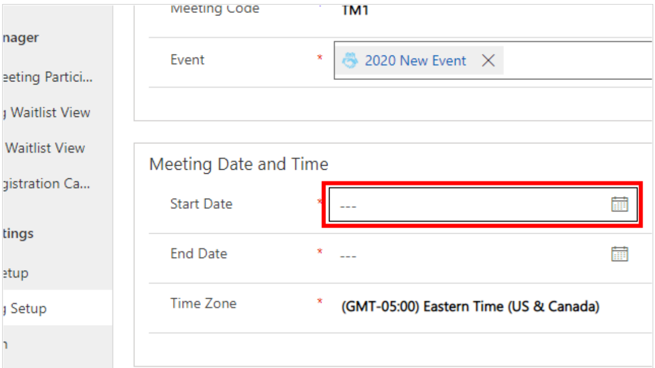
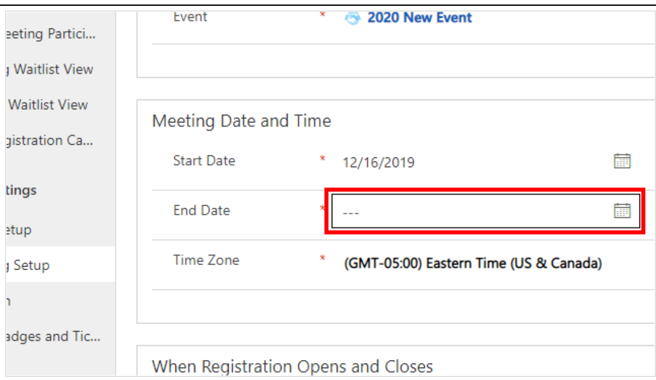
Click on the lookup in the field 'Event' to find and select the event you would like the meeting to take place in.



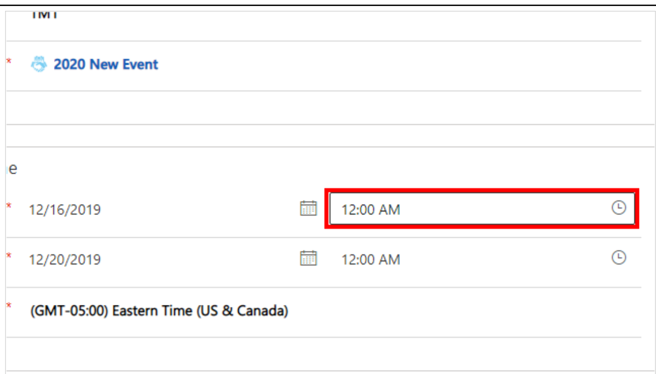
Adjust the Start Date of the meeting by clicking the calendar inside of the field.



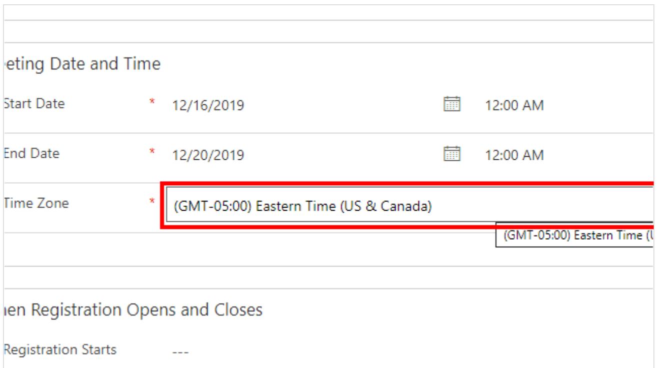
Adjust the End Date of the meeting by clicking the calendar inside of the field.



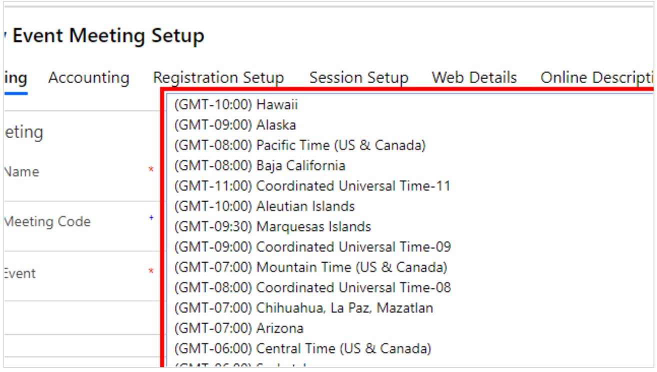
You can also adjust the start and end time of the meeting by clicking the clock inside of the fields to the right of Start/End date.



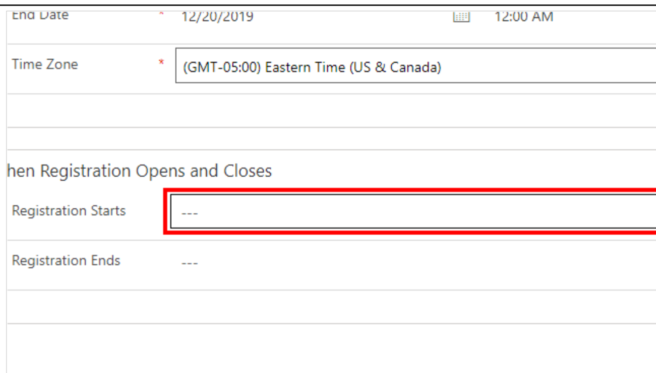
To change the Timezone of the event, click the field 'Timezone'



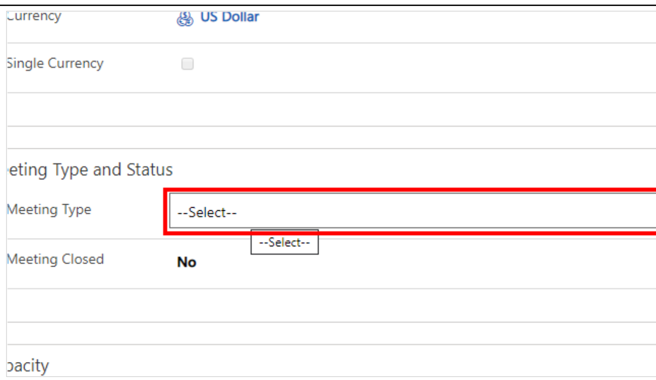
There will be a dropdown menu of timezones for you to choose from.



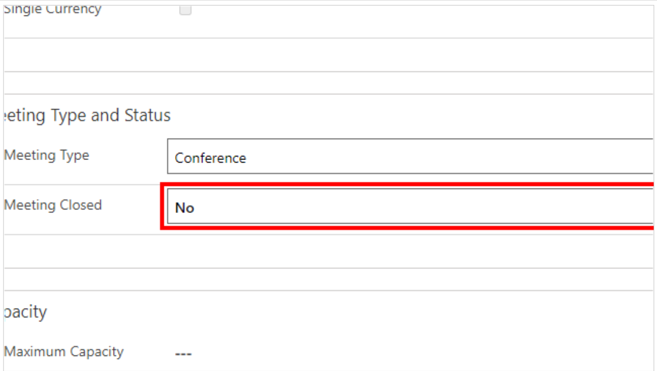
Click the calendar in 'Registration Starts and Registration Ends' to change when the registration opens and closes



Meeting Type – This option set field is optional and can be used either for reporting or for MX Online. There are no default options for this field deployed with your system. If your organization uses this field, your System Customizer will need to add options to this field in your organization's custom solution.



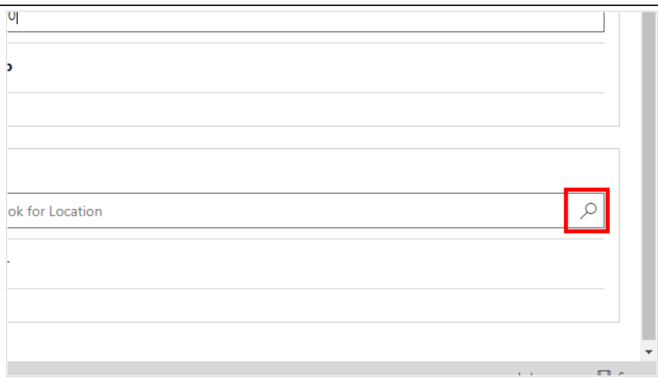
Click on the field 'Meeting Closed' to switch from No to Yes and vice versa



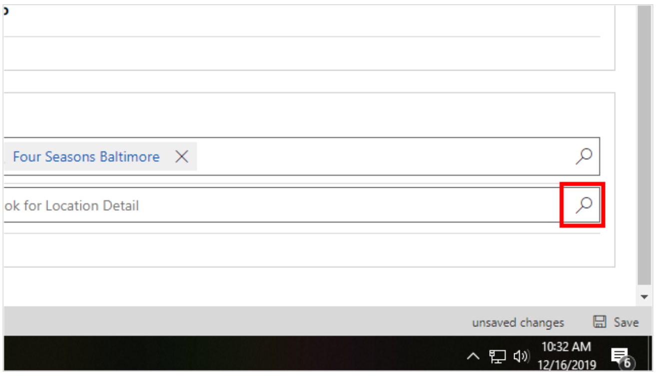
Add a maximum capacity in this field if you would like

Click on waitlist off to change field from NO to YES and vice versa

Click on the lookup icon next to the 'Location' field to find and select a location for the meeting

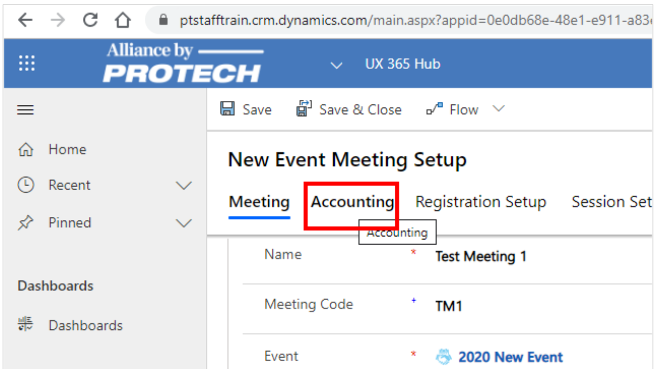


If this is a smaller meeting where the entire session takes place in a single room, click the Lookup button to select the room or hall where the meeting will occur.

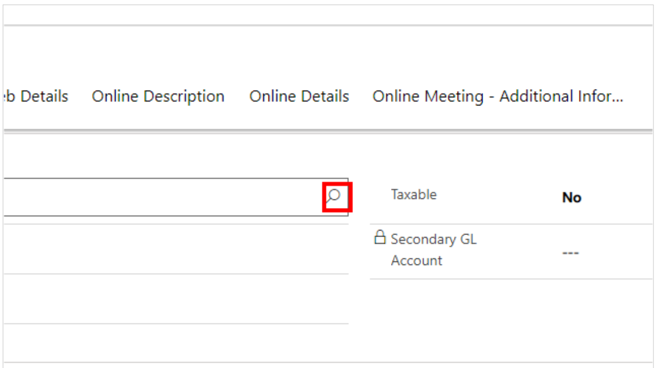


5.20.3. Setting Up A Meeting: Accounting Information

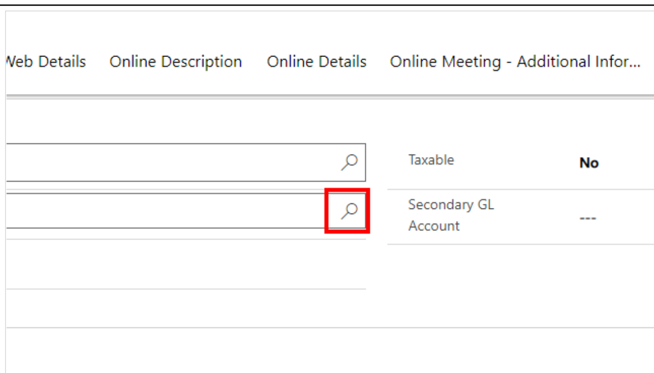
To navigate to the Accounting Area of a meeting setup record, click 'Accounting' at the top of the record.



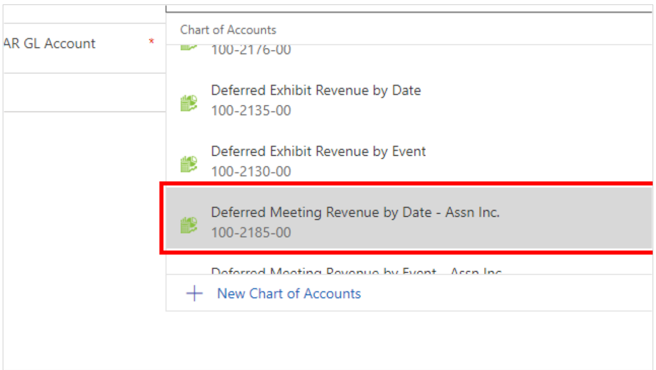
The system will automatically populate the 'Company' field with the record flagged as default in your setup. If you need to make a change...Click on the lookup icon to the right of 'Company' field to find and select another company.



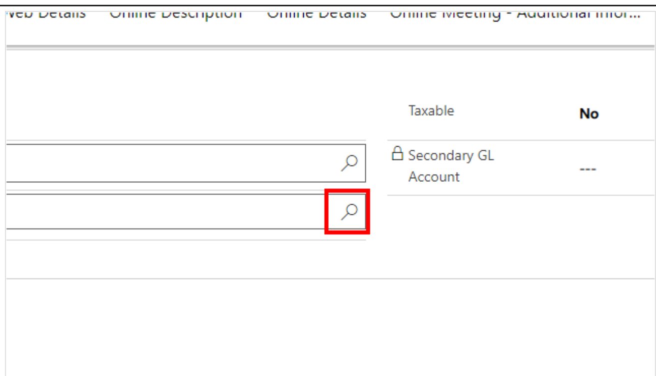
Primary GL Account - Click the Lookup icon to select the general ledger account number for revenue associated with this meeting. If your association defers meeting revenue, enter the deferred account here. If your association does not defer meeting revenue, enter the revenue account here. All registrations and sessions that are created for this meeting will inherit the primary GL account selected here.



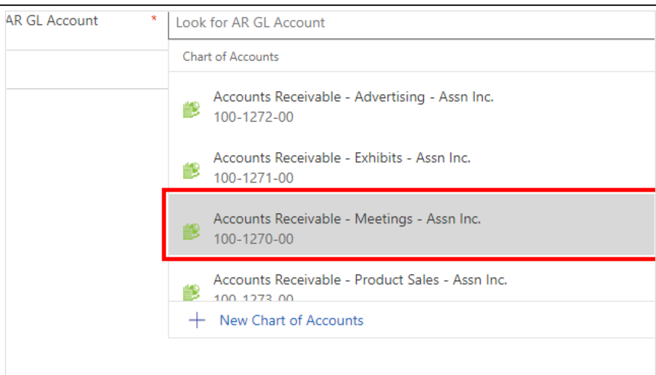
Select the primary GL account from the dropdown.



AR Account – Click the Lookup button to select the accounts receivable general ledger account for this meeting. All registrations and sessions that are created for this meeting will inherit the AR account selected here.

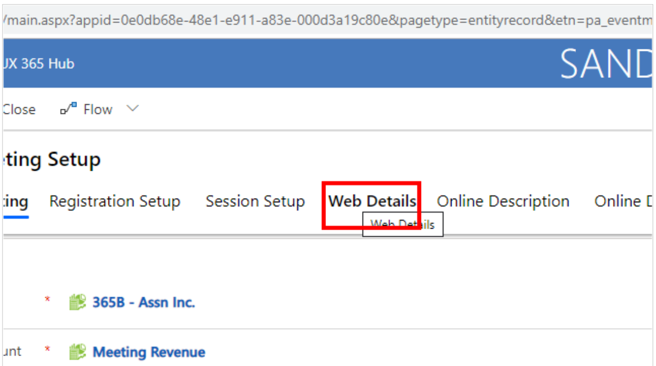


Select the AR account from the dropdown.

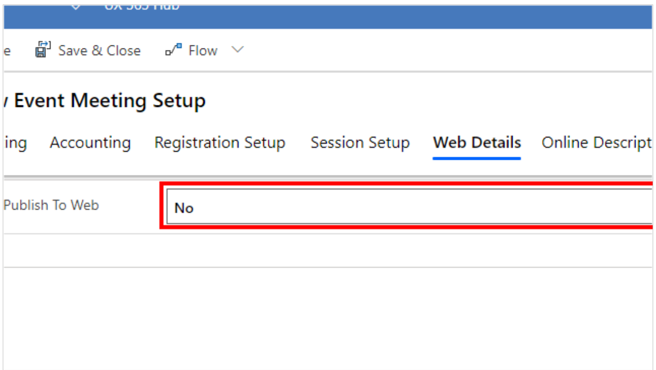


5.20.4. Setting Up A Meeting: Web Details

To navigate to the Web Details area of a meeting setup record, click 'Web Details' at the top of the record.

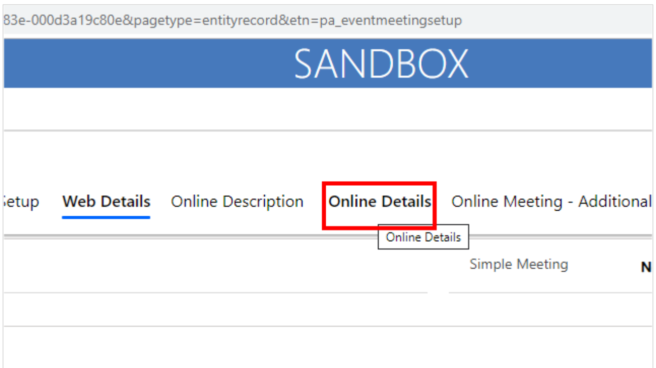


Publish to Web - Select this option if the meeting is to be available on the web

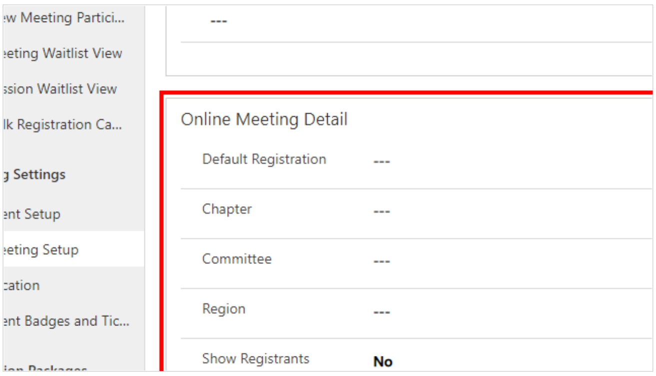


5.20.5. Setting Up A Meeting: Online Details

To navigate to the Online Details area of a meeting setup record, click 'Online Details' at the top of the record.

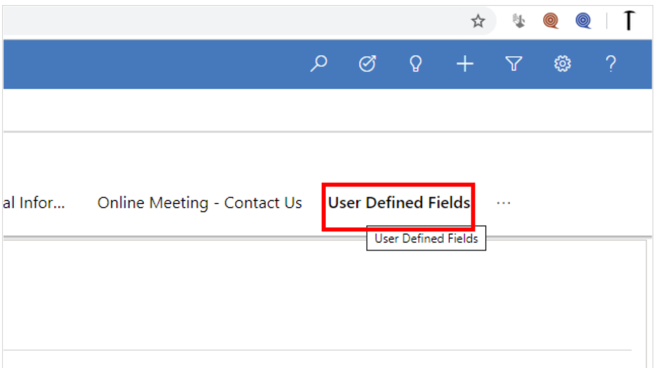


The online meeting detail form is where you can change specific details of the meeting such as Defualt Registration, Chapter, Commitee, Region, Web Site, Topic, Audience, Speaker, etc.

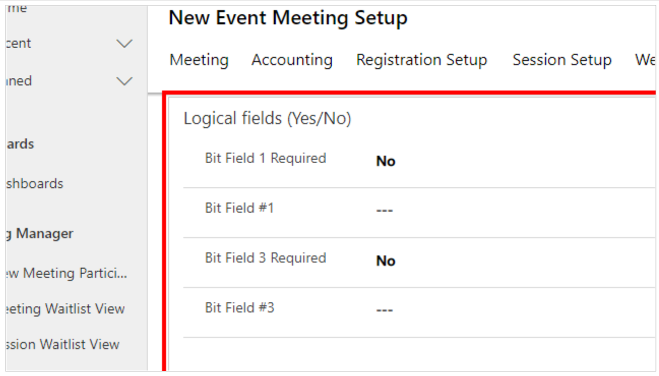


5.20.6. Setting Up A Meeting: User-defined Fields to Track Meeting Attendee Information

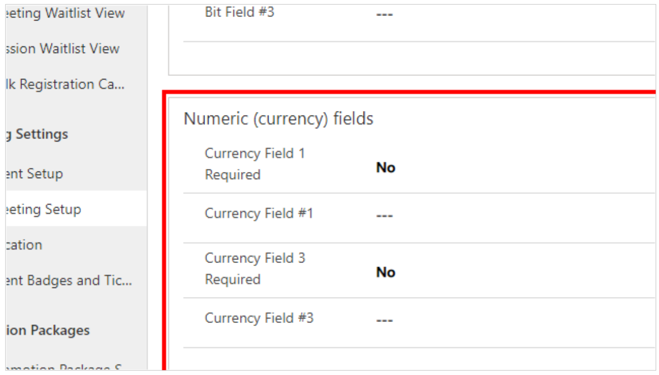
If you need to track custom information about your meeting attendees, you can set up a number of user-defined fields that will be available when you enter meeting registrations. For example, you can have fields you use for tracking emergency contact information. To do so, click on the item 'User Defined Fields.'



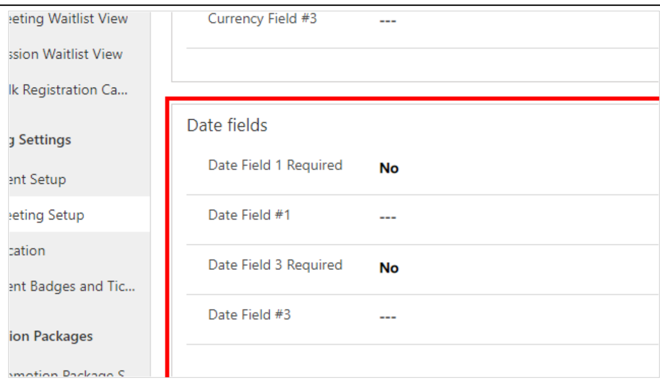
Logic Fields (Yes/No) – To set up fields to track Yes/No information, type labels in the Logical Fields (Yes/No) section. For example, if you want to identify registrants who have not attended this event previously, you could type the label “First Time Attendee.”



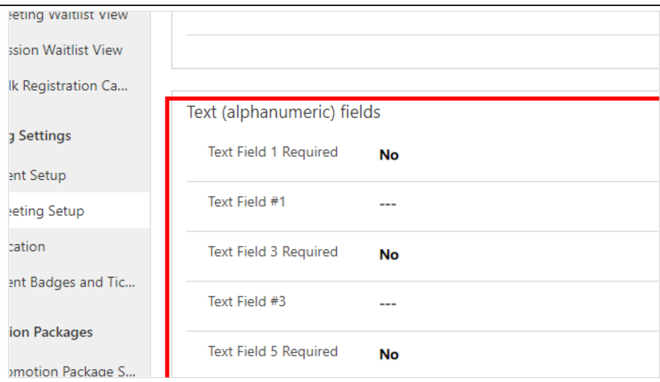
Numeric (currency) fields – To set up fields to track currency information, type labels in the Numeric (currency) fields section. For example, you can enter labels to track information such as income levels or donation amounts.



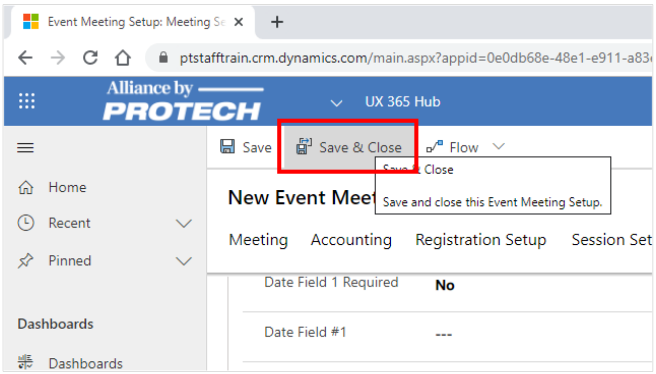
Date fields – To set up fields to track date information, type labels in the Date fields section. For example, you can use these fields to track a registrant’s certification or graduation date.



Text (alphanumeric) fields – To set up fields for free-form text information, type labels in the Text (alphanumeric) fields section. For example, you could use these fields to record notes about special accommodation needs for a registrant or emergency contact information.

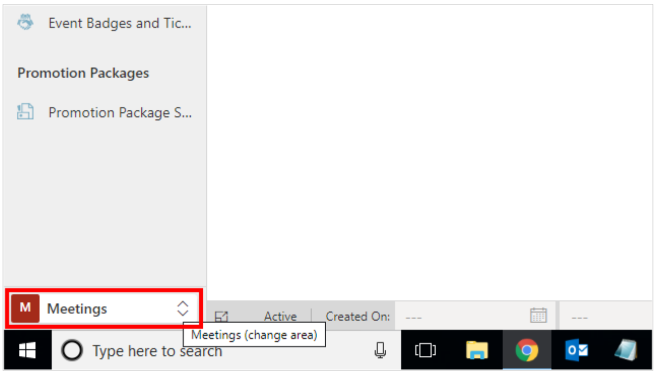


When you are finished editing your meeting setup record, click Save or Save & Close to save your work.

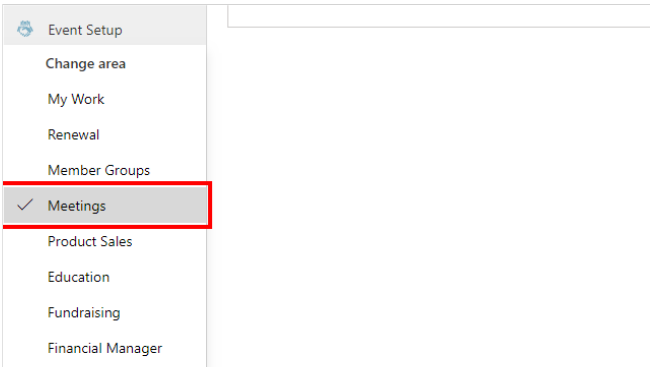


5.21. Setting up Registration Cancellation Fees

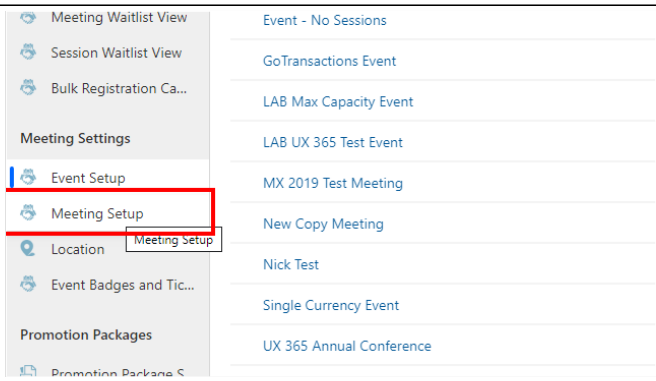
Click on the button **Meetings (change area)**



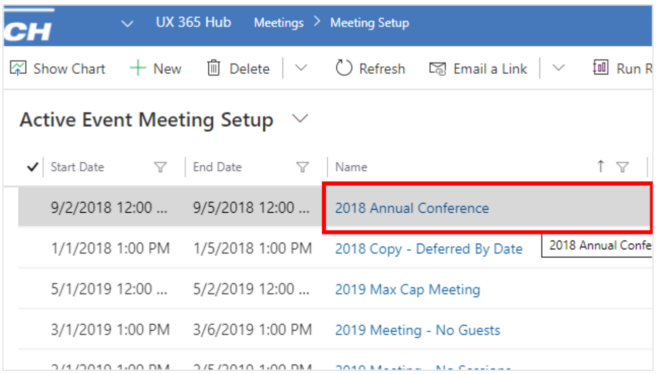
Click on the item **Meetings**



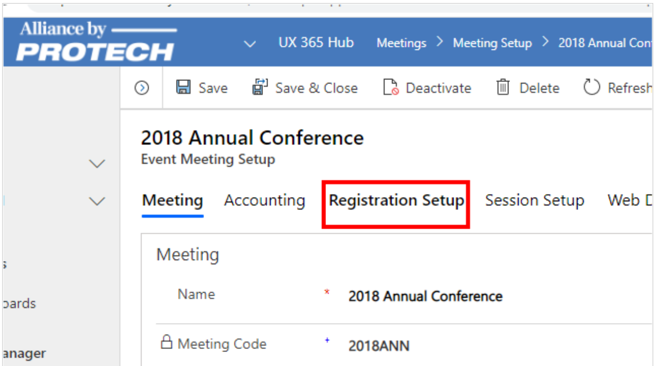
Click on the item **Meeting Setup**



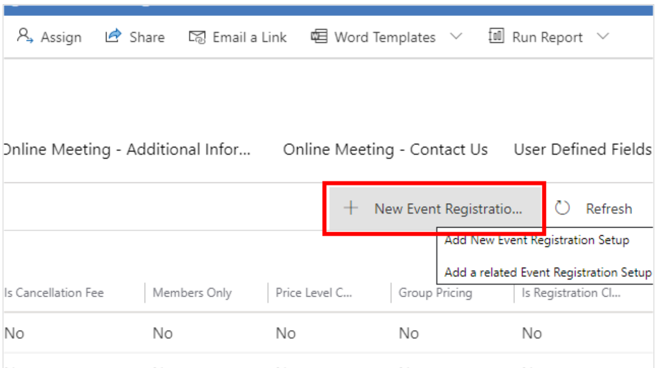
Open the Meeting record



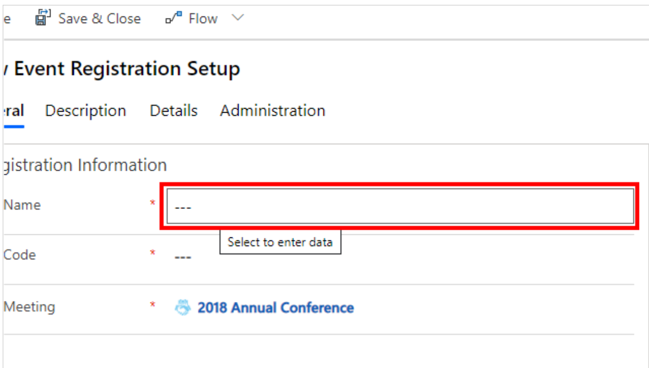
Click on the Registration Setup tab



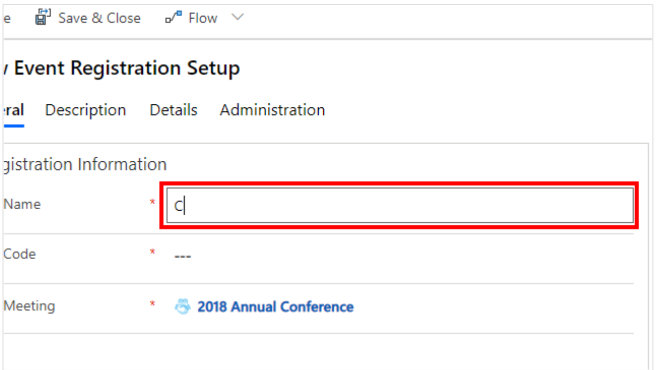
Click on New Registration



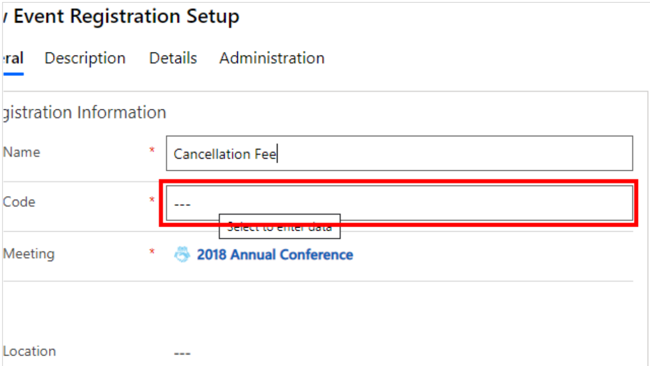
Click on the text field **Name**



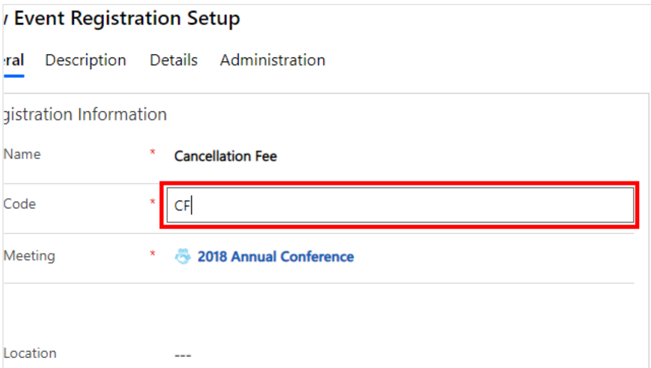
Enter **Name**.



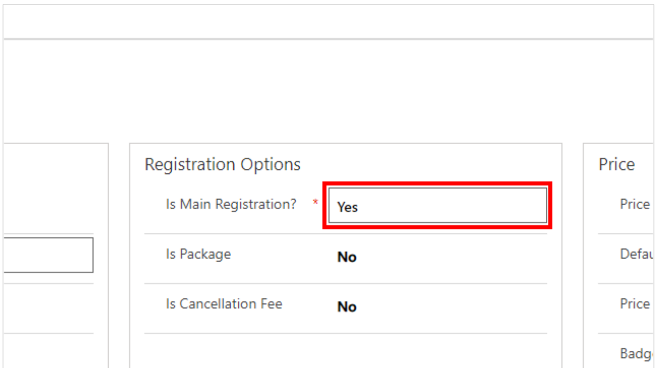
Click on the text field **Code**



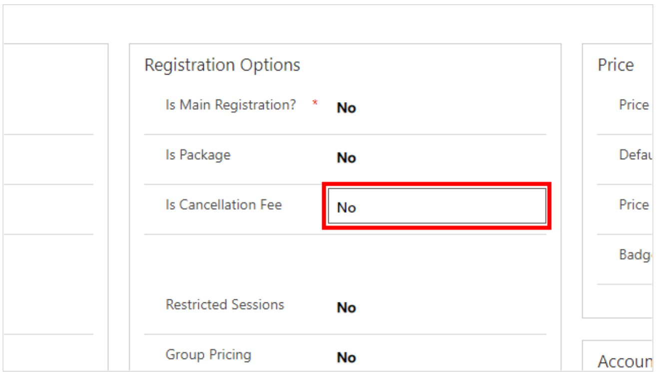
Enter **Code**.



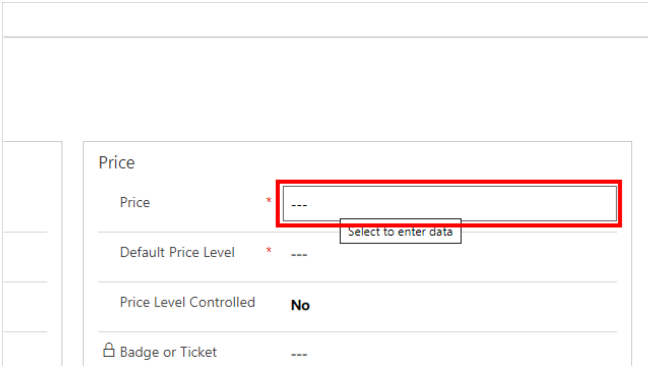
Click on, Is Main Registration and set this value to no



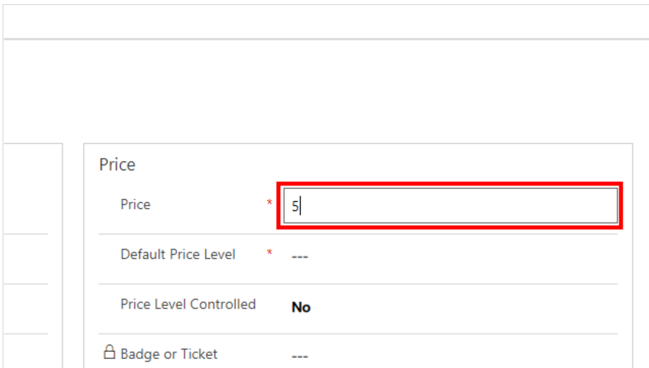
Click on, Is Cancellation Fee and set this value to yes



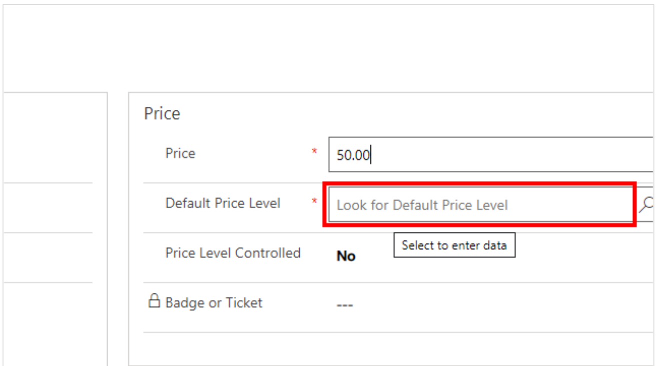
Click on the text field **Price**



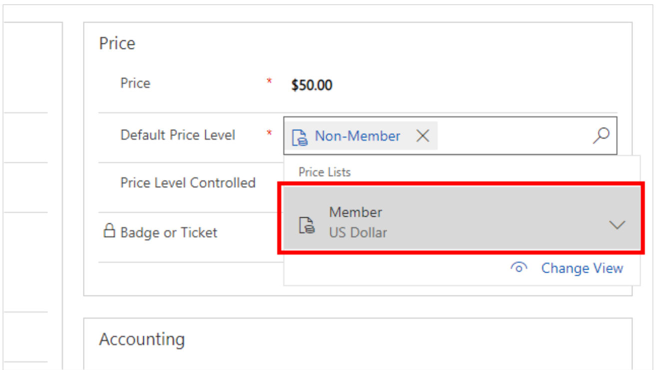
Enter **Price**.



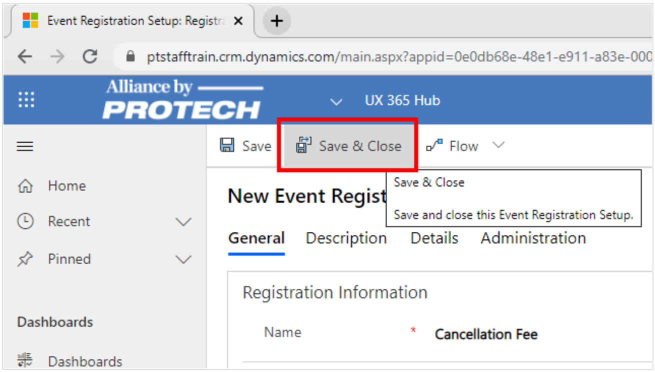
Click on the lookup field **Default Price Level**



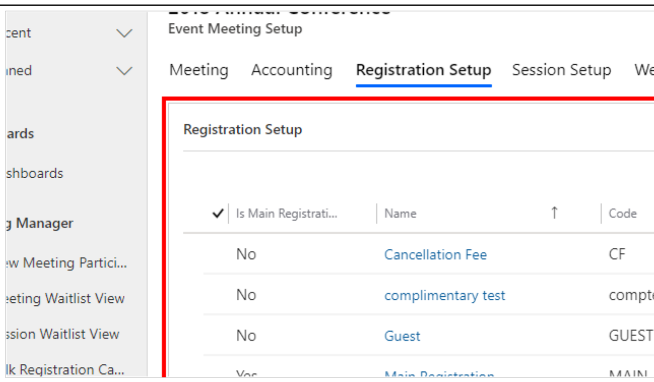
Click on an option from the list



Click on the menu item **Save & Close**



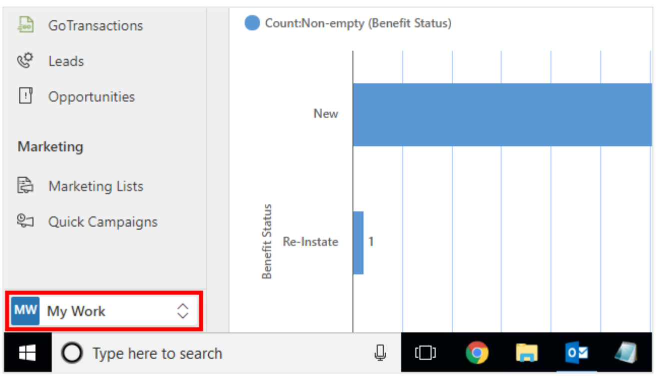
Cancellation Fee has been added



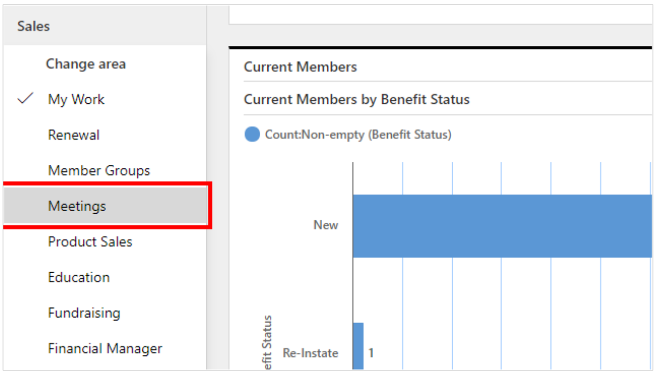
5.22. Setting up Registrations

5.22.1. Setting Up Registrations

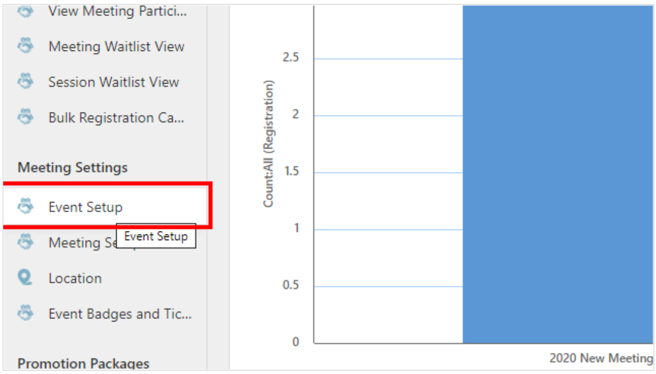
Click on the button My Work



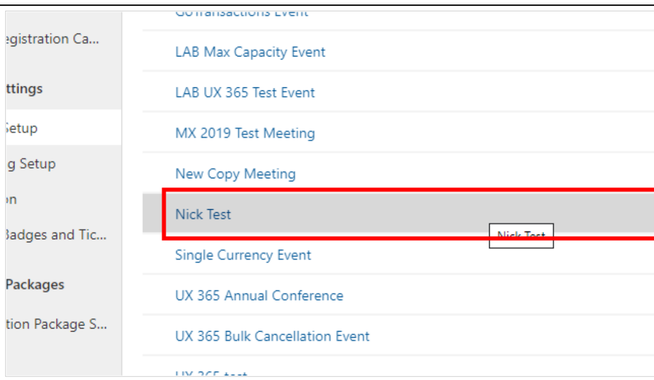
Click on the item **Meetings**



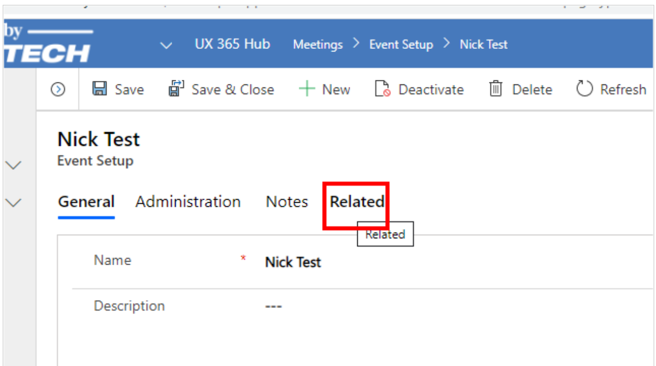
Click on the item **Event Setup**



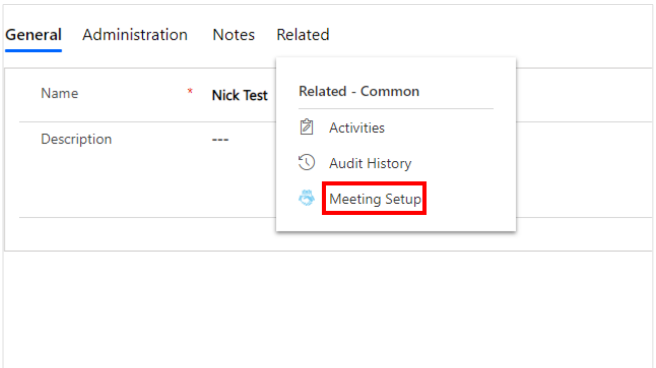
Locate and open the event



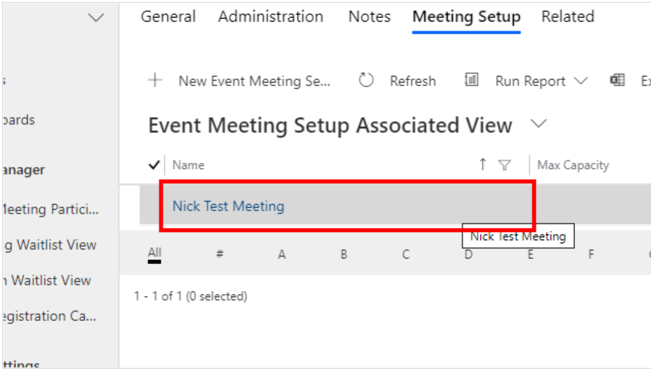
Click on the item **Related**



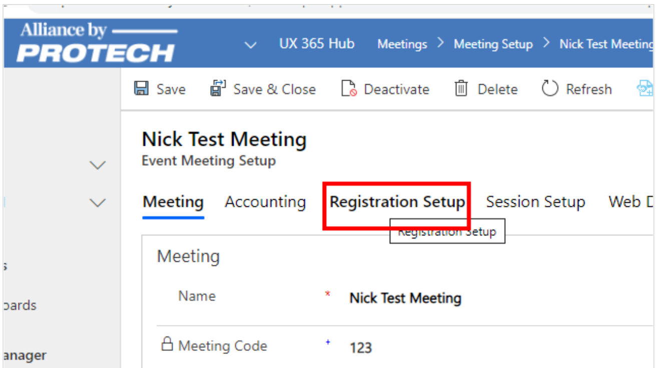
Click on the menu item **Meeting Setup**



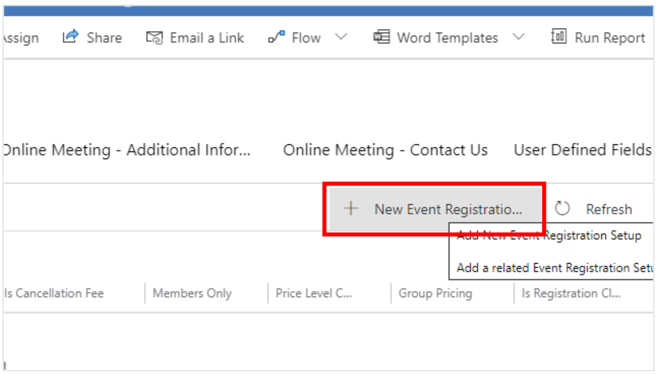
Click and open the meeting setup



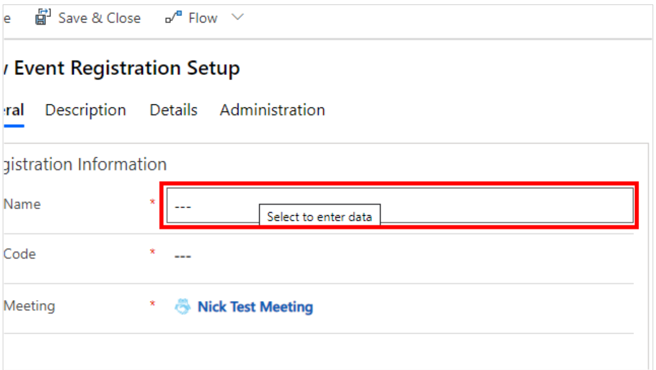
Click on the item **Registration Setup**



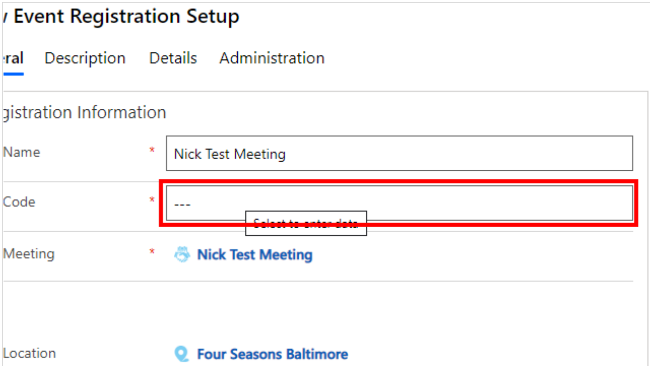
Click on the menu item **Add New Event Registration Setup**



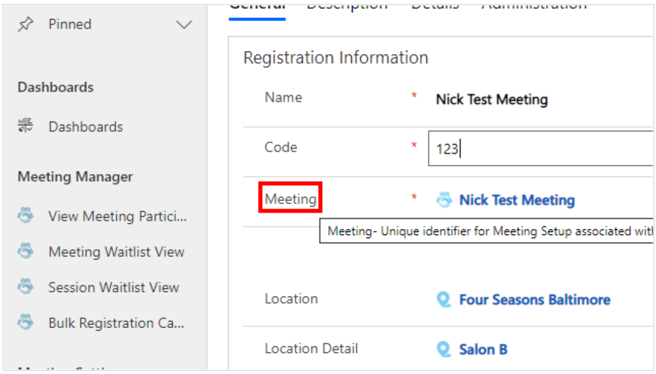
Enter the name of the registration.



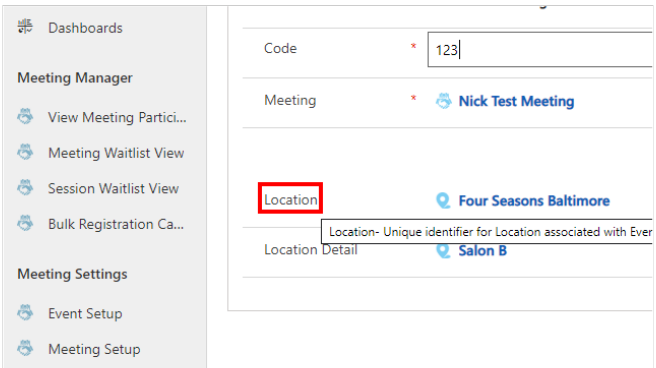
Enter a code for the registration. The Event ID will be appended to the code, so keep it short and simple. Use only letters and numbers; do not use spaces or symbols.



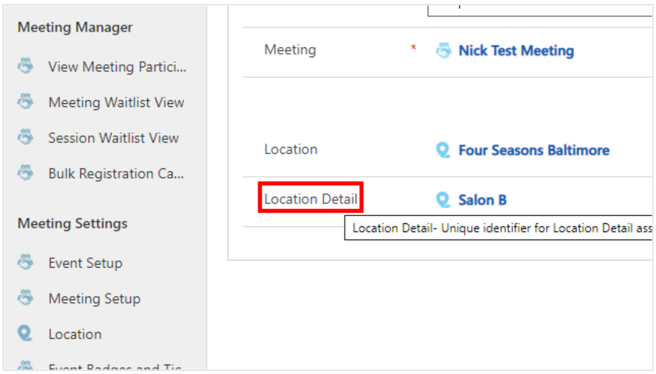
Meeting displays the parent meeting. Do not change this field.



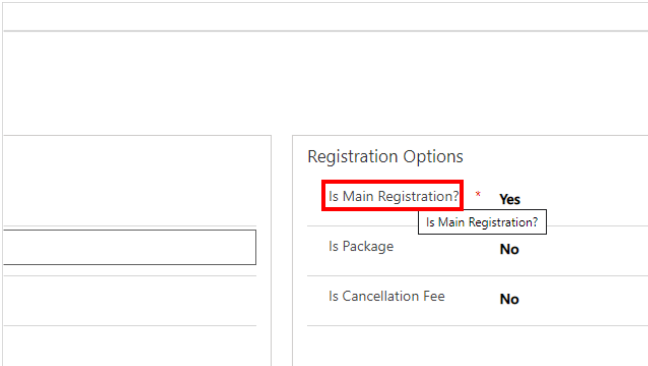
Location displays the location for the parent meeting by default. Click the Lookup button to select a different location, if necessary.



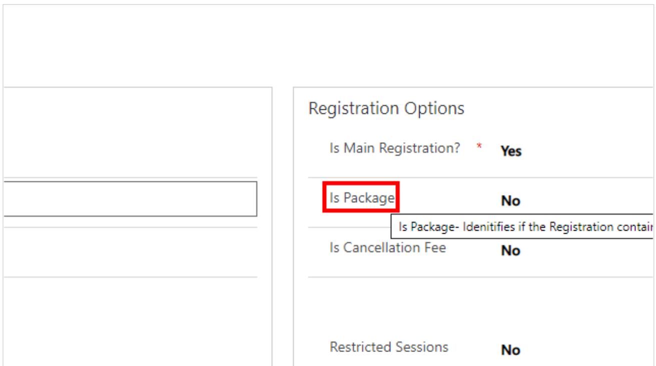
Location Detail displays the location detail for the parent meeting by default. Click the Lookup button to select a different location detail, if necessary.



If this registration is available to guests, click to select No. If this registration not available to guests, select Yes.

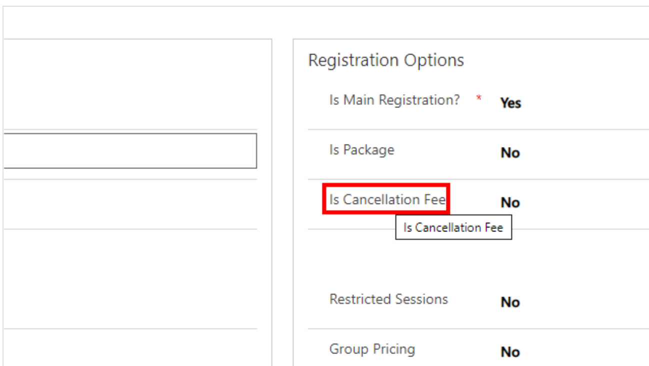


If this registration will include packaged sessions, select Yes.

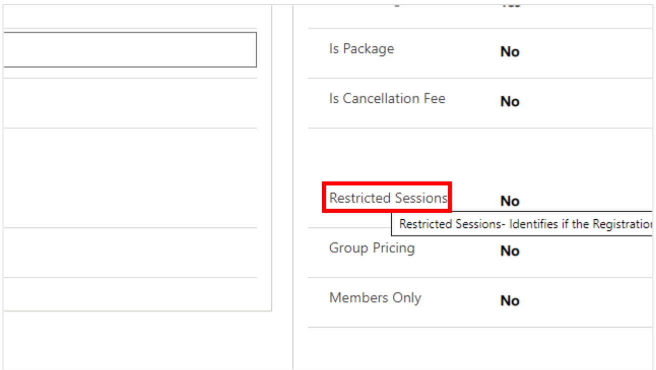


For example, if the registration fee includes tickets to a banquet, set up the registration as a package and add the banquet session to it. (For more information, see Setting up registrations with packaged sessions.) The individual sessions added to a packaged registration are not assessed an additional charge, even if they are available for purchase separately. (If you select Yes, the Packaged Sessions option will be activated in the Navigation Pane after you save this registration.)

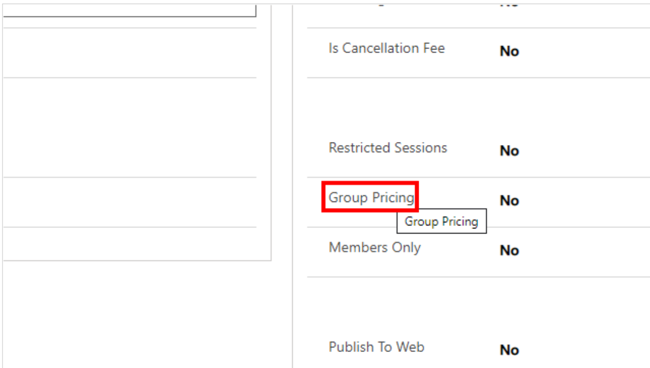
If you are creating a cancellation item, click to select Yes; otherwise, leave this setting as No.



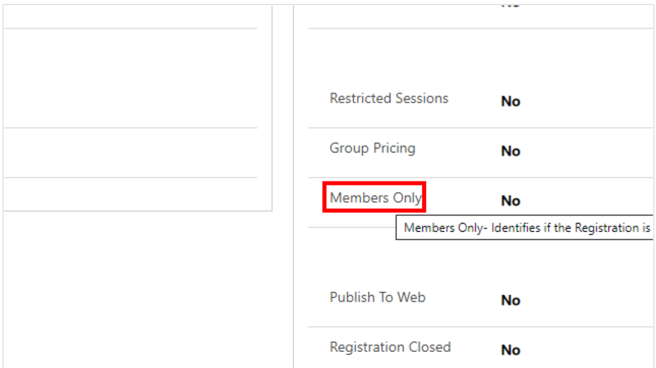
If registrants choosing this registration may select only from a specific subset of sessions, click to select Yes. If registrants are not restricted to a specific set of sessions, select No.



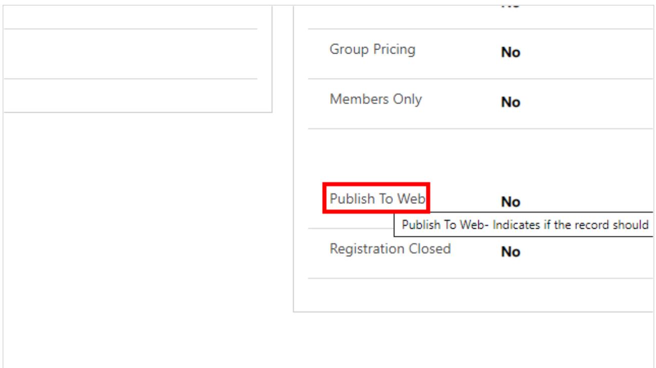
If you are creating a registration for group pricing, click to select Yes; otherwise, leave this setting as No.



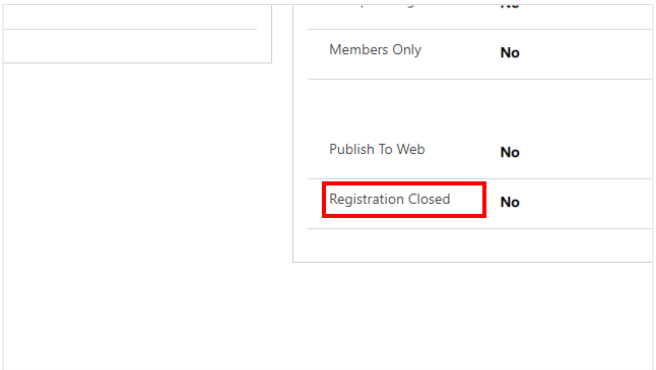
If this registration is available to both members and non-members, click to select No. If this registration is only available to members, select Yes.



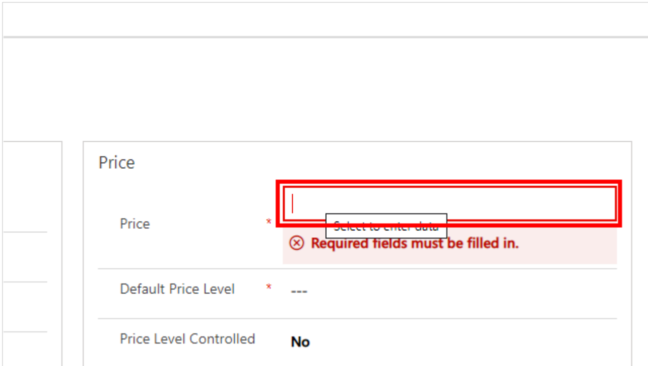
Publish to Web indicates if the record should be published to the web.



Registration Closed identifies if the registration is opened or closed.

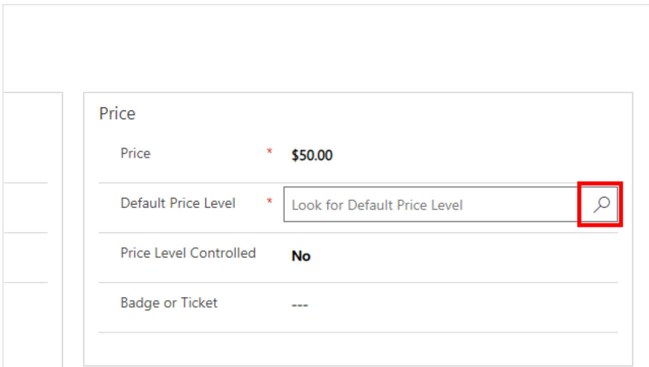


Enter the default price based on the default price list.

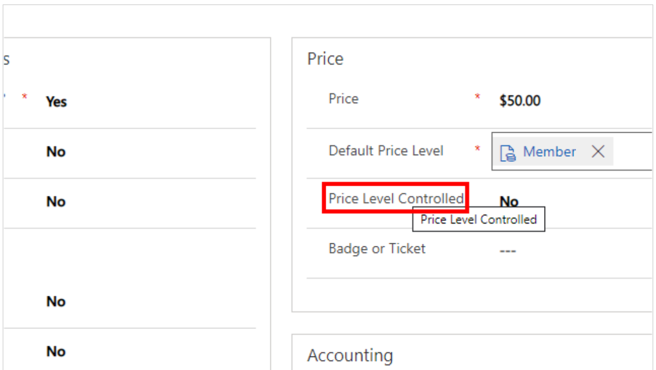


If members are charged $50 and non-members are charged $75, AND the default price list is set to non-member, enter $75..

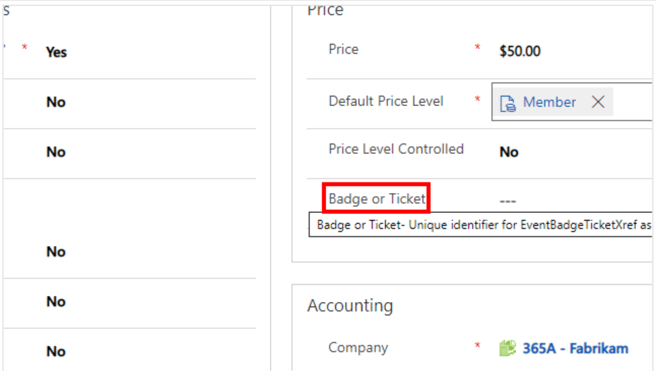
Click the Lookup button to select the default price list for this registration. If a registrant is assigned a price list that does not apply to the meeting or is not assigned a default price list, then the price list identified as the default for the registration will be used when calculating a cost.



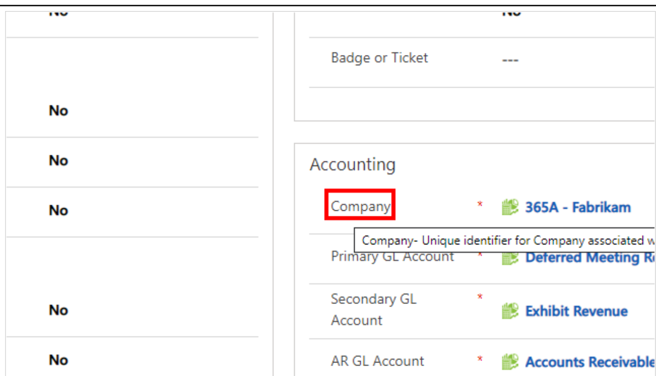
Select Yes or No, if you want the price level controlled



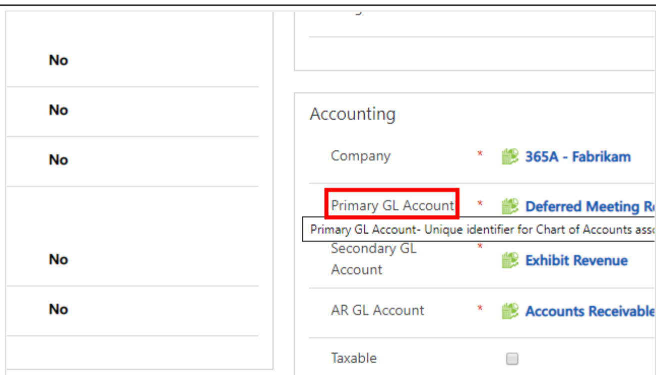
If the attendee gets a badge or ticket with this registration, click the Lookup button to select the appropriate badge or ticket.



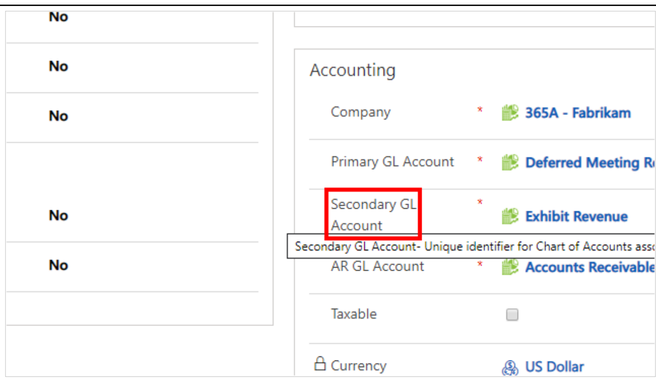
Company , Displays the accounting system company selected in the meeting setup. Do not change this field.



By default, the GL account from the meeting appears here. If you want to change the GL account, click the Lookup button to select a different account number for revenue associated with this registration.

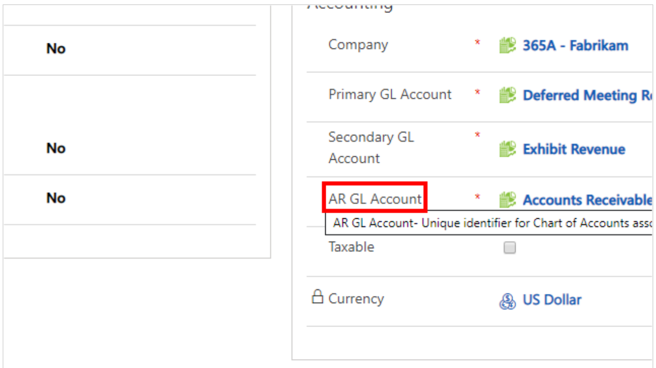


By default, the secondary GL account from the meeting appears here. If you want to change the secondary GL account, click the Lookup button to select a different account number for deferred revenue associated with this session. If your organization does not defer meeting revenue, leave this field blank.

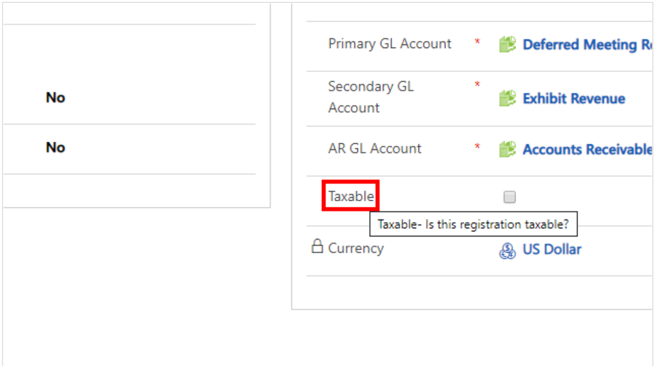


If you make any changes to the accounting setup for a registration—for example, if you change the deferred revenue account—that change will apply to all future transactions involving the registration, but it will not change any transactions that already exist.

By default, the AR account from the meeting appears here. If you want to change the AR account, click the Lookup button to select a different account number for accounts receivable associated with this registration.

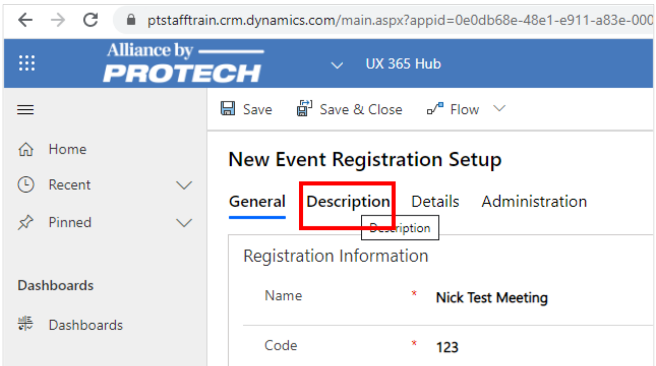


If this registration is taxable, mark this option.

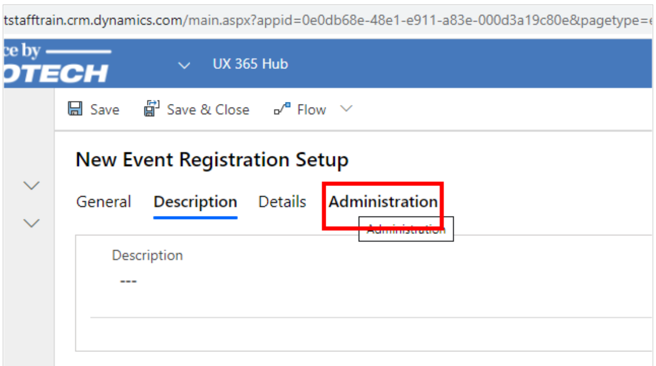


The default setting comes from the meeting setup; however, you can change it for individual registrations.

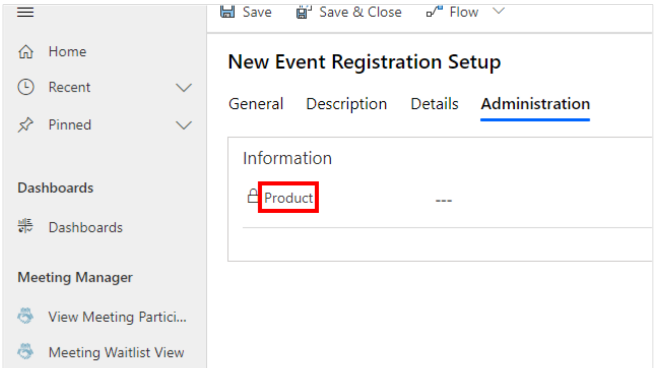
This is where you will enter the Description of the Registration Setup



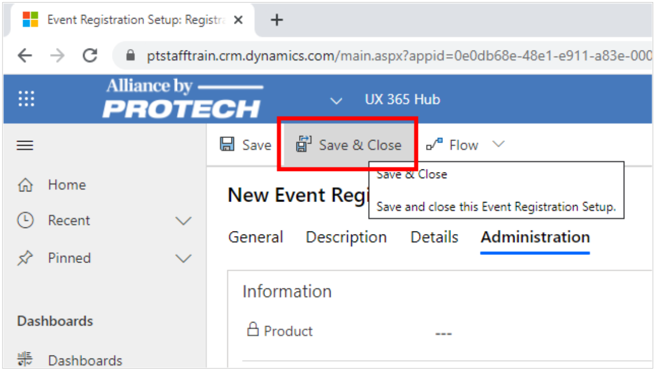
Click on the item **Administration**



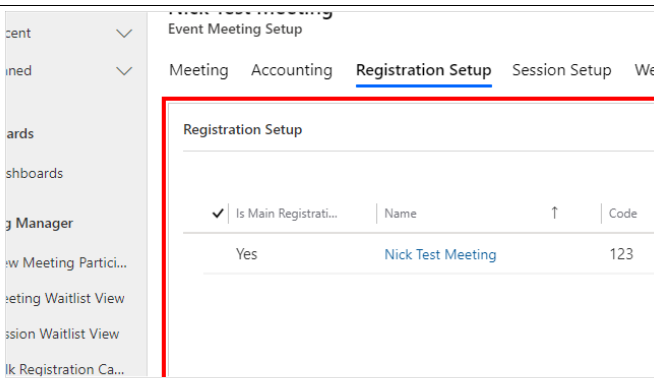
Displays the related registration setup record.



Click on the menu item **Save & Close**

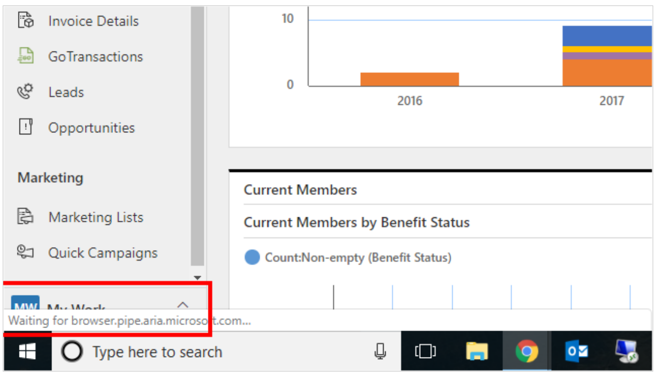


Once all info is Saved and Closed, the registration will show up in this view.

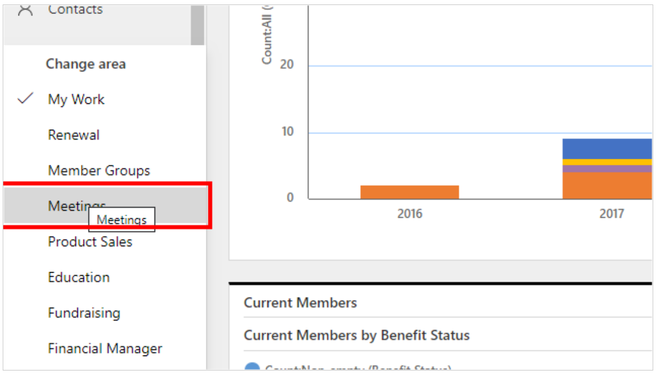


5.23. Setting up Registrations with Packaged Sessions

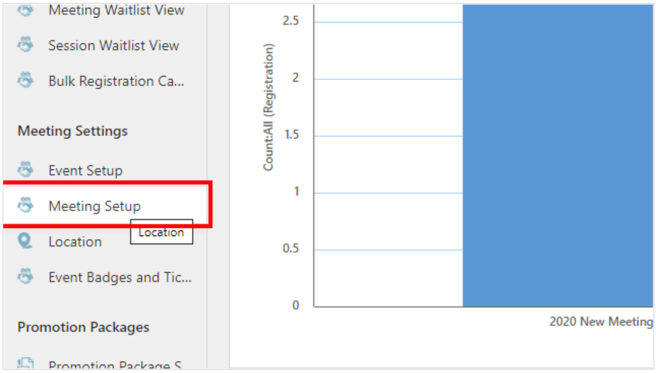
Click on **MW My Work**



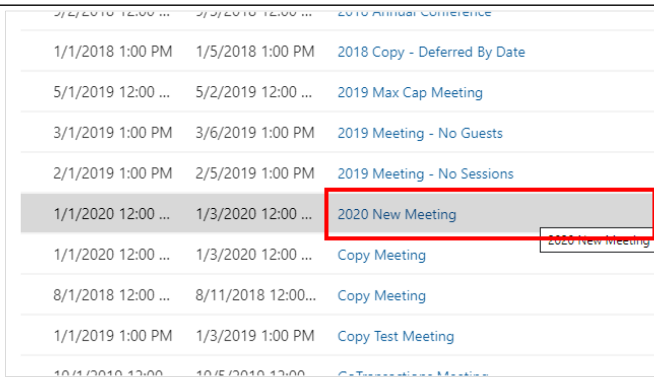
Click on the item **Meetings**



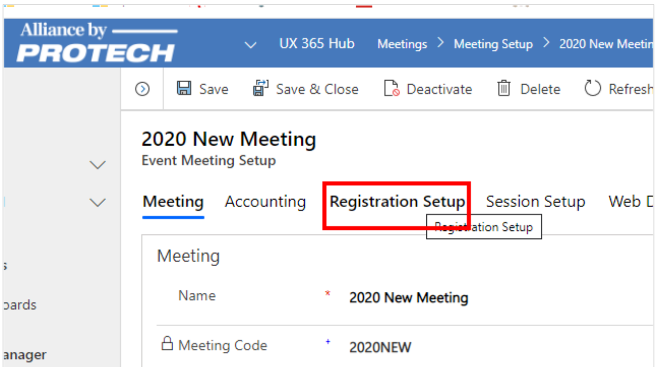
Click on the item **Meeting Setup**



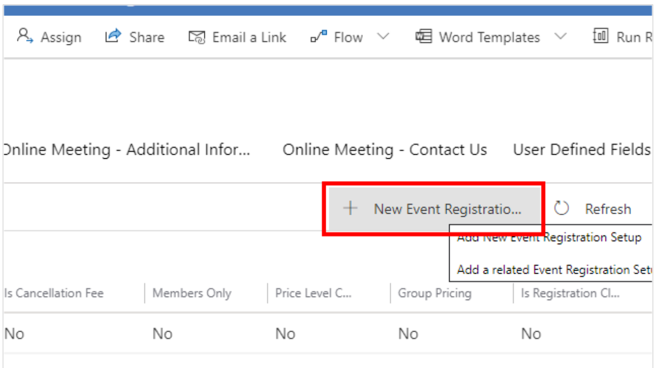
Select the meeting you would like to have a packaged registraion for



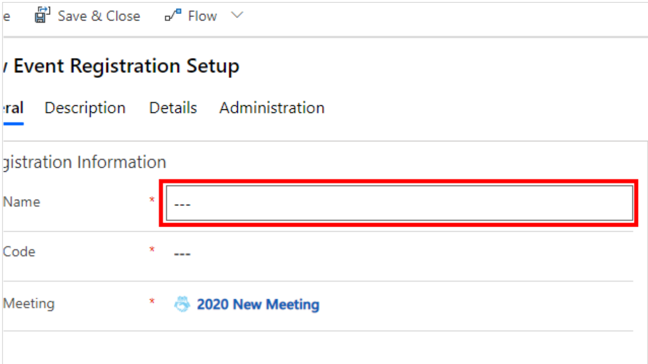
Click on the item **Registration Setup**



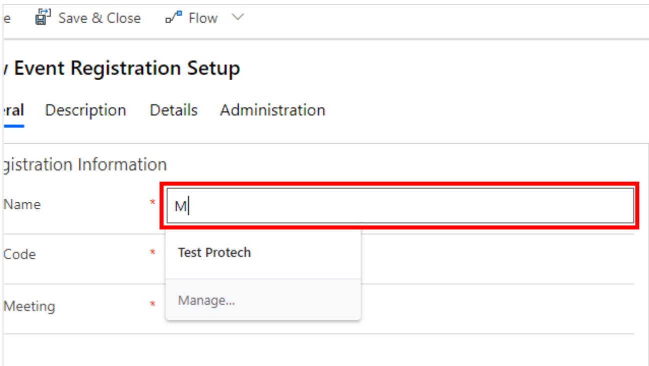
Click on the menu item **Add New Event Registration Setup**



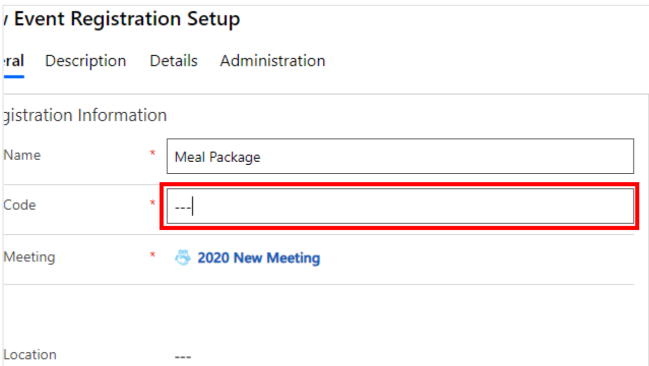
Enter the name of the package

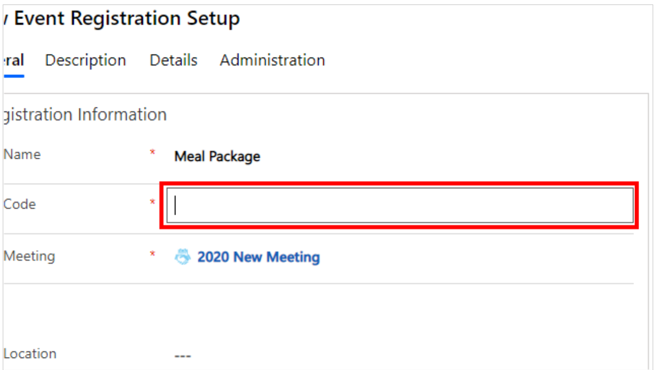
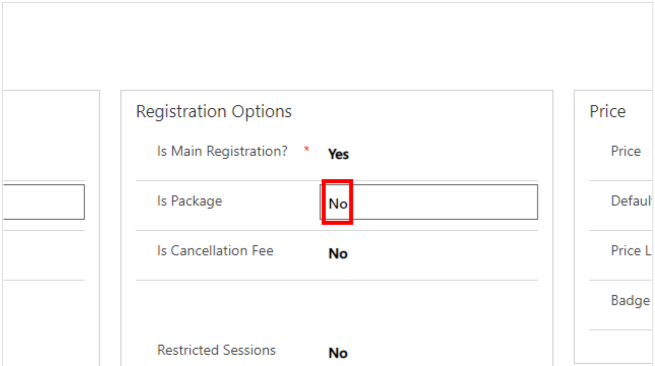
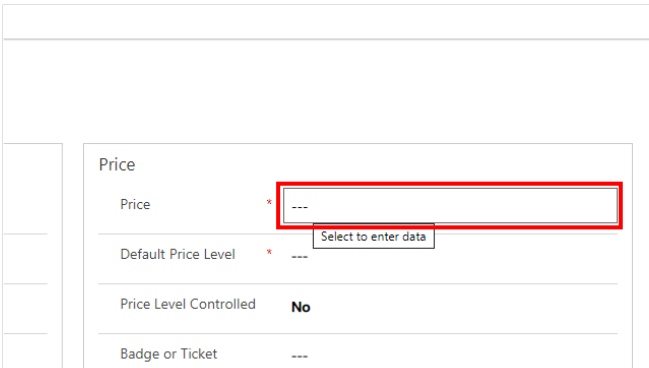
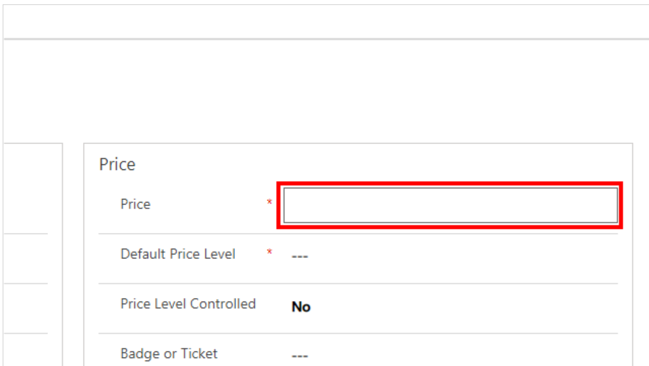


Enter **name**.

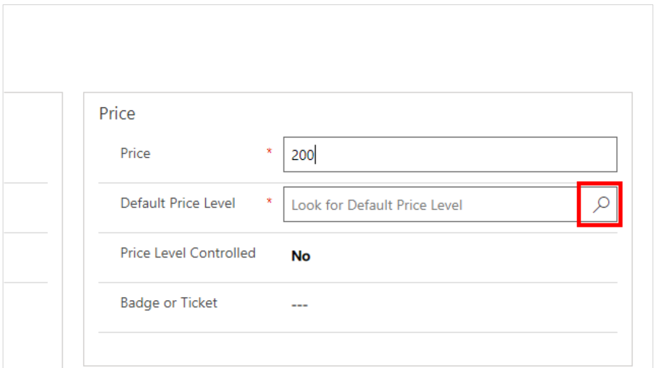


Click on the text field **Code**

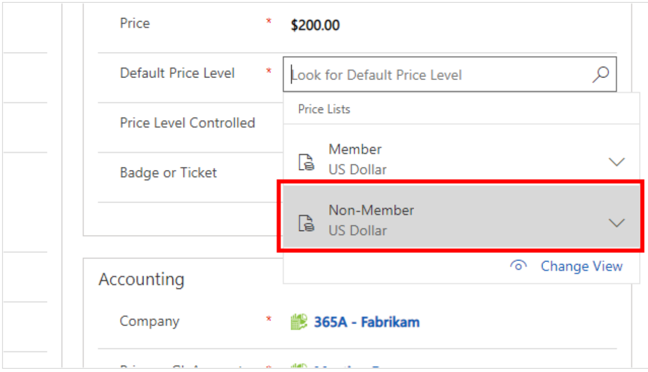


Enter **code for registration**.	
Mark is package as yes	
Click on the text field **Price**	
Enter price for package	

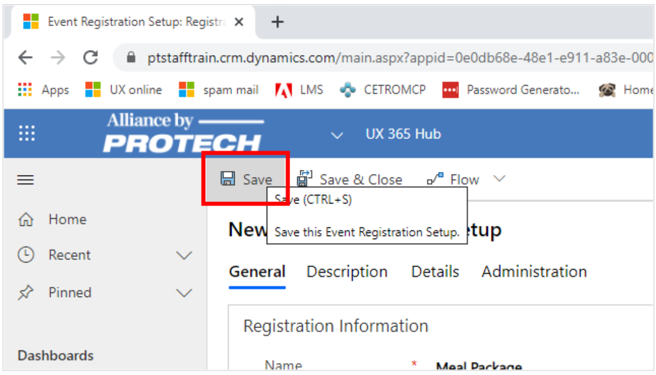
Click on the link **Default Price Level**



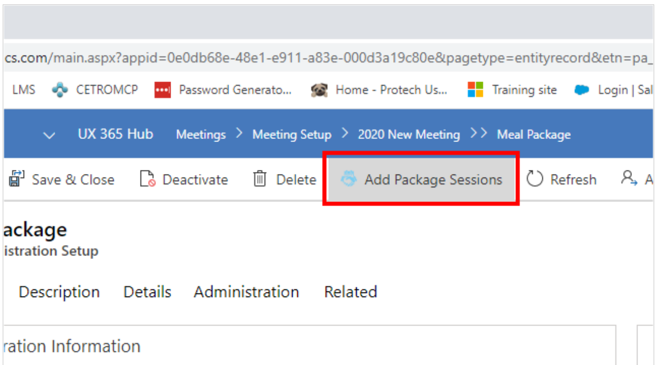
Click on the item **Non-Member US Dollar US Dollar $ USD**



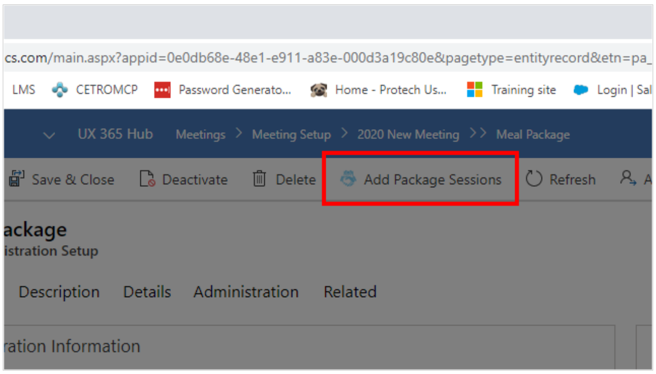
Click on the menu item **Save (CTRL+S)**



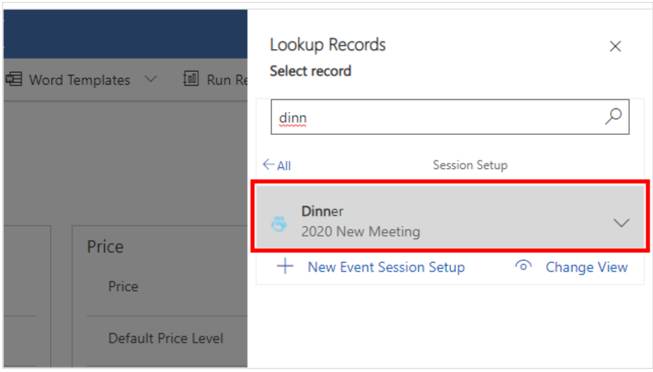
Click on the menu item **Add Package Sessions**



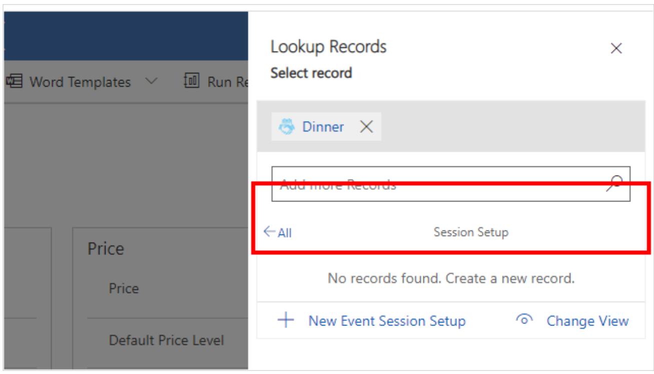
Enter name of sessions you would like to add or create them if they have not yet been created



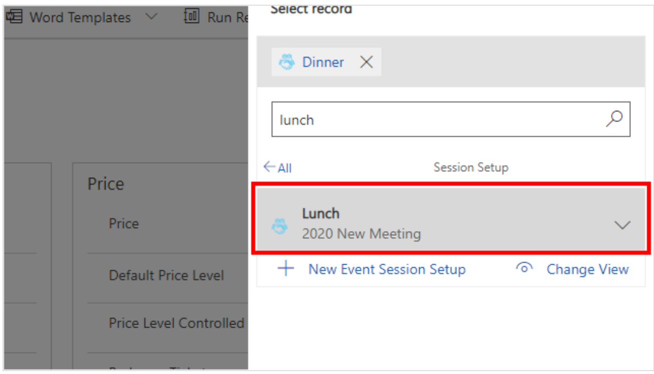
Click on session you would like to add



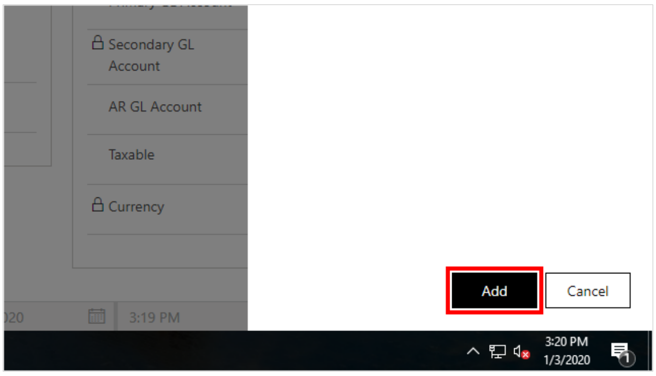
Enter name of sessions you would like to add or create them if they have not yet been created



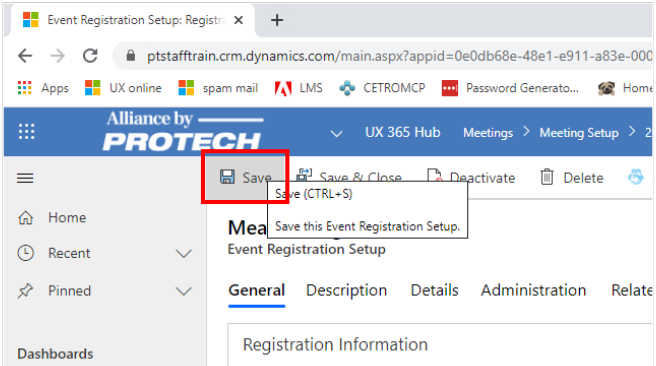
Click on session you would like to add



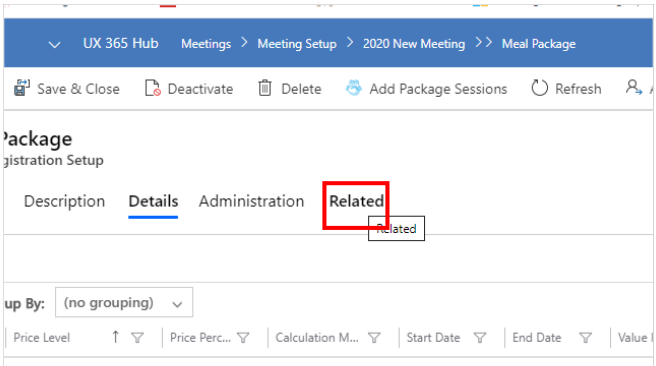
Click on the button **Add**



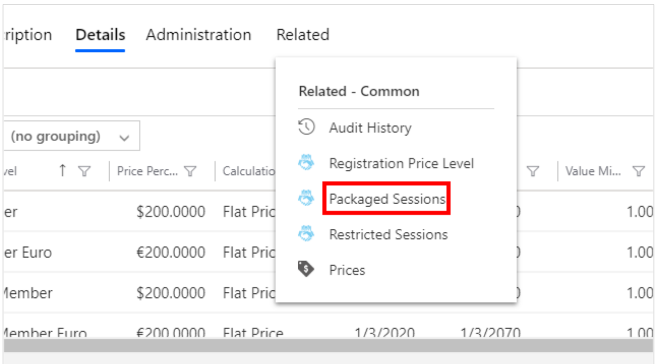
Click on the menu item **Save (CTRL+S)**



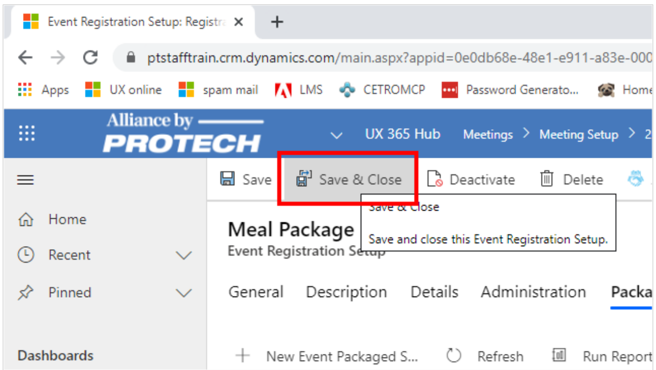
Click on the item **Related**



Click on the menu item **Packaged Sessions**



Click on the menu item **Save & Close**

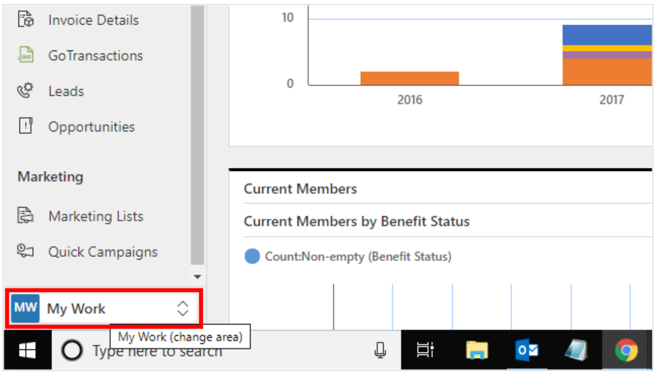


5.24. Setting up Session and Registration Prices

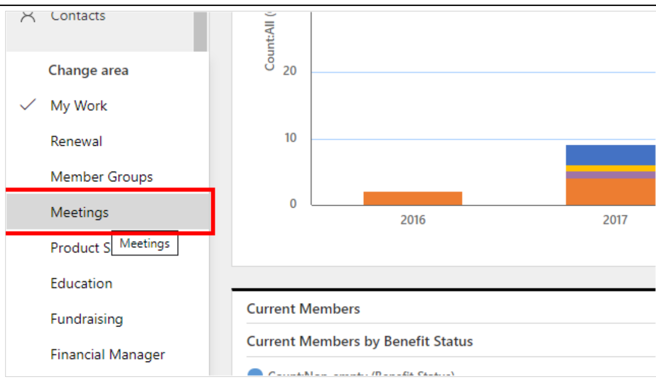
5.24.1. Setting up registration prices

You can set up various pricing schemes for your sessions and registrations. For example, you can set up member and non-member pricing, early bird registration fees, and similar pricing schemes. When you create a new Registration or Session, price records are automatically created for each price list that is set up for your organization. Typically, this includes member and non-member price lists, but it could include others, depending on your organizational settings. Each automatically created price record is assigned the default price that you set up when you created the registration or session, so you may need to modify the pricing in these records. Because price records include a start and end date, you can also use them to support date-based prices, such as an "early bird registration." This example will show how to create early bird pricing for registrations and sessions.

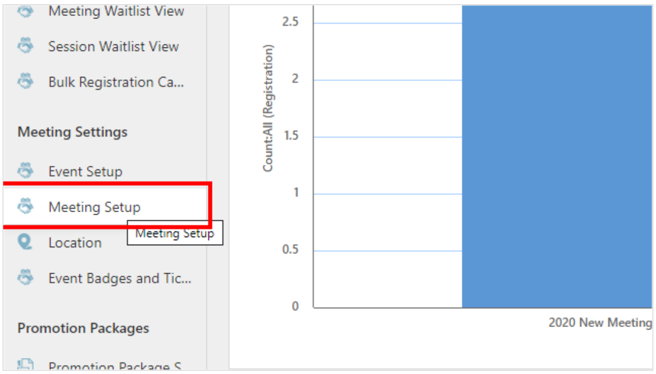
Click on the button **My Work (change area)**



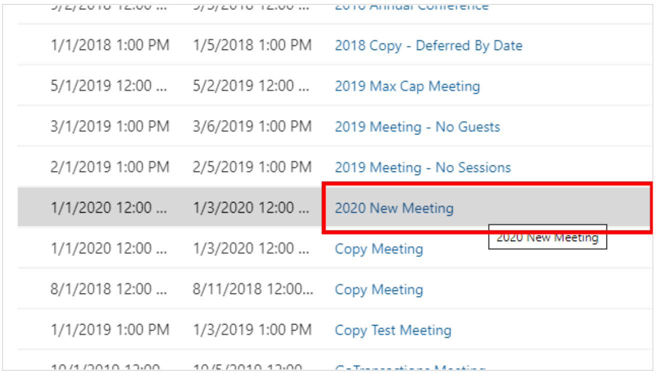
Click on the item **Meetings**



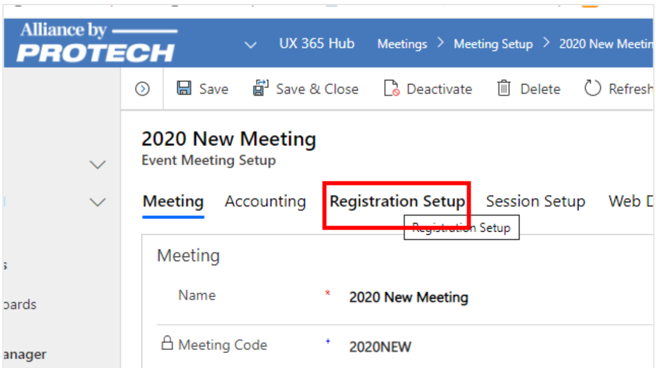
Click on the item **Meeting Setup**



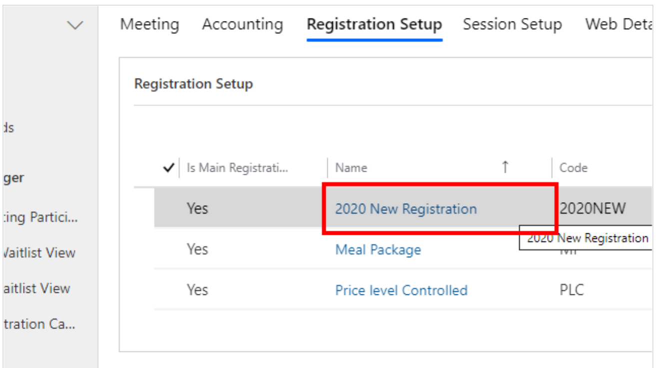
Click on the cell **Name**



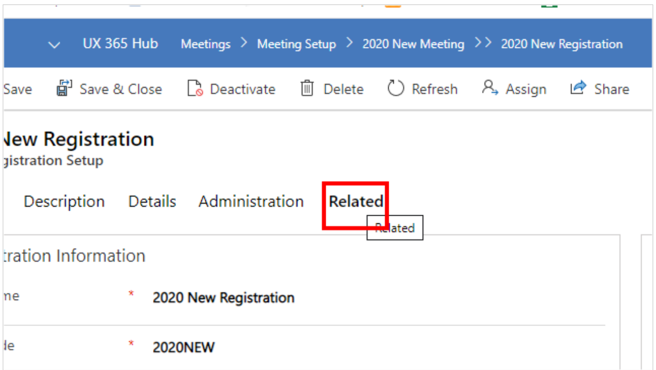
Click on the item **Registration Setup**



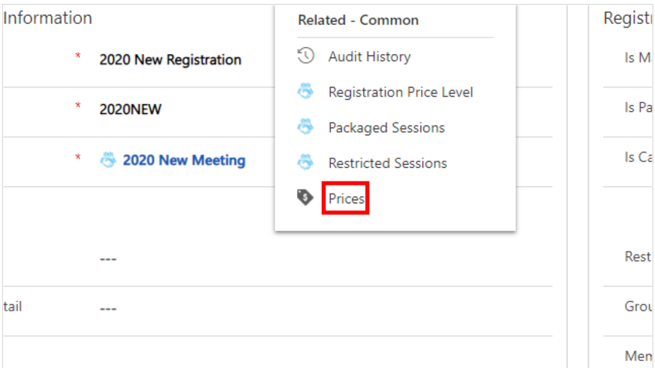
Click on the cell **Name**



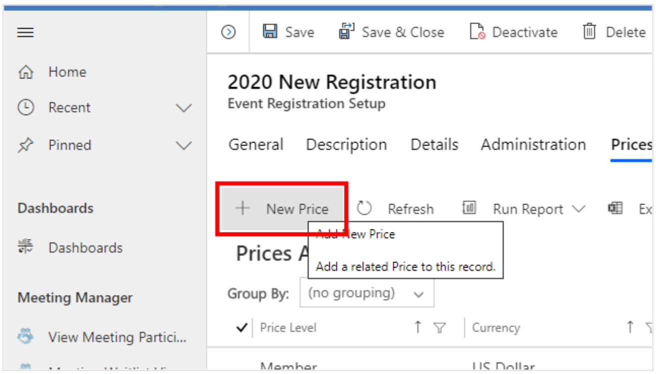
Click on the item **Related**



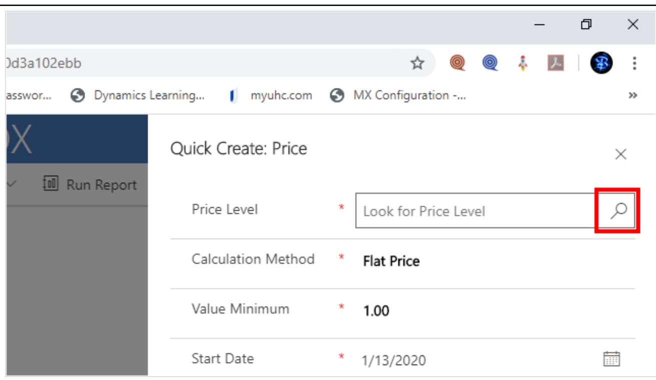
Click on the menu item **Prices**



Click on the menu item **Add New Price**

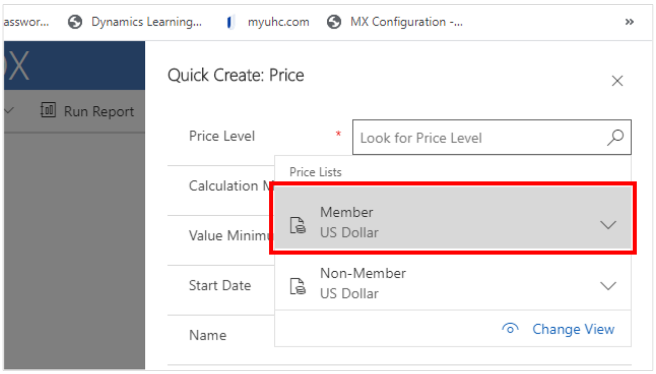


Click on the link **Price Level**
Displays the price level used for the registration. If no price level exists, the default price level in the registration or session setup is used.

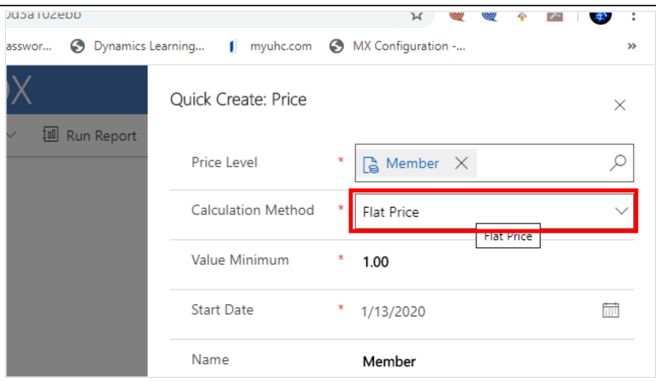


PROTECH

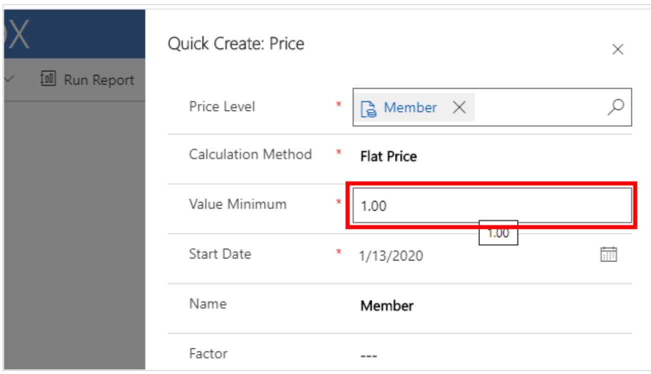
Click on the price level you are adding a price for.



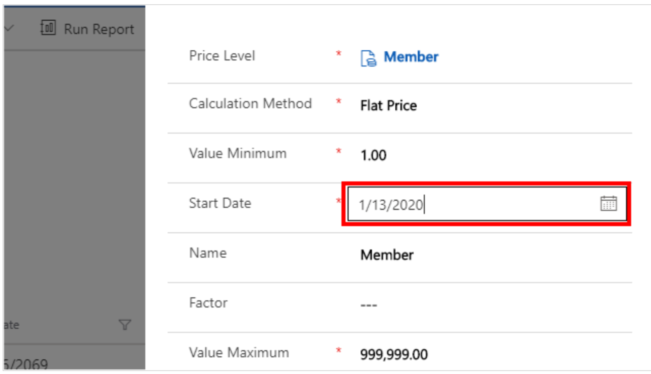
Calculation Method
Choose from Flat Price or Percentage. For cancellation fee price records, the Calculation Method = Percentage applies to a percentage of all cancelled meeting registration charges rather than a percentage of the default price. In the price record setup for cancellation fees, you can charge a flat amount by selecting Calculation Method = Flat Price with an amount in the Price/Percent of List Price field or you can charge a percentage of the total cancelled meeting registration charges by selecting Calculation Method = Percentage and entering the percentage amount in the Price/Percent of List Price field.



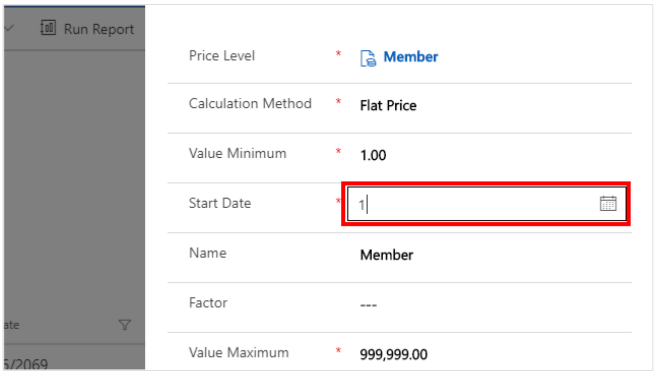
Value Minimum
Do not modify the entry in this field unless setting up pricing for a registration setup where Group Pricing = Yes.



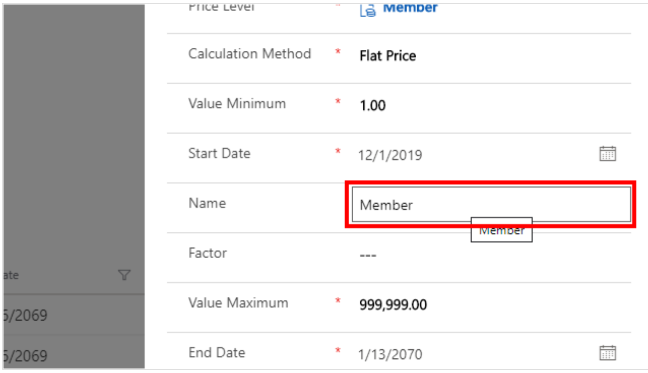
Click on the input field **Start Date**



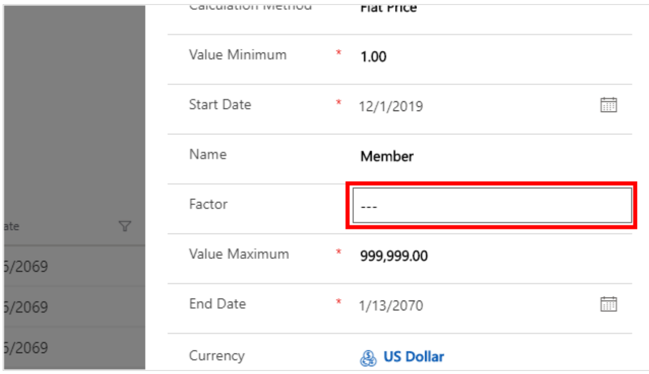
Enter start date.



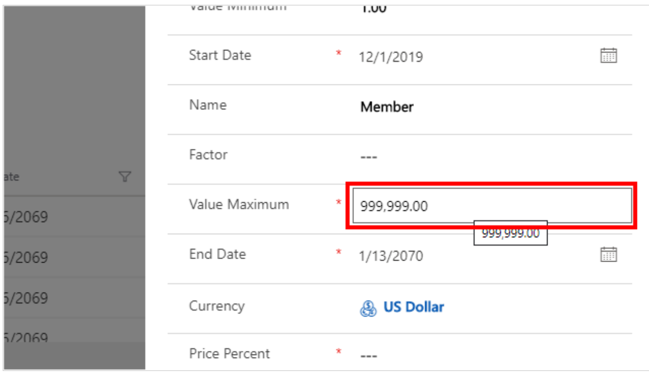
Name
Defaults from the Price Level selected.



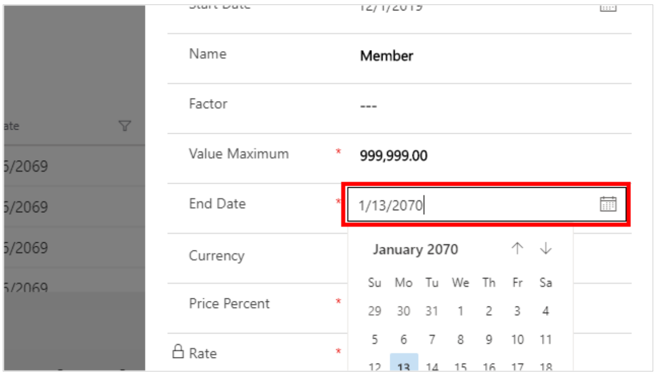
Factor
Does not apply.



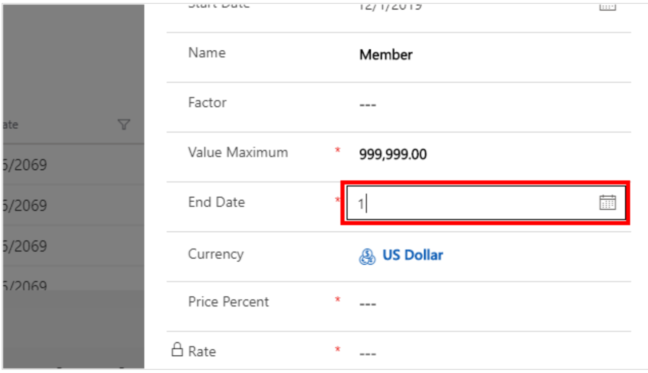
Value Maximum
Do not modify the entry in this field unless you are setting up for pricing for a registration setup where Group Pricing = Yes.



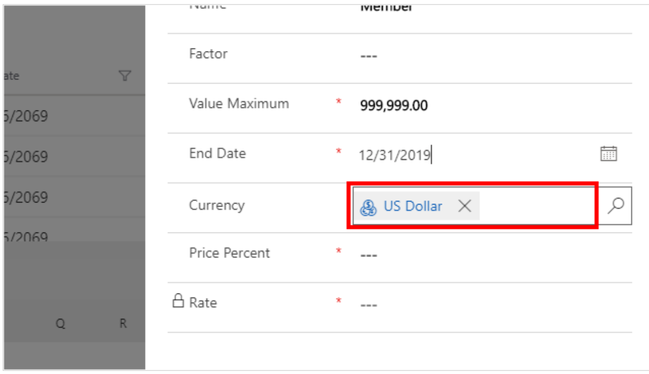
Click on the input field **End Date**



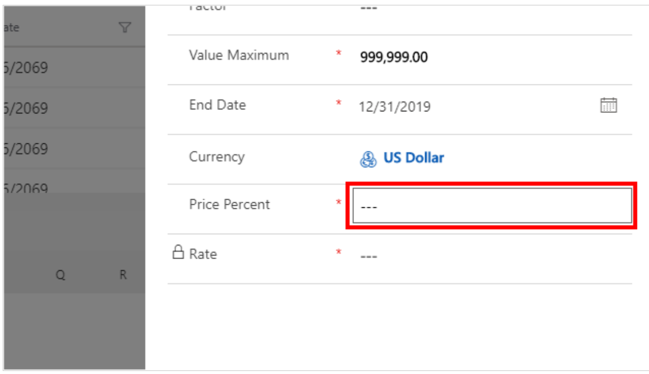
Enter end date.



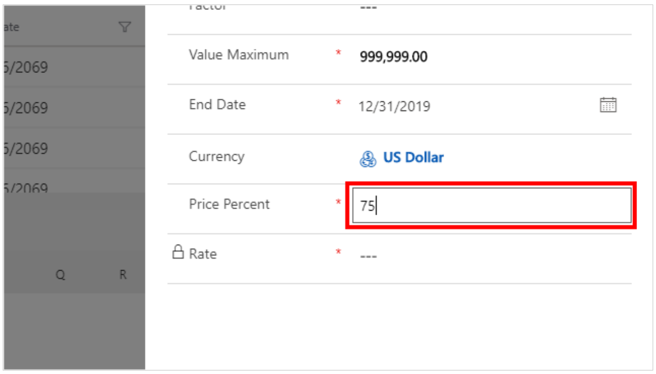
Currency
Upon Save, this field will update to the Currency related to the Price Level selected.



Click on the text field **Price Percent**
If this is a flat price, enter the dollar amount. (You must also select Flat Price in the Calculation Method field in this case.) Except for cancellation fees, if this price is calculated as a percent of the default price, enter the percentage of the price that the registrant should pay. (You must also select Percentage in the Calculation Method field in this case.) For example, if you are offering a 15% discount, enter "85.00" to indicate that the registrant should pay 85% of the default price that was entered when you set up this session or registration.

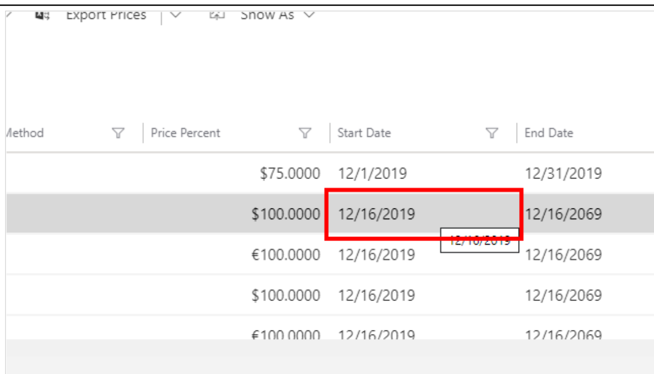


Enter **Price Percent**.

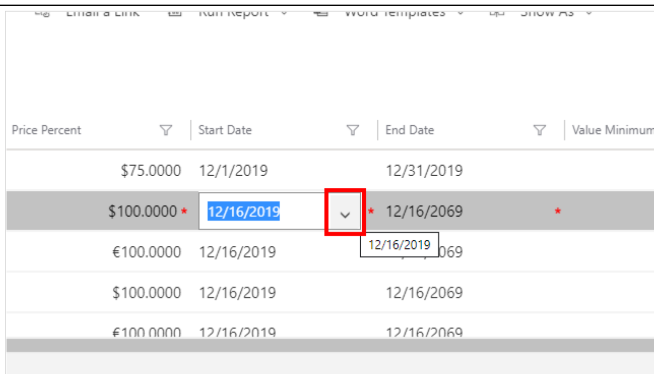


Click on the button **Save and Close**

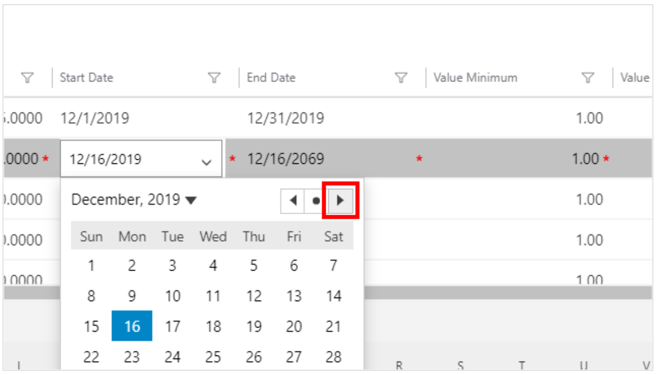
Using inline editing, edit the price record that was created upon the initial save of this registration record. Make sure there are no overlaps or gaps in date ranges, otherwise, when adding this to an invoice the price will be $0.00.



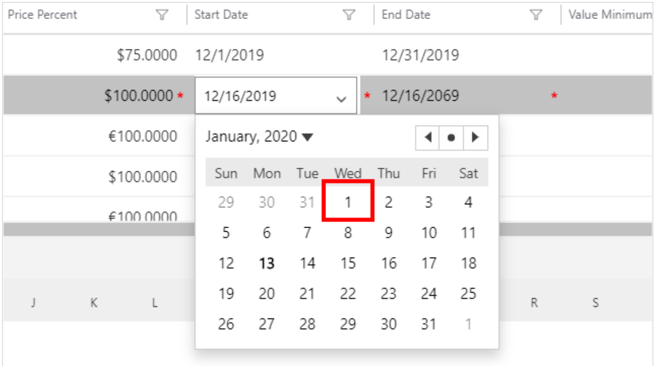
You are able to edit this date by using the dropdown option or by manually entering the date.



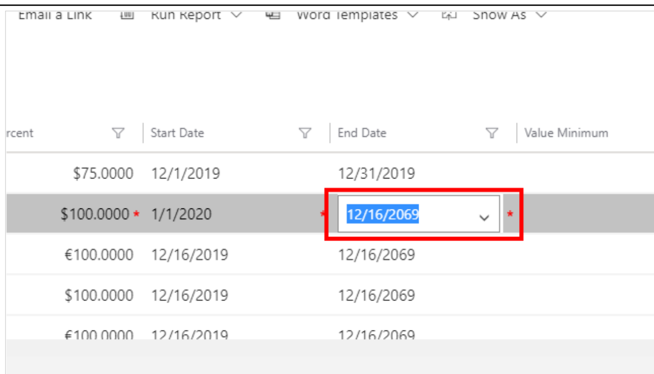
Click on the button **Next Month**



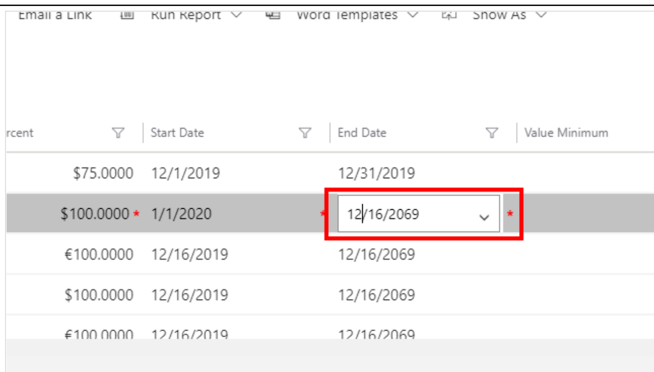
Click on **1**



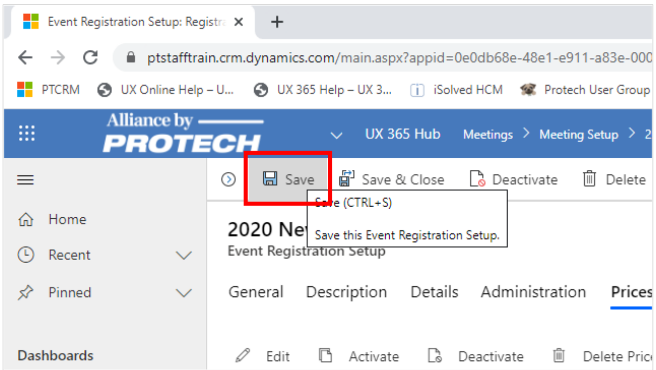
Click on **End Date**



Edit end date.

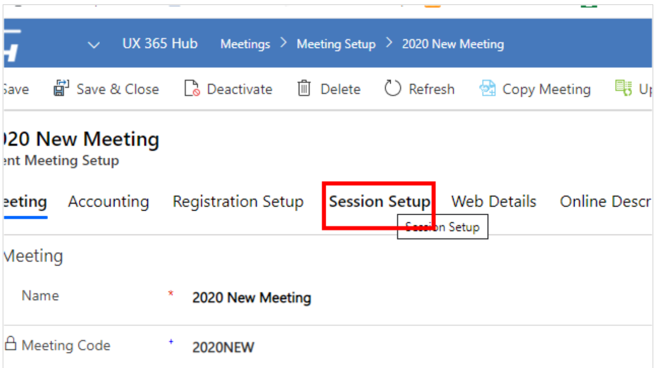


Click on the menu item Save

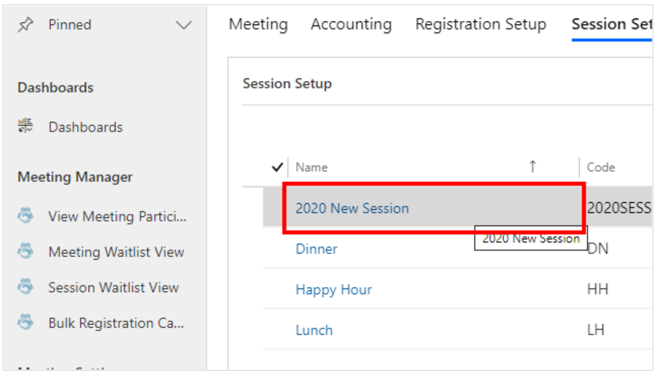


5.24.2. Setting up session prices

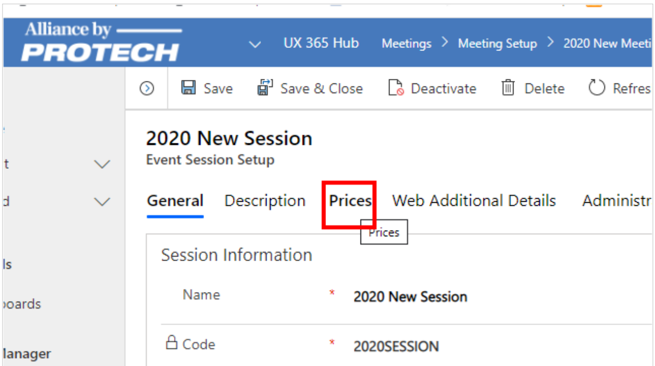
From the meeting setup record click on the item Session Setup.



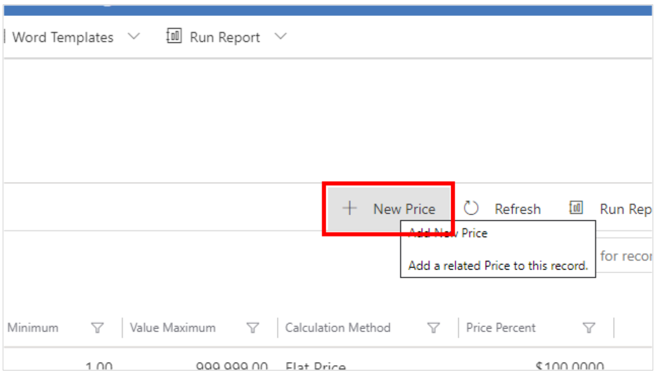
Click on the cell **Name**



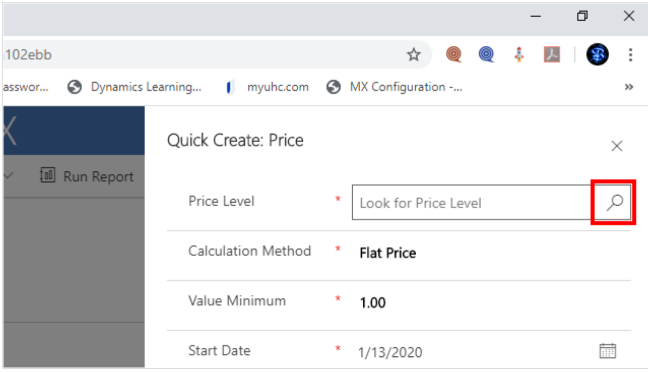
Click on the item **Prices**



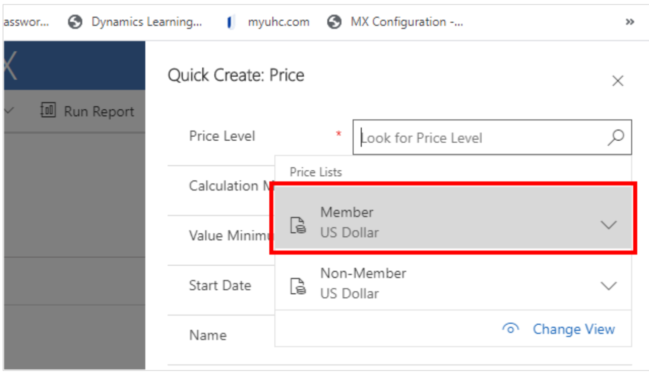
Click on the menu item **Add New Price**



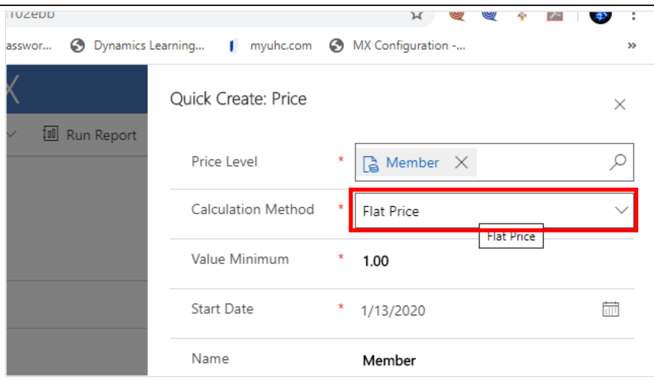
Click on the link **Price Level**
Displays the price level used for the registration. If no price level exists, the default price level in the registration or session setup is used.



Click on the price level you are adding a price for.

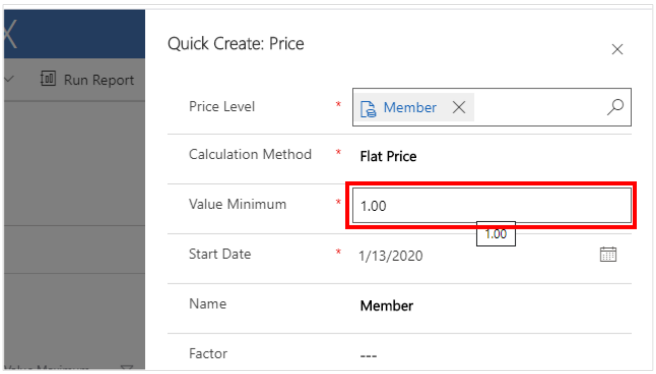


Calculation Method
Choose from Flat Price or Percentage. For cancellation fee price records, the Calculation Method = Percentage applies to a percentage of all cancelled meeting registration charges rather than a percentage of the default price. In the price record setup for cancellation fees, you can charge a flat amount by selecting Calculation Method = Flat Price with an amount in the Price/Percent of List Price field or you can charge a percentage of the total cancelled meeting registration charges by selecting Calculation Method = Percentage and entering the percentage amount in the Price/Percent of List Price field.

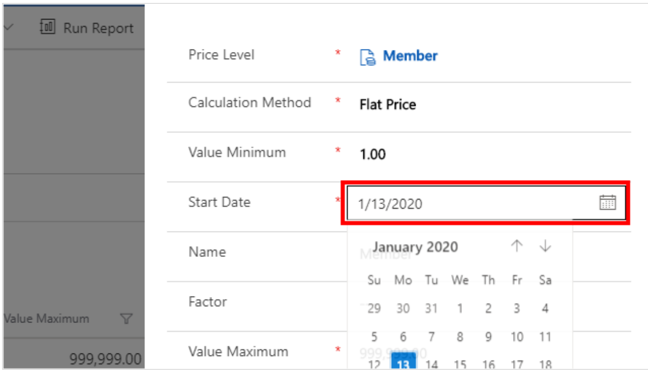


PROTECH

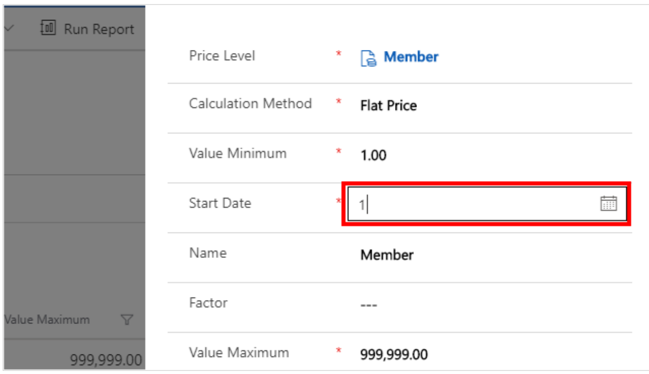
Value Minimum
Quantity pricing is not applicable to Sessions.



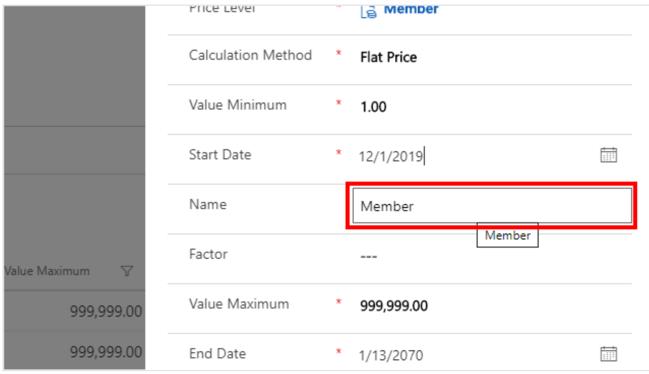
Click on the input field **Start Date**



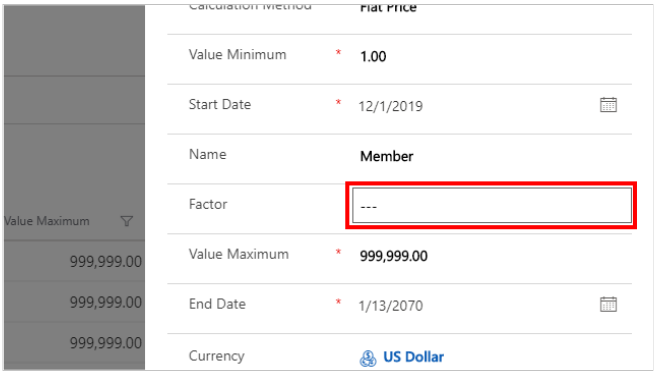
Enter start date.



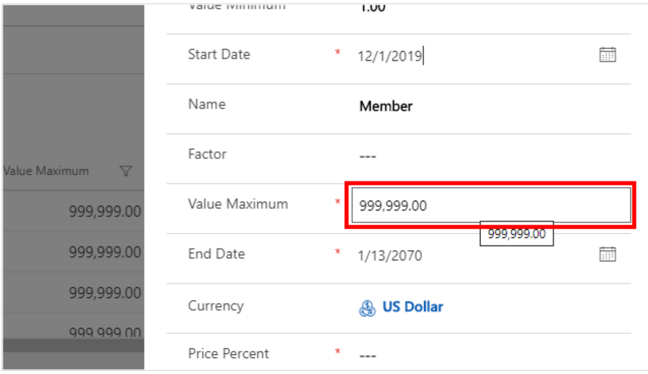
Name
Defaults from the Price Level selected.



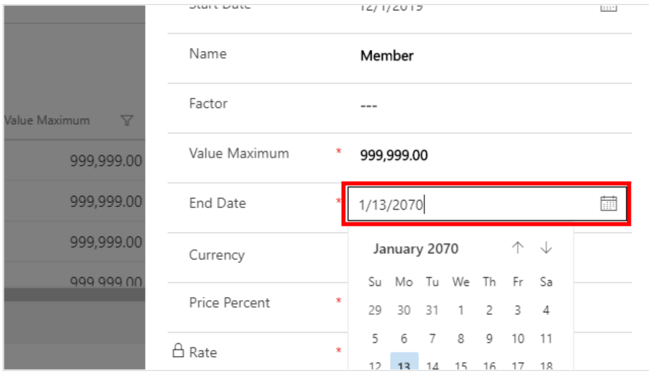
Factor
Does not apply.



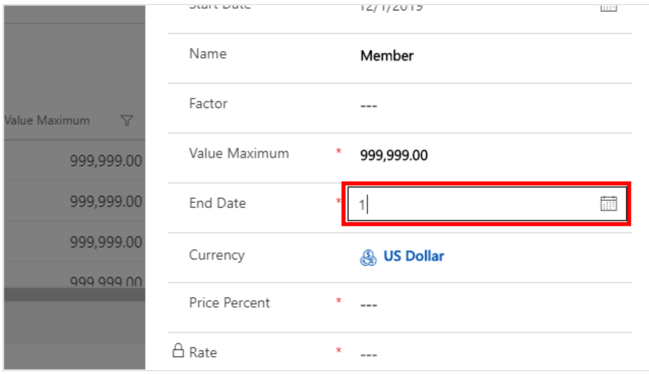
Value Maximum
Quantity pricing is not applicable to Sessions.



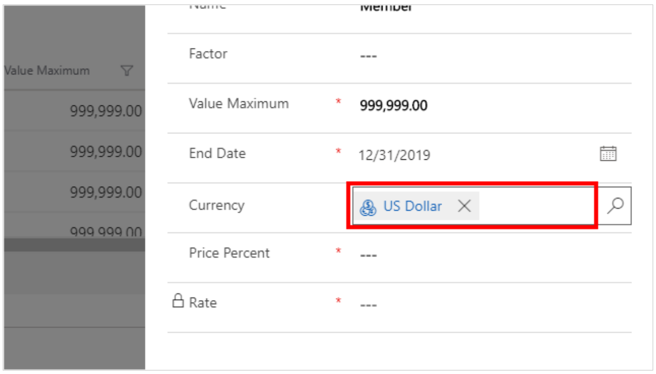
Click on the input field **End Date**



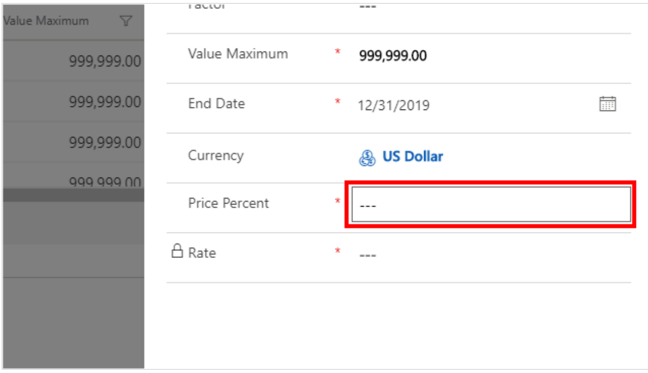
Enter end date.



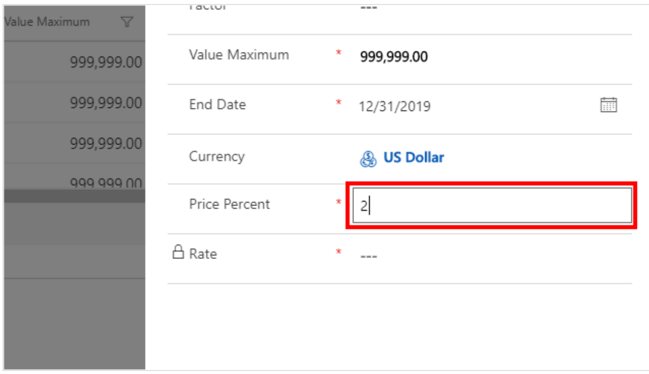
Currency
Upon Save, this field will update to the Currency related to the Price Level selected.



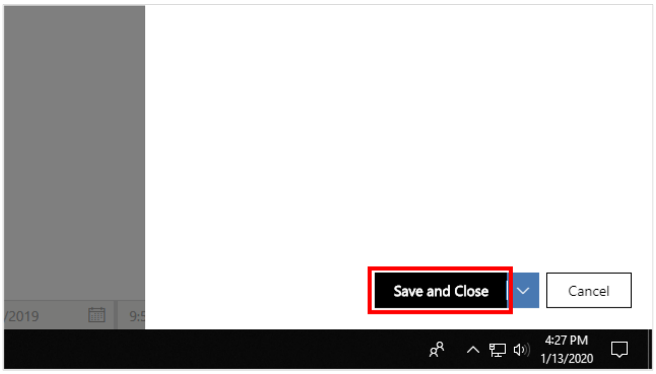
Click on the text field **Price Percent**



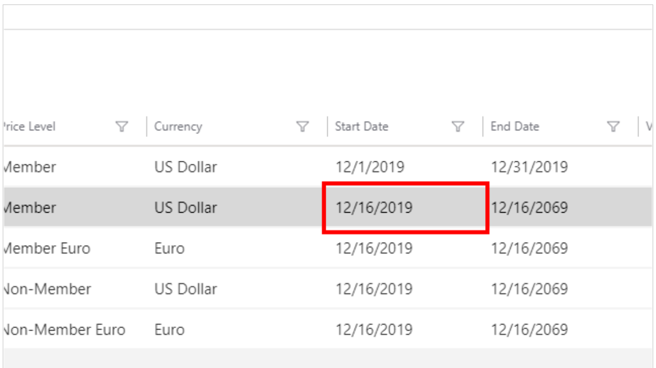
Enter **Price Percent**.



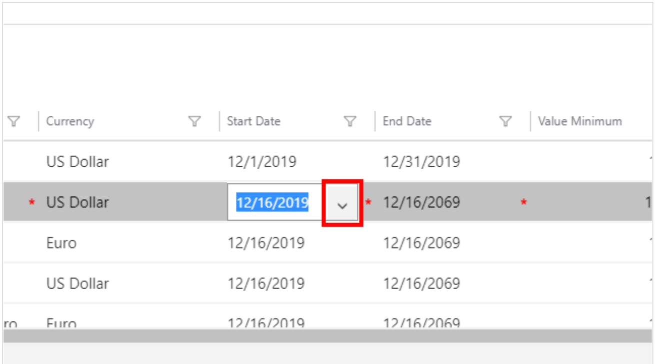
Click on the button **Save and Close**



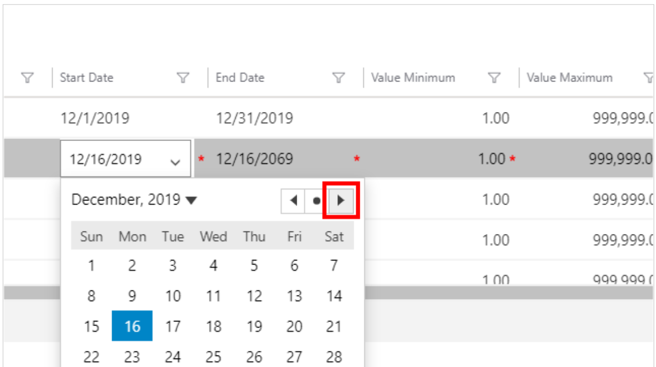
Using inline editing edit the price record that was created upon intial save of this session record. Make sure there are no overlaps or gaps in date ranges otherwise when adding this to an invoice the price will be $0.00.



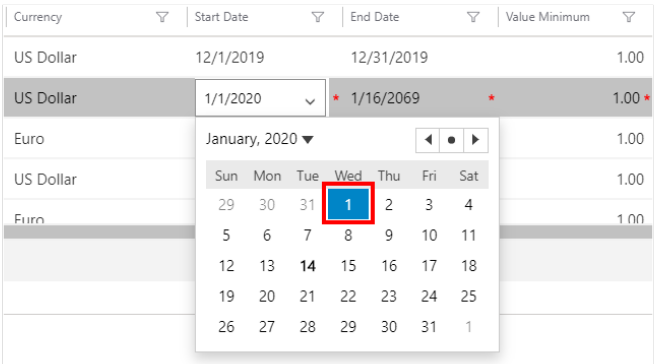
You are able to edit this date by using the dropdown option or by manually entering the date.



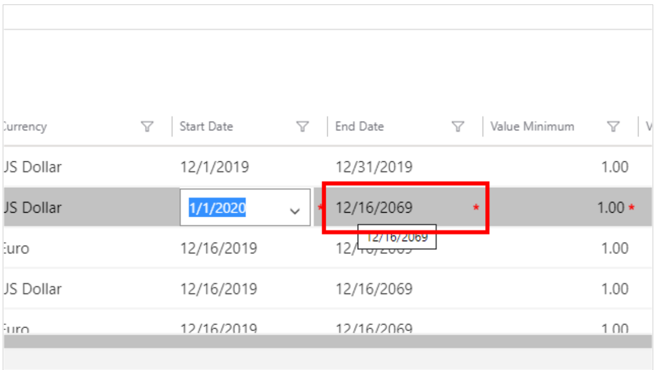
Click on the button **Next Month**



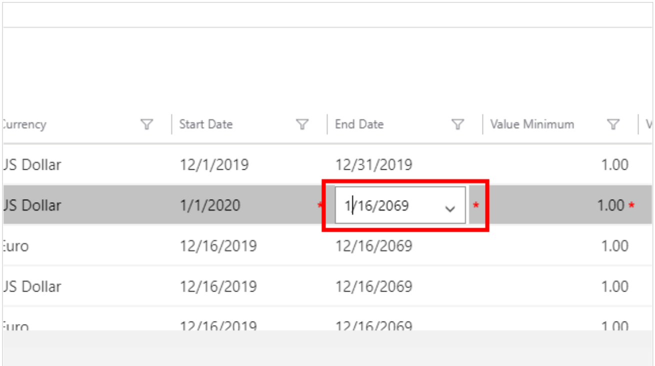
Click on **1**



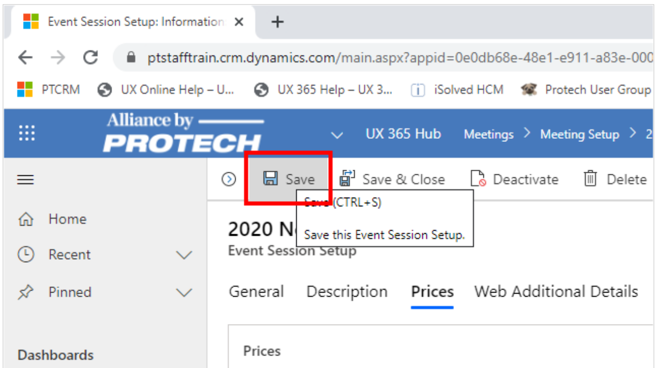
Click on the cell **End Date**



Edit end date.



Click on the menu item Save

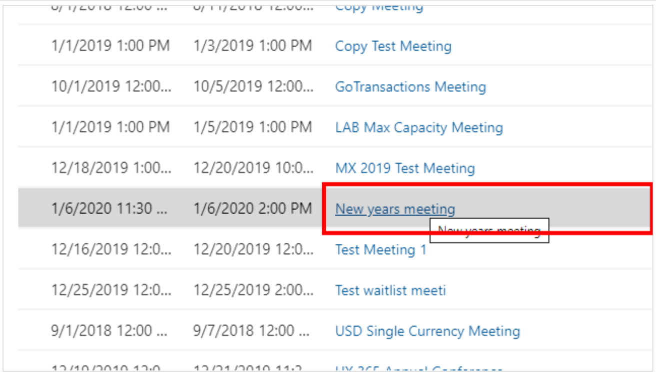


5.25. Setting up Sessions for a Meeting

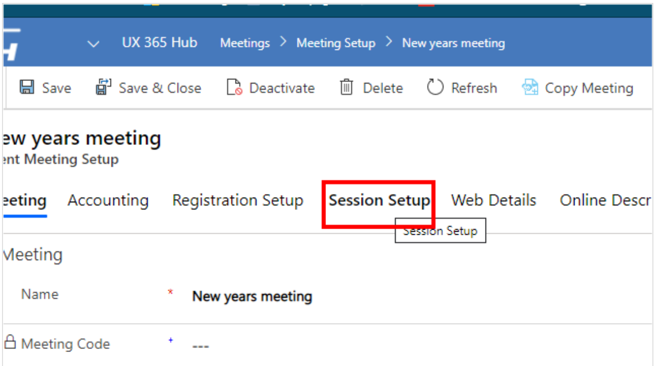
Access the meeting setup from the event sub-grid or click Meeting Setup in the Navigation Pane of the event record.

Click on the item **Meeting Setup**

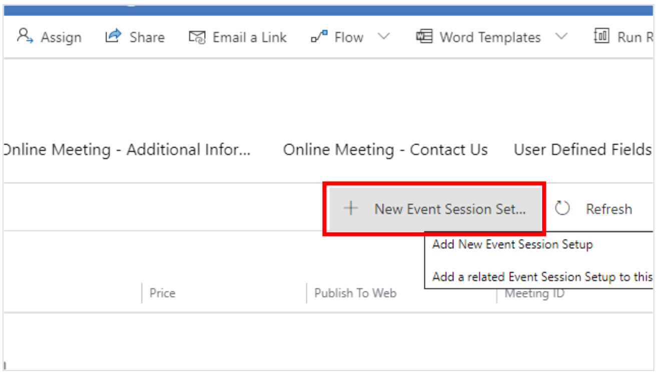
Open the meeting that you set up for this event.



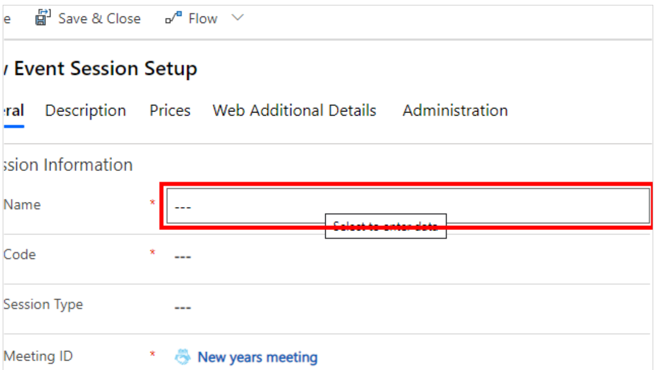
Click Session Setup in the Navigation Pane of the meeting setup record to open the Event Session Setup Associated View of existing session setup records for this meeting.



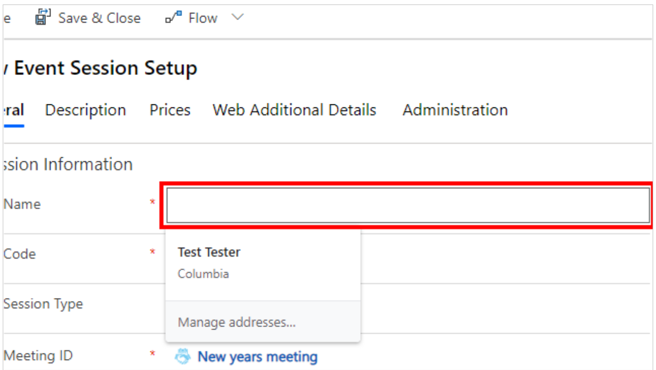
Click Add New Event Session Setup on the List View toolbar to create a new session.



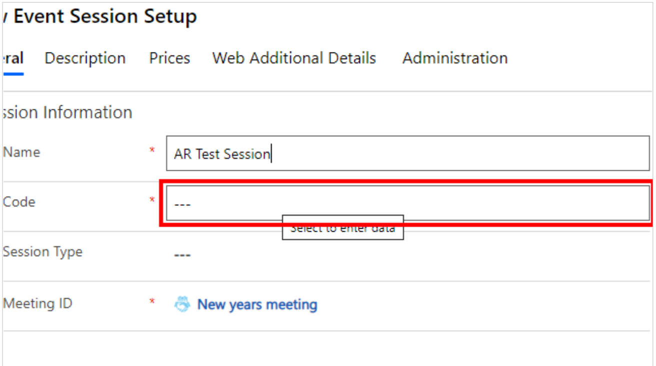
Name – Enter the name of the session.



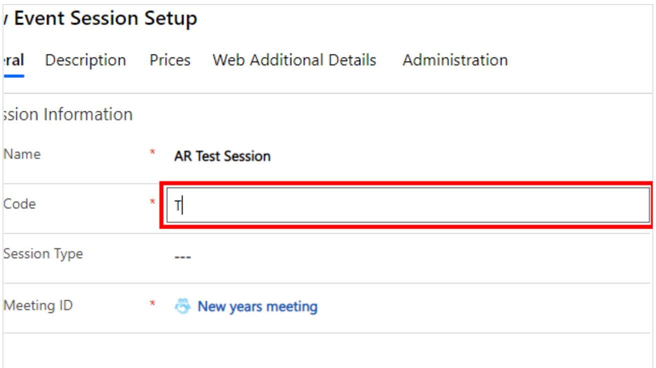
Enter **Name**.



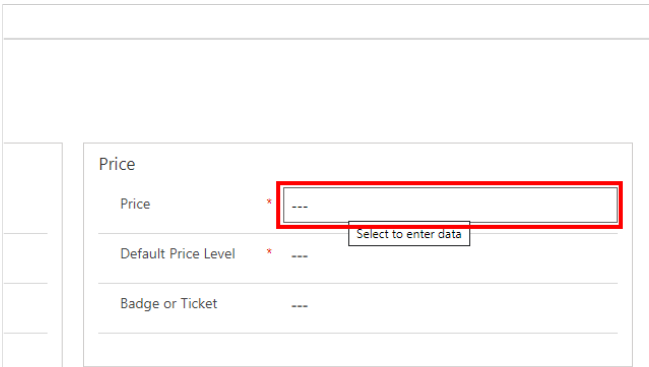
Enter a code for the session. The Event ID of the parent event will be appended to the session code, so keep the code short and simple. We recommend that you use letters and numbers only. Do not use spaces or symbols.



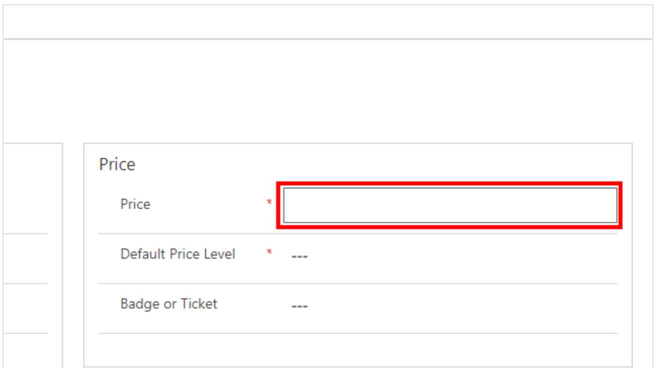
Enter **Code**.



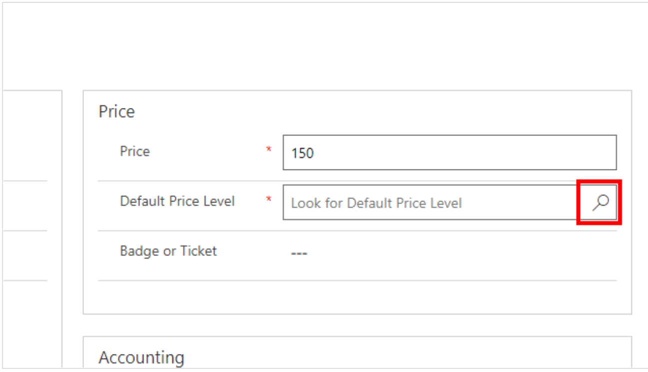
Enter the price of the session



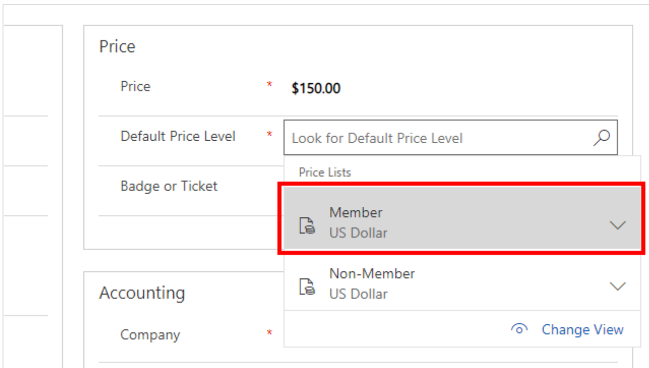
Enter **Price**.



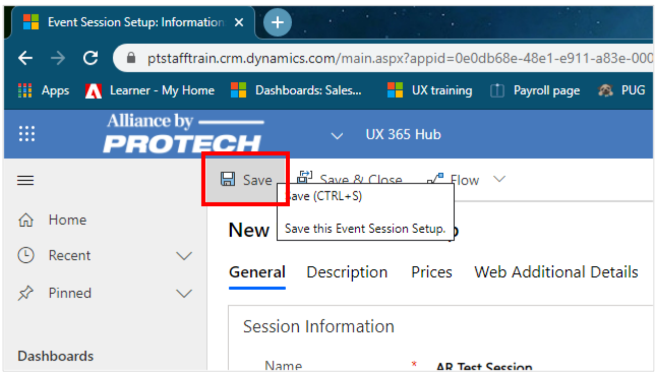
Click on the link **Default Price Level**



Choose the default price level for the session.



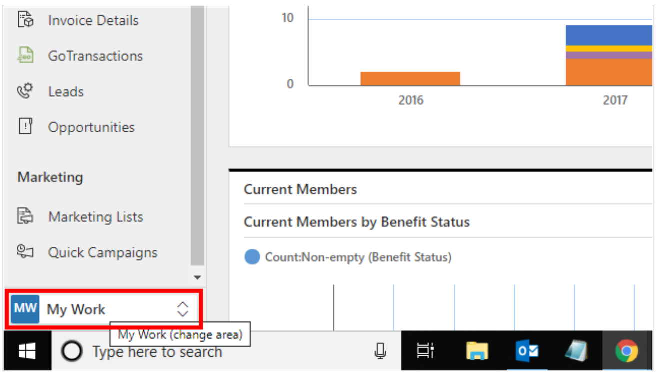
Click on the menu item **Save (CTRL+S)**



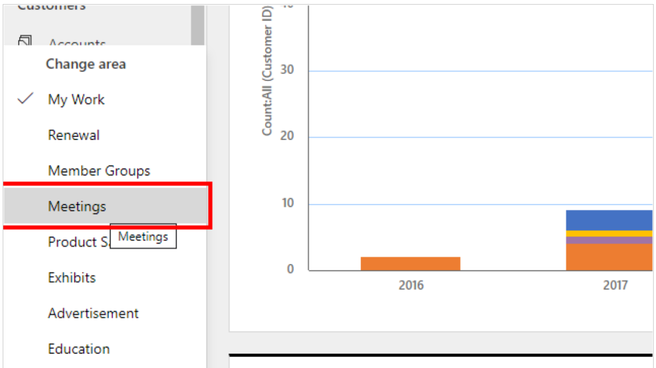
5.26. Setting up Speaker Specialties

In addition to speaker specialty types, you can use speaker specialty items to define more narrow areas of expertise for your speaker profile records. Because each speaker profile record is related to a speaker specialty type and speaker specialty item, speaker specialty items allow you to identify all speakers that share the specific area of expertise.

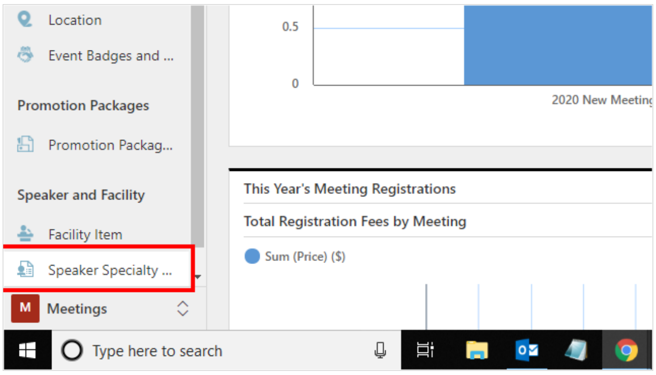
Click on the button **My Work (change area)**



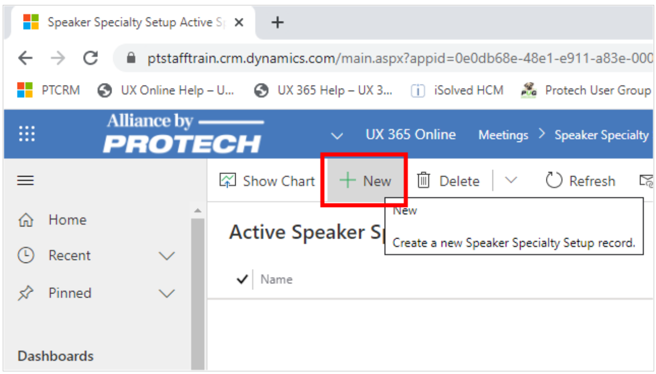
Click on the item **Meetings**



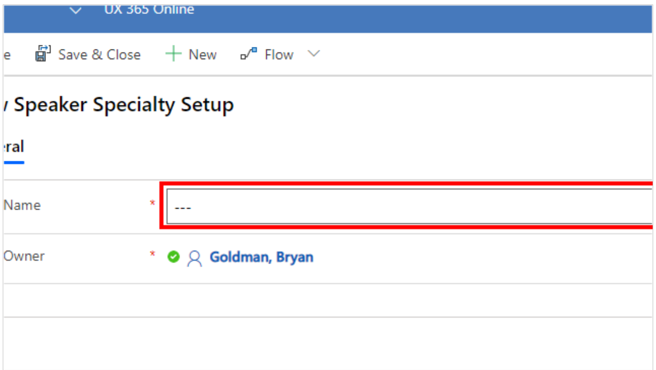
Click on the item **Speaker Specialty Setup**



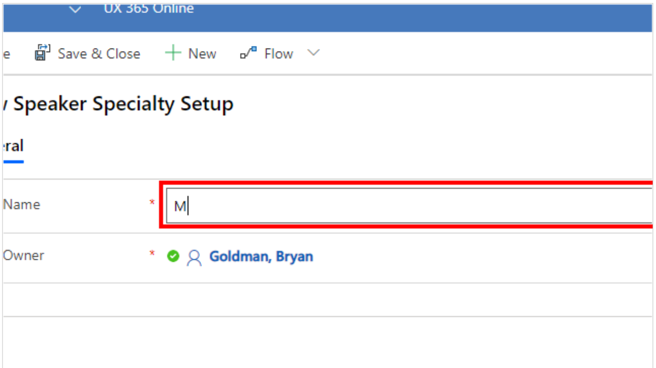
Click on the menu item **New**



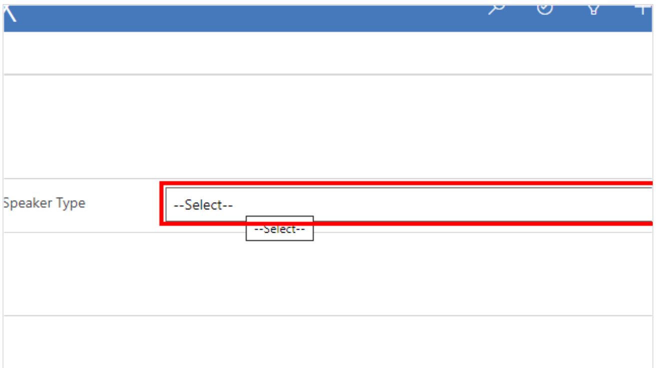
Click on the text field **Name**



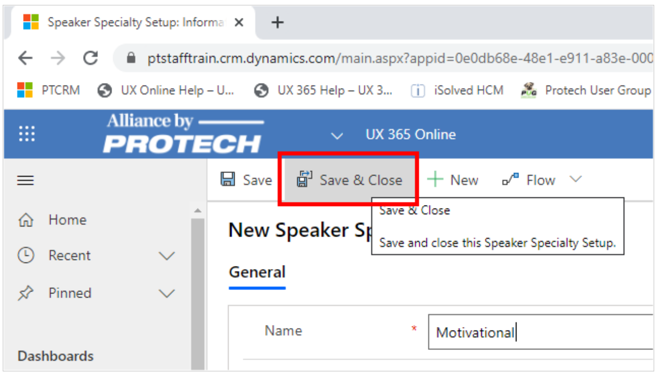
Enter Name, for example, Motivational Speaker



Speaker Type
Displays the speaker specialty records related to this speaker specialty setup record.

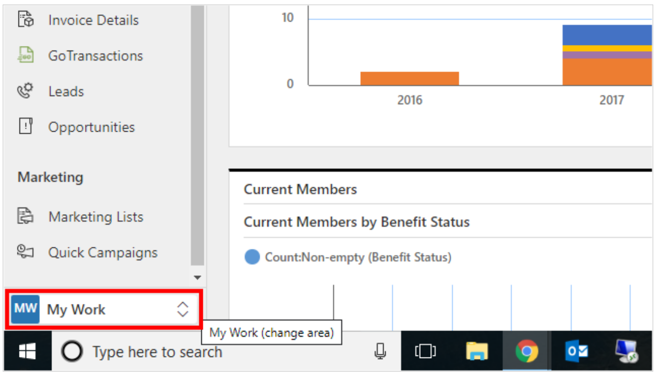


Click on the menu item **Save & Close**

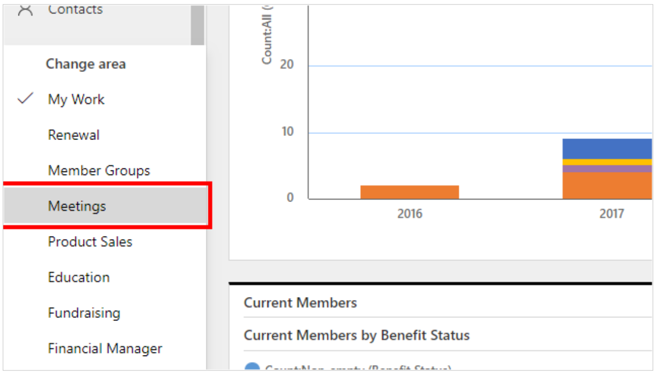


5.27. Substituting a Registrant

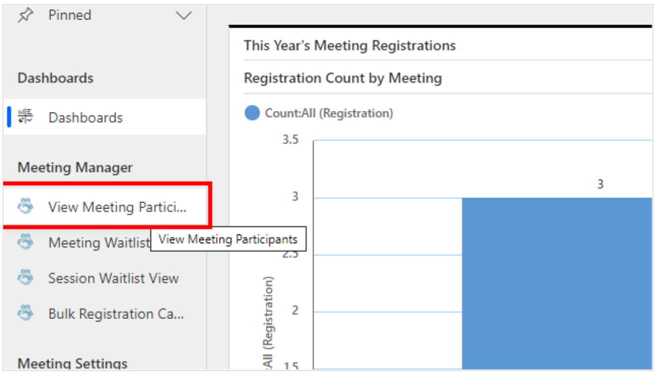
Click on the button **My Work (change area)**



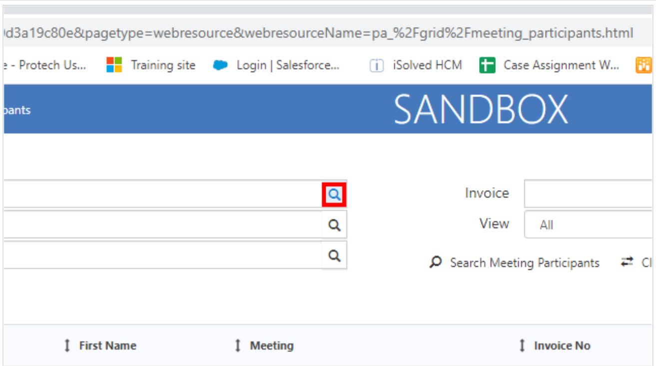
Click on the item **Meetings**



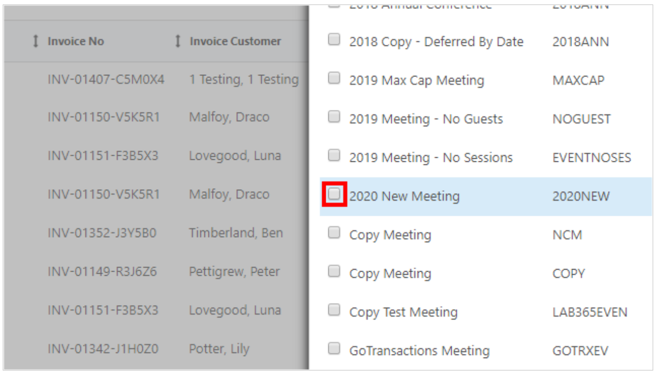
Click on the item **View Meeting Participants**



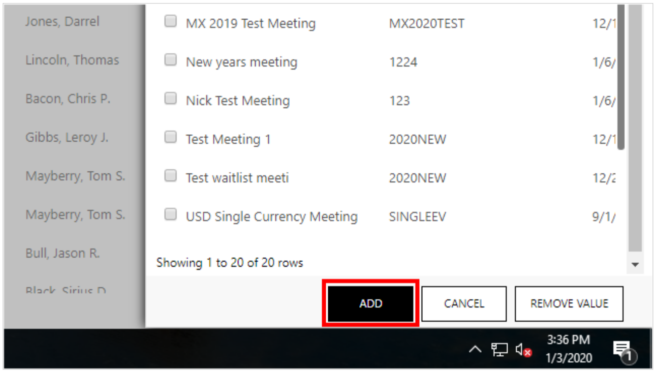
Search for the meeting the participant is registered for



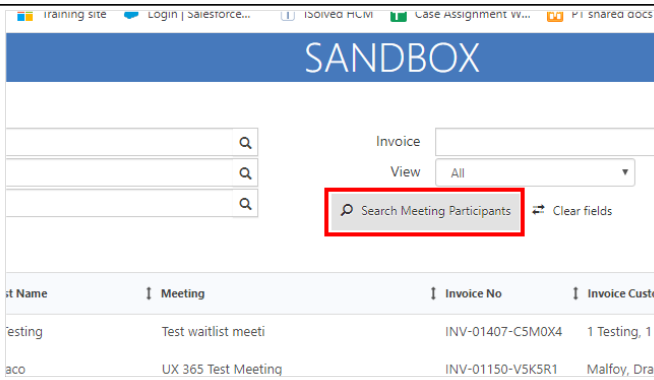
Select meeting



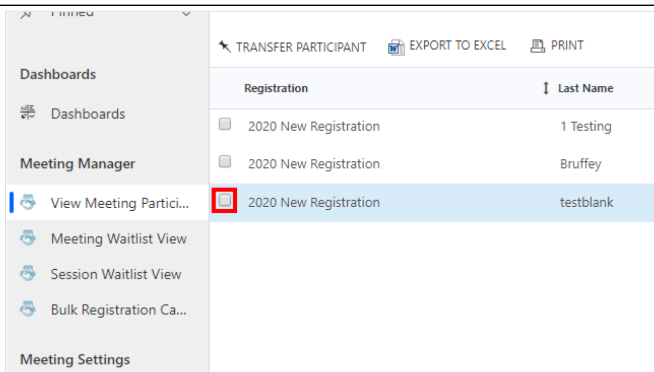
Add meeting



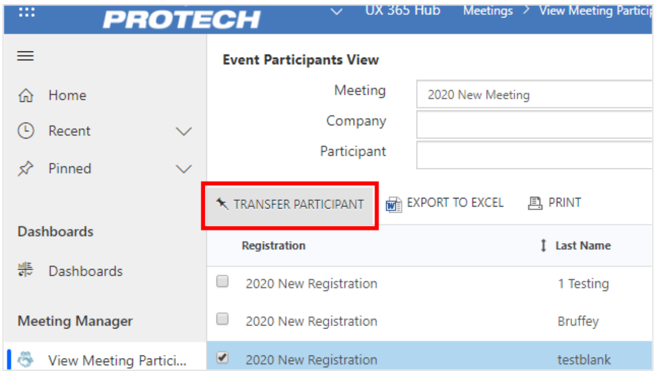
Click on **Search Meeting Participants**



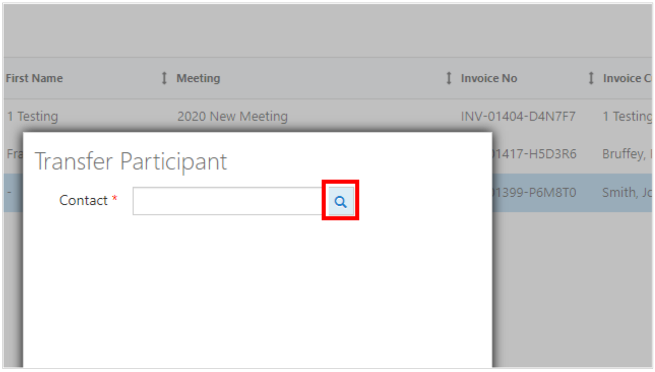
Select participant that will be transferring out of the registration



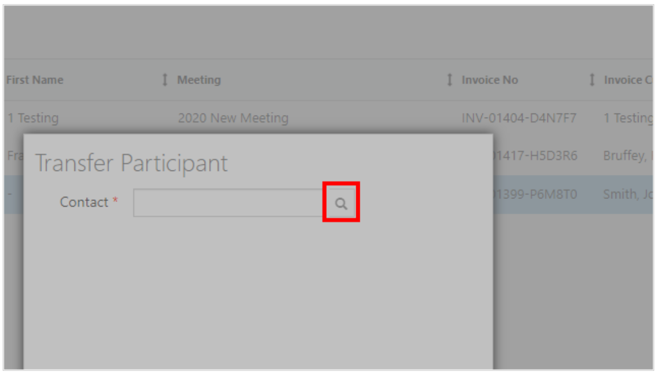
Click on **TRANSFER PARTICIPANT**



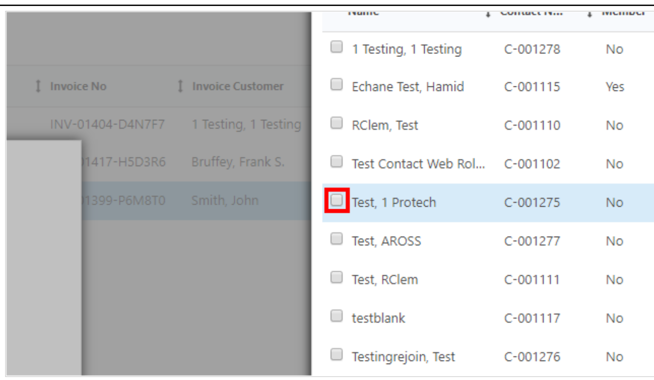
Search for the contact that will be transferred into the meeting



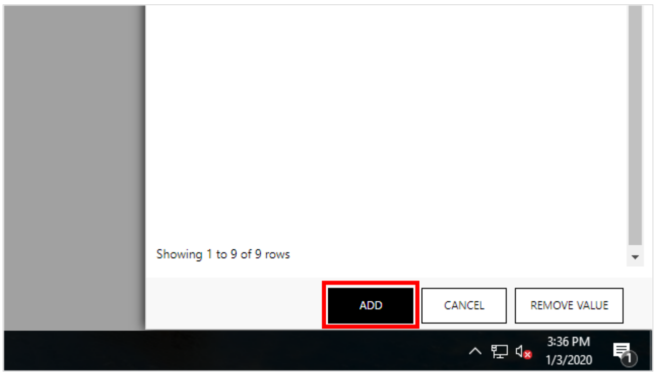
Enter participant name



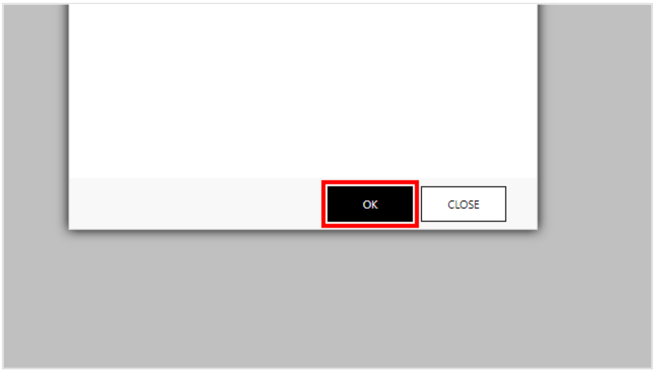
Select participant



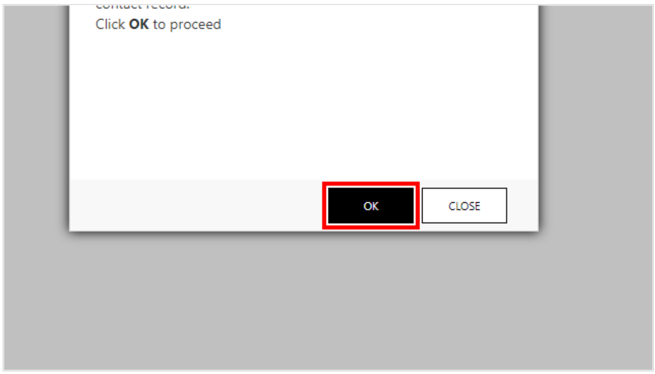
Click on the button **ADD**



Click on the button **OK**

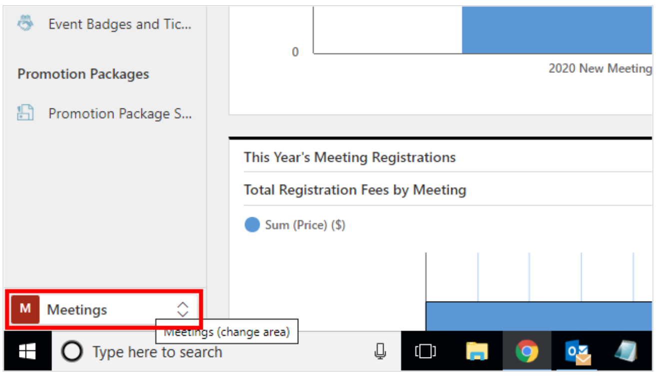


Click on the button **OK**

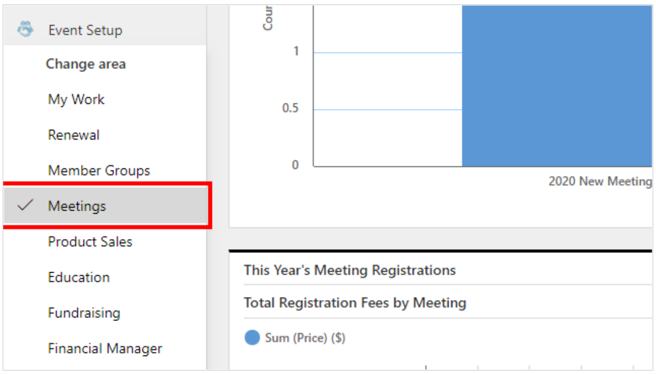


5.28. Transferring Registration From One Contact To Another

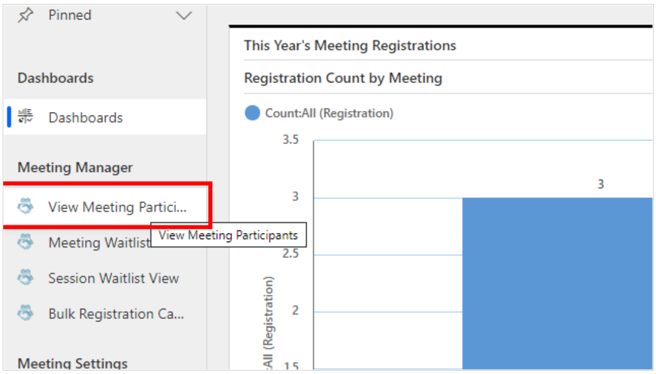
Click on the button **Meetings (change area)**



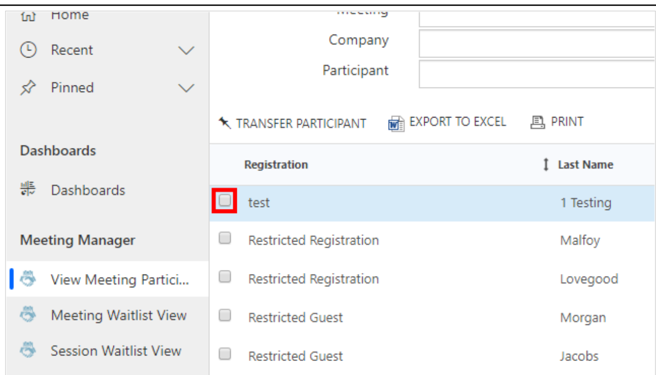
Click on the item **Meetings**



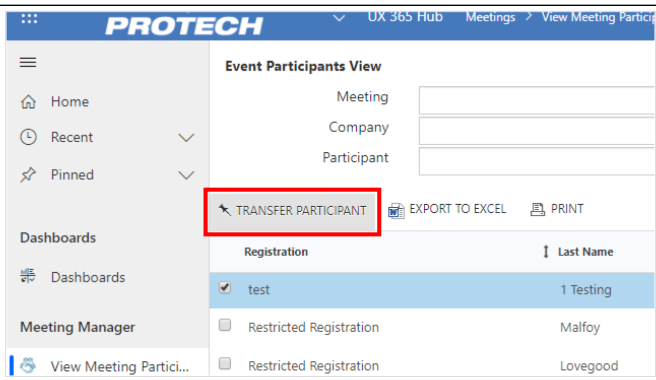
Click on the item **View Meeting Participants**



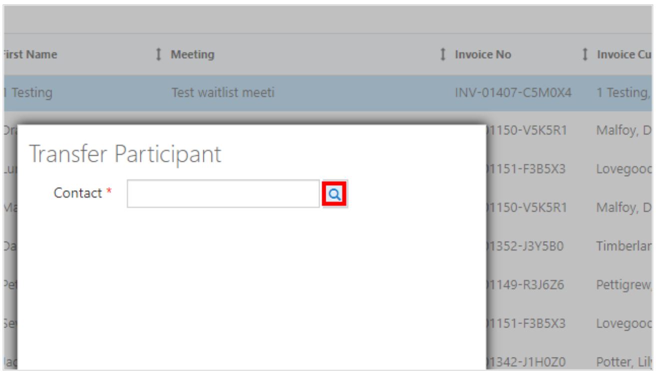
Check mark the registration record to be transferred



Click on **TRANSFER PARTICIPANT**

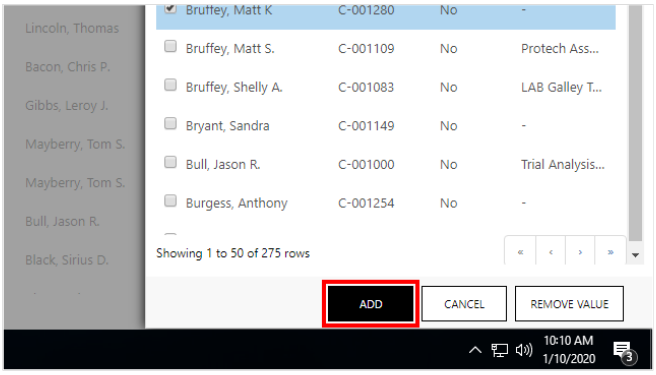


Click on, the Contact Look up

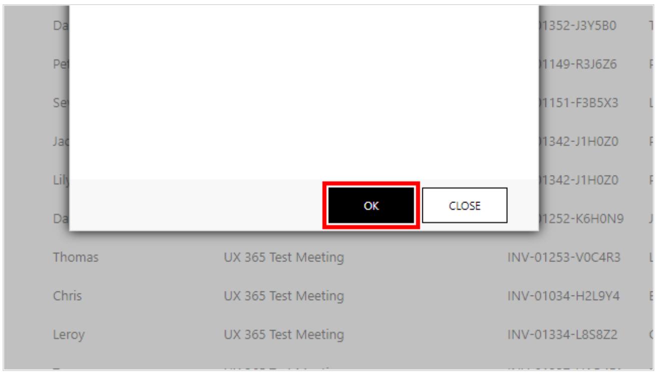


Check mark, the contact you would like to transfer registation to

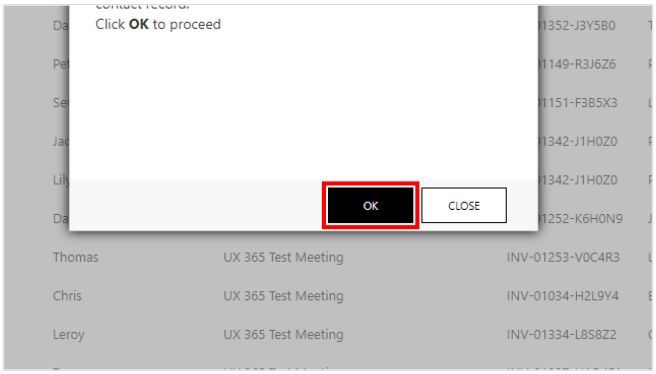
Click on the button **ADD**



Click on the button **OK**



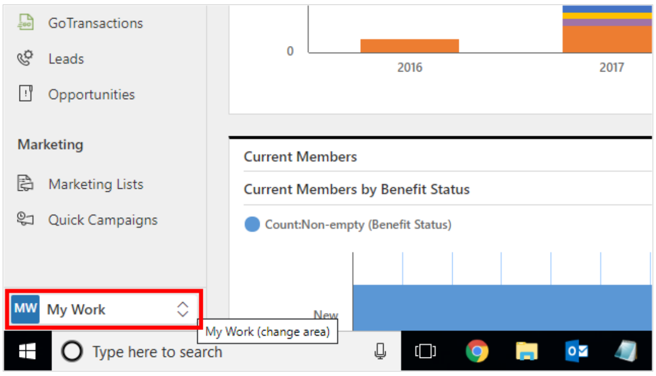
Confirm you would like to run the process and click, Ok



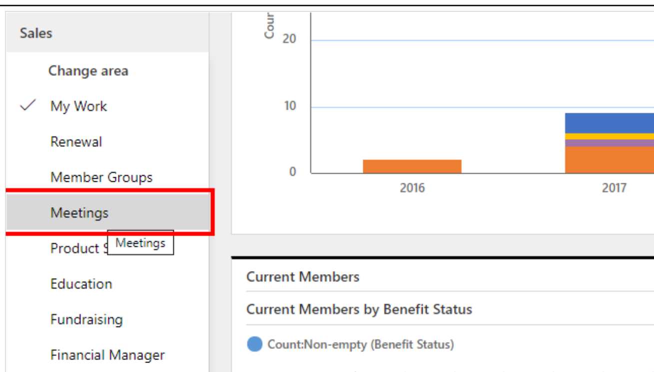
If the registration is eligible for transfer, UX 365 will make the following changes: Update the Contact field, as well as the Contact Information, Address Information, and Communication Information sections on the meeting registration detail record. Update any session registrations with the new contact's information (except for canceled sessions, which will retain the original registrant's contact information). Update the address information for any guest registration detail records where the Address Same As Participant option is marked Yes. Update any associated session badge records with the new contact's information. Click the Refresh button on the right side of the list column headers in the Event Participants View to display the updated list of event participants.

5.29. Viewing Event Meeting Participants

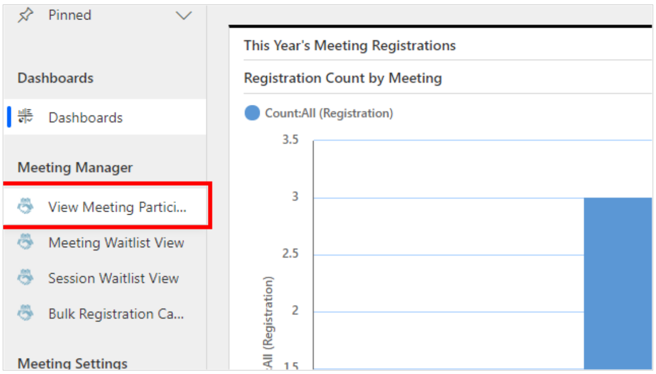
Click on the button My Work



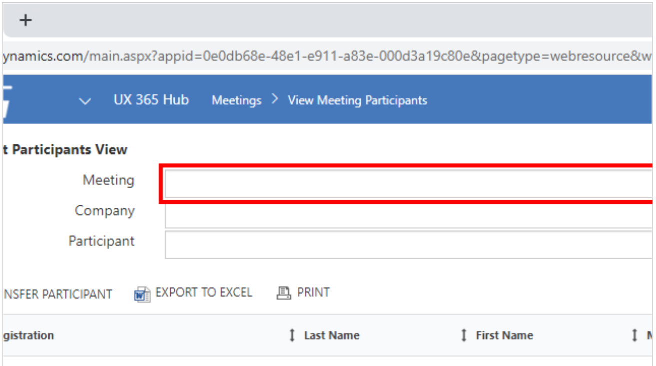
Click on the item **Meetings**



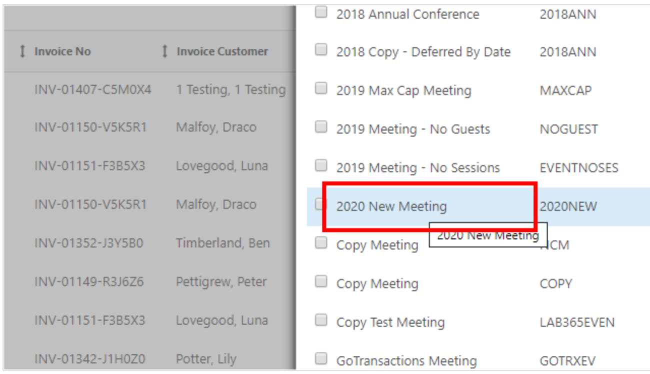
Click on the item **View Meeting Participants**



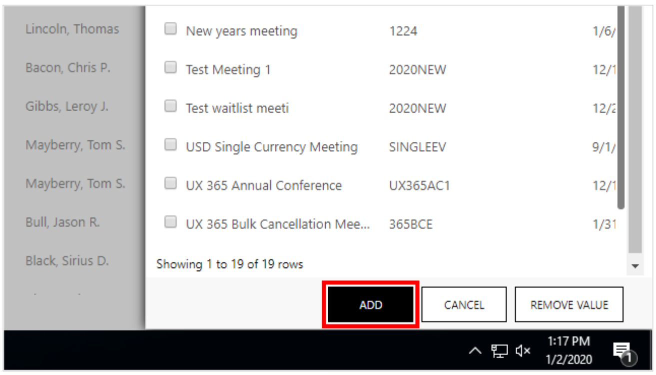
Click the text box to type a specific Meeting or click the lookup button and select the meeting



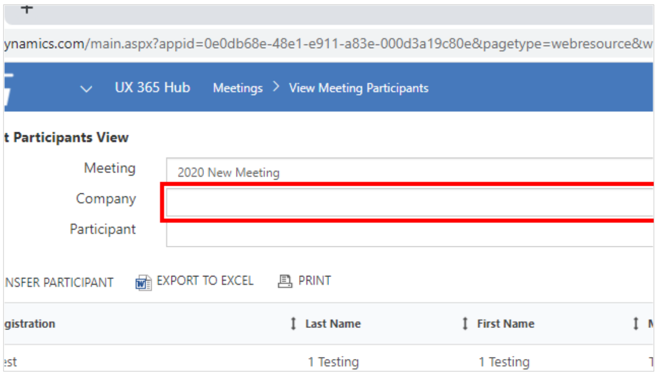
Select the Meeting you would like to view



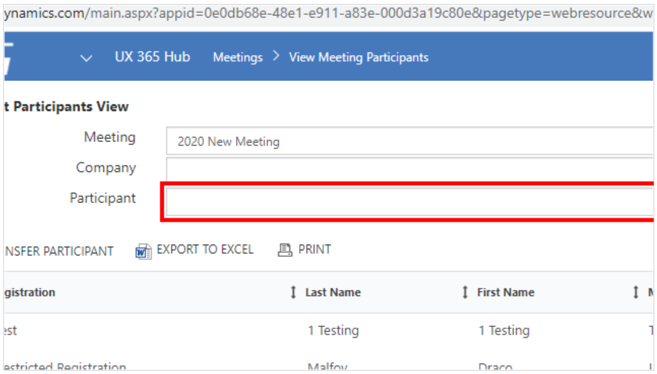
Click Add to add the selection to your search



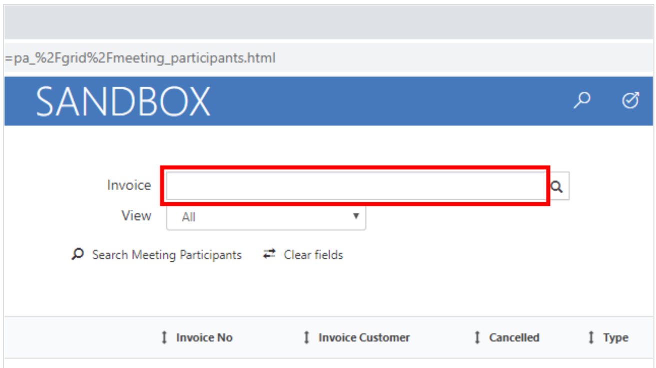
This field is used to view meeting participants for a specific company, click the Lookup button and select the company.



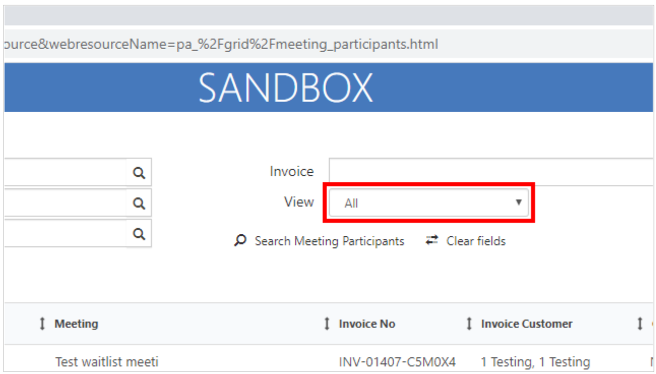
This field is used to view participant records for a specific participant, click the Lookup button and select the participant.



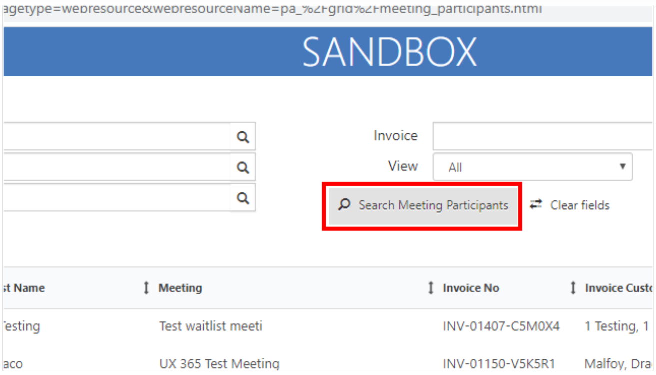
This field is used to view a participant record for a specific invoice, click the Lookup button and select the invoice containing the meeting registration. You can search by Invoice ID or Invoice Name.



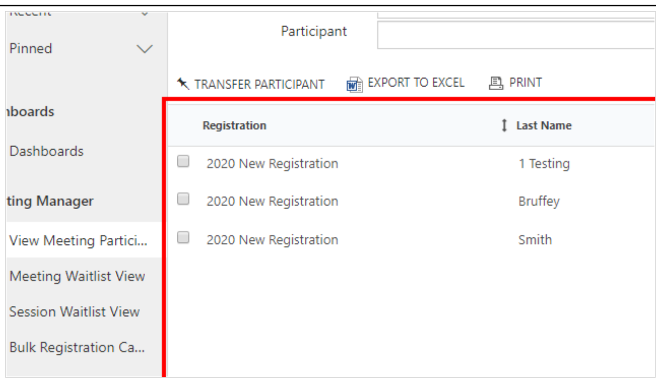
This is used to indicate whether you want to view participants for open, closed, or both open and closed meetings.



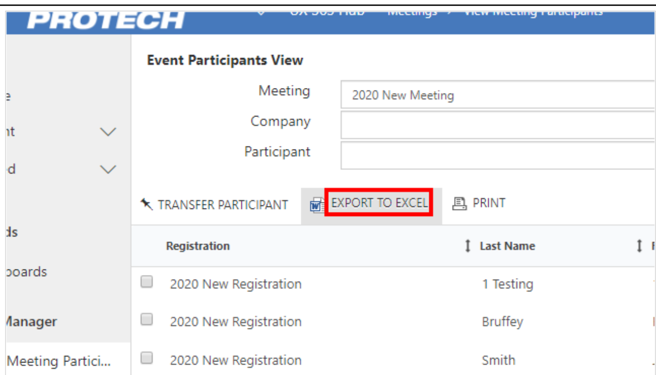
Click on Search Meeting Participants. The list will display all meeting participants that meet the criteria you entered. You can sort the list by clicking on the column headings: Registration, Last Name, First Name, Meeting, Invoice Number, Invoice Customer, Cancelled, Participant Type, and Company Represented.



This shows all the meeting registrants based on the search criteria



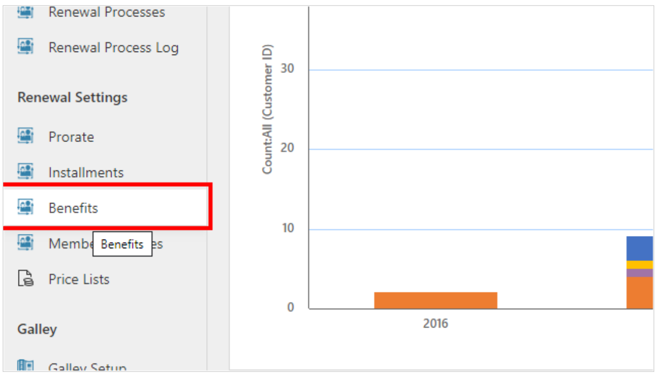
You can export the list of participants to Excel by selecting the Export to Excel button



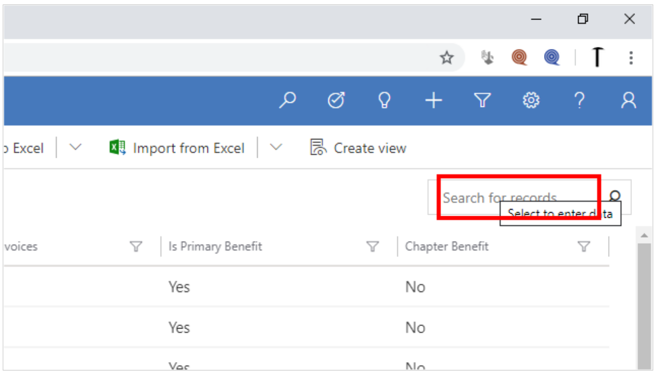
6. Membership

6.1. Benefit Rate Pricing

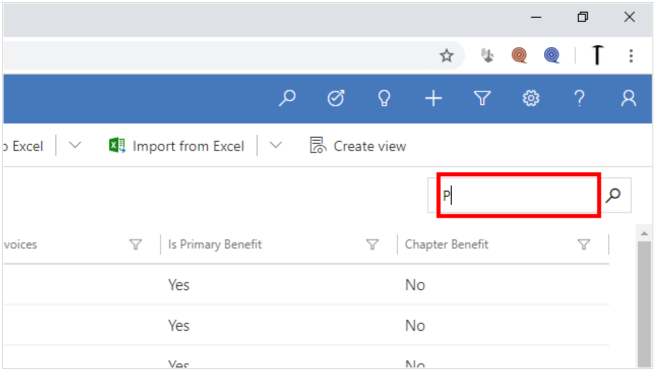
To navigate to Benefit Rate Prices; First click the item 'Benefits'



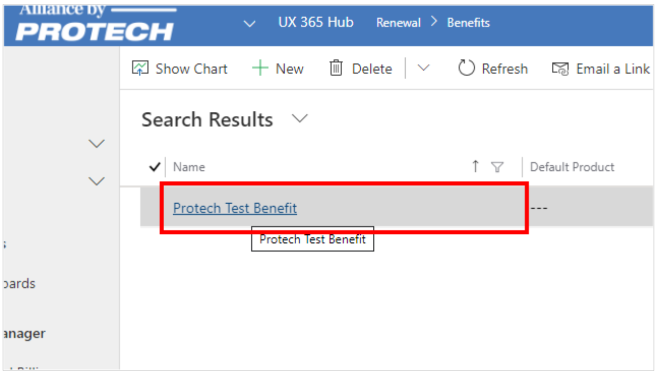
Click on the 'Search for records' field to lookup the benefit that contains the rate you would like to add prices to or view current prices that are already created by the system.



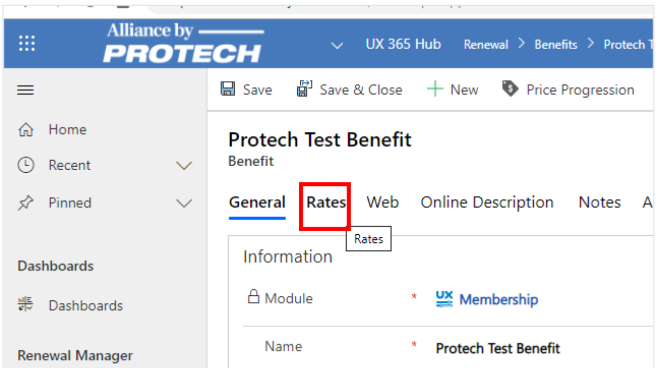
Enter the benefit's name



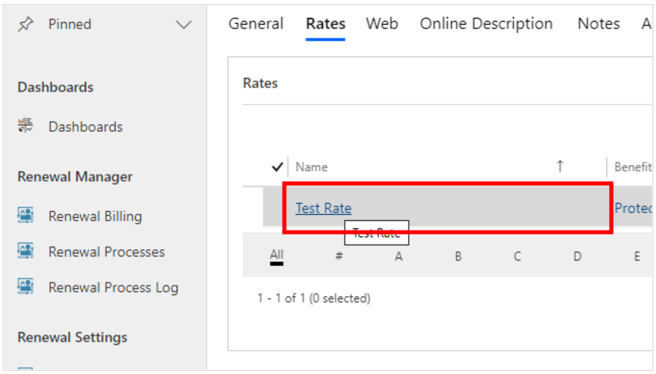
Click into the benefit



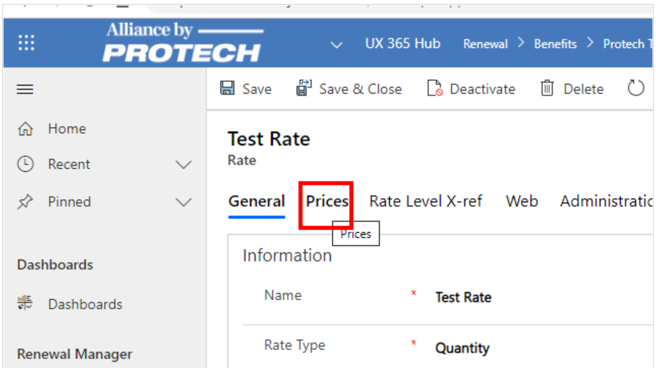
Click on the item **Rates**



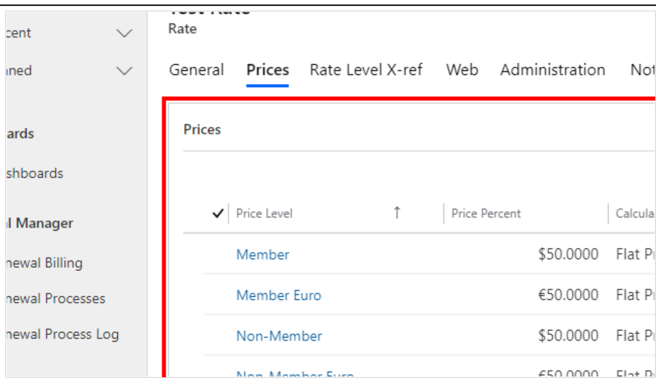
Click into the rate you would like to view or edit



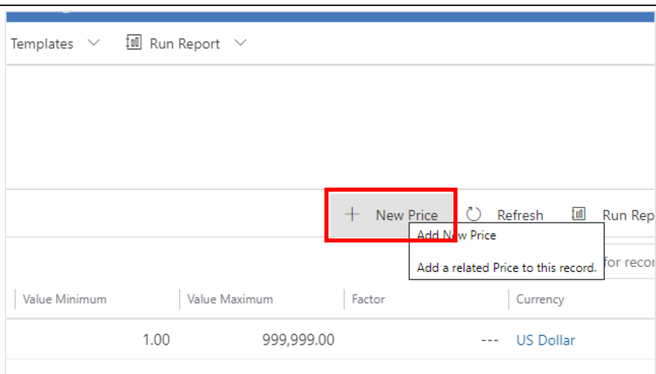
Click on the item **Prices**



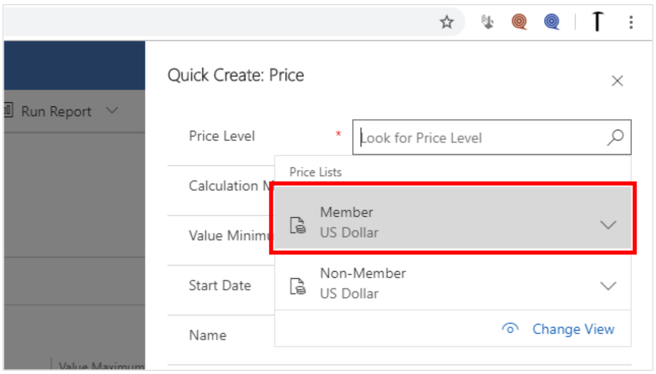
This view is where you can see the prices that are already created



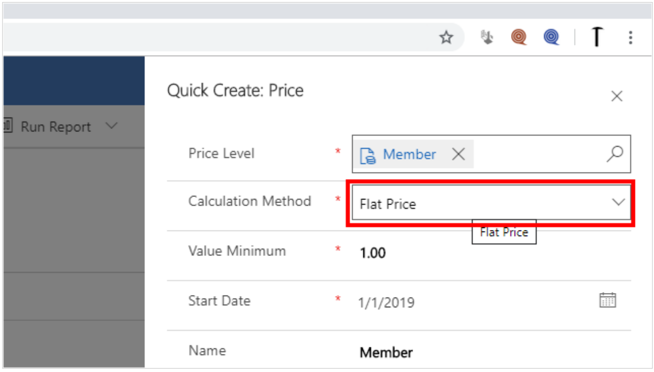
Click on the menu item **Add New Price**



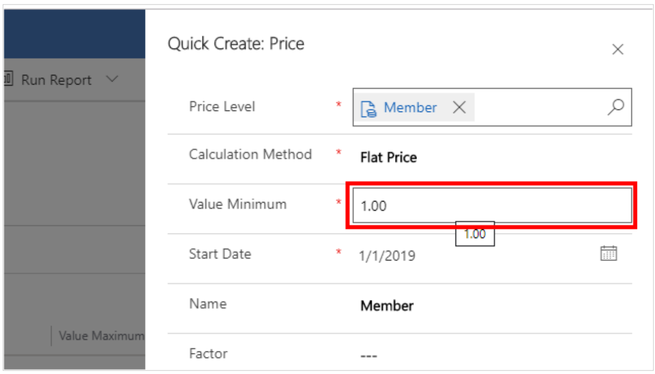
Click the Lookup button to select either Member or Non-member as the price level for this price record (Remember that you must create both member and non-member versions of every price your organization uses.)



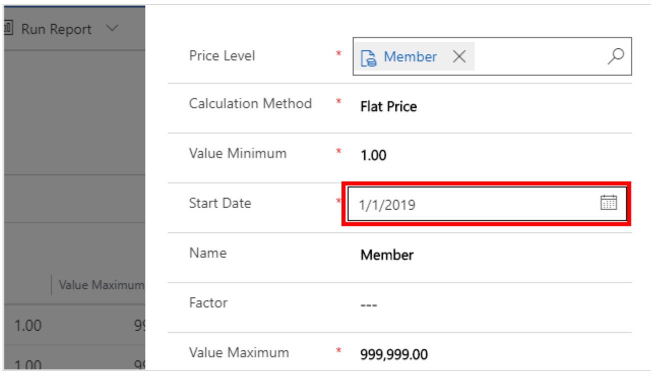
Calculation Method:	For dues and chapter billing, do not change the default value of Flat Rate. This method applies to all rate types.



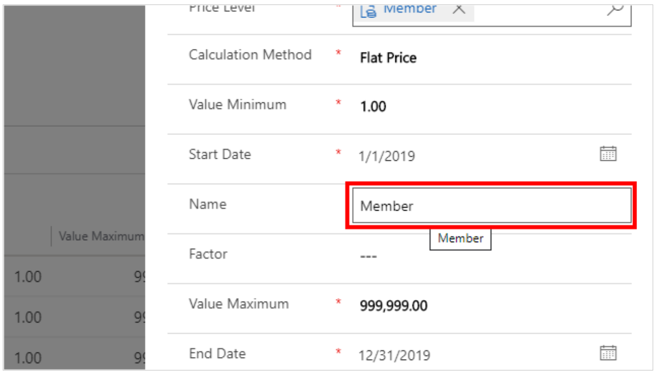
If you selected Volume or Factor for the rate type, enter the minimum value for the range for this price. If you selected Quantity for the rate type, you do not need to change the default values.



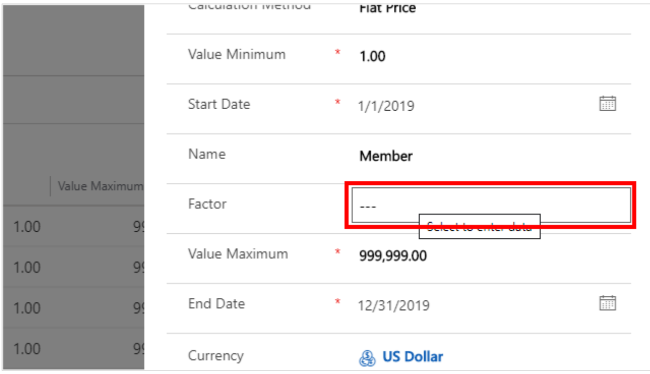
Start Date:	The default start date is the Pricing Start Date entered for this benefit, which typically reflects the start date of the benefit dues year. If the price is valid for a different date range, select the starting date.



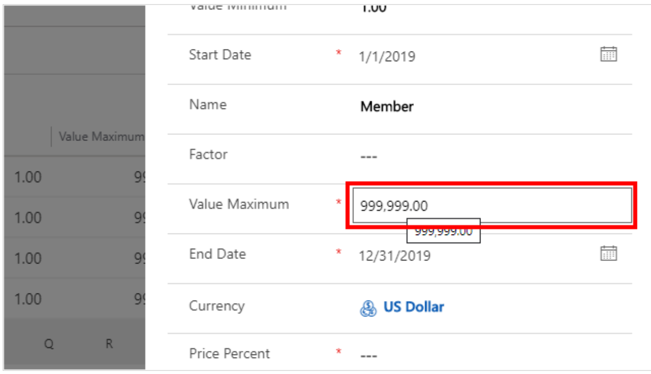
Name: The system will populate this field based on the Price Level you selected.



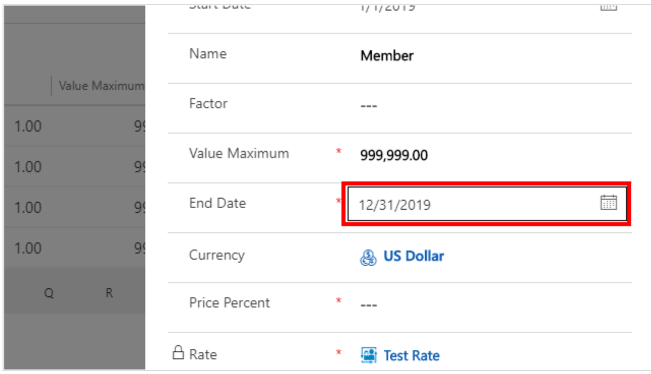
Factor: If you selected Factor for the rate type, enter the factor for calculating dues. Otherwise, leave this field blank.



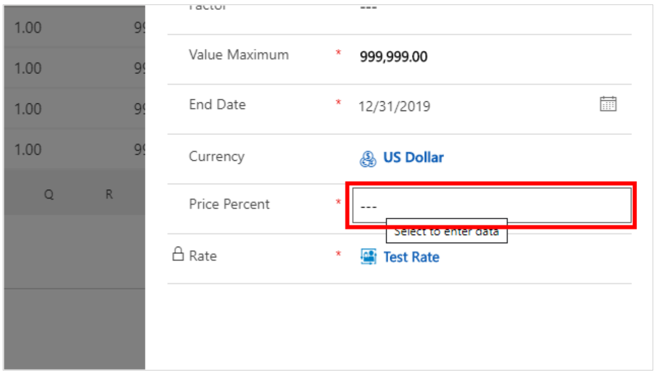
If you selected Volume or Factor for the rate type, enter the maximum value for the range for this price. If you selected Quantity for the rate type, you do not need to change the default values.



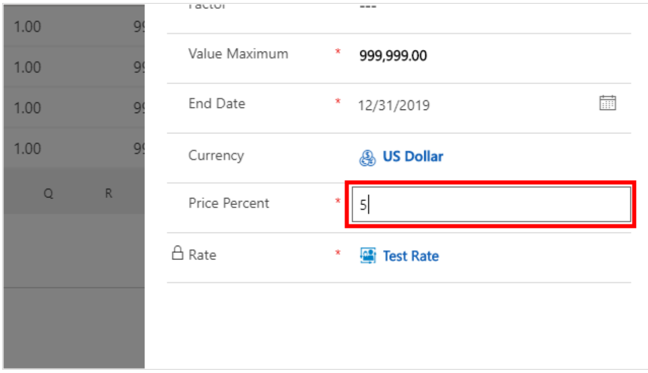
The default end date is the Pricing End Date entered for this benefit, which typically reflects the end date of the benefit dues year. If the price is valid for a different date range, select the end date.



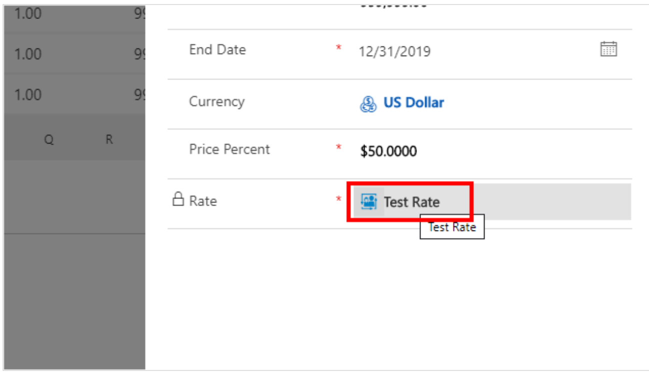
Price/Percent of List Price: If you selected Quantity or Volume for the rate type, enter the total amount due. Price is ignored for rate type Factor.



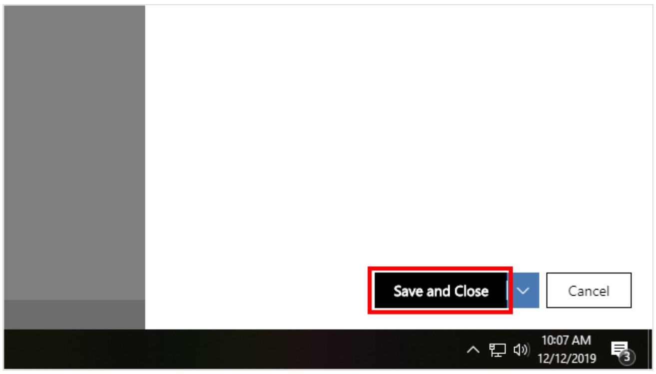
Enter the desired price



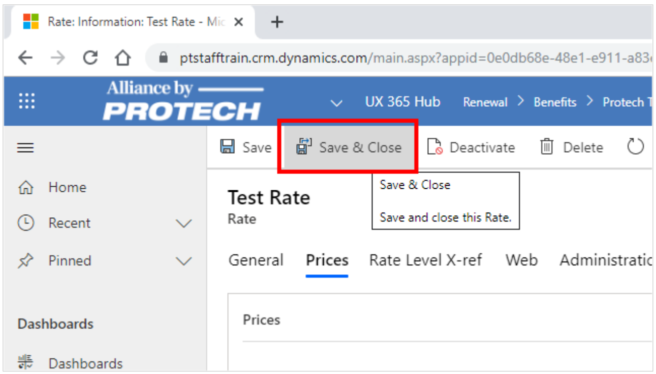
Rate: Displays the name of the rate.



Click 'Save and Close' to save the price you just created



Click Save and Close to return to the benefit record

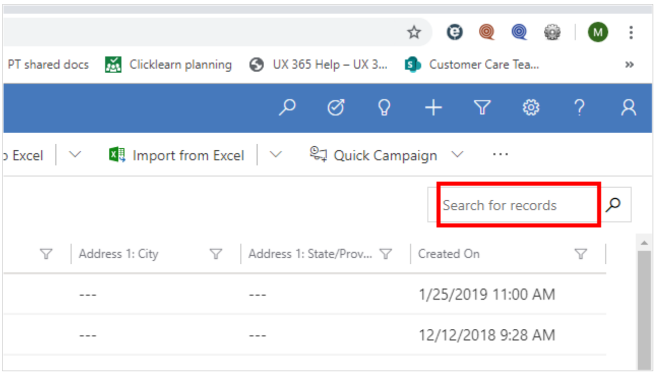


6.2. Cancelling a Renewal Invoice

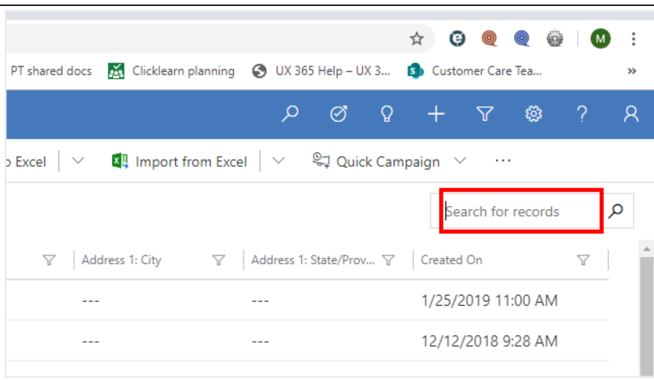
6.2.1. Cancelling an renewal invoice in an open batch

Click on the item **Contacts**

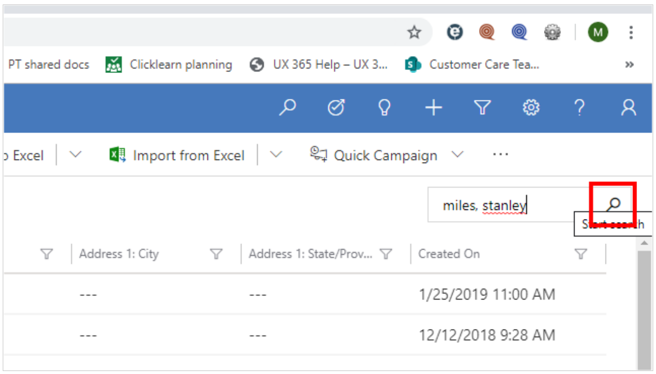
Click on the input field **Search for records**



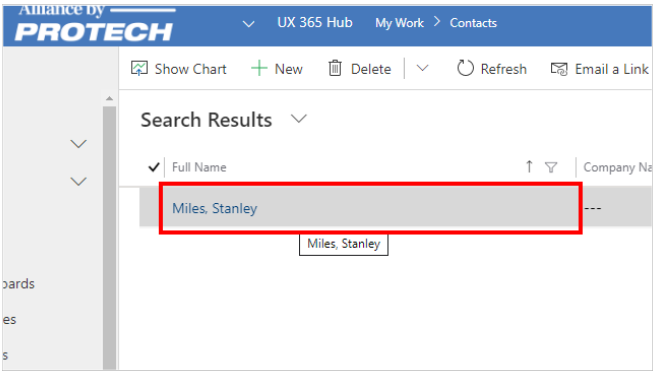
Enter contact or account that the renewal is associated with



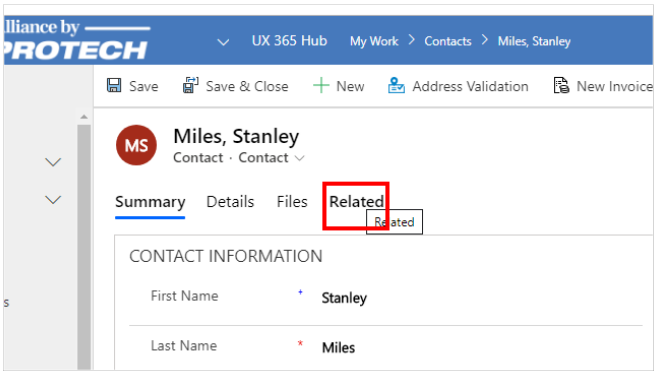
Click on the button **Start search**



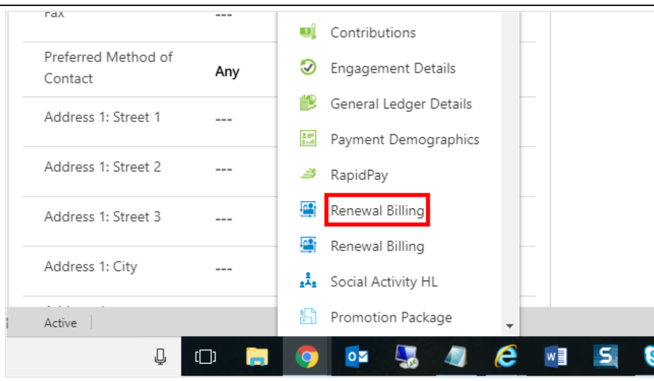
Double click on the cell **Full Name**



Click on the item **Related**

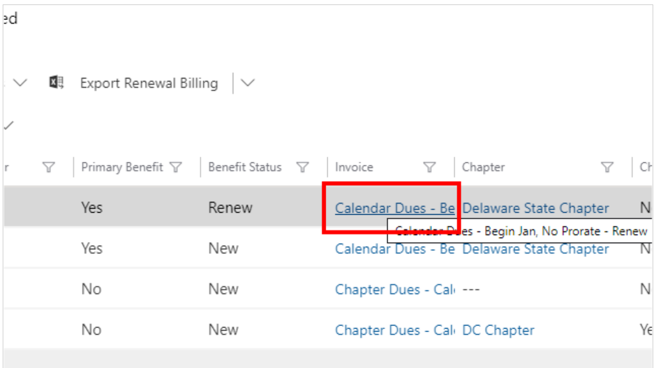


Click on the menu item **Renewal Billing**

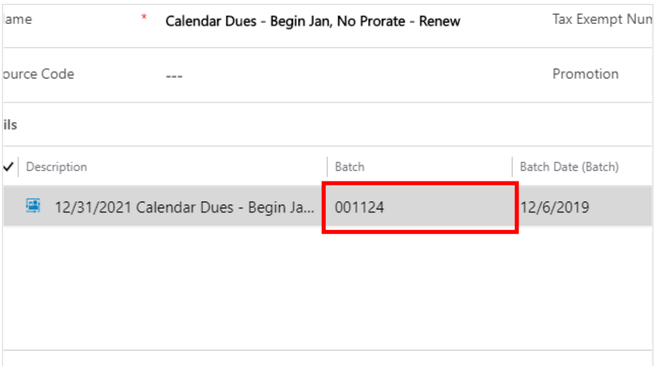


PROTECH

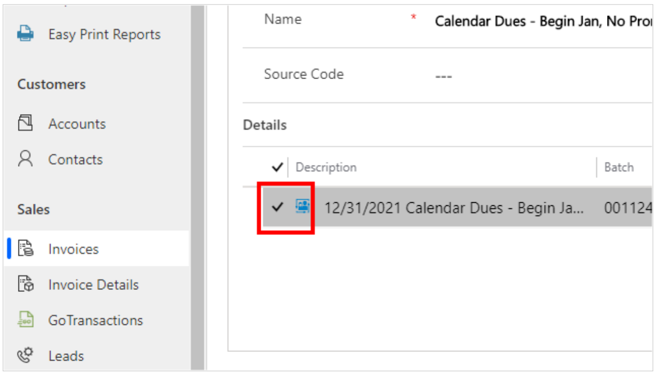
Click on **Invoice**



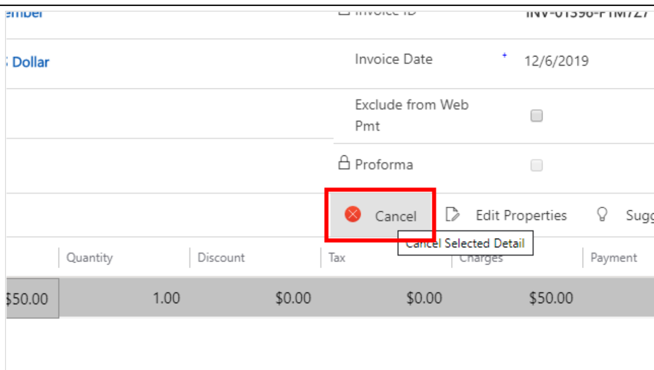
Move the mouse to the cell **Batch**



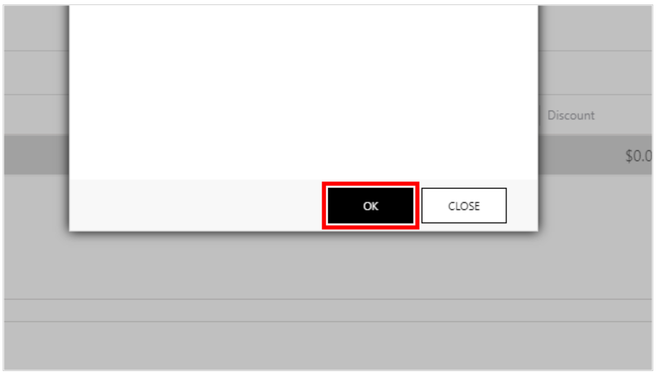
Click on the row selector where **Description = 12/31/2021 Calendar Dues - Begin Jan, No Prorate, Volume - 2 Year Annual, Batch = 001124, Batch Date (Batch) = 12/6/2019**



Click on the menu item **Cancel**

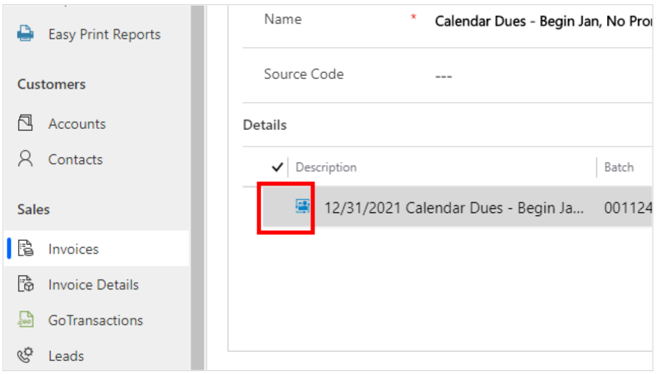


Click on the button **OK**

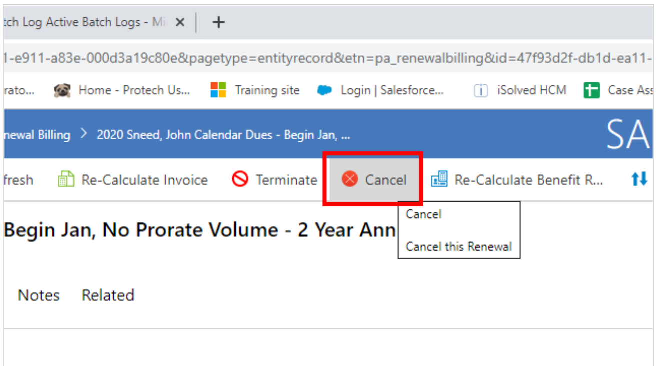


6.2.2. Cancelling a renewal invoice in a closed batch

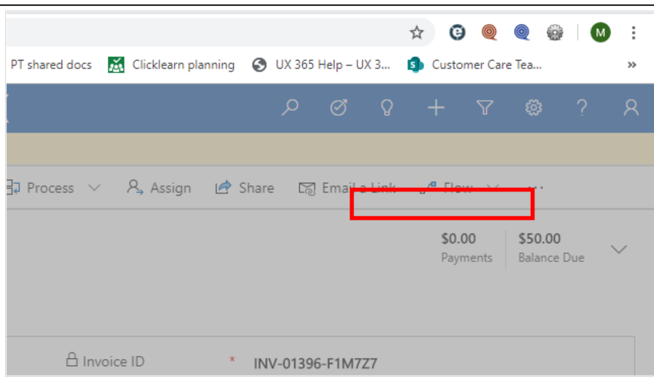
Double click on the row selector where **Description = 12/31/2021 Calendar Dues - Begin Jan, No Prorate, Volume - 2 Year Annual, Batch = 001124, Batch Date (Batch) = 12/6/2019**



Click on the menu item **Cancel**

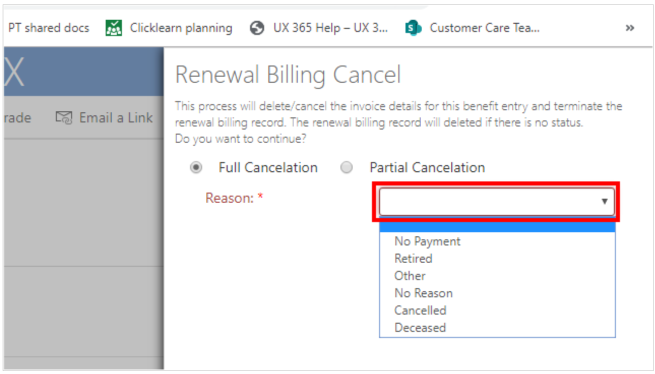


Move the mouse to the label **Partial Cancelation**

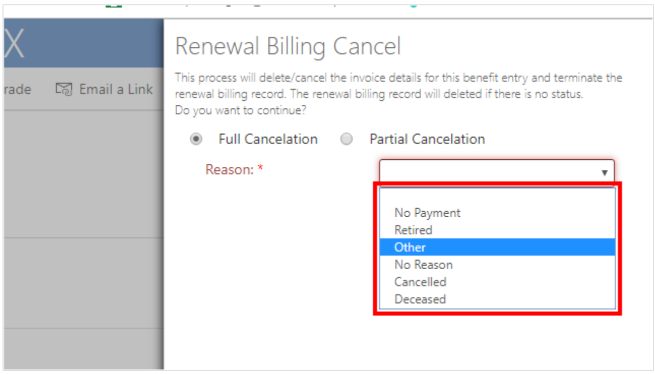


If a member wishes to cancel their membership and your organization does not prorate the amount of "unused" membership, you would process a full cancellation on the current renewal invoice. If you had already run the renewal process for the next renewal cycle, you would also process a full cancellation on the upcoming renewal invoice. If a member wishes to cancel their membership and your organization prorates the "unused" membership based on the cancellation date, you would process a partial cancellation on the current renewal invoice. You can partially cancel single and multiple-installment anniversary dues, single-installment calendar dues, and multiple-installment calendar dues if they are not prorated. If you had already run the renewal process for the next renewal cycle, you would then process a full cancellation on the upcoming renewal invoice.

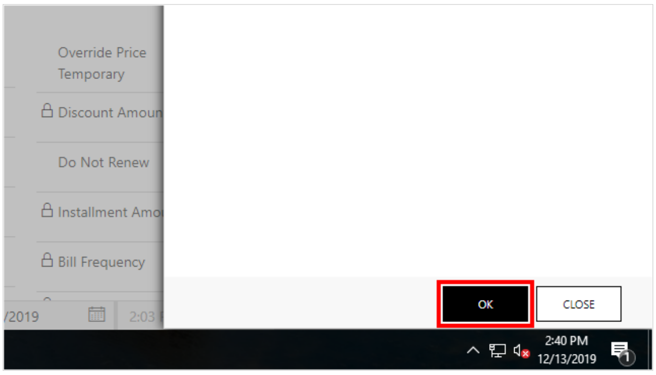
Click on the combo box



Click on the reason for cacellation

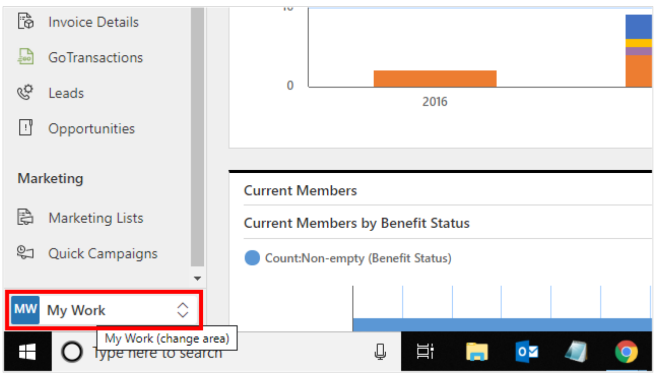


Click on the button **OK**

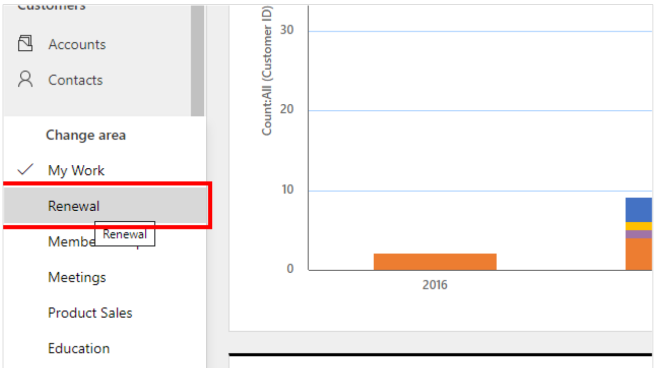


6.3. Creating a Benefit

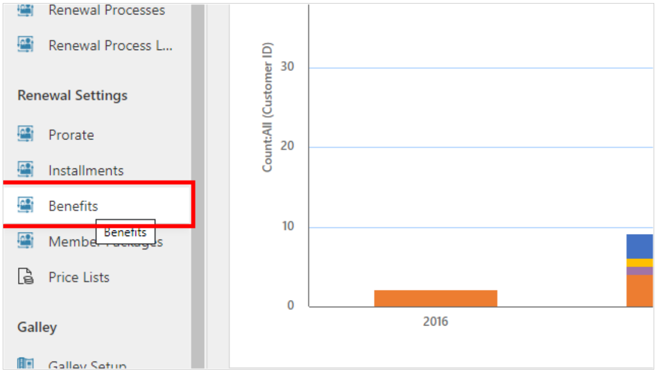
Click on the button **My Work (change area)**



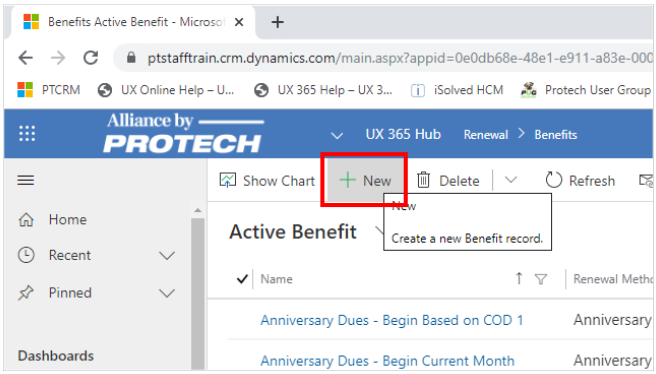
Click on the item **Renewal**



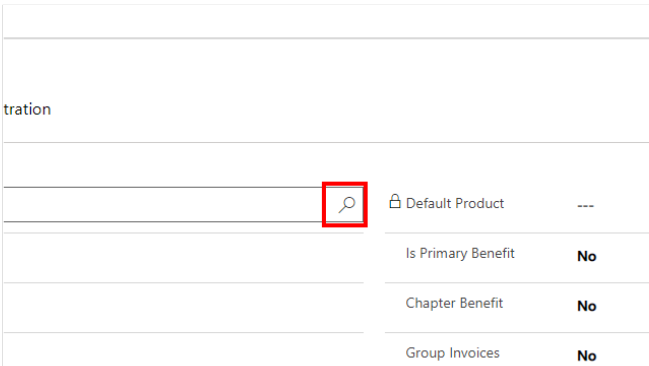
Click on the item **Benefits**



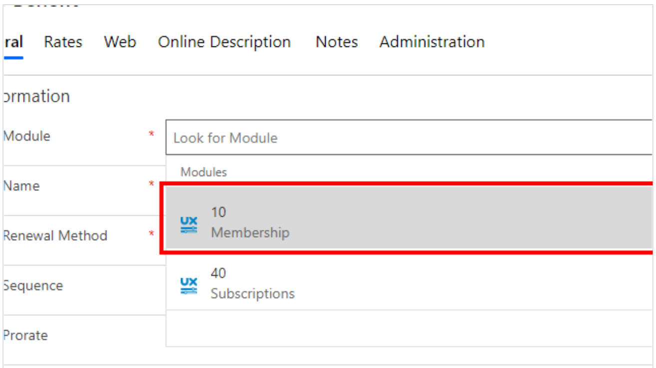
Click on the menu item **New**



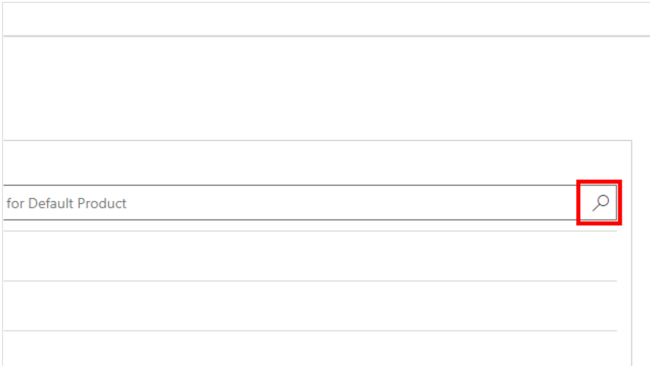
Click on the link **Module**



Click on the item Membership

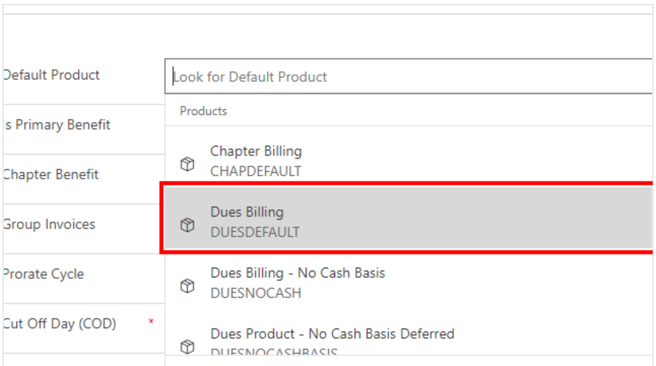


Click on the link **Default Product**

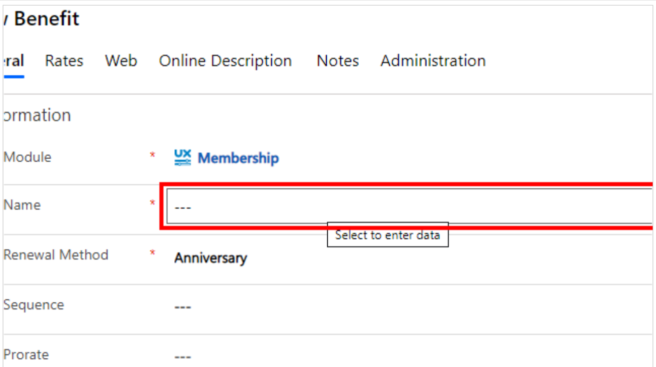


The default product will be used as the default for all rates defined within the benefit. However, you can assign a different dues billing or chapter billing product to specific rates if needed.

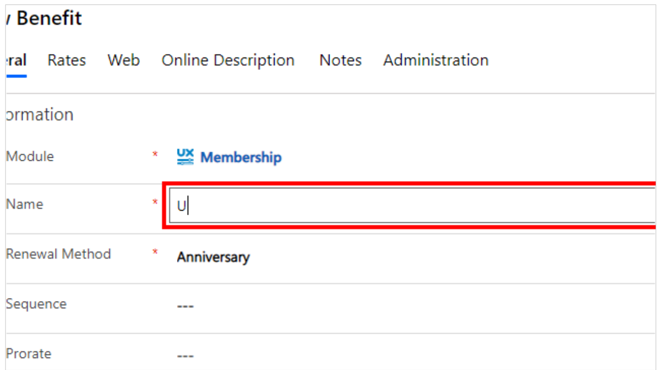
Click on the item Dues Billing



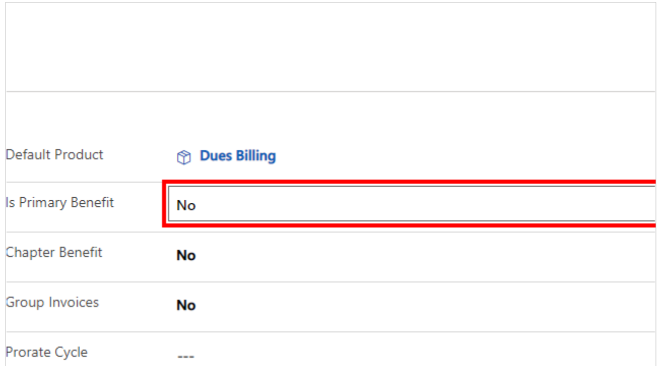
Click on the text field **Name**



Enter **Enter Benefit Name**.

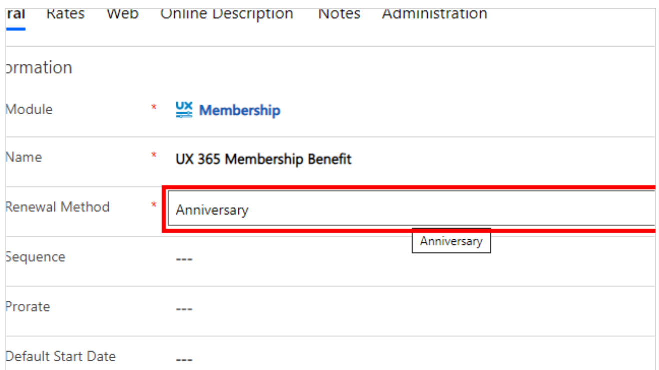


Click on **Is Primary Benefit**



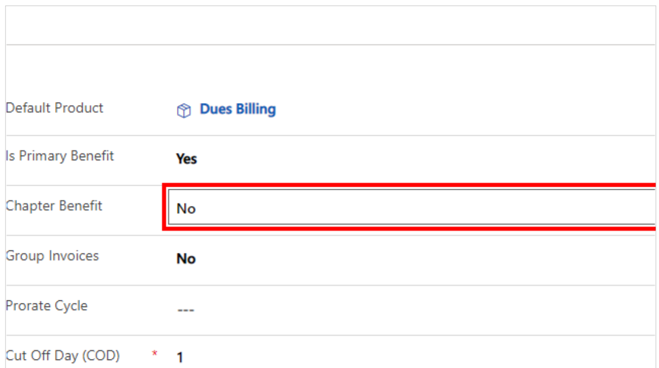
Click to select Yes if this benefit controls membership status. If this benefit does not control membership status, click to select no.

Renewal Method



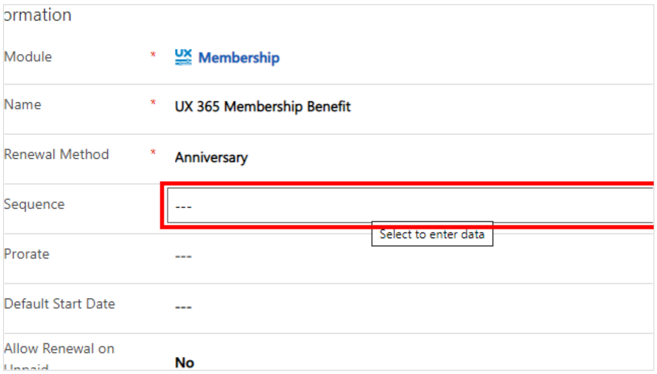
Select either Calendar or Anniversary. Calendar - All members will have the same Cycle Start and Cycle End Dates. Anniversary - Members can have different Cycle Start and Cycle End Dates based on when they join.

Chapter Benefit



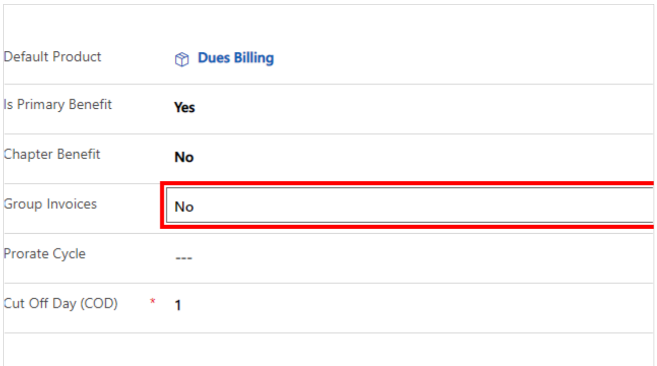
If you are creating this benefit to manage chapter renewal billing, click to select Yes. Click to select No if this benefit is for any renewal other than chapter renewal billing, including membership dues billing, subscription renewal billing, etc.

Sequence



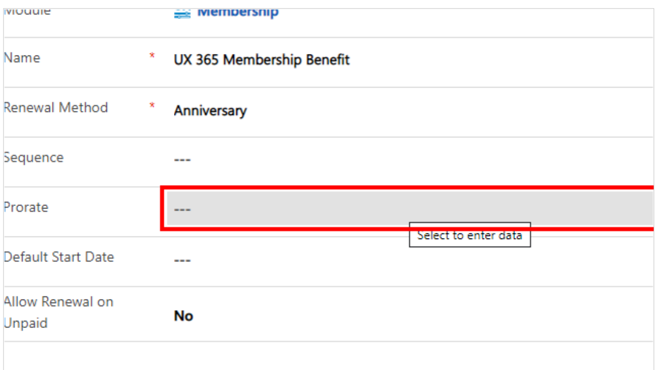
Used to control the order in which invoice detail is created in a UX 365 grouped invoice that is created during the generate renewal billing process. See About renewal benefit sequencing for important information on how UX 365 relies on the Sequence number during renewal processing.

Group Invoices



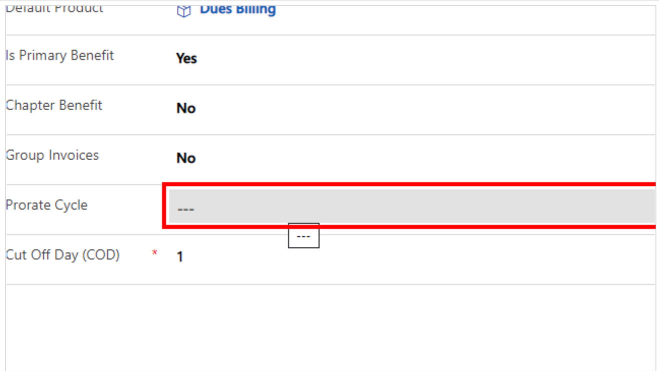
Click to select Yes if this benefit should be grouped during renewal processing with other renewal benefits that share the same invoice customer, invoice Bill To, and renewal billing expiration date into a single invoice. For example, if a subscription benefit for an account or contact has the same as this membership renewal benefit, and you want the two benefits grouped into one invoice, you would select Yes. If you do not want benefits with the same expiration date grouped on a renewal invoice, click to select No. If you choose to group benefits on renewal invoices, the sequence number you enter in the Sequence field for each benefit determines the sequence of the invoice detail on a renewal invoice. All benefits must have a sequence number.

Prorate



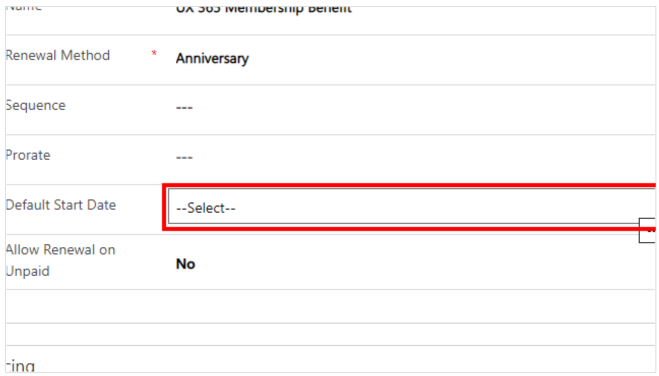
If you selected the Calendar renewal method, and you want to prorate the new member's dues for this benefit, click the Lookup button to select the prorate schedule and click OK. A prorate schedule is required for all benefits where the renewal method = Calendar. If you selected the Anniversary renewal method, do not select a prorate schedule.

Prorate Cycle

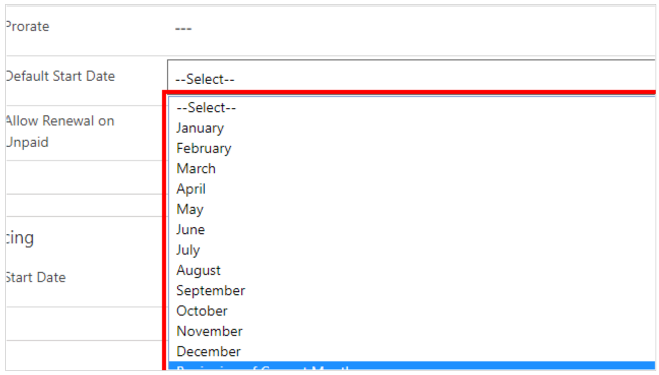


This setting works in conjunction with the Calendar renewal method only. Current Cycle – Select this option if a new member's dues are prorated during the first calendar year of their membership. For example, assuming a January to December dues year, if a member joins in June, the member would pay the half of the dues amount. Next Cycle – Select this option if a new member's dues are prorated during their second dues cycle (that is, their second calendar year of membership – their first renewal). For example, assuming a January to December dues year, if a member joins in June, the member would pay the full dues amount for the first year of membership – even though actual membership was only for six months. When the member renews at the end of December, they would pay half of the dues amount for the second full year of membership.

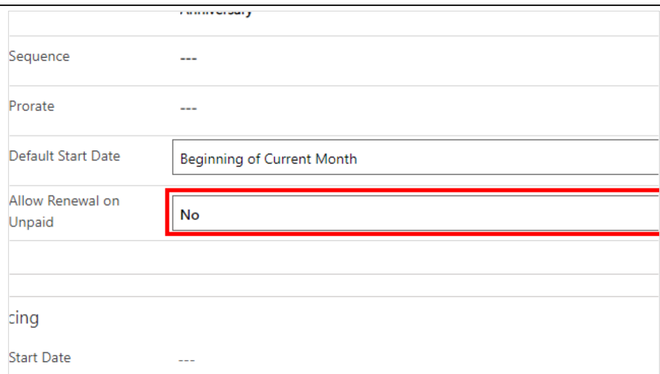
Click on the field **Default Start Date**



Click on the item **Beginning of Current Month** in the list

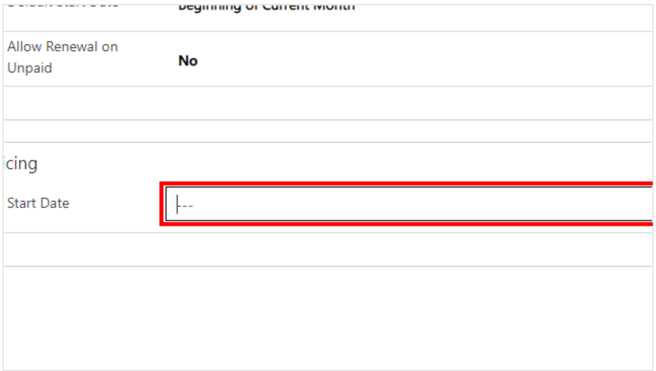


Allow Renewal on Unpaid



If you want to allow the system to create a new renewal billing invoice when the contact or account has a previous renewal invoice that is still unpaid, click to select Yes. Click to select No if you want to require that the previous renewal billing invoice must be paid before a new one can be created.

Click on the field **Start Date**

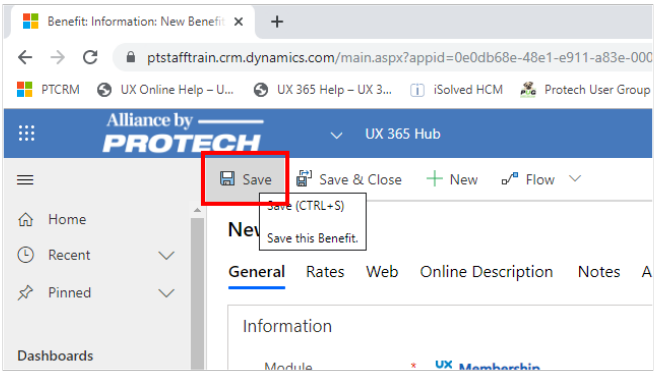


Enter **Start Date**.

Click on the field **End Date**

Enter **End Date**.

Click on the menu item Save



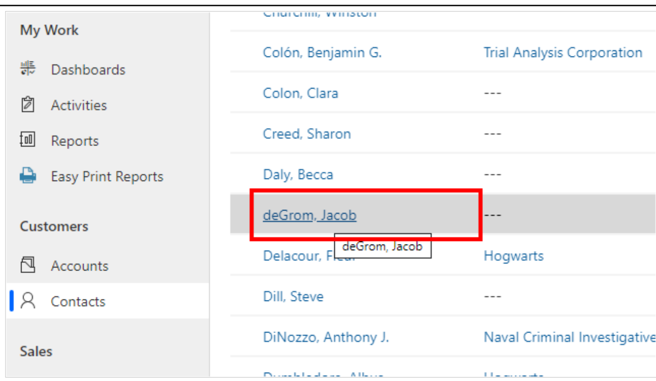
6.4. Creating a New Member Invoice

6.4.1. Creating a new member invoice using a renewal benefit

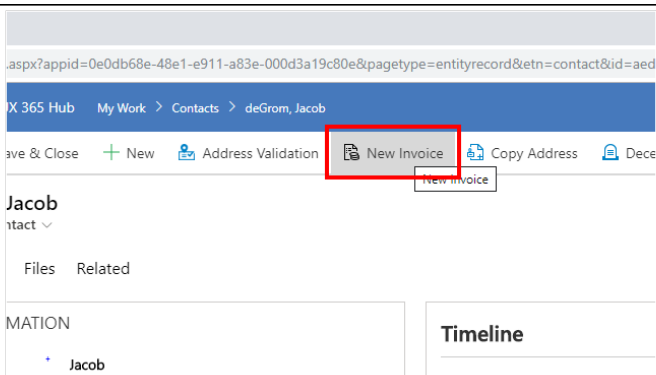
This procedure describes how to create a new member invoice for billing initial membership dues, chapter dues, or both, by selecting a renewal benefit.

Click on the item **Contacts**

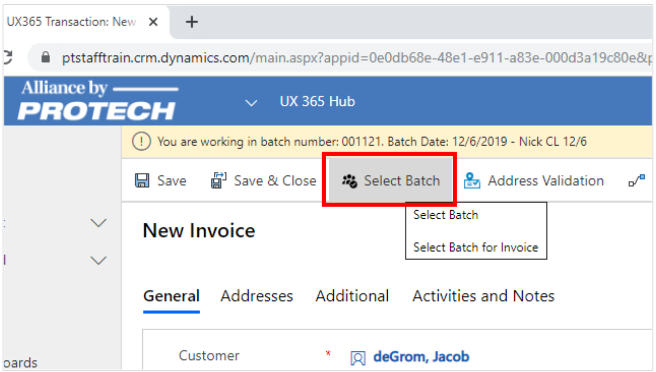
Click on the link in cell **Full Name**



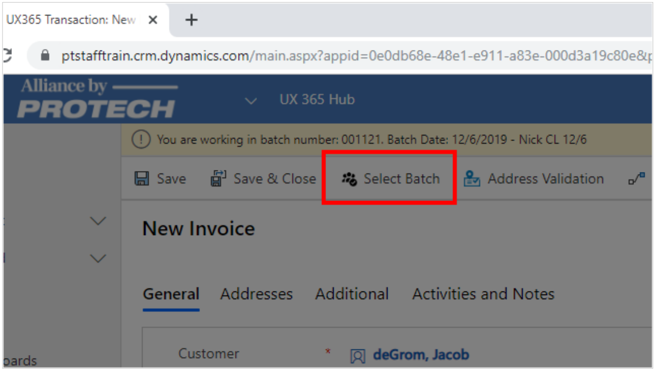
Click on the menu item **New Invoice**



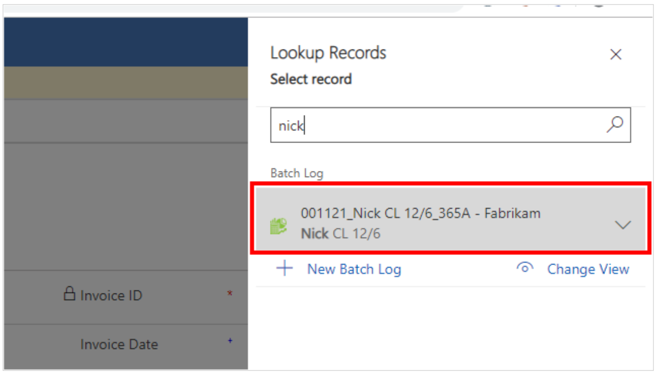
Click on the menu item **Select Batch**



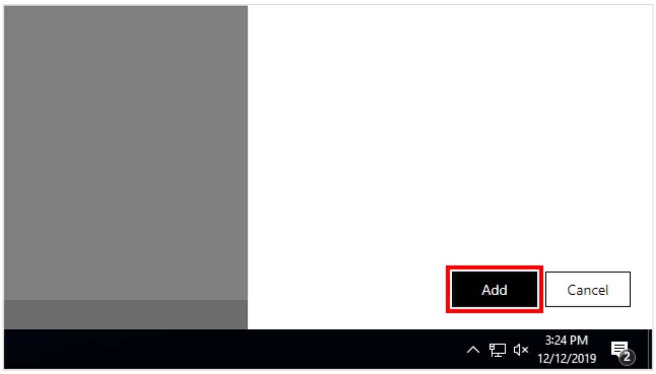
Enter the name of the batch you would like to use



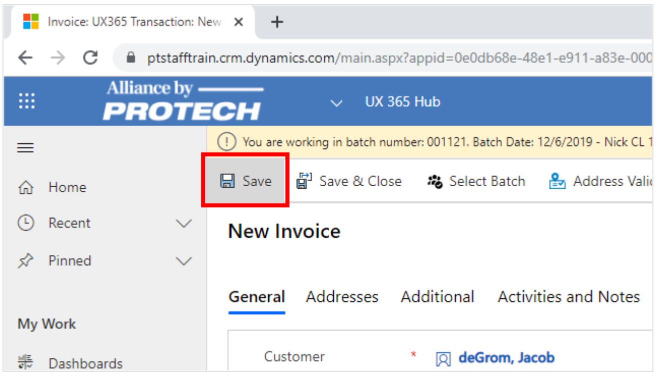
Select the correct batch



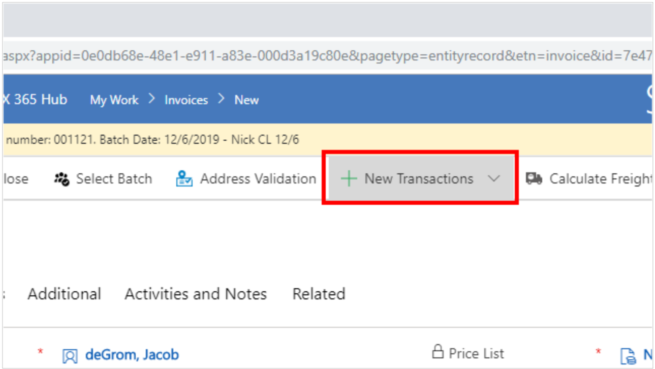
Click on the button **Add**



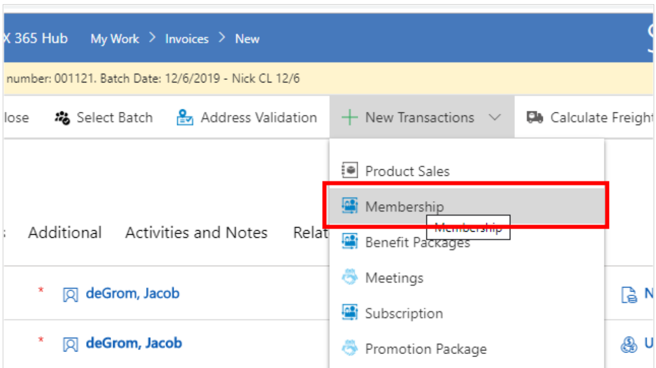
Click on the menu item Save to save the invoice with the selected batch



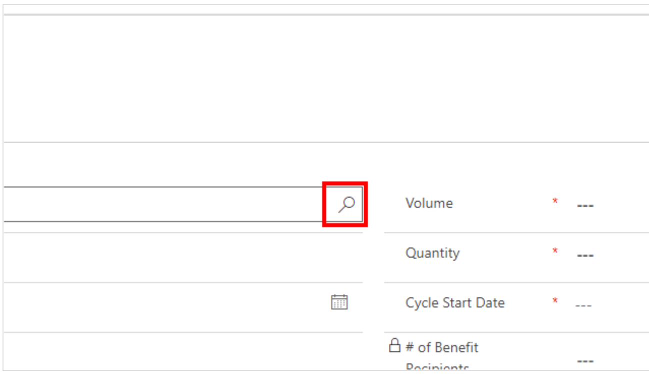
Click on the menu item **New Transactions**



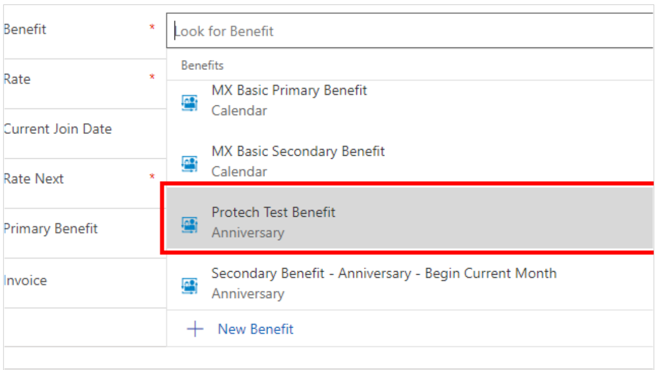
Click on the menu item Membership from the drop-down list



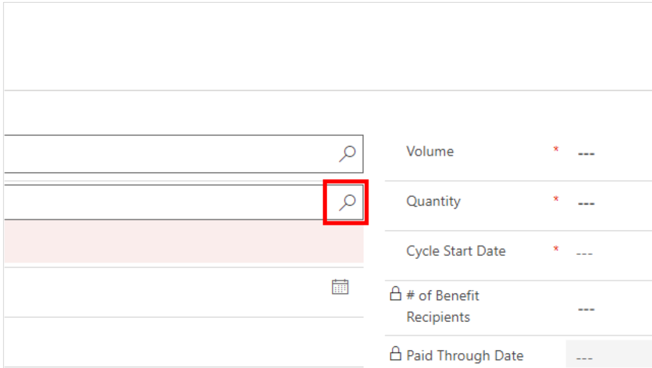
Click the Lookup button to select the membership or chapter benefit.



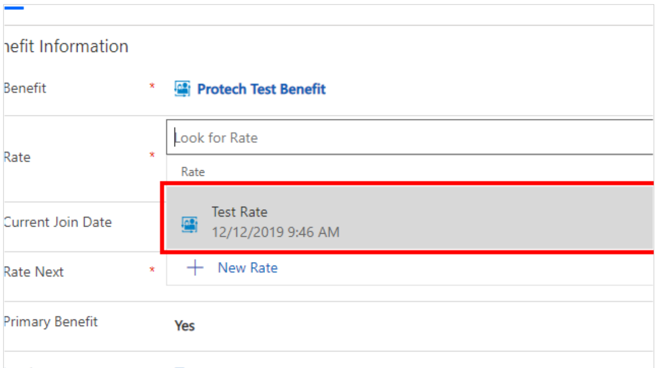
Select the benefit you would like to use



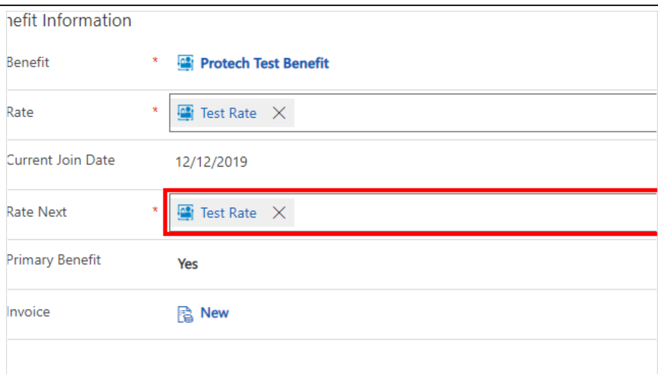
Click the Lookup button to select the membership dues or chapter rate. When you select the rate, the system automatically fills in several of the remaining fields on the benefit entry form.



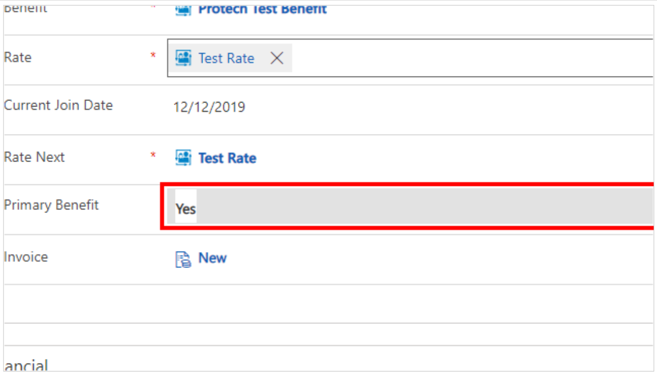
Select the Rate you would like to use



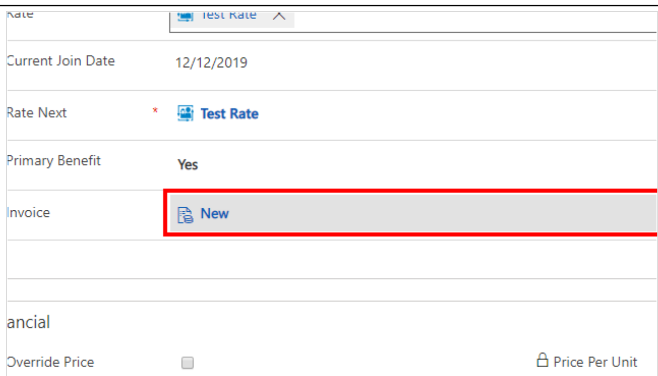
Displays the Rate Next defined in the select Rate setup. If you need to make a change, use the Lookup button and manually select the Rate Next.Important NoteThe Rate Next Look Up filters the rates available for selection based on the benefit setup for the existing rate. If the existing rate's benefit setup 'Is Primary' = Yes, then the Rate Next Look Up Records displays only rates for benefits where the benefit setup 'Is Primary' = Yes. Additionally, for benefits where the renewal method equals Anniversary, then the Rate Next Look Up shows only rates from other benefits that are also Anniversary, and have the same module and Chapter Benefit setting. For benefits where the renewal method equals Calendar, then the Rate Next Look Up shows only rates from other benefits that are also Calendar, and have the same module, Chapter Benefit setting, and Default Start Date



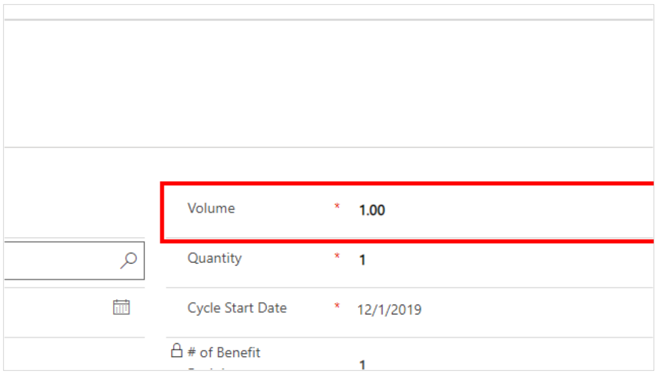
Primary Benefit- Identifies if the benefit is the Primary Benefit. Only one benefit may be chosen as the primary. The Active or Terminated Price Level X-Ref defined in the Rate will flow to the Account/Contact record.



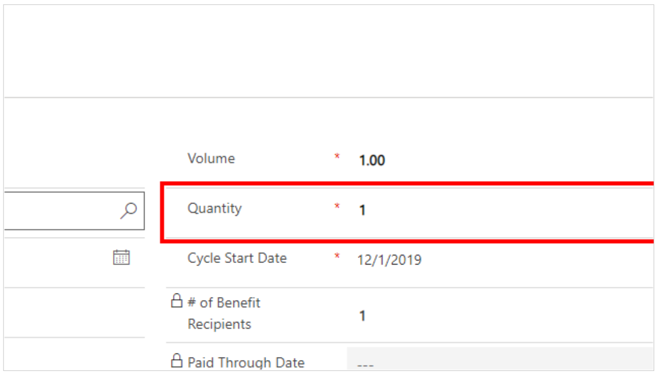
This is the name of the created invoice



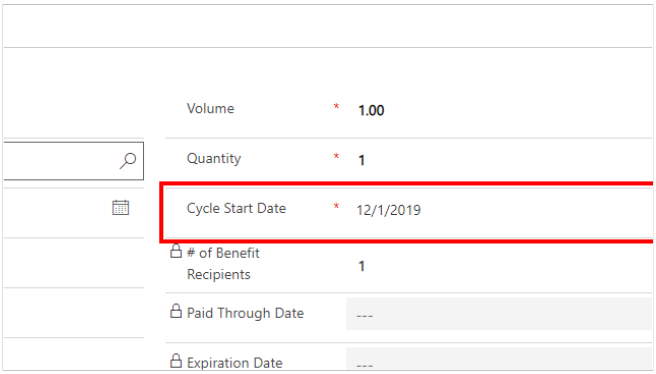
Volume- If the rate you select is Rate Type = Volume or Factor, the system automatically displays the value from the specified pa_volume field in the account or contact record. You can enter a different volume if necessary. If you change the volume in a new renewal transaction, the system will update pa_volume field in the customer record and the related renewal billing record with this new value when the new transaction is saved for the first time. If the rate you selected is not a volume-based rate, this field is ignored and no entry is required



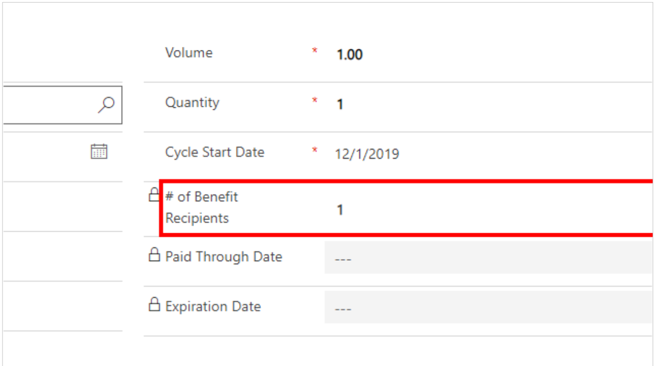
The Quantity field displays a quantity of one by default. If you change the quantity and the selected Rate type = quantity, the system will calculate the price based on price per unit times the quantity entered. The system will also update the quantity field in the related renewal billing record for renewal processing



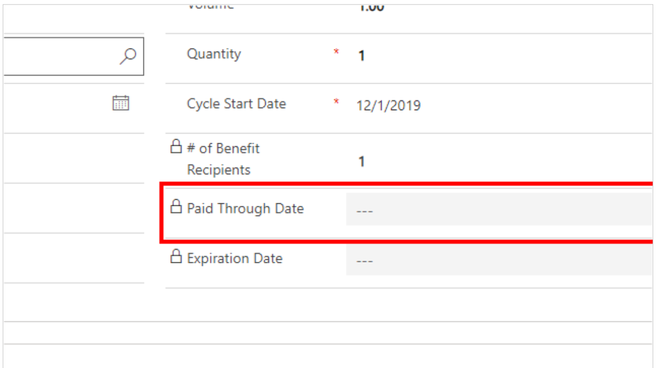
Cycyle Start date is calculated by the system based on the Current Join Date and the selected benefit setup



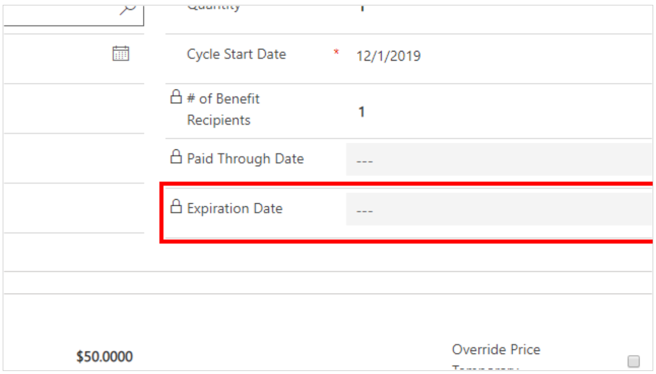
This field displays the number of benefit recipients defined in the selected rate setup. This field is disabled and cannot be modified.



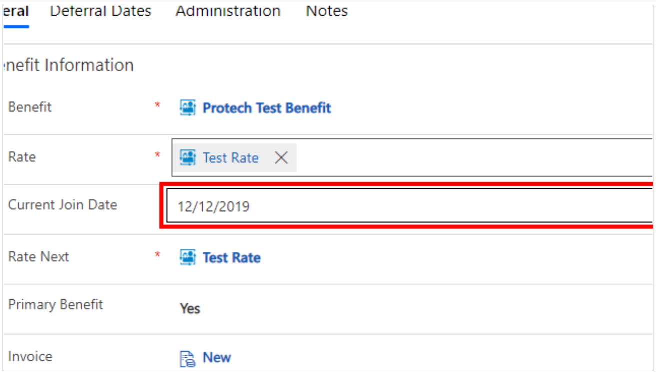
This field is blank until payment is applied on the invoice. When it will displays the paid through date based on the number of installments the member has paid. If your organization allows installment billing, this date updates each time an installment is paid against the dues invoice. If your organization does not support installment billing, then the paid through date will equal the member expiration date provided the invoice is paid in full.



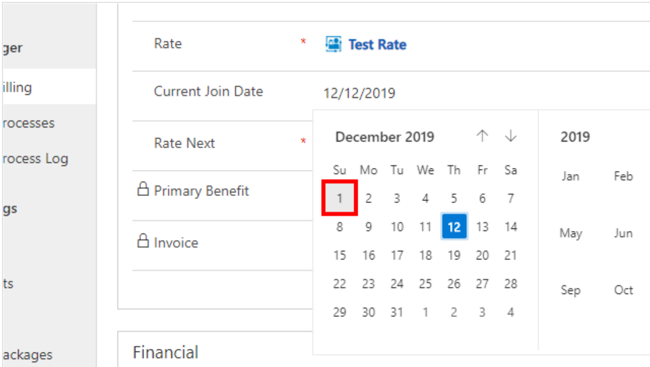
The Expiration Date is the date that the membership or chapter dues expire



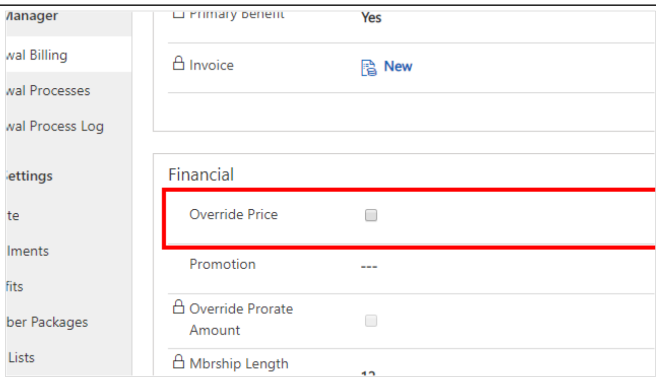
Click on **Current Join Date**



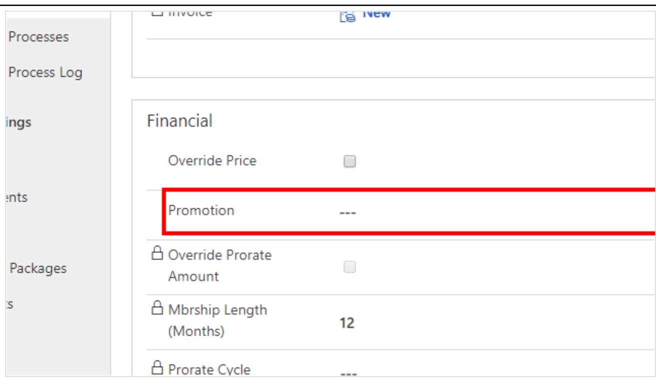
The Current Join Date displays the system date. If you need to change the date, click the Calendar button to select a date. If necessary, the system will use this date to calculate the prorate, installment billing, and cycle start date, using the information in the benefit and rate selected.



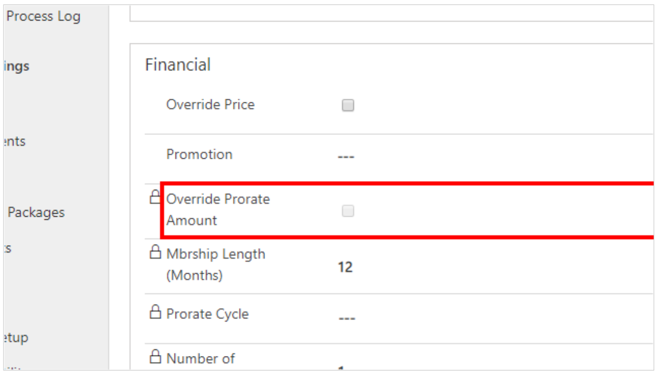
Override Price- This is used to override the default price per unit, mark this checkbox ☐ and then enter the price you wish to charge for this dues invoice in the Price Per Unit field



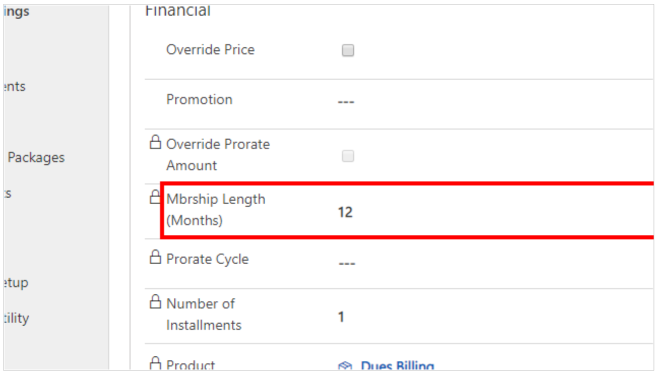
Promotion field is used if you want to apply a one-time discount to this new membership, use the Lookup to select the predefined promotion code



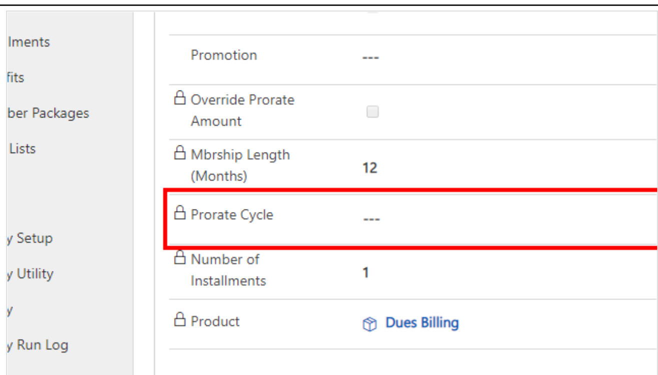
Override Prorate Amount-If you want to override the prorate amount, mark this checkbox and then change the amount in the Prorate Amount field to whatever is appropriate for this member.



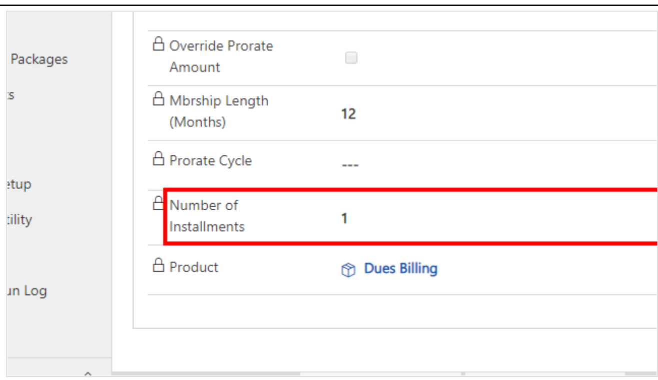
This field shows the length of the membership in months



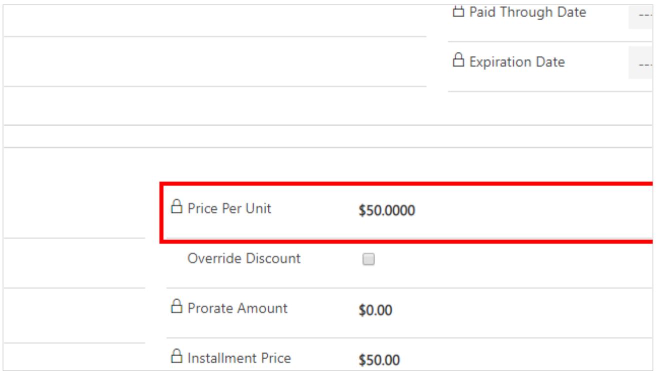
The Prorate Cycle field defaults from the selected benefit setup. This field is disabled and cannot be modified.



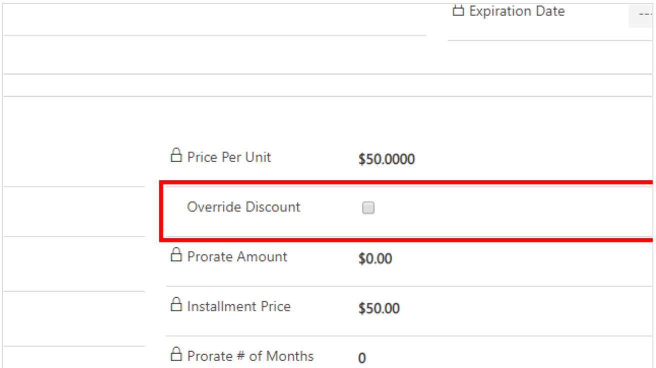
The Number of Installments field displays the number of installments associated with the installment schedule for the selected rate setup.



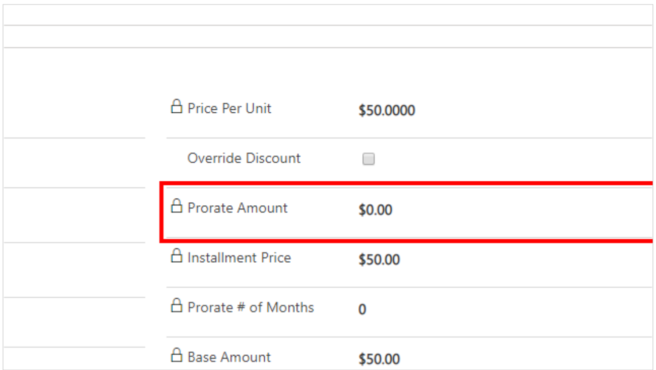
Price Per Unit field displays the full price for the dues rate selected and the price that will be used when the member renews (unless rates are changed in the setup area). This field is disabled unless Override Price = Yes.



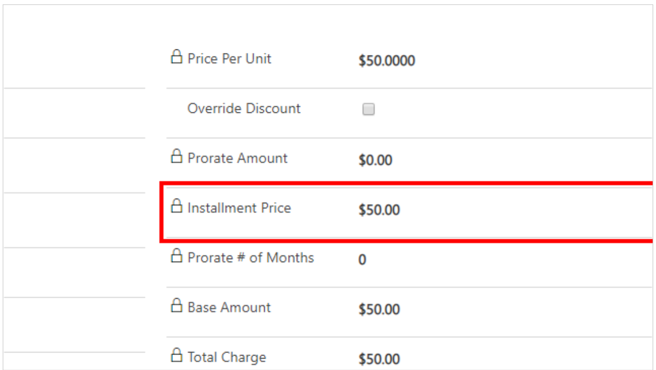
The Override Discount field if you want to override the default discount calculated for this invoice, mark this checkbox and change the amount in the Discount Amount field. Any discount you enter applies to the current invoice only and is not applied to dues renewal invoices.



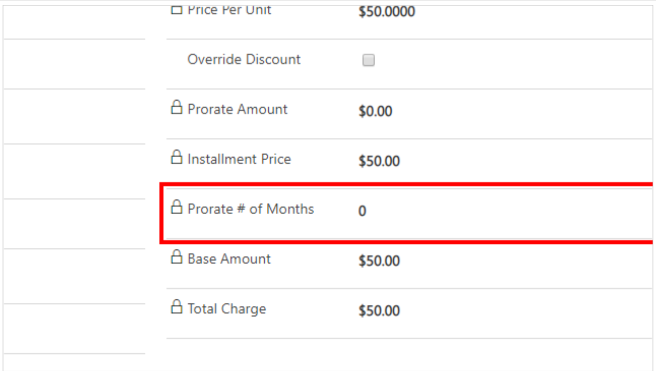
Prorate Amount field is used if your organization prorates new member dues, the amount prorated (based on the rate selected and the join date) is calculated and displayed in this field



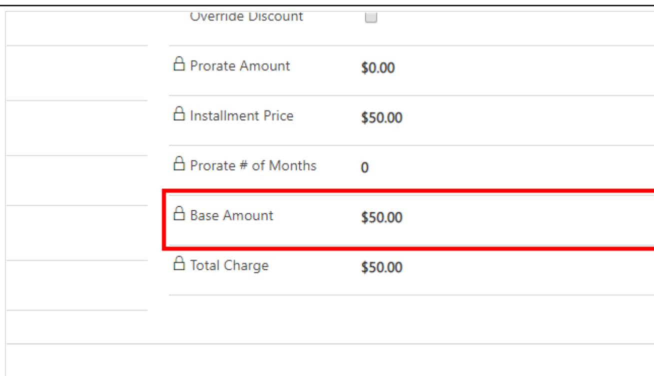
Installment Price displays the amount of each installment.



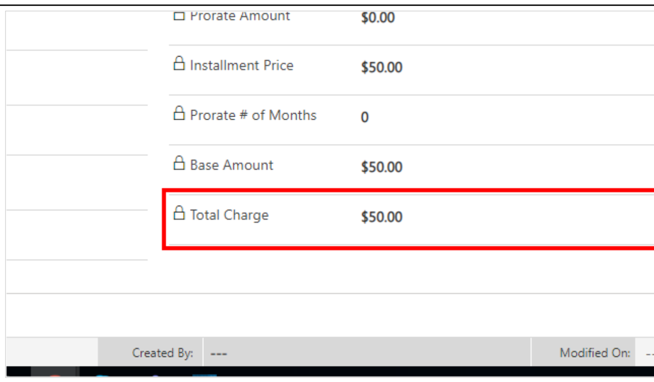
Prorate Number of Months displays the system calculated number of prorate months based on the benefit setup and the Cycle Start Date.



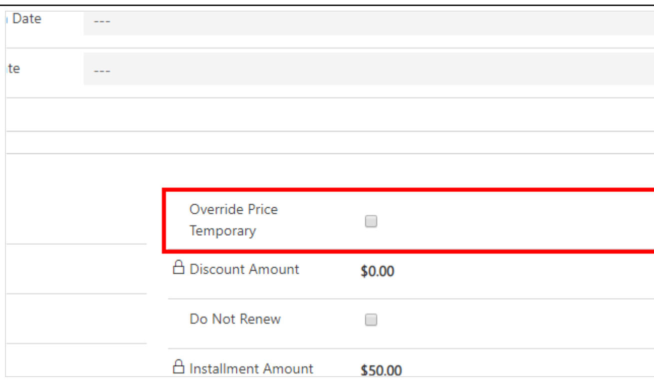
Base Amount displays the dues price that was defined when the benefit and rate selected for this member was set up.



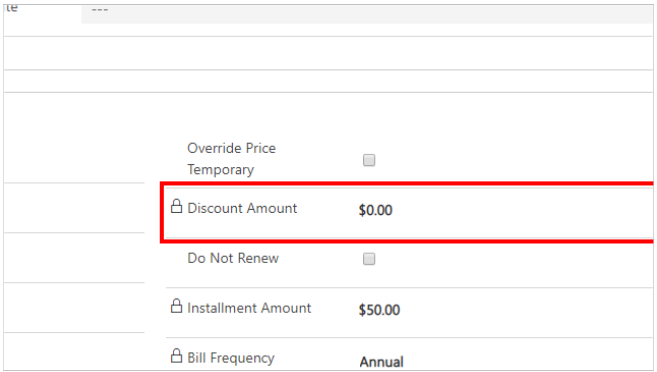
Total Charge displays the base amount less any discounts, prorated amounts.



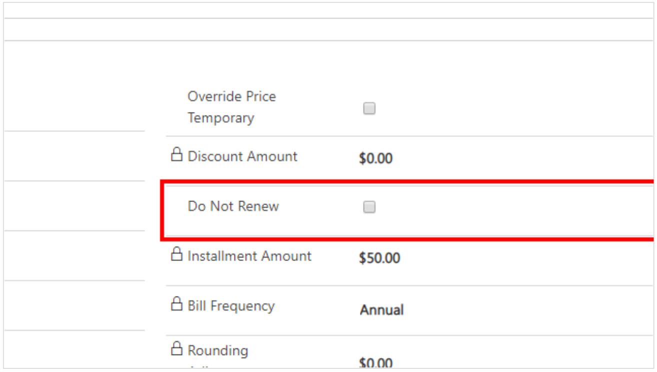
Override Price Temporary – If Override Price = Yes, mark this checkbox, if this is a one-time override and you want the system to use pricing in the Rate Next setup during the next dues renewal. Do not select this checkbox if this is a permanent override and you want the system to use the Price Per Unit.



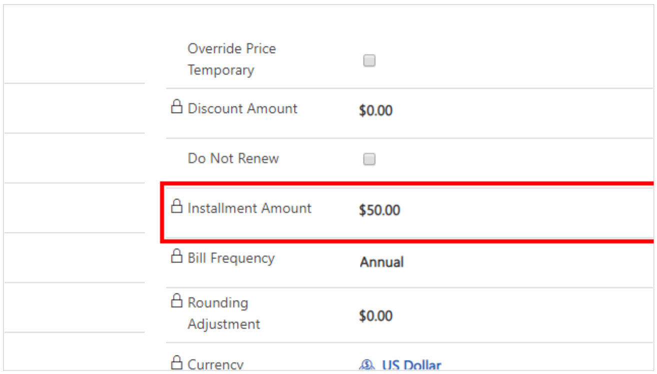
Discount Amount – If you are using a predefined promotion code (discount), the amount of that discount is displayed in this field.



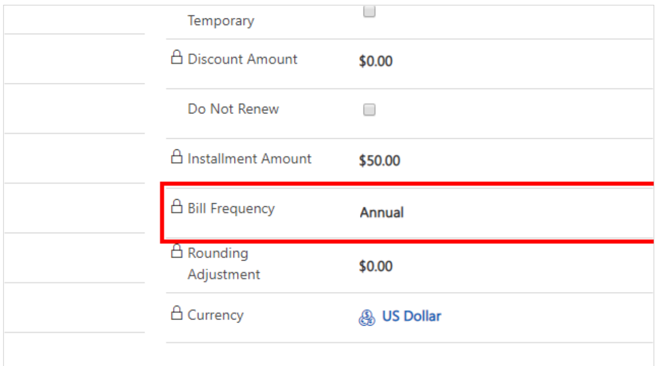
Do Not Renew – Select this checkbox if you want to exclude this membership from the dues renewal process. Otherwise, do not mark this checkbox.



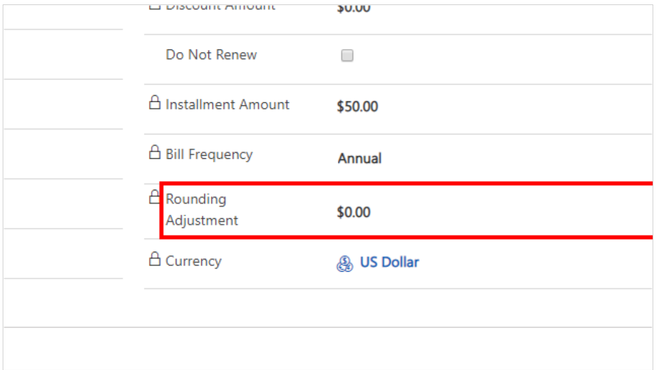
Installment Amount – Displays a calculated value of Installment Price times Quantity. For membership or chapter dues, this will display the Installment Price because dues are always a quantity of 1. For subscriptions, where you might have a quantity of 2, this would display 2 times the installment price.



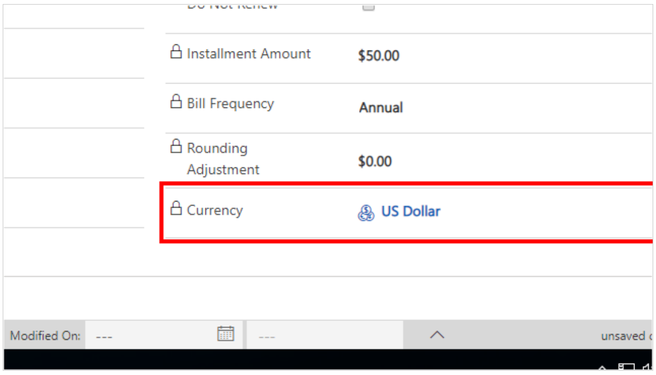
Billing Frequency – Displays the billing frequency associated with the installment schedule for the selected rate setup.



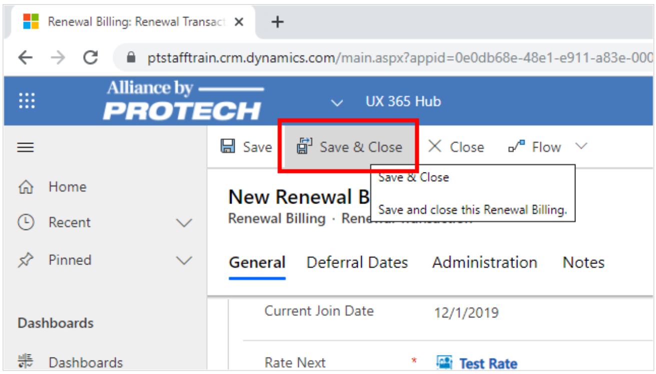
Rounding Adjustment- When the total charge for the benefit divided by the number of installments does not result in an evenly distributed amount across all installments, this remainder is adjusted in the 1st installment.



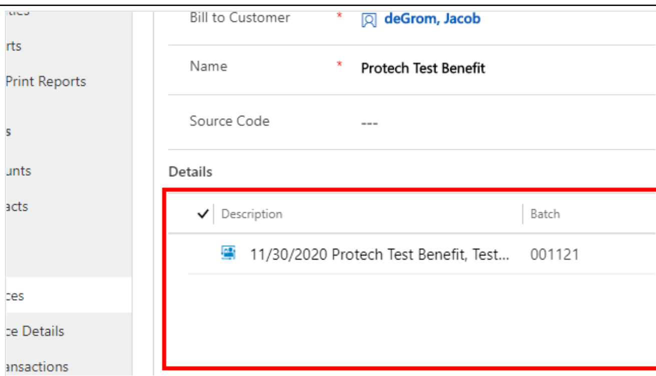
Currency-Unique identifier of the currency associated with the entity.



Click Save & Close to save this invoice detail line item and return to the invoice.

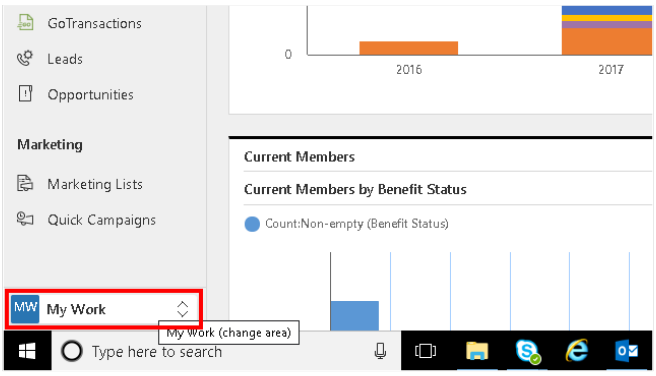


Review the invoice and detail to ensure that the invoice is correct. Verify that it is correct and click Save & Close if you are finished and there are no payments to apply to this invoice. If you have a payment to apply, click Save to save the invoice and then create a payment transaction

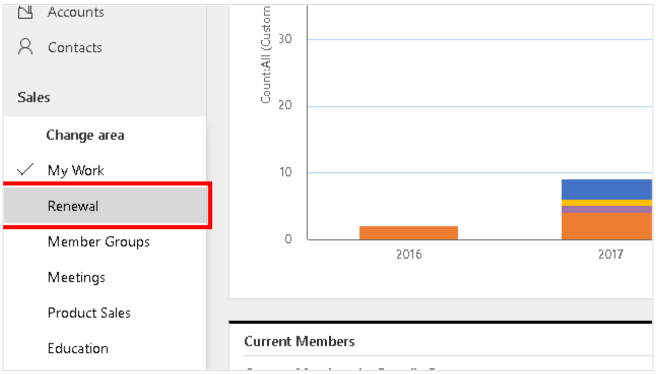


6.5. Creating a New Member Renewal Package

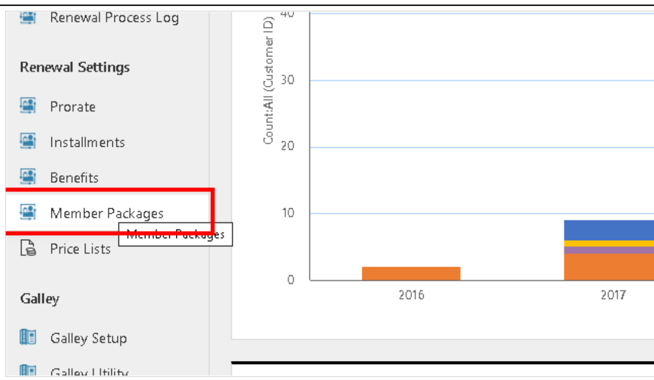
Click on the button **My Work (change area)**



Click on the item **Renewal**

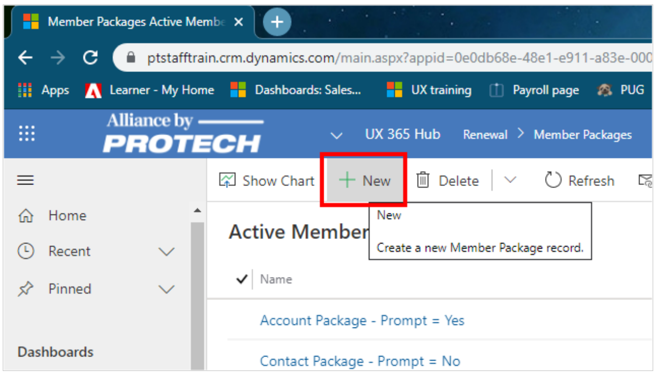


Click on the item **Member Packages**

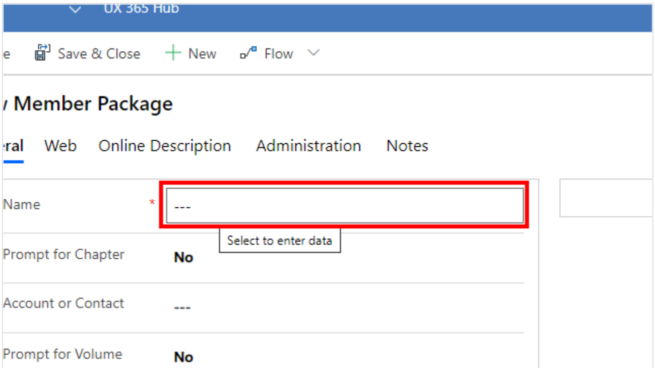


Click on the item **Member Packages**

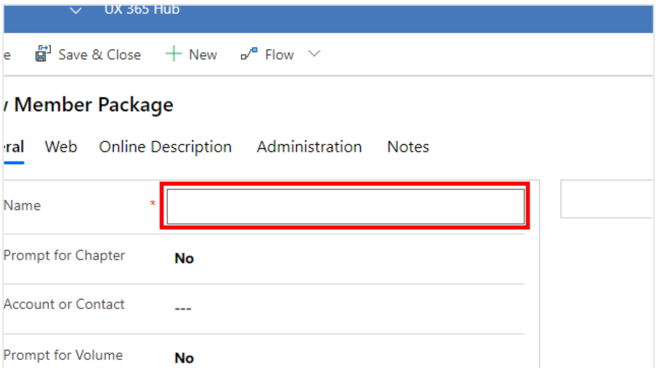
Click on the menu item **New**



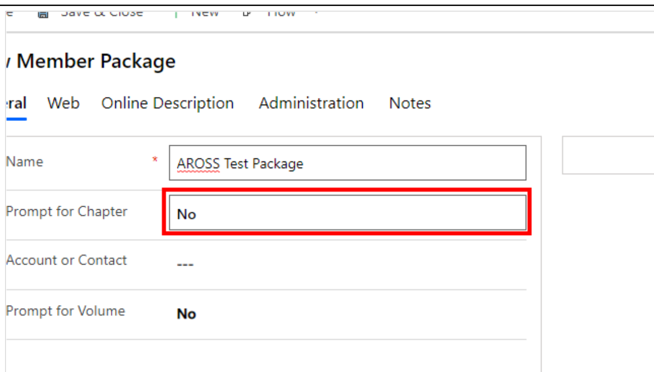
Click on the text field **Name**



Enter Package Name



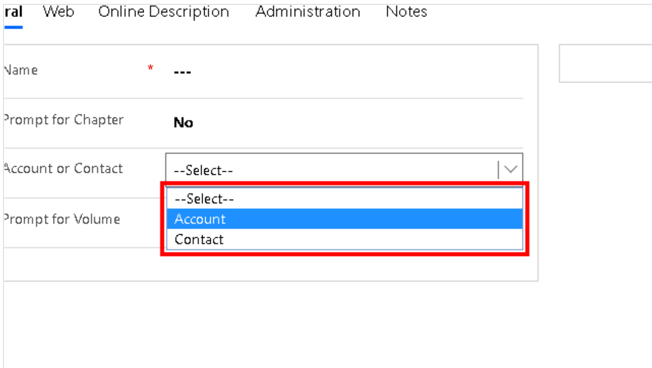
Select Yes or No in Prompt for Chapter
Click Yes, if this package will contain a chapter benefit where the chapter is not defined in the chapter benefit rate. This would be the case where you have one rate for all chapters and your rate setup does not contain a pre-defined chapter. By selecting Yes, you will have the opportunity to assign the specific chapter at the time you create an invoice using this package. Click to select No if this package contains a chapter benefit where the chapter is defined in the chapter benefit rate. Click to select No if this package will not contain a chapter benefit.



Click on the field **Account or Contact**

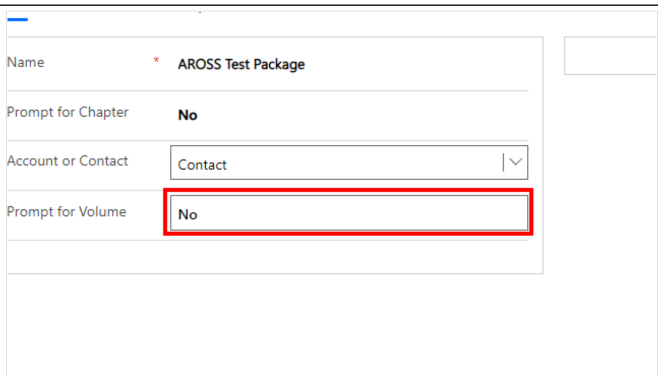
Click on an option from the list

If this member package will be used for account records select Account. If it will be used for contacts records, select Contact.

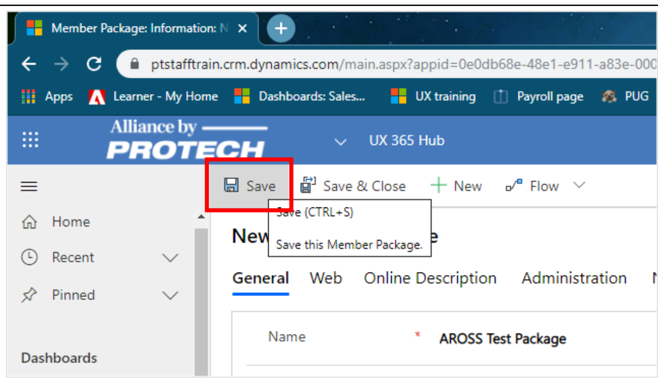


Select Yes or No in Prompt for Volume

Click to select Yes if you want the system to enable a prompt asking for the volume information when you are creating the renewal invoice. Click to select No if you do not require a prompt.

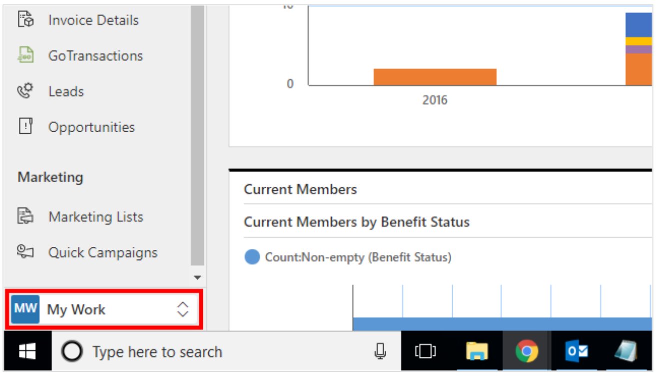


Click on the menu item **Save (CTRL+S)**

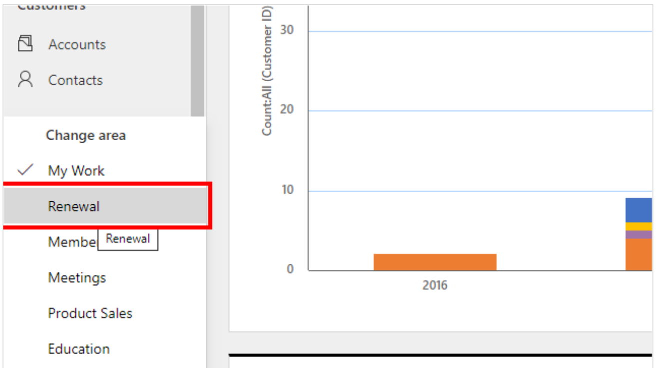


6.6. Creating a Rate

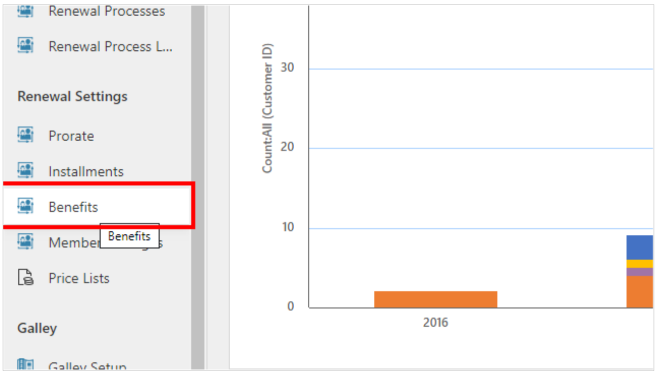
Click on the button **My Work (change area)**



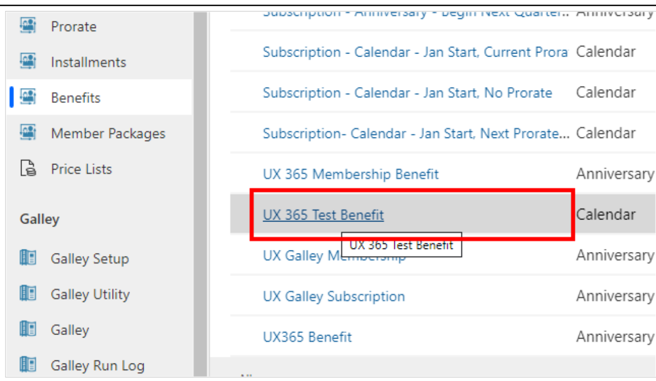
Click on the item **Renewal**



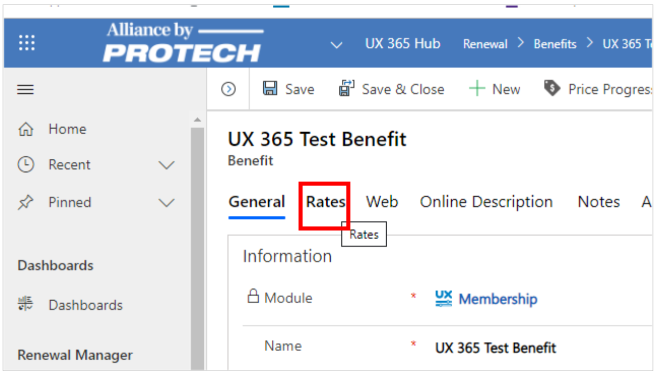
Click on the item **Benefits**



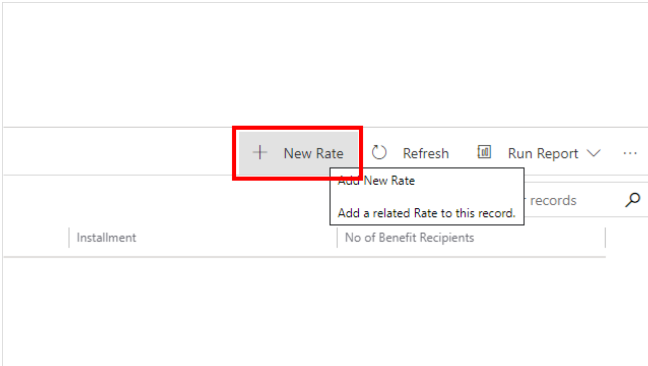
Locate the Benefit you would like to add this new Rate too. Click on the Benefit name.



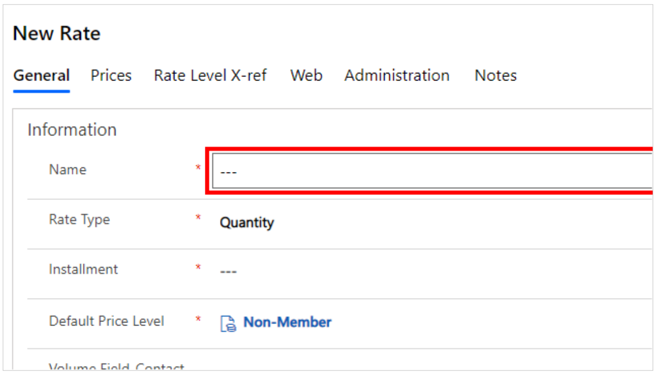
Click on the item **Rates**



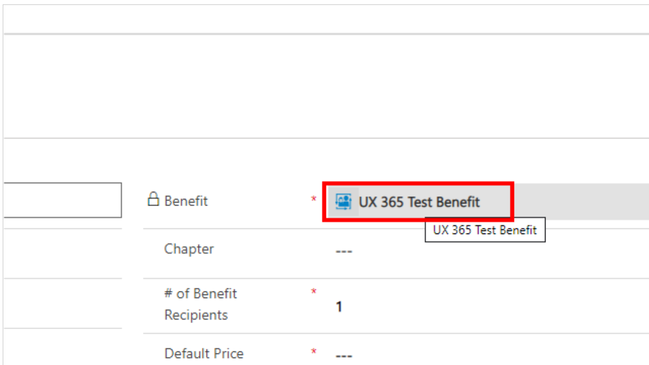
Click on the menu item New Rate



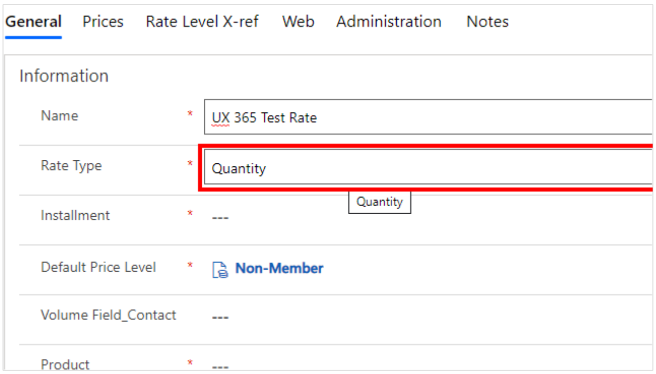
Enter in the Name for the Rate.
Enter a descriptive name for the rate. If a rate is going to have a specific installment option, we recommend that you include that in your name rate (for example, “National Membership – Quarterly Installments”).



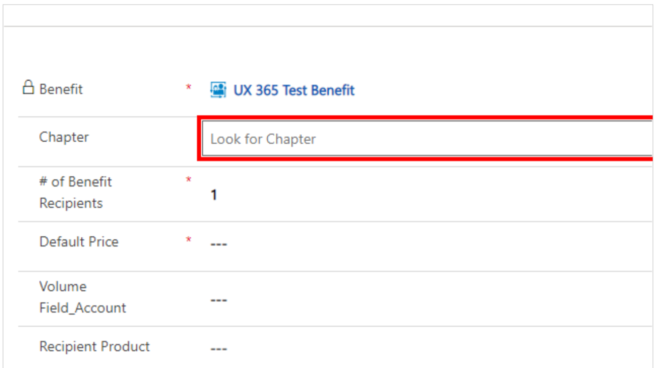
The Benefit field displays the name of the parent benefit for this rate and is not available for edit.



Select the calculation method for this rate: Quantity, Volume, or Factor.
Select Quantity if the pricing is not calculated based on volume data in the account or contact record; instead, the price is based on a flat quantity (typically 1). Select Volume if the pricing is calculated based on volume data in the account or contact record. For example, your organization can base its dues amount on a company's sales revenue and you capture that sales revenue figure for purposes of calculating dues. You could use Volume rates so that the system will calculate the dues automatically for you based on the value ranges in your price setup for this rate. For more information, see Setting up volume-based rates and prices. Select Factor if the pricing is calculated based on a factor calculation using volume data in the account or contact record. For example, your organization can base its dues amount based on a factor calculation of a company's sales revenue. You could use Factor rates so that the system will calculate the dues automatically for you based on the value ranges in your price setup for this rate. For more information, see Setting up factor-based rates and prices.



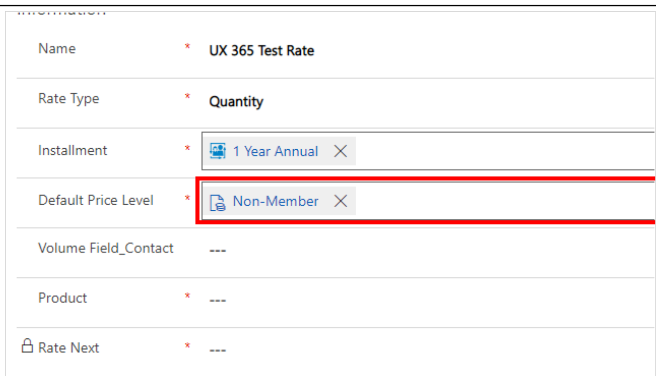
Chapter
If the parent benefit is not a chapter benefit (that is, the Chapter Benefit option is set to No), leave this field blank. If the parent benefit is a chapter benefit (that is, the Chapter Benefit option is set to Yes), do one of the following: If you have different rates for each chapter, and the rate is for a specific chapter, click the Lookup button to select the chapter. (For more information about chapters, see Chapters.) For example, if you have a chapter for each state and each chapter has a different rate, then you would create a separate rate for each chapter and define the chapter within the rate. When you create an invoice using a rate where the chapter is defined, the system will automatically assign the new member to that chapter. If you have multiple chapters that share the same price, leave this field blank. When you create a new member invoice, you can use a renewal package that will prompt you for the appropriate chapter. For more information, see Creating a new member renewal package.



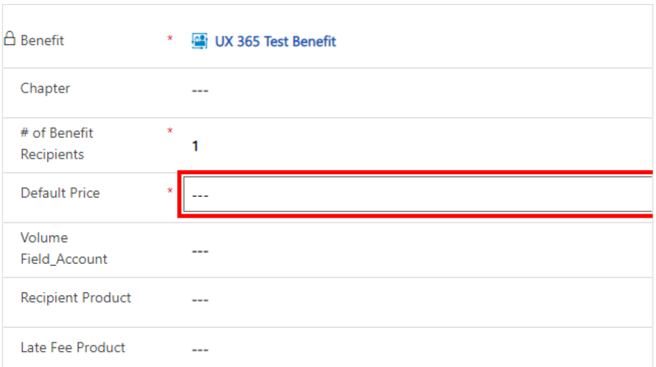
Click the Lookup button to select the installment schedule for this rate.
If your organization uses calendar-based dues, you must follow the guidelines provided in Membership Renewal Setup. For important additional information, see Calendar-based dues prorate guidelines.

Enter the number of Benefit Recipients.
You must enter at least 1; however, the number is based on your organizational needs. For example, if you are creating a rate that is specific to account records, enter the number of records that can benefit from the account's renewal billing record. See Benefit recipients and Additional benefit recipient charges for more information.

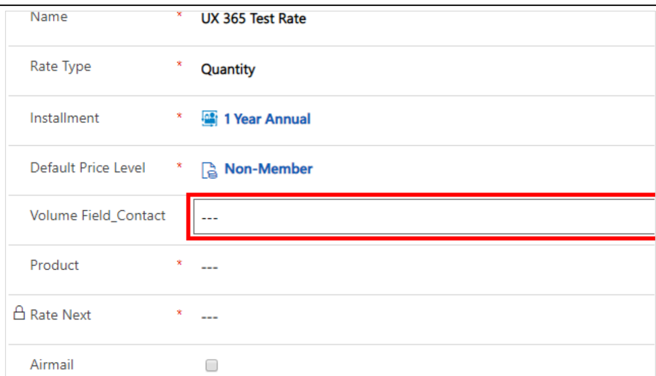
In the Default Price Level field, click the lookup button to select the default price level for this rate.
Price levels in CRM allow an organization to have multiple price lists. Typically, organizations have two price levels to differentiate pricing for members from pricing for non-members (although some have more intricate pricing structures). Every account and contact record in CRM has a field that indicates the price list that applies to that record. Each product also has a field relating that product to a particular price level. If an account or contact record does not have a default price level, the system uses the default price level indicated for the product itself. For membership or chapter dues, the default price level will typically be Non-Member.



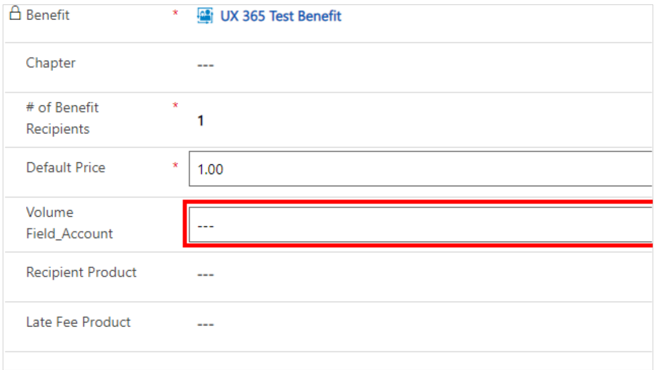
Enter the default price for this rate.
The system will use this entry to create a price for each price level that you have set up. You can modify these prices at any time, or you can create additional price records for this rate, if needed.



Volume Field_Contact
If you selected Volume or Factor as the Rate Type, enter the attribute name for the contact field used to maintain volume data for purposes of calculating dues. The typical contact attribute is pa_volume. If the Rate Type selected is Quantity, leave this field blank. You must identify the account and/or contact attribute used to determine volume-based dues pricing. Eligible contact attributes include those with a field type equal to whole number, decimal number, floating point number and money. Selecting an ineligible field type will generate an error causing system logic to fail.

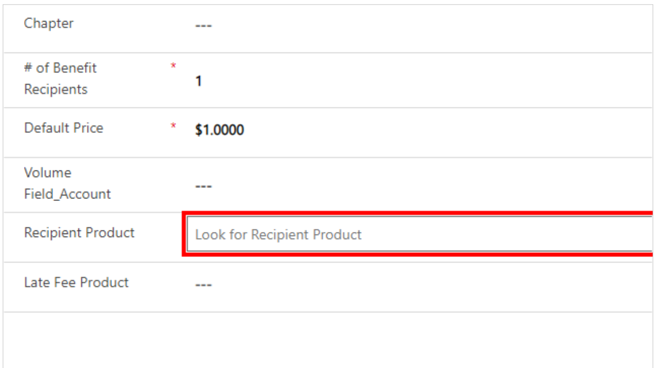


Volume Field_Account
If you selected Volume or Factor as the Rate Type, enter the attribute name for the account field used to maintain volume data for purposes of calculating dues. The typical account attribute is pa_volume. If the Rate Type selected is Quantity, leave this field blank. You must identify the account and/or contact attribute used to determine volume-based dues pricing. Eligible account attributes include those with a field type equal to whole number, decimal number, floating point number and money. Selecting an ineligible field type will generate an error causing system logic to fail.

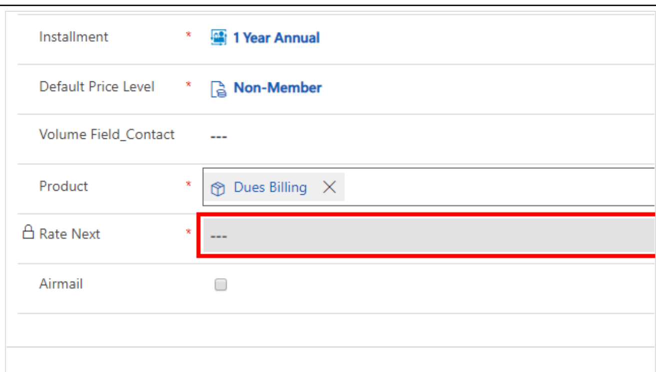


In the Product field, click on the lookup button to select the appropriate product.

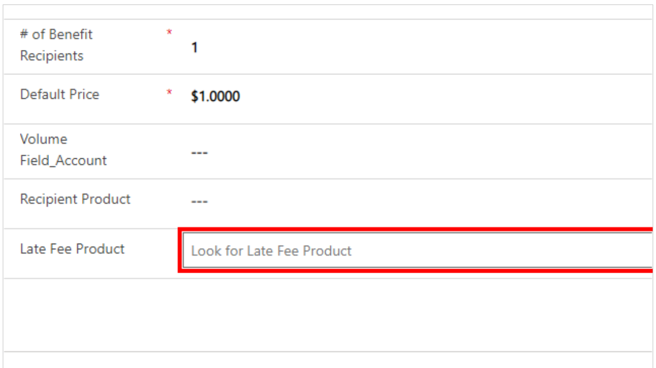
Recipient Product
If this rate supports a specific number of “free” benefit recipients (as defined in the Number of Benefit Recipients field), and your organization charges for any additional recipients above this number, you will need to assign a product for this. This product is used to calculate additional charges on the renewal invoice if a company member’s benefit recipient count exceeds the number defined for this rate. For more information, see Creating a new product for benefit recipient charges. See also Benefit recipients and Additional benefit recipient charges.



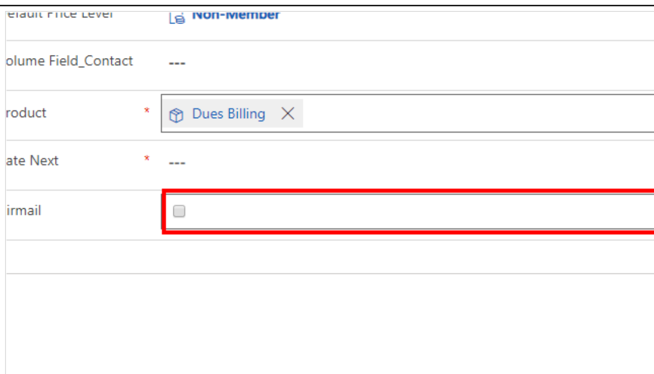
The Rate Next field is not enabled until you save the Rate, then the system automatically populates this field with this Rate.
If this rate supports a specific number of “free” benefit recipients (as defined in the Number of Benefit Recipients field), and your organization charges for any additional recipients above this number, you will need to assign a product for this. This product is used to calculate additional charges on the renewal invoice if a company member’s benefit recipient count exceeds the number defined for this rate. For more information, see Creating a new product for benefit recipient charges. See also Benefit recipients and Additional benefit recipient charges.



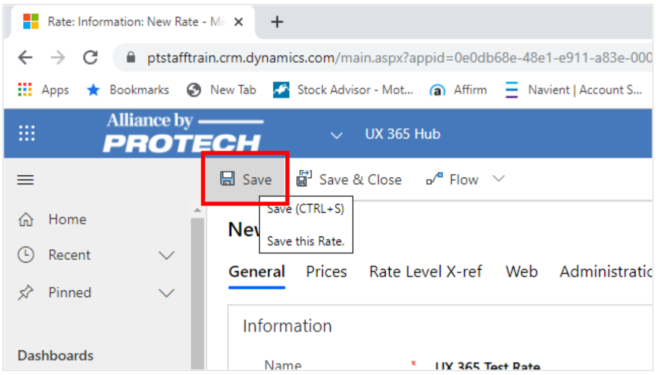
Late Fee Product
A product used to charge a different fee for late renewals.



Airmail
Do not change this option; it is used for subscription benefits.

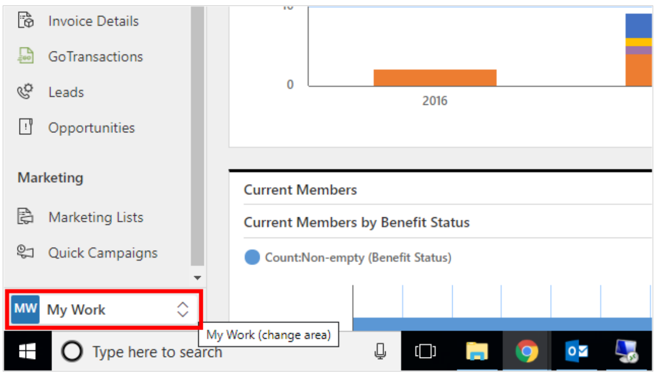


Click on the menu item Save.

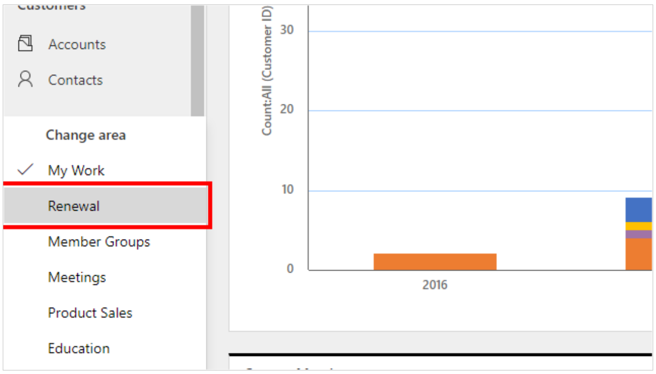


6.7. Creating Price Level X Ref Records

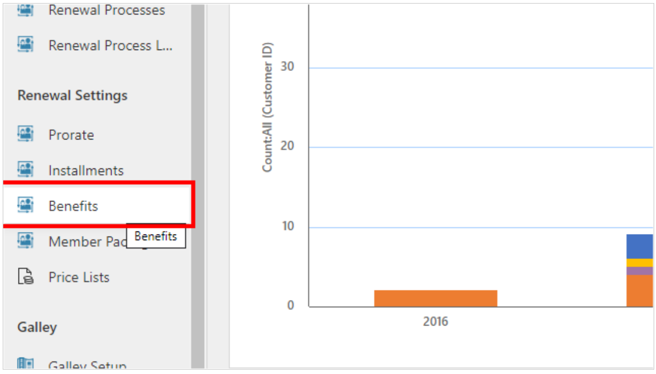
Click on the button **My Work**



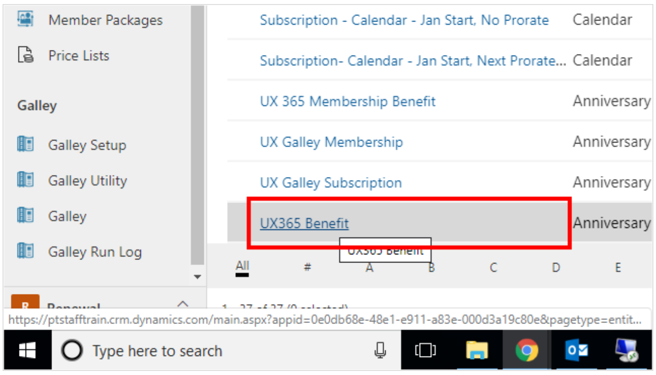
Click on the item **Renewal**



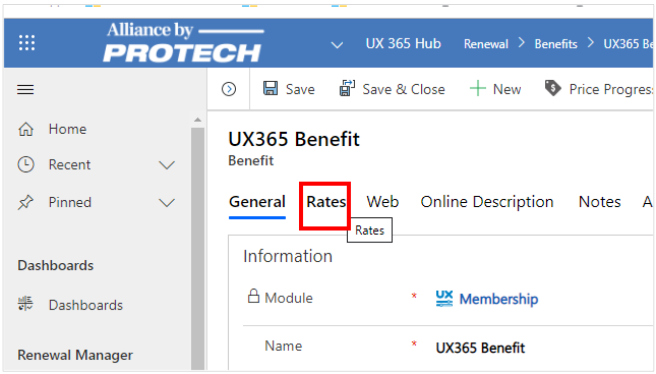
Click on the item **Benefits**



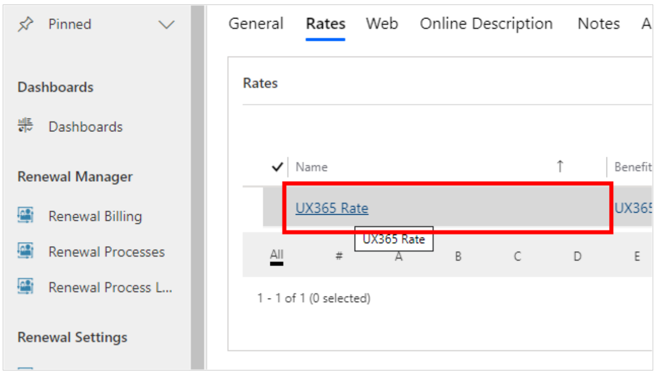
Click on the desired Benefit



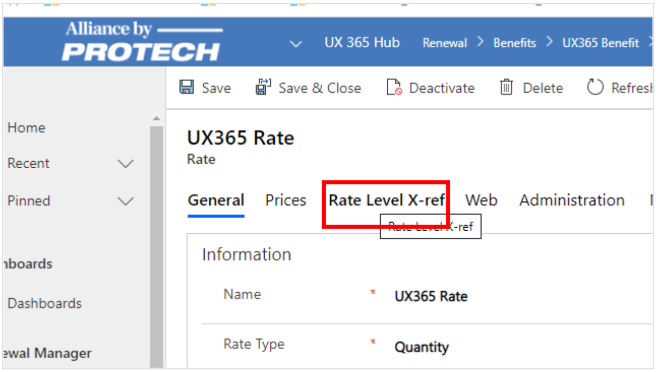
Click on the related item Rates



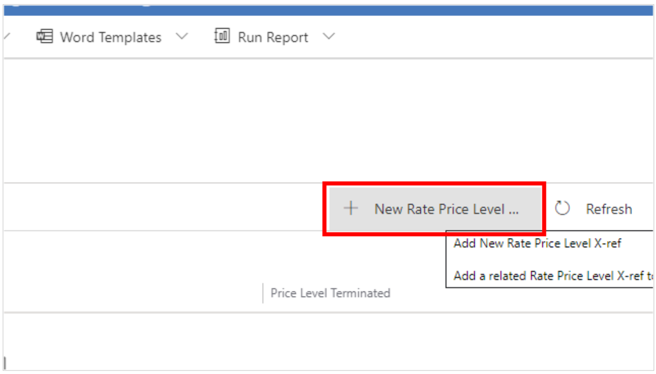
Select the desired Rate



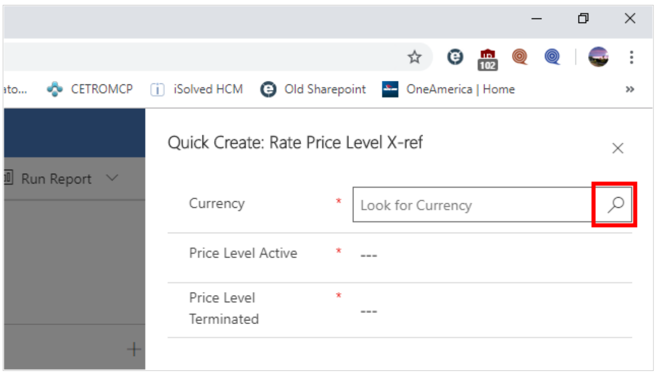
Click on the item **Rate Level X-ref**

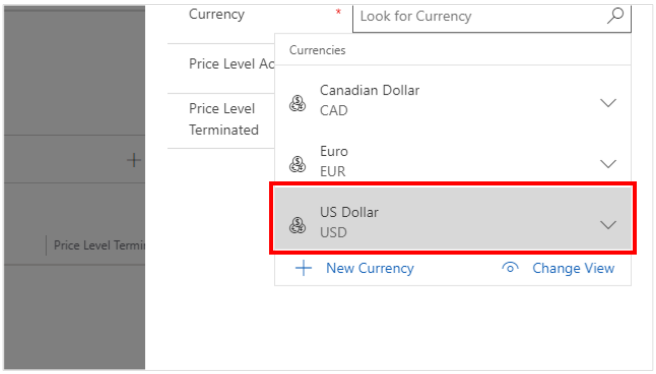
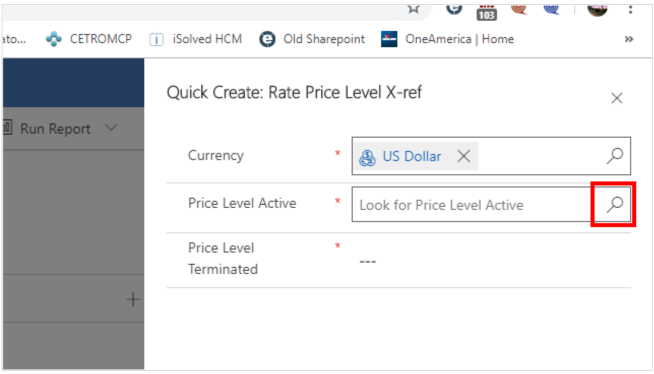
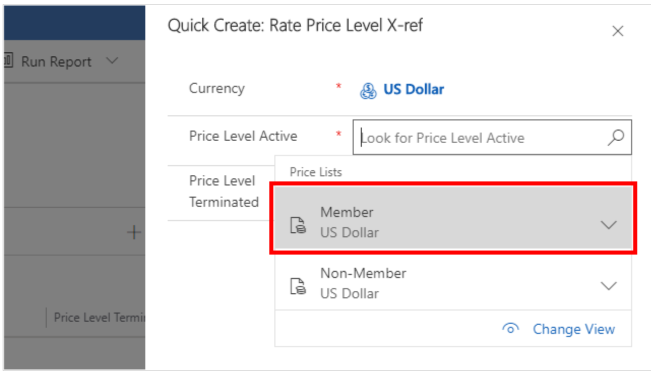
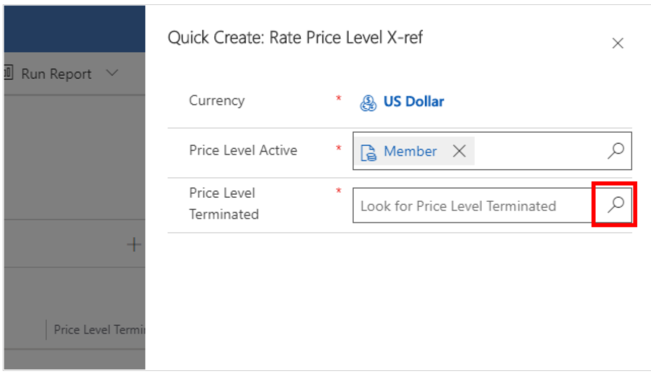


Click on the menu item **Add New Rate Price Level X-ref**

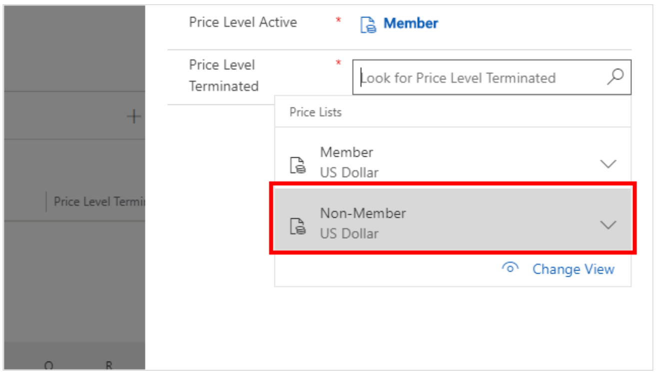


Click on the search icon for Currency



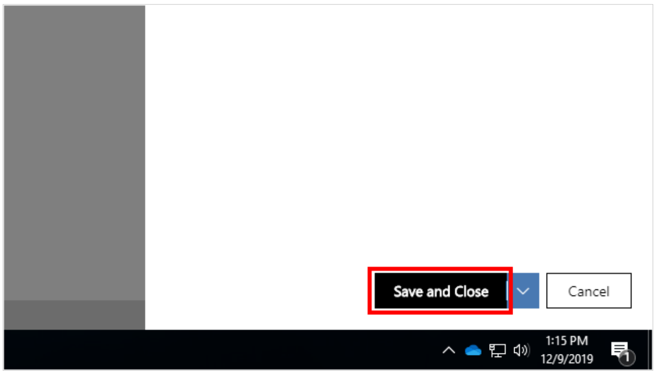
Click on the item **US Dollar**	
Click on the search icon for Price Level Active	
Click on the item **Member**	
Click on the search icon for Price Level Terminated	

Click on the item **Non-Member**



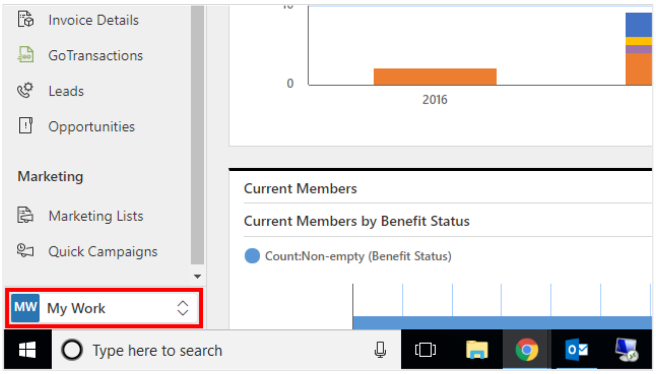
If this rate setup is for a primary benefit (that is, a benefit that controls membership status), you must have a Rate Price Level X-ref record that controls the price level of a record when membership is active and when membership is terminated. If you are working in a multi-currency environment, you must have a Rate Price Level X-ref for each currency.

Click on the button **Save and Close**

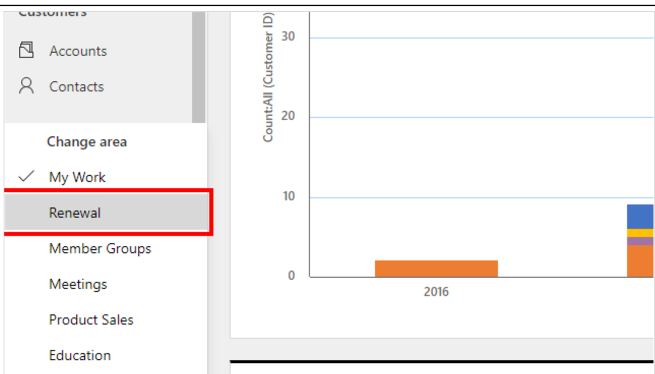


6.8. Generating Membership Renewal Billing Invoices

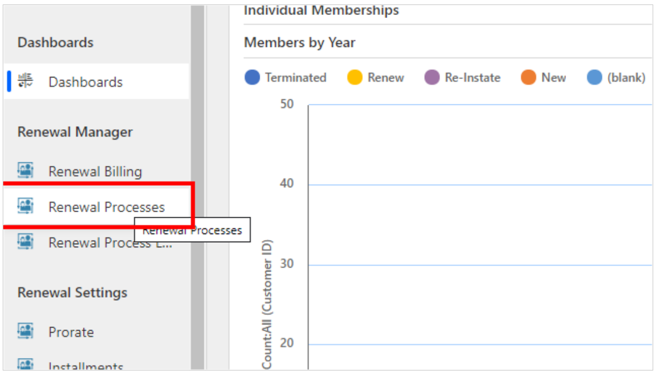
Click on the button **My Work**



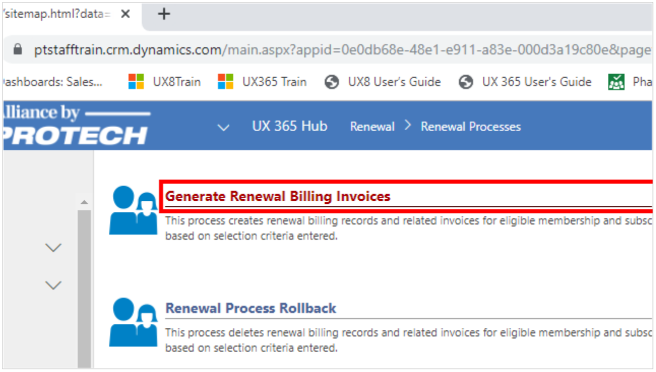
Click on the item **Renewal**



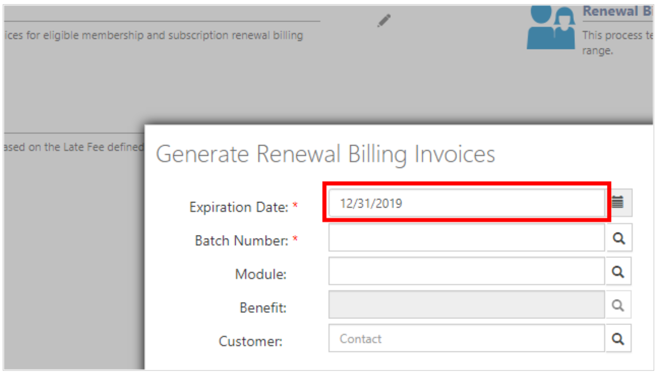
Click on the item **Renewal Processes**



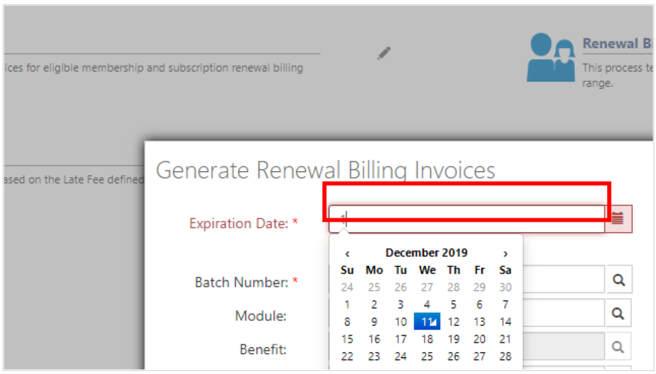
Click on **Generate Renewal Billing Invoices**



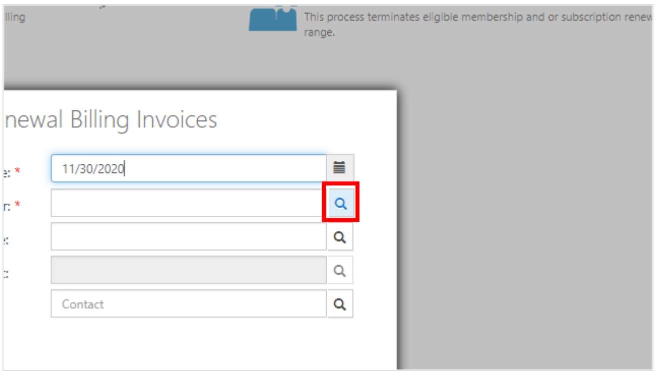
Click on the input field Expiration Date



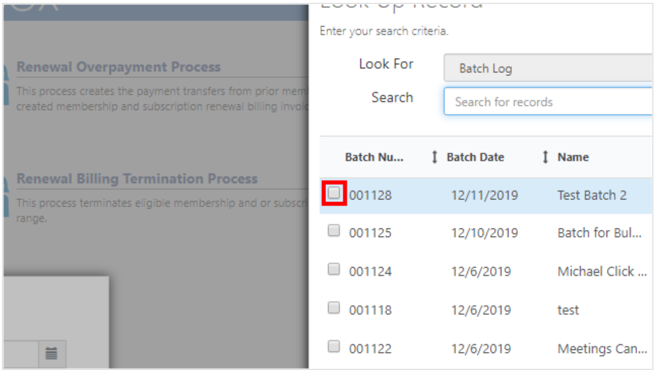
Enter or select the Expiration Date of the Renewal Billing records to be renewed. This will always be the last day of the month



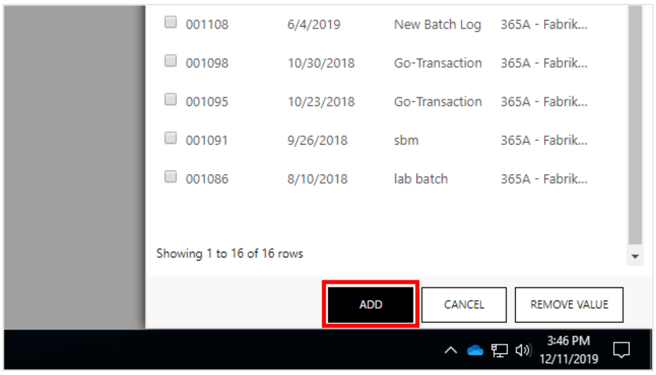
Click on **Lookup button for Batch Number**



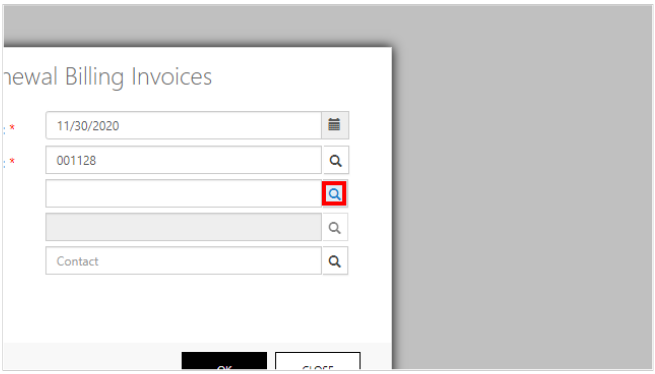
Click on the checkbox **for the desired Batch**



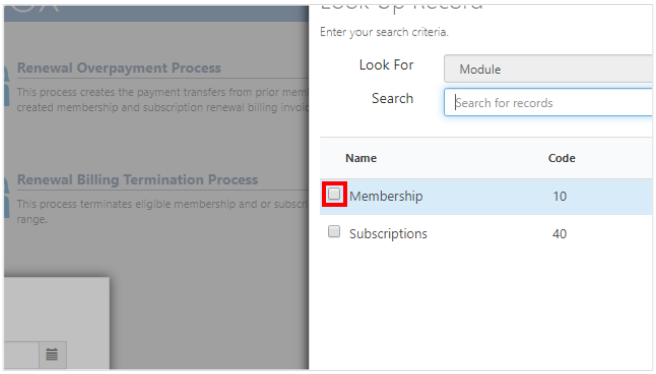
Click on the button **ADD**



Click on **Lookup button for Module**

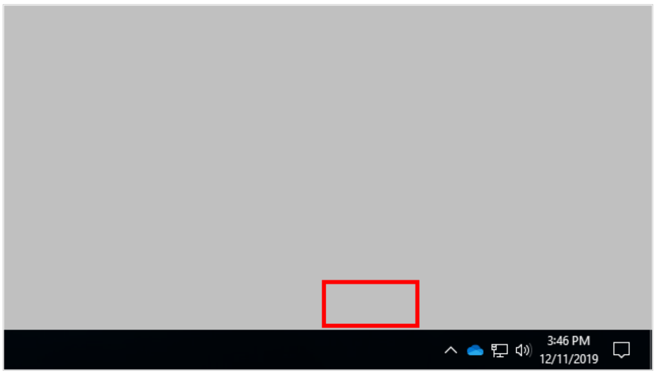


Click on the checkbox **for the Membership module**

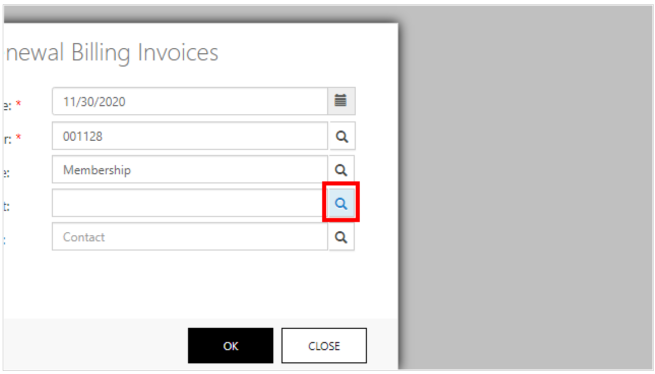


If you do not select a module, you will be able to select benefits from both Membership and Subscription modules.

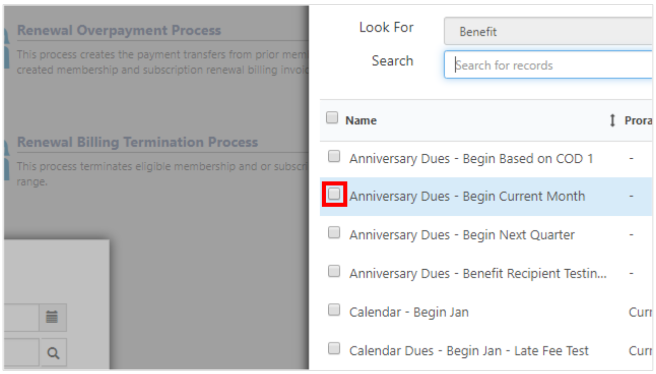
Click on the button **ADD**



Click on **Lookup button for Benefit**

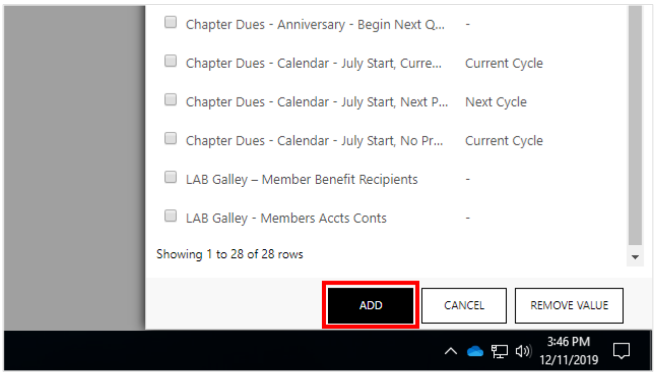


Click on the checkbox **for the desired Benefit**

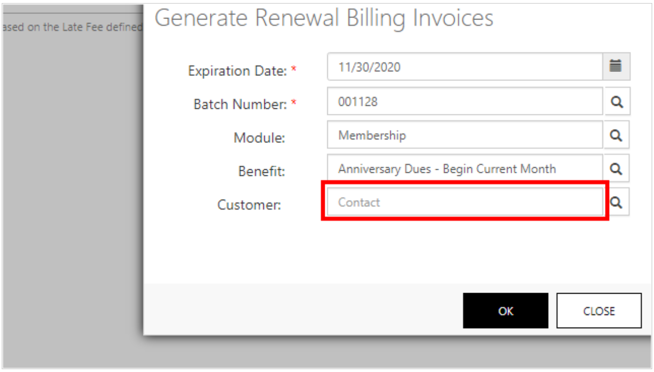


If you do not select a benefit, the system will run the renewal process on all renewal benefits within the selected module. If no module was selected, the system will run the renewal process on all eligible membership and subscription renewal billing records for the selected Expiration Date.

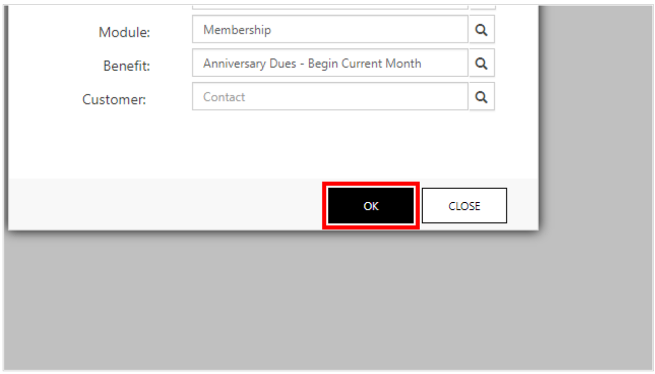
Click on the button **ADD**



You can use the Customer field to narrow down your search by Contact or Account if you are generating a renewal invoice for a single customer.



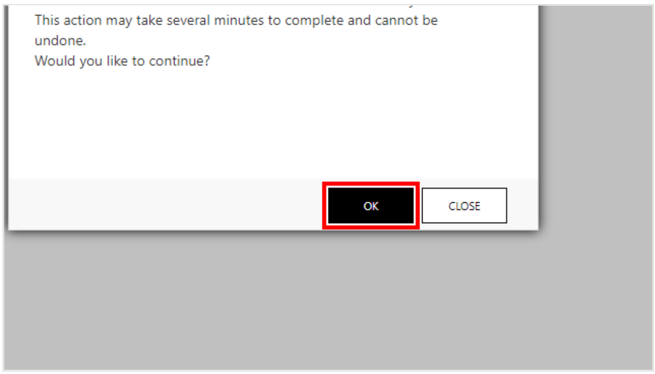
Click on the button **OK**



A message will appear displaying the number of renewal billing records found that meet the search criteria you entered and meet the conditions for eligible renewal billing records described earlier. Verify that this number matches the number of records shown on the UX Membership Dues Renewal Edit Report for Accounts and Contacts.

Please note that this process may take several minutes to complete if there is a large number of invoices to be generated. After you click the OK button, allow the system several minutes to generate the invoices. Do not attempt to re-run the process.

Click on the button OK to run the renewals process



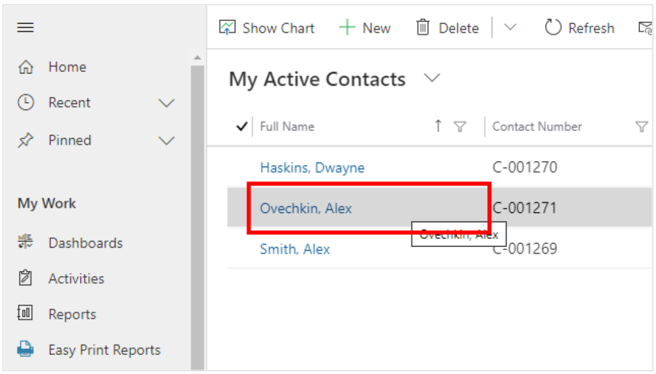
6.9. Recalculating a Membership Renewal Invoice

You may recalculate a renewal billing invoice if you need to change the join date, the rate, the quantity, or the volume if the rate selected is a volume-based rate. You cannot recalculate a membership invoice if you need to change the benefit selected.

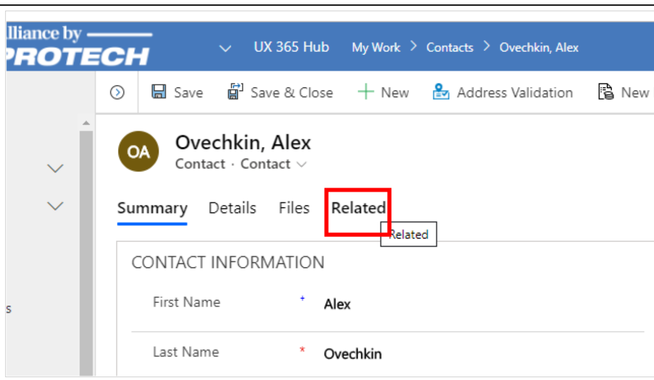
The following procedure shows how to begin this process from the contact's record, but you can also begin from an account record.

Click on the item **Contacts**

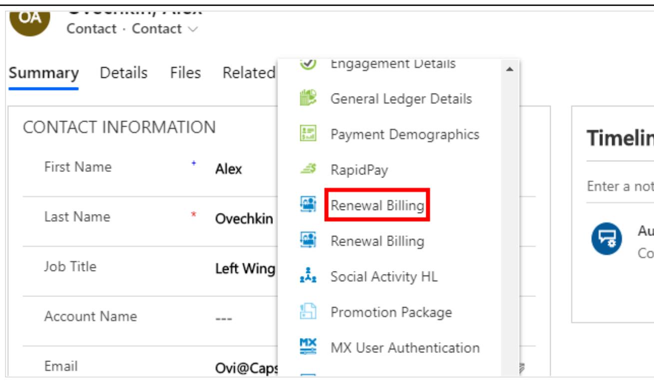
Click on the cell **Full Name**



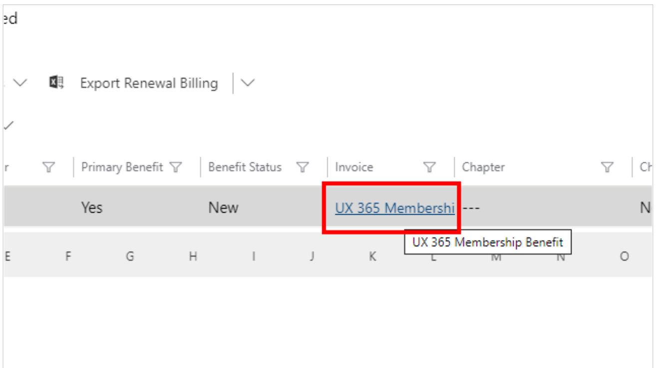
Click on the item **Related**



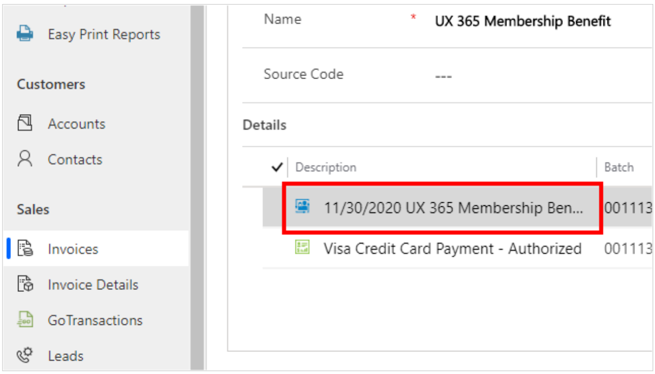
Click on the menu item **Renewal Billing**



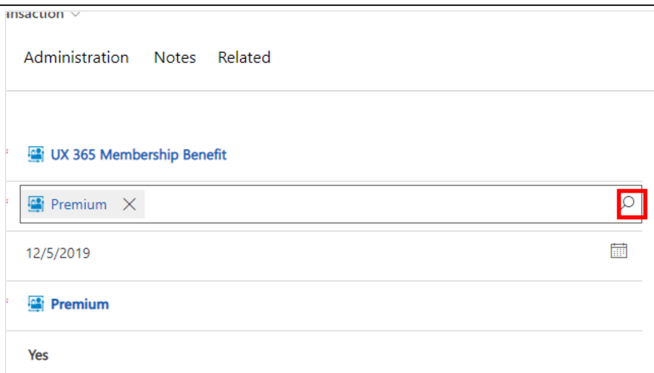
Find the Renewal Billing record you need to change and click on the corresponding Invoice Hyperlink



Double click on the renewal billing invoice line item.

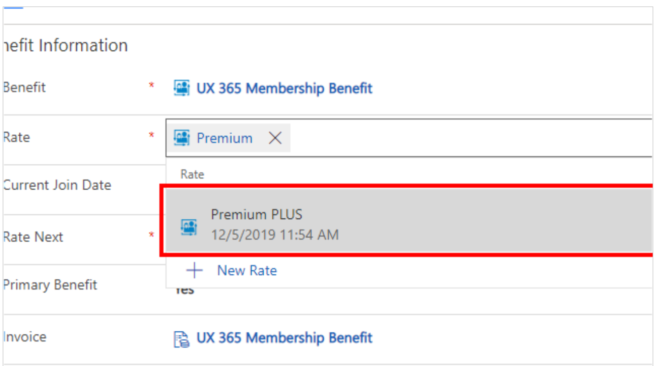


Click on the Rate Look Up

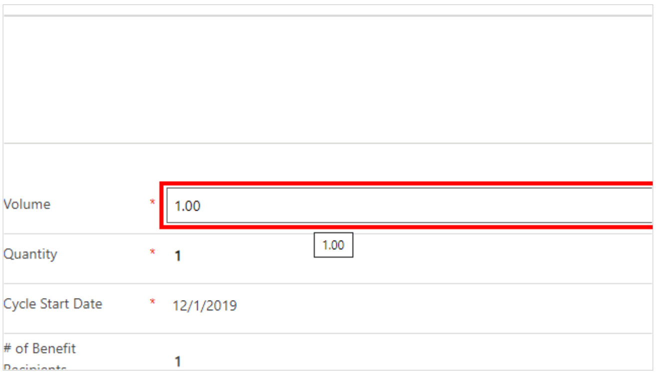


If you need to change the benefit rate, click the Lookup button on the Rate field and select a new rate.

Select the New Rate you wish to add

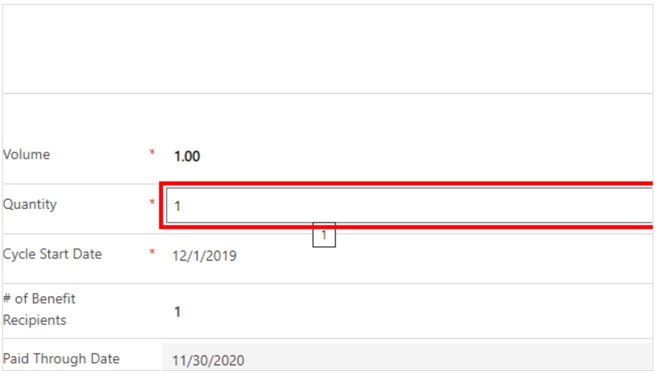


Volume



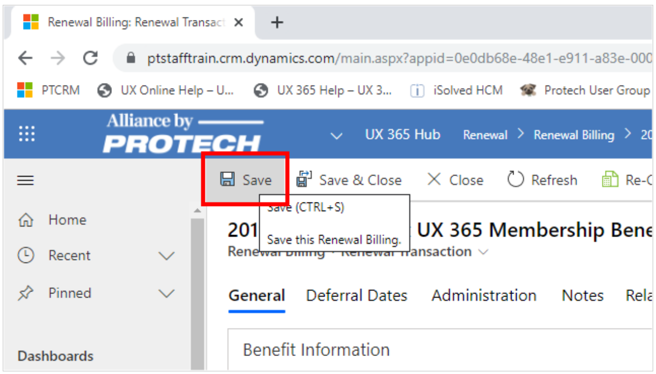
To modify the volume, enter a new value in the Volume field. For rates where the rate type = volume or factor, UX will update the price based on the changed value and the rate/prices setup.

Quantity



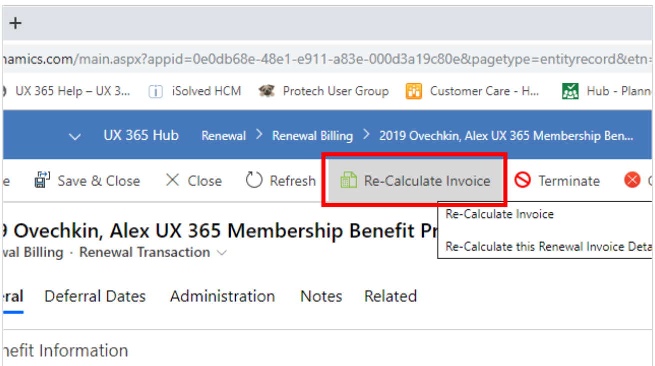
To modify the quantity, enter a new value in the Quantity field. For rates where the rate type = quantity, UX will update the price based on the quantity x price per unit for the selected rate. Changes to this field do not affect pricing for rates where rate type = volume or factor.

Click on the menu item Save

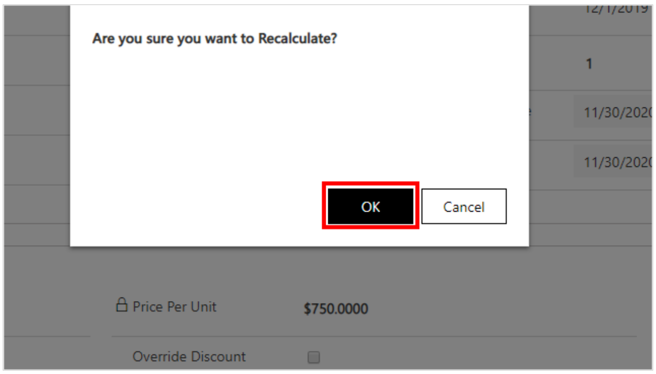


The invoice will not be recalculated until you click the Re-Calculate Invoice button to complete the transaction.

Click on the menu item **Re-Calculate Invoice**

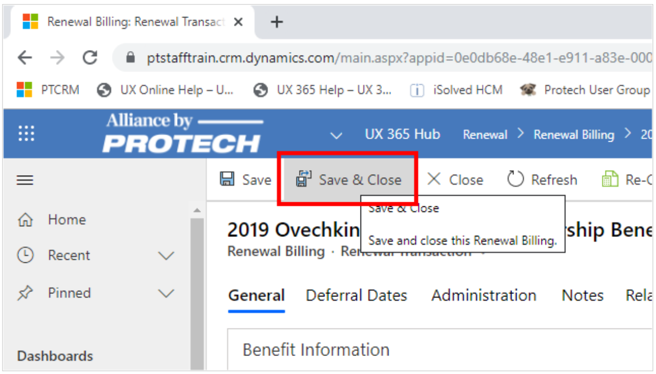


Click on the button **OK**

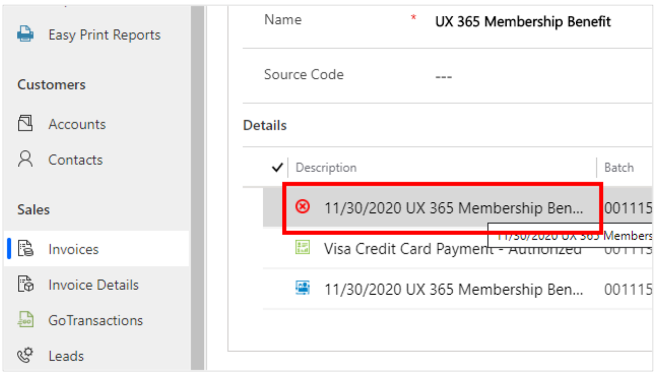


The system will recalculate the invoice amount and totals based on the new rate, join date, or volume, etc. For example, if the recalculation is based on a new rate, you will see the new rate and amounts due based on the new rate selected. If the recalculation was based on a change to the volume or the original join date, only the amounts will be updated.

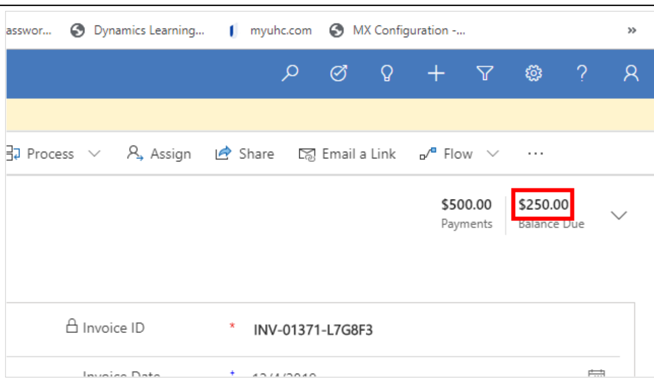
Click on the menu item **Save & Close**



If the batch in which the original detail line item had been entered has since been closed, then the Re-Calculate logic will automatically cancel the original line item and create a new line item with the new information. If the batch is still open, the original line item will be deleted, and a new line item will be created.



Balance Due



If a payment had been entered on the original transaction, you may have a balance due or a credit balance depending on whether the price on the new rate is more or less than what was originally paid. If full payment had been entered on the original transaction and the recalculation results in a balance due of the first installment for any renewal benefit in the recalculated invoice, the system will update the renewal billing record as follows: If the renewal benefit status is New or Reinstated and the renewal cycle state = Current, the system will update the renewal billing record and update the account/contact default price level field and member flag if the renewal billing record flag is primary. If the renewal benefit status is Renew and the renewal cycle state = Current, the system will update the renewal billing record. There are no changes to the account/contact default price level field and member flag if the renewal billing record flag is primary.

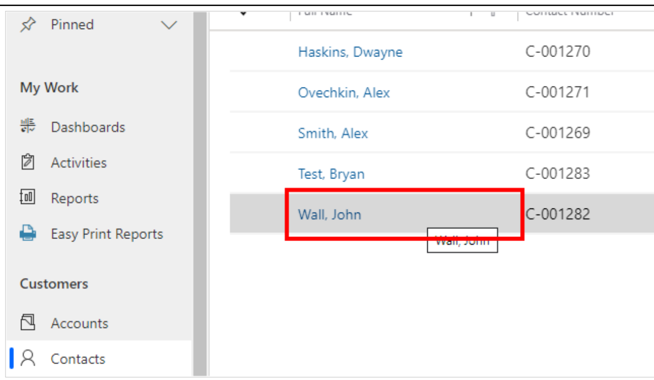
6.10. Reinstating Membership

6.10.1. Reinstating membership terminated for nonpayment

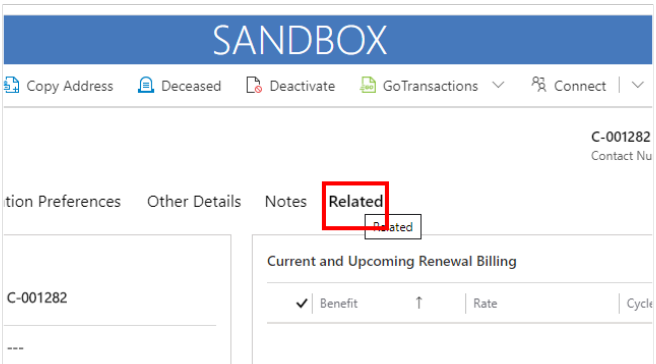
If a member's current renewal billing record was terminated for non-payment, you can reinstate the current renewal billing record by applying full payment to the related current membership dues invoice. You can only reinstate during the current dues cycle. Payments applied to a Past or Upcoming membership dues invoices will not reinstate membership. If a membership was terminated for a past dues cycle and you want to allow that customer to join again, UX 365 treats this as a Rejoin. Once payment is entered and you Save & Close the invoice, the system processes the reinstatement: 1. The system then updates the Benefit Status field on the terminated renewal billing record to Reinstated, and the record is now eligible for renewal in the next renewal billing cycle. 2. If this is the primary renewal billing record, the system also updates the record price level from member to non-member and the member flag to Yes. If this is not the primary renewal billing record, no changes are made to the price level or member option. Normally, when you enter a transaction that changes a customer's membership status, the UX 365 system takes a few minutes to finish updating the membership record.

Click on the item **Contacts**

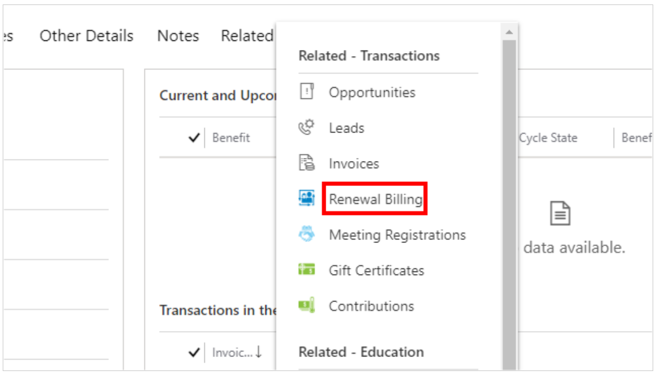
Open Contact record that is to be reinstated



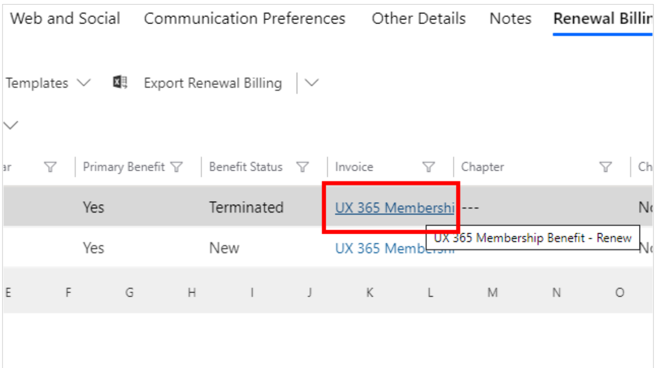
Click on the Related tab



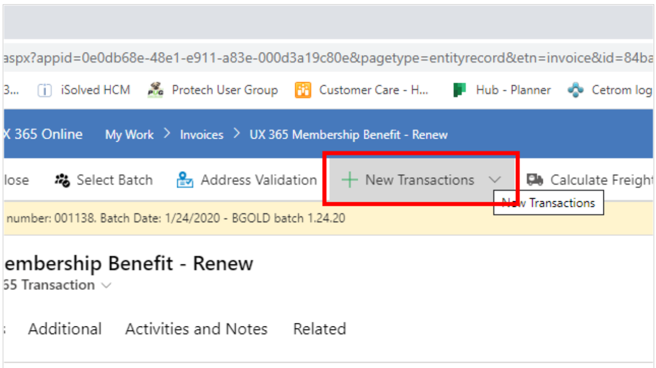
Click on the menu item **Renewal Billing**



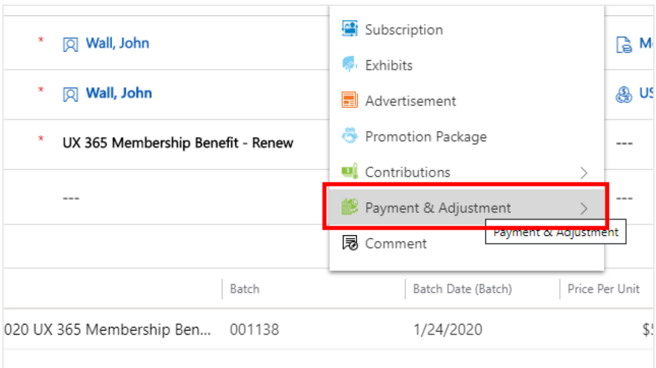
Click on the Invoice that is associated with the renewal billing record that was terminated due to no payment.



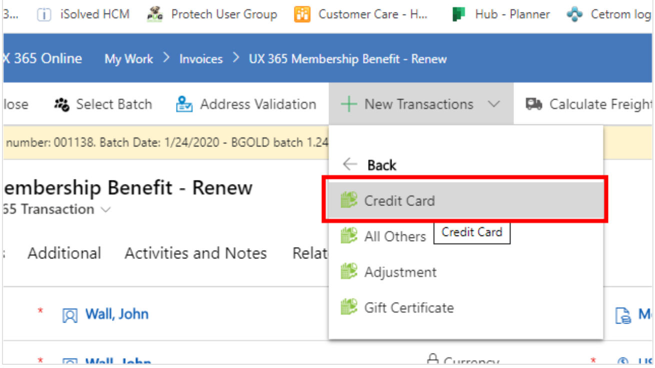
Click on the menu item **New Transactions**



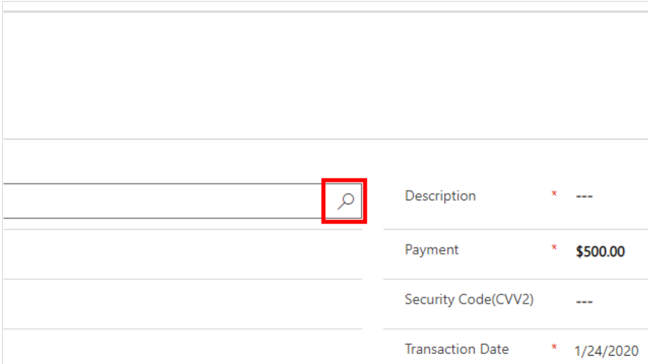
Click on the menu item **Payment & Adjustment**



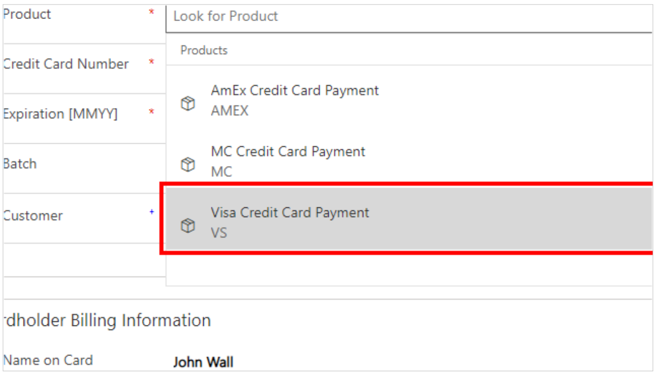
Select payment type. In this example choose Credit Card.



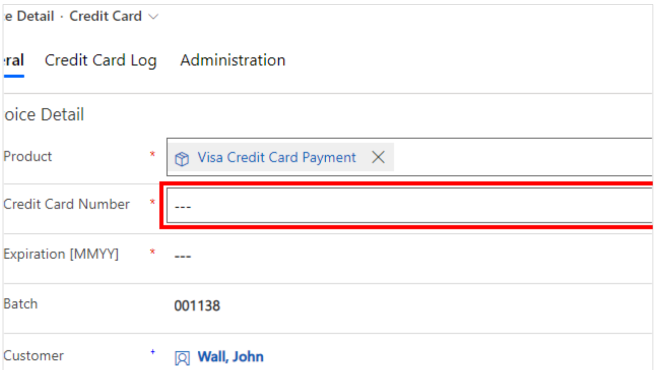
Click on the link **Product**



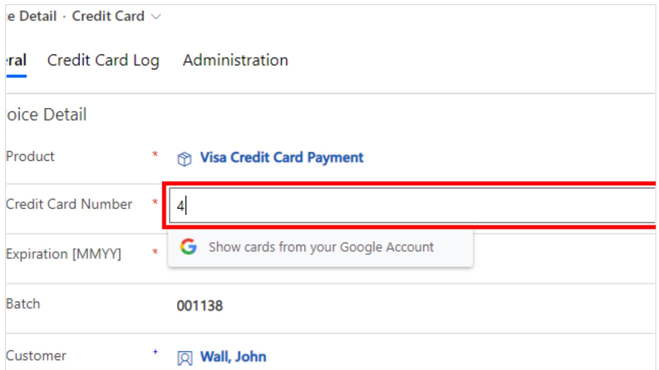
Click on the item Visa Credit Card Payment



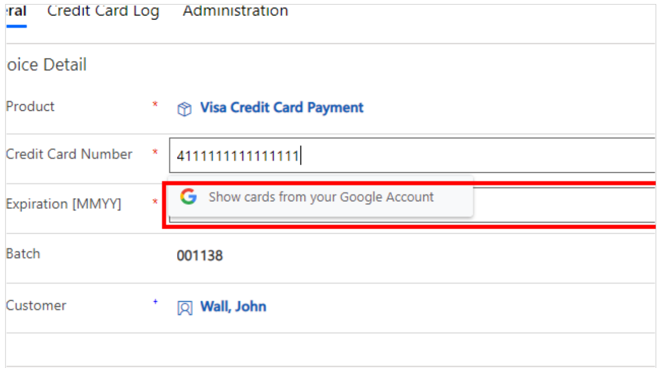
Click on the text field **Credit Card Number**



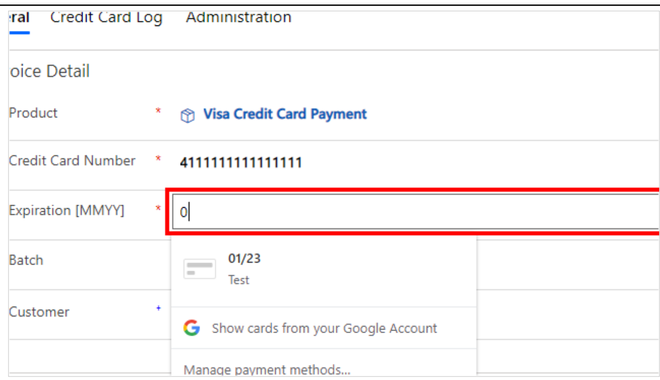
Enter **Credit Card Number**.



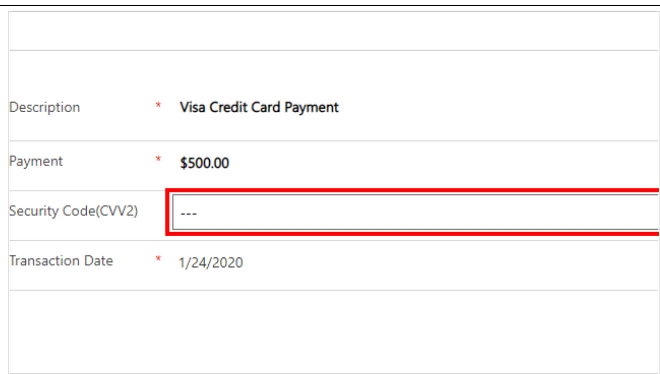
Click on the text field Expiration



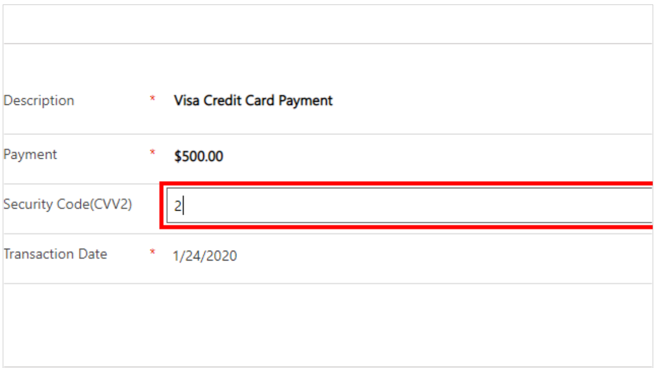
Enter Expiration Date



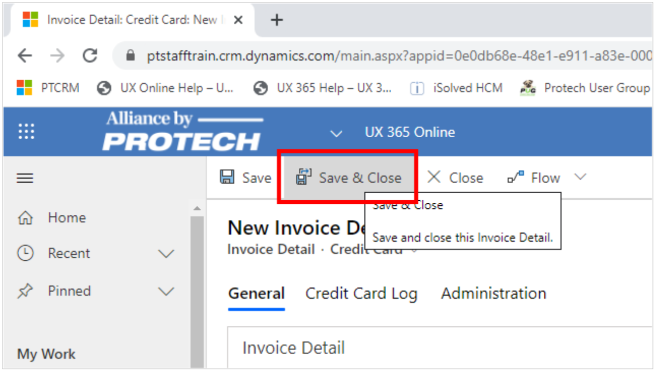
Click on the text field Security Code



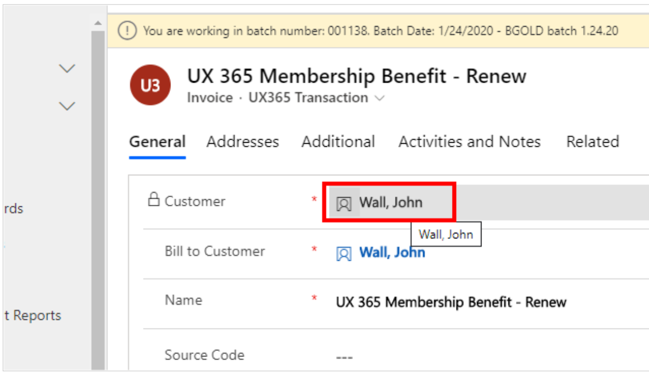
Enter **Security Code(CVV2)**.



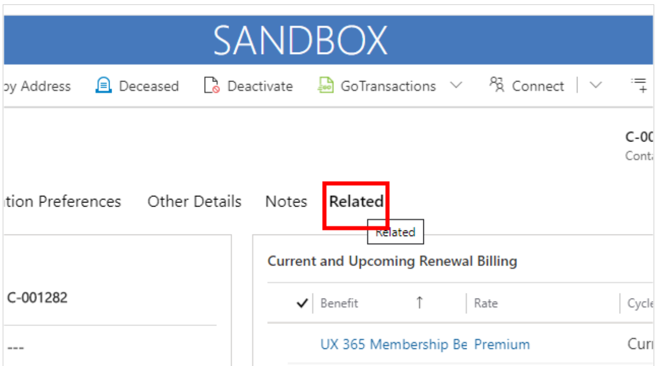
Click on the menu item **Save & Close**



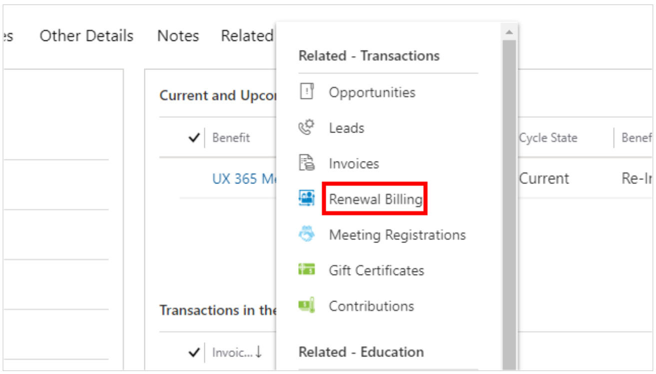
Verify that the membership has been reinstated by navigating back to the contact record.



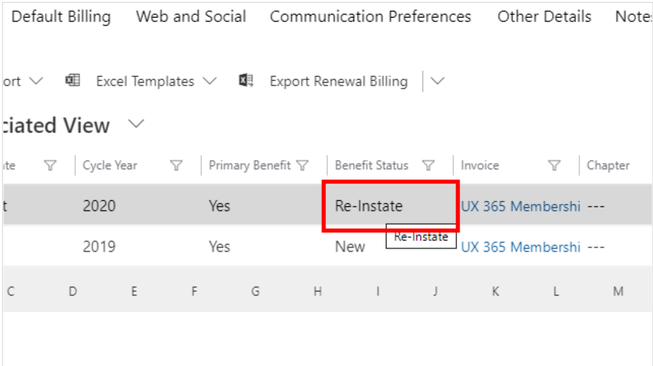
Click on the item **Related**



Click on the menu item **Renewal Billing**



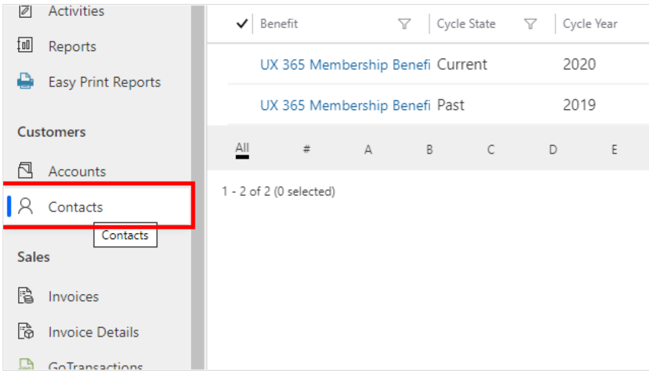
Benefit Status has been updated to Re-Instate and Expiration Date and Paid through Date have increased to the correct term.



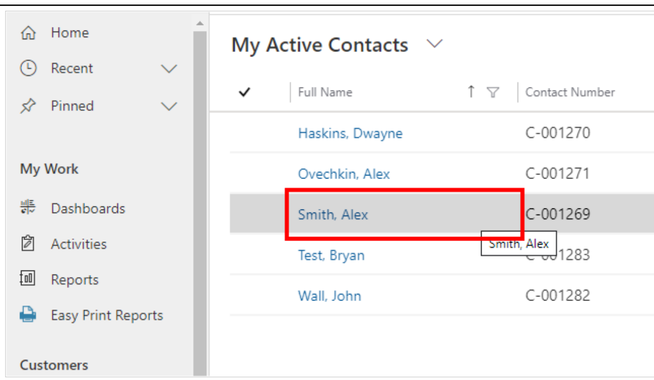
6.10.2. Reinstating membership terminated for reasons other than nonpayment

If the current renewal invoice was paid in full prior to termination, and the membership was terminated for any reason other than nonpayment, you can reinstate the current membership during the current renewal cycle.

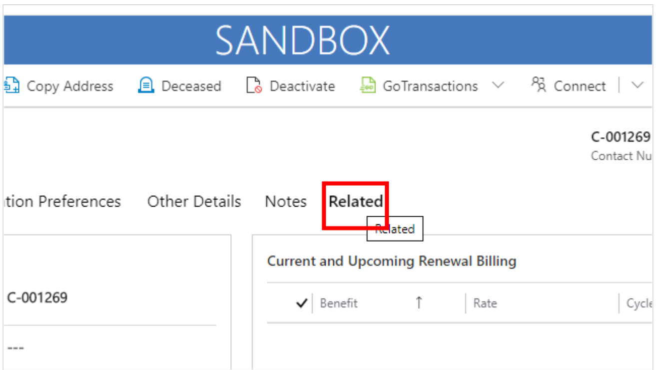
Click on the item **Contacts**



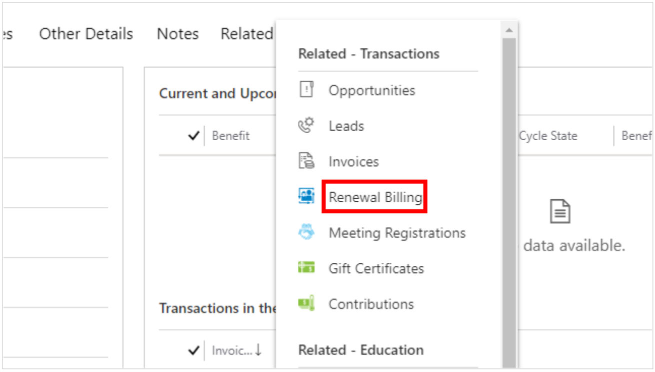
Open the Contact that is to be reinstated



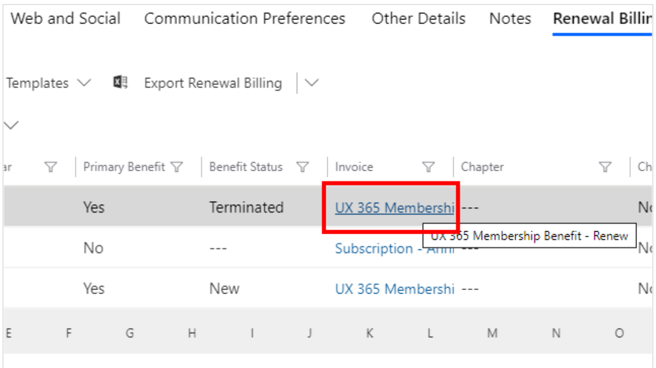
Click on the Related tab



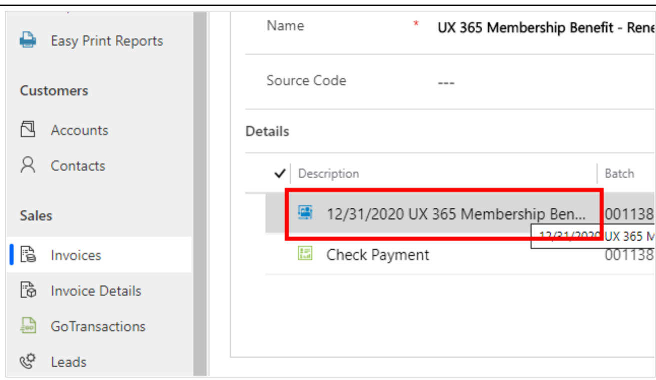
Click on the menu item **Renewal Billing**



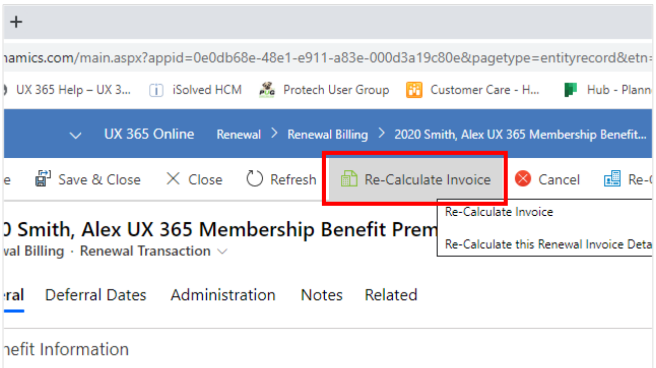
Click on the Invoice that is associated with the renewal billing record that was terminated for reasons other than nonpayment.



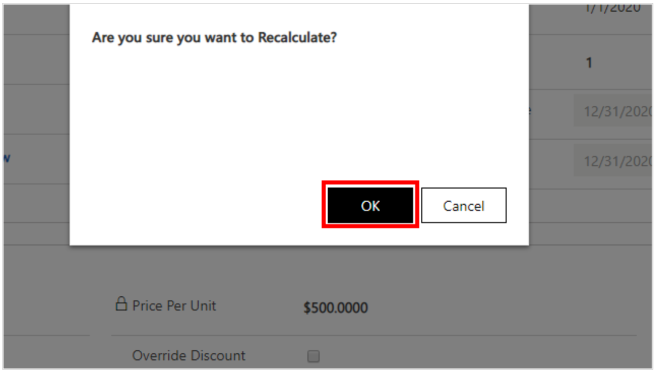
Double click on the membership line item.



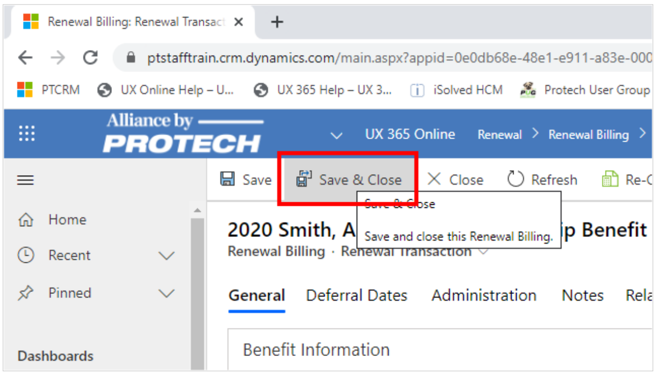
Click on the menu item **Re-Calculate Invoice**



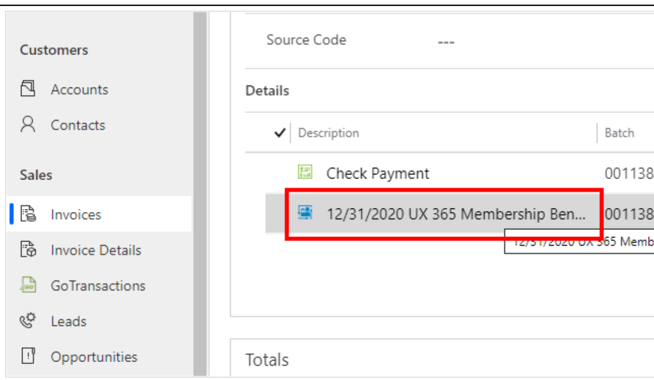
Click on the button **OK**



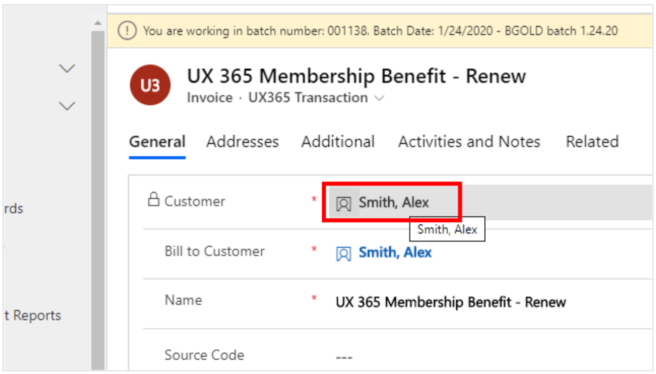
Click on the menu item **Save & Close**



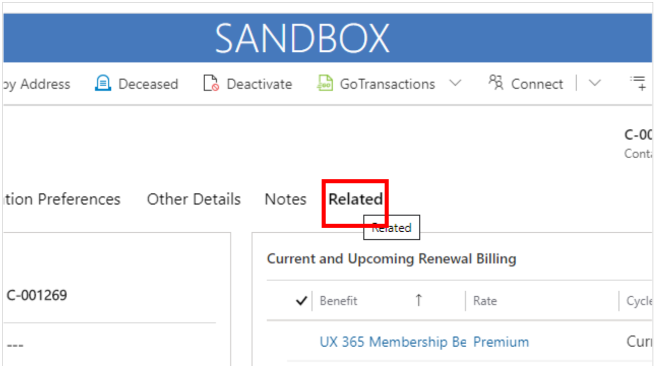
A new invoice line item will be created upon Recalculation. If the original transaction was in an open batch that line will be deleted and replaced with the new line item. If the original transaction was in a closed batch the line item will be cancelled, signified with a red X and a new line item will be added to the invoice.



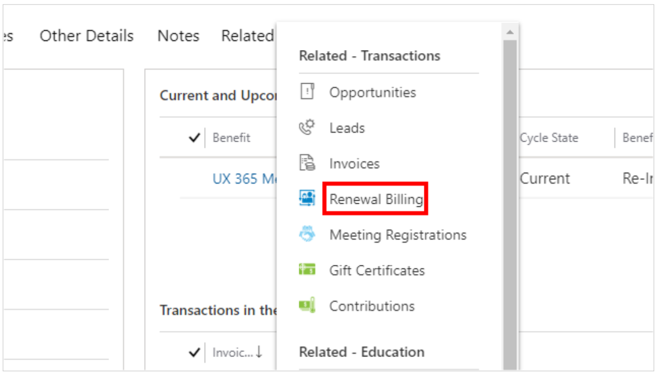
Verify that the membership has been reinstated by navigating back to the contact record.



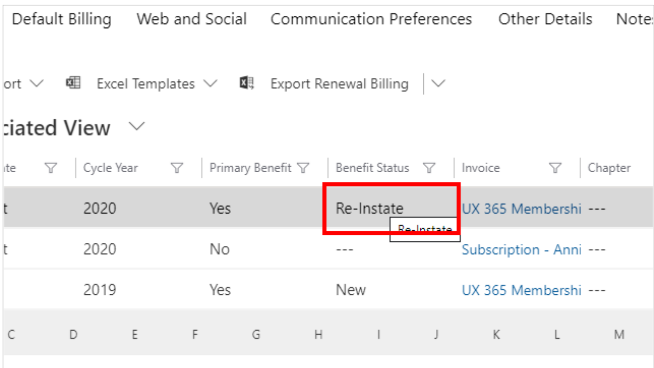
Click on the item **Related**



Click on the menu item **Renewal Billing**



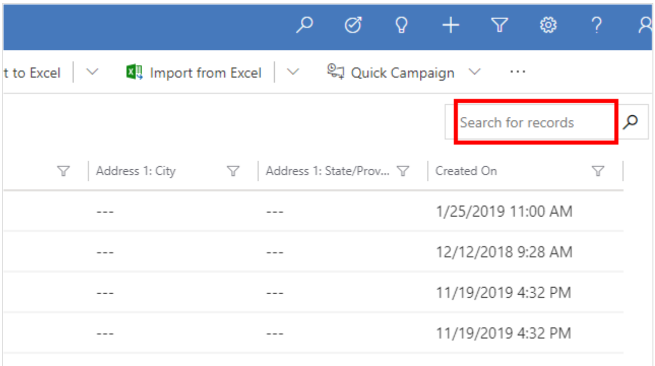
Benefit Status has been updated to Re-Instate and Expiration Date and Paid through Date have increased to the correct term.



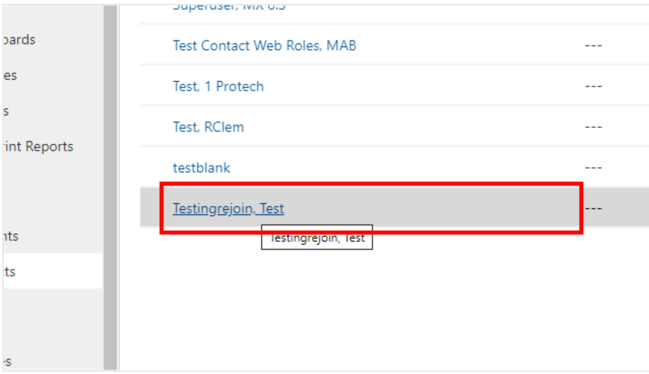
6.11. Rejoining a Membership

Click on the menu item Contacts.

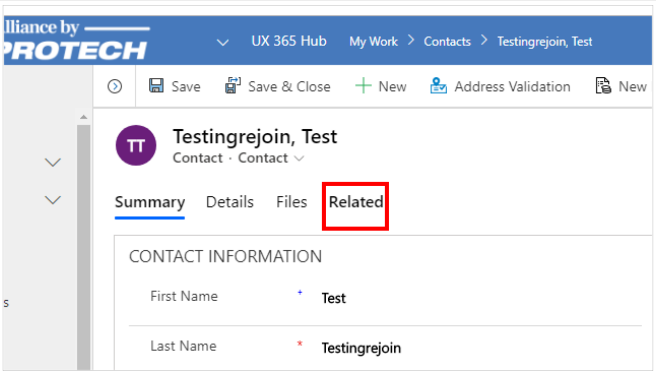
Search for the contact you would like to rejoin.



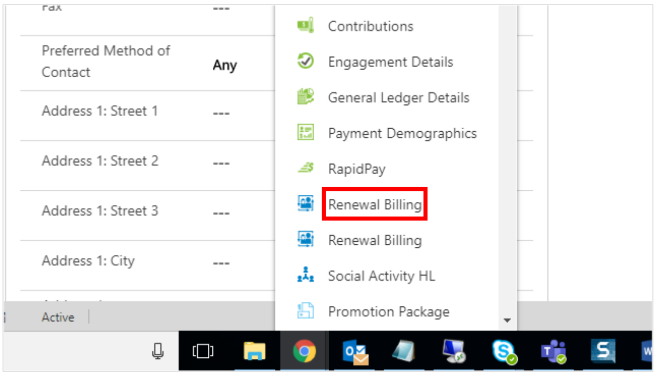
Open the contact record by clicking on the contact's name.



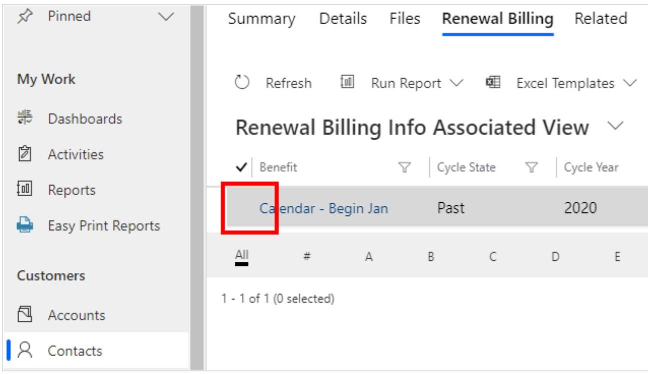
If renewal billing is not already among the menu items, click on the menu item Related.



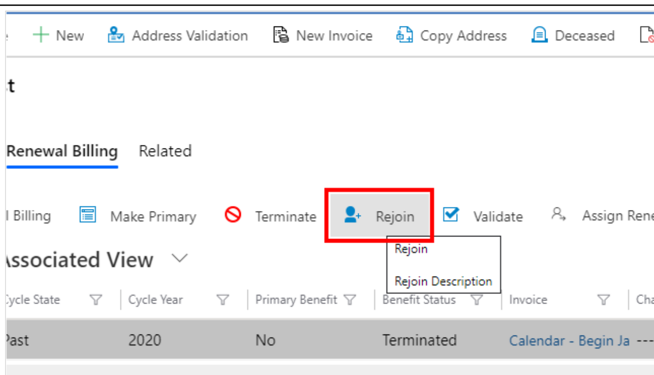
Click on the menu item **Renewal Billing**



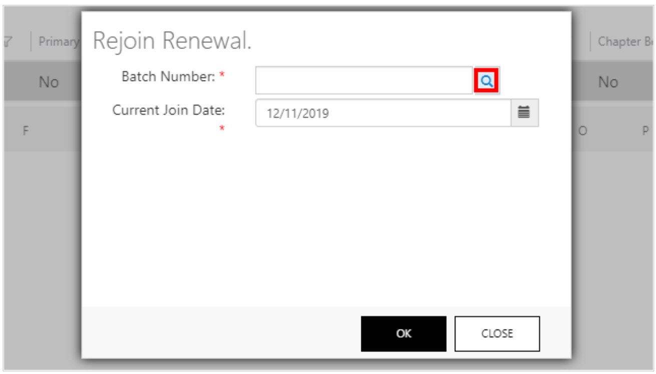
Select the renewal billing record.
Rejoining an existing renewal billing record is available only for renewal billing records where the cycle state = Past and the benefit status = Terminated and there is no renewal billing record for the same benefit with a cycle state = Current.



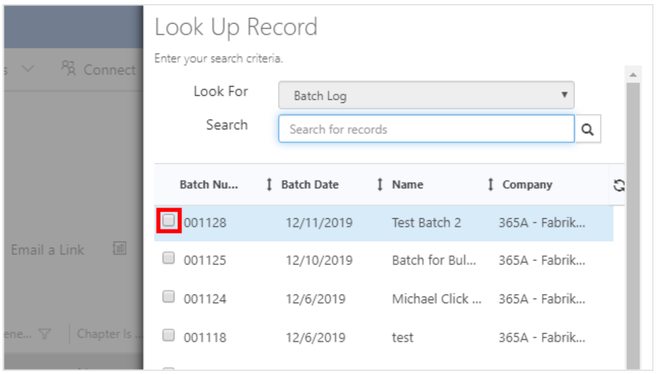
Click on the menu item **Rejoin**



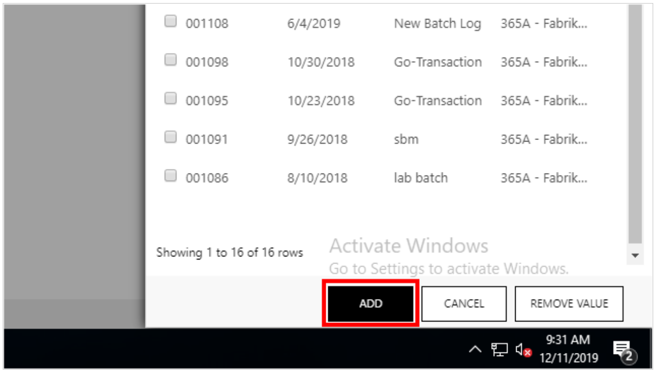
Use the lookup to search for batches.



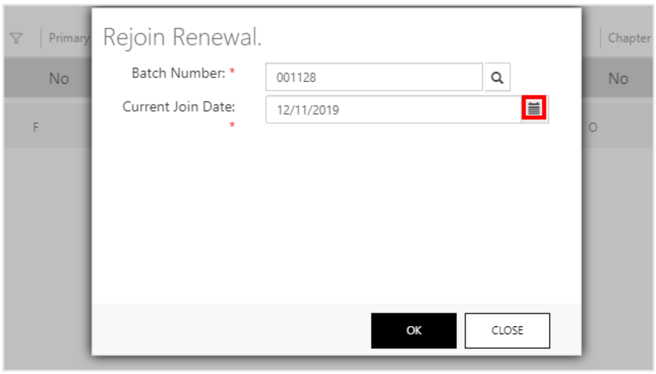
Select the Batch you would like to use for this transaction.



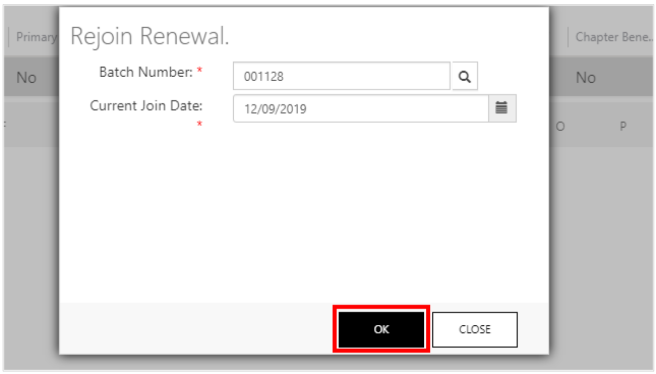
Click on the button **ADD**



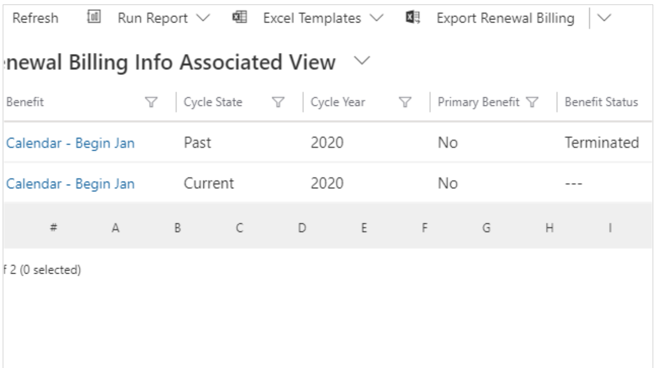
Use the calendar to select the current join date for the new renewal billing record.



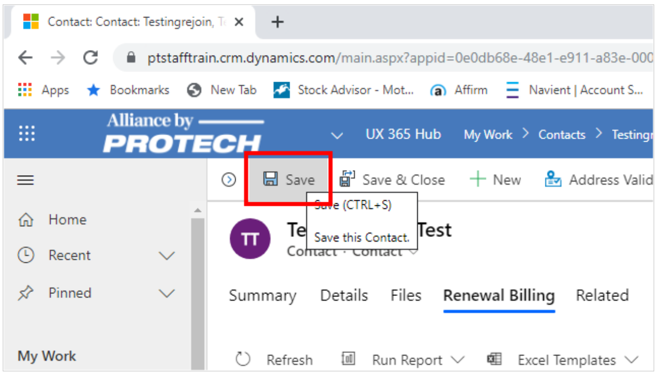
Click on the button **OK**



New renewal billing record before payment:
The system will create a new renewal invoice and a new related renewal billing record for the current renewal cycle. The benefit status will remain NULL until full payment is applied against the newly created renewal invoice. To apply payment to the invoice, see Applying payments to a membership renewal invoice. Once the invoice is paid in full, the system will update the renewal billing record as follows: Benefit Status will change from NULL to New, if the payment was equal to or greater than the first installment detail line in the invoice. Date Renewed field will change from NULL to the system date, when the payment is applied. Paid Through Date will change from NULL to the installment end date. In the case of a single annual installment, this date will be the cycle end date. In the case of multiple installments, this date will be the end of the last fully paid installment. Expiration Date will change from NULL to the cycle end date. If the renewal billing record for the benefit in this invoice was marked as primary, the system will change the account or contact price level from non-member to member and change the member flag from No to Yes.



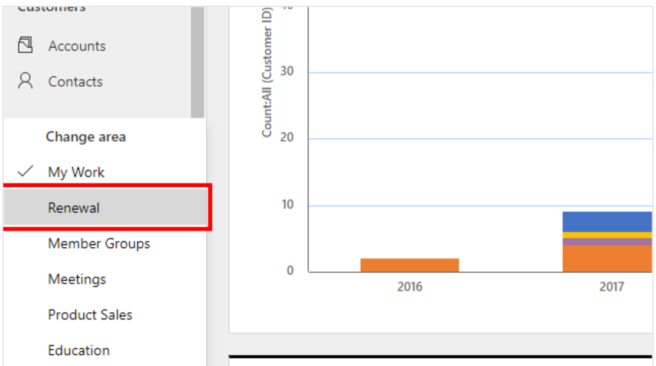
Click on the menu item Save



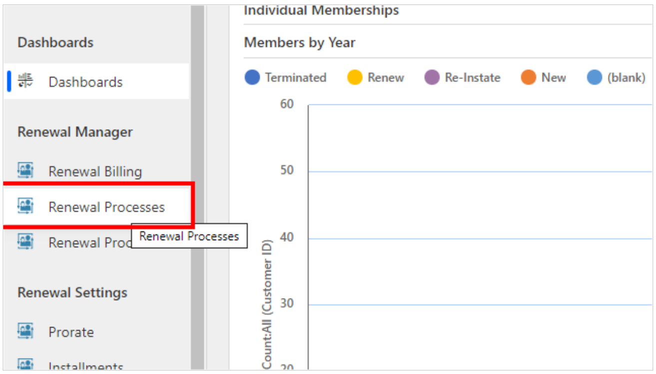
6.12. Renewal Process Rollback Utility

IMPORTANT NOTE: Only a System Administrator can run this utility. Please backup your database before running this process.

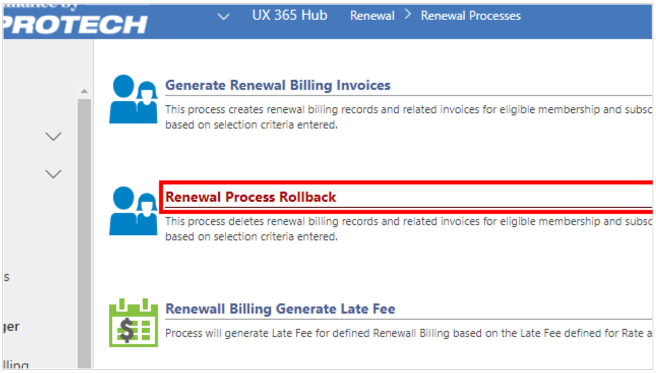
Click on the item **Renewal**



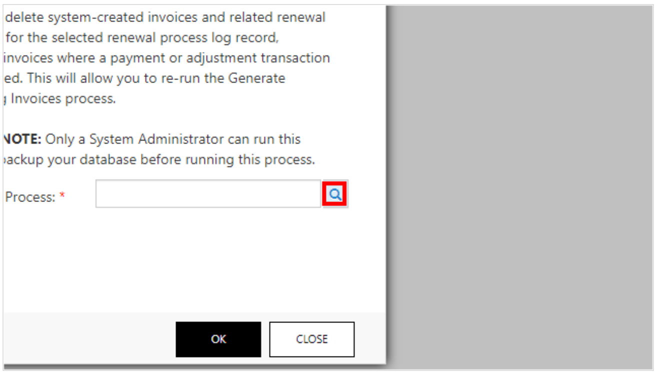
Click on the item **Renewal Processes**



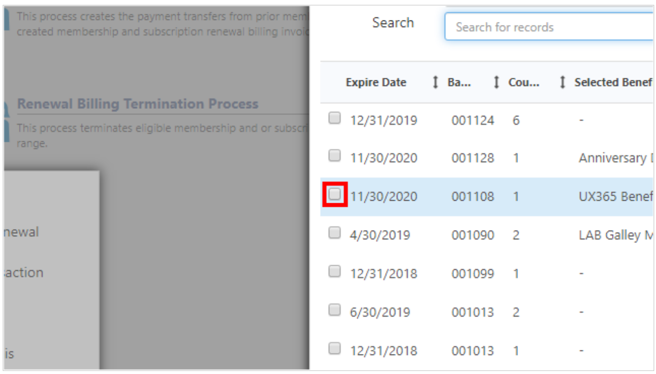
Click on **Renewal Process Rollback**



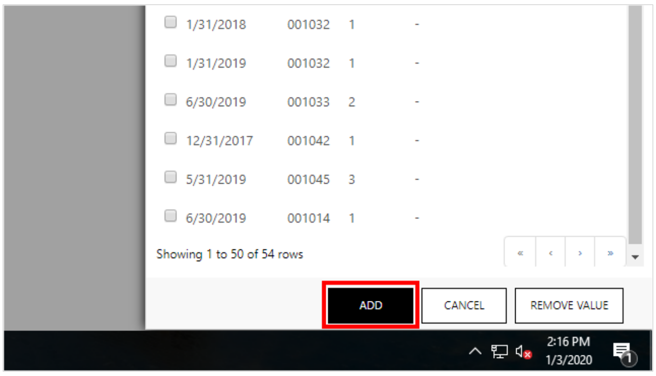
Search for the batch the renewals were created in



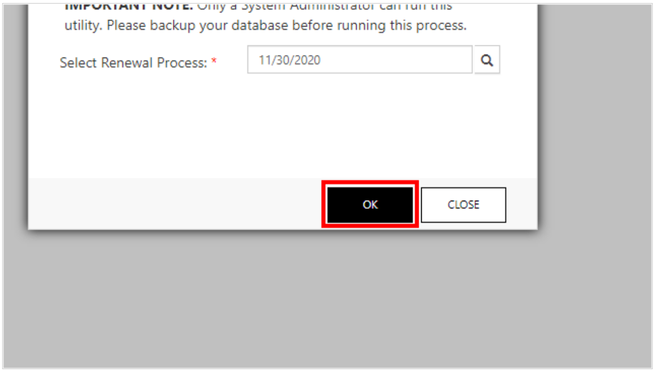
Select batch used for the renewal you would like to roll back



Click on the button **ADD**



Click on the button OK, once selected the utility will rollback all renewall billings created in the batch selected



Validating rollback

Validating the rollback

You can validate the number of renewal billing records that were processed by comparing the **Total Processes** for the original renewal process to the **Total Processes** for renewal process rollback in the Renewal Process Log. If the numbers match, all renewal billing records were rolled back and their related invoices deleted. If the numbers do not match, then some renewal records were not eligible for rollback and should be examined individually.

To identify renewal billing records that were not rolled back, you can create an Advanced Find or search on Invoice Details, as described below.

- Create an Advanced Find query on renewal billing records using the same search criteria that was used for the initial renewal process (benefit and expiration date), plus a search where Expire Date of Last Renewal contains data.

Note

The benefit and expiration date of your original process is referenced on the record in the Renewal Process Log. The search results will return renewal billing records that were not rolled back during the rollback process.

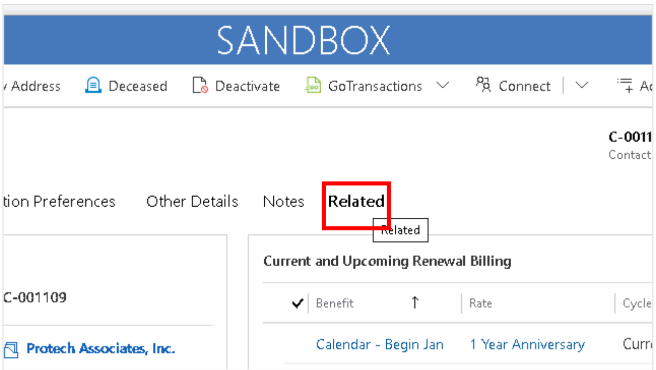
- Assuming you used a unique batch for the original renewal process, you can identify renewal invoice detail line items (and invoice number) that were not deleted during the rollback process by conducting a search in the Invoice Details view. From any UX work area in the **Navigation Tile Bar**, select **Invoice Details.** This view opens in a new window. Search for records using the batch number of the original renewal process. The search results will return any that were not rolled back.

6.13. Terminating a Single Membership

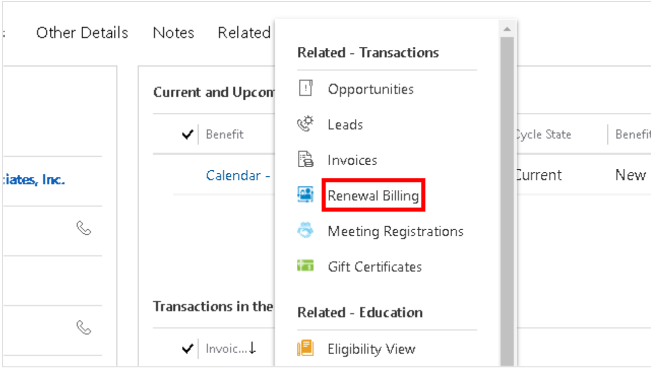
Terminating a single membership does not alter the charges in the dues renewal invoice, as is the case with cancellation. Typically, you would only terminate the current renewal billing record, unless you have already run the renewal process for the upcoming renewal year. The effect of the termination depends on the renewal billing record Cycle State: Terminating a Past renewal billing record is not recommended. These records are in the past and have no effect on renewal billing or membership status. If you are terminating a Current renewal billing record, the termination will not affect any related Past or Upcoming renewal billing records or their related invoices. If this was a primary benefit, terminating a Current renewal billing record will update the price level and member flag in the record. Benefit status is updated to Terminated, along with updates to the Termination Date and Reason. The record is no longer eligible for renewal; however, the invoice detail for dues remains in place.

The following procedure shows how to begin this process from the contact's record, but you can also begin from an account record

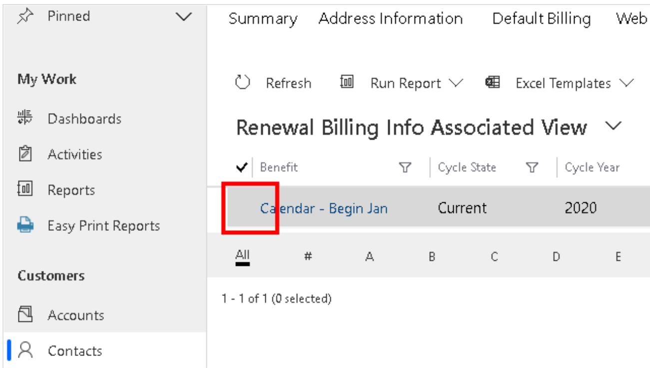
Open the Contact record and click on the Related tab



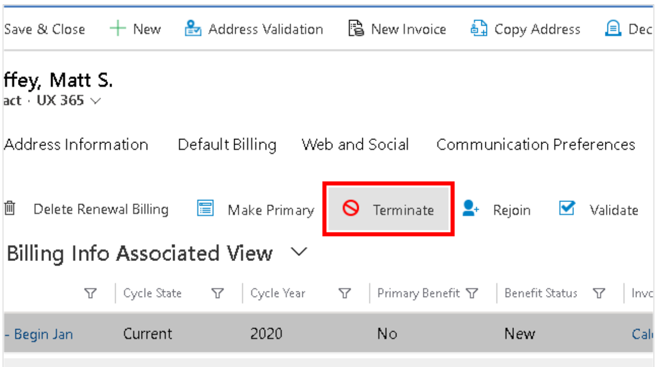
Click on the menu item **Renewal Billing**



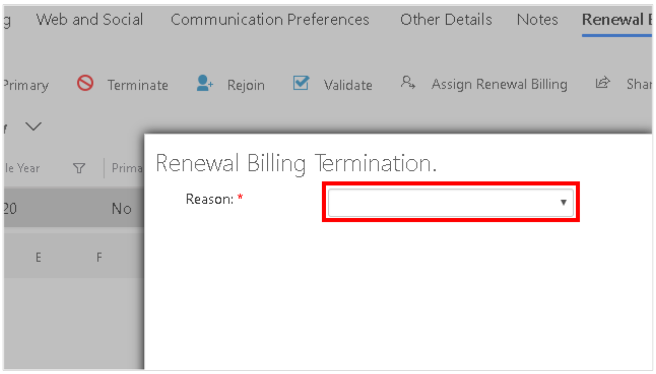
Check mark the Benefit to be Terminated



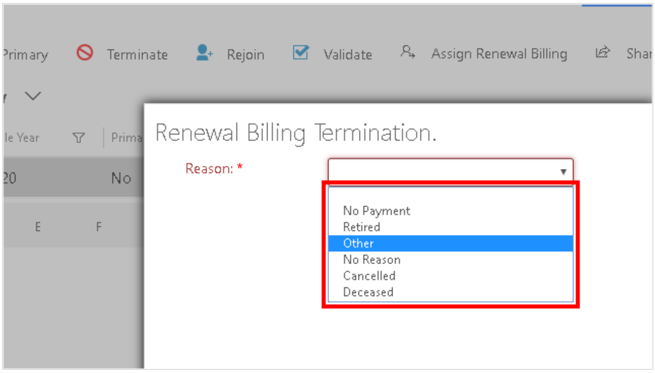
Click on the menu item **Terminate**



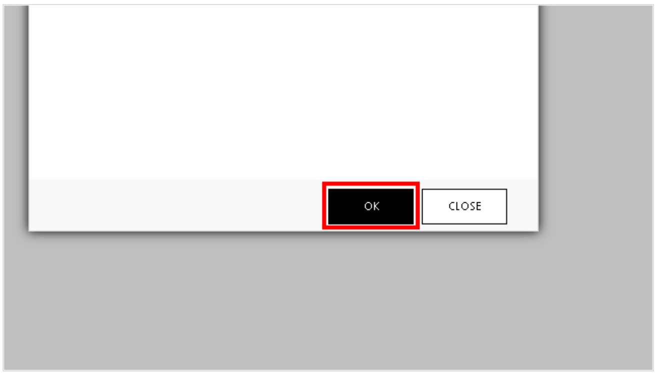
Click the Termination Reason drop down



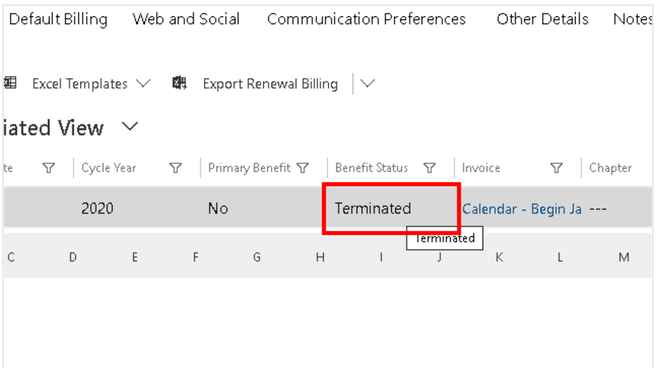
Select a value from the list



Click on the button **OK**



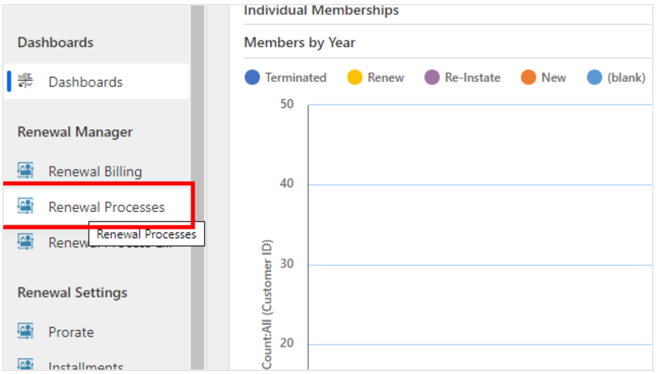
The benefit status is now Terminated



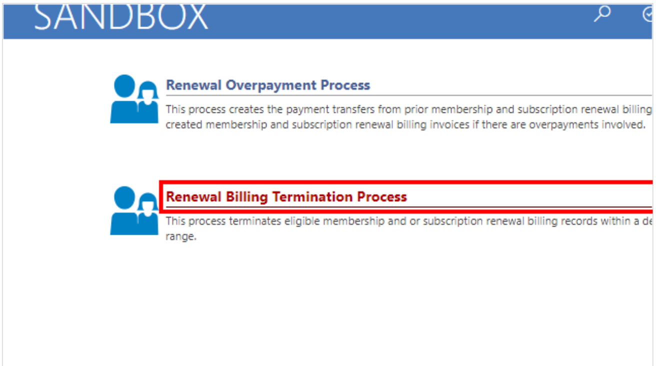
6.14. Terminating Expired Memberships

We recommend that you generate the UX Membership Termination Report before performing this procedure. This report shows all members whose memberships need to be terminated because it has expired. You can use the total number of memberships to terminate on this report to verify that the correct number of memberships will be terminated by this process. For more information, see Printing the UX Membership Termination Edit Report.

Click on the item **Renewal Processes**

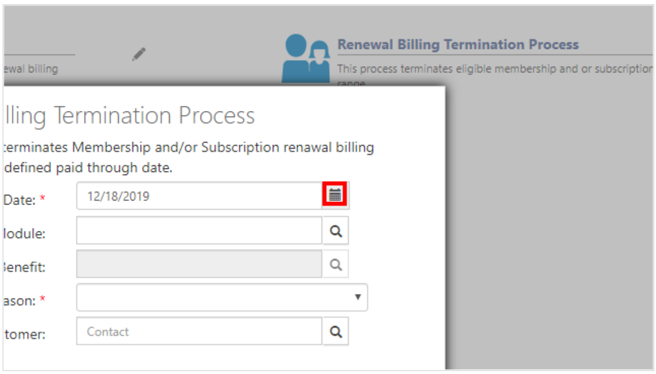


Click on **Renewal Billing Termination Process**

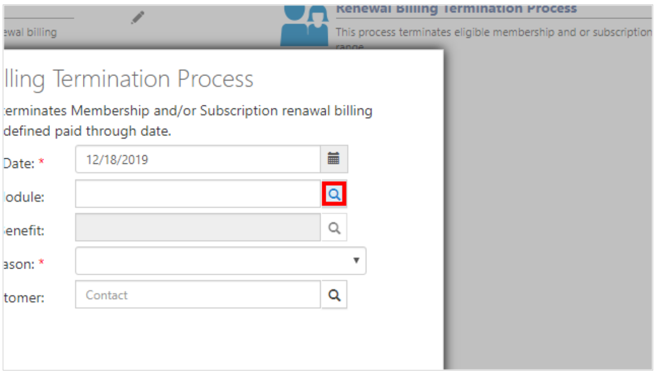


The Termination Process dialog appears.

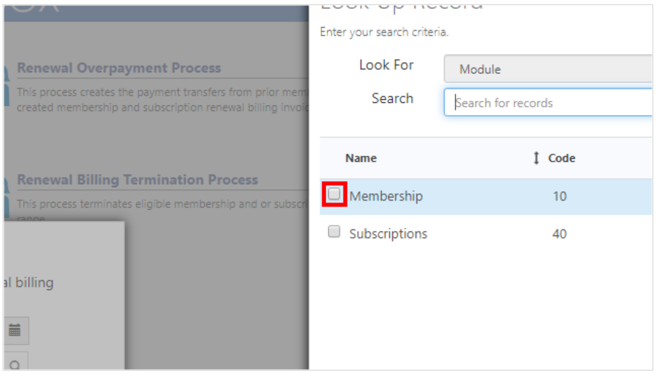
Paid Thru Date – Click the Calendar button and select the expiration date of the memberships you want to terminate. This date will always be the last day of the month you are running this for.



Module – Click the Lookup button and select Membership.

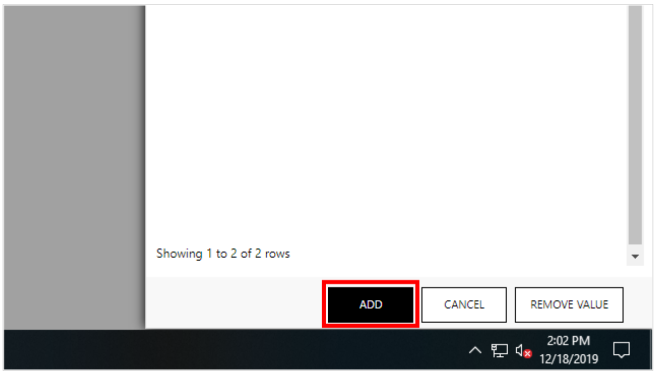


Select Membership

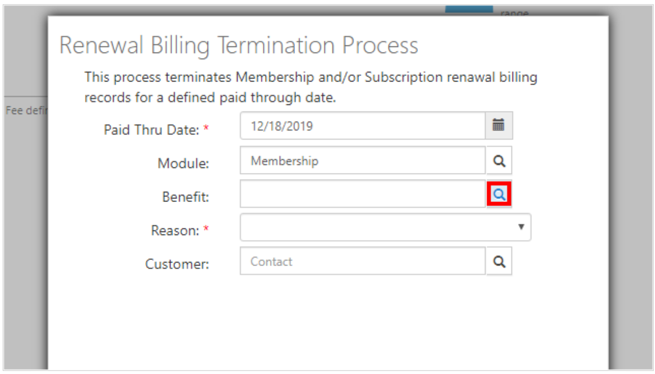


Important - If you do not select a module, the system will run the termination process on both the membership and subscription modules. Certification renewal billing records are specifically excluded from this process.

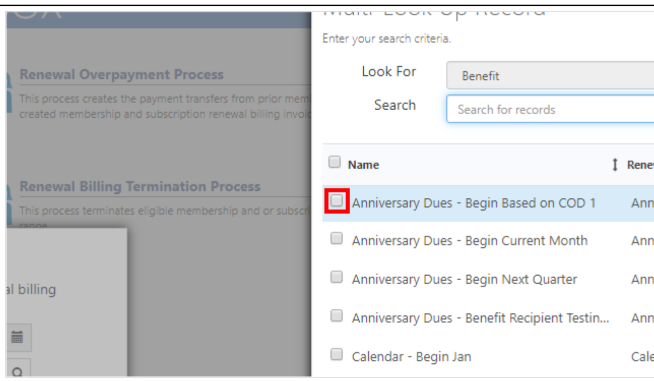
Click on the button **ADD**



Benefit – Click the Lookup button to select the membership renewal benefit you are running this termination process for.

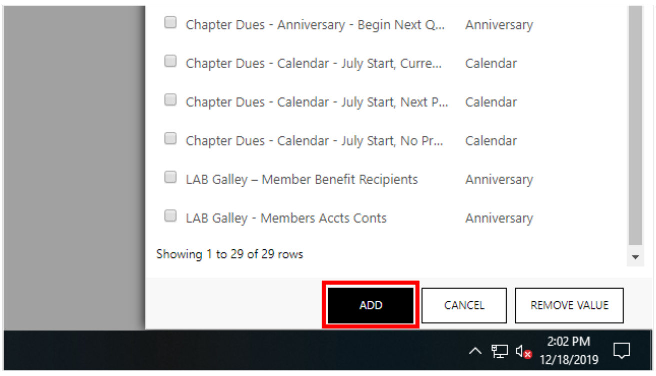


Select the benefit



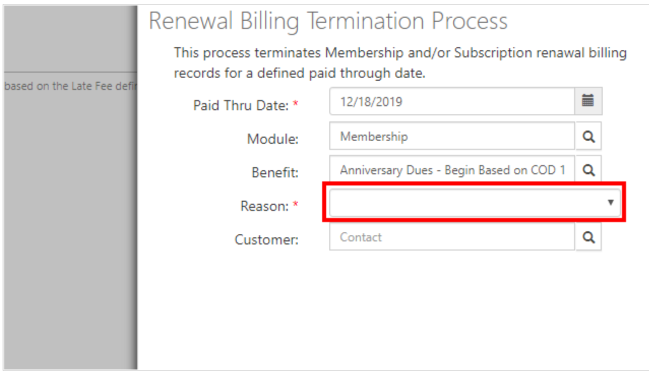
Important - A module is required to select a benefit. If you do not select a benefit, the system will run the termination process on all renewal benefits within the selected module. If no module or benefit is selected, the system will run the termination process on all membership and subscription benefits. Certification renewal billing records are specifically excluded from this process.

Click on the button **ADD**



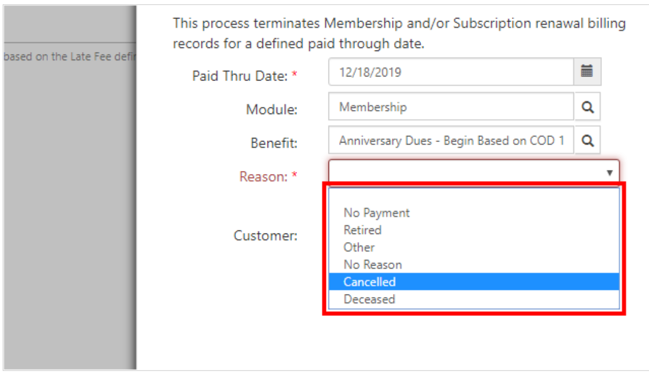
Reason – Select a termination reason from the menu. This reason will be recorded on the renewal billing record.

Click on the combo box



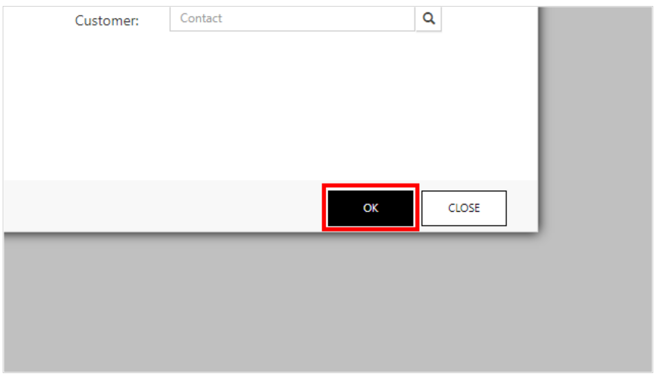
Select the item that pertains to termination

The Termination Reason list can be modified in your client-specific solution package to add additional reasons reflecting your organization's reasons by your system administrator. Do not delete or edit existing Termination Reason option set values. Because a Termination Reason field exists in both the Renewal Billing entity and in the Renewal Process entity, you must add the client-specific option to the Termination Reason field in both entities. Contact your Protech account manager for guidance on the recommended framework for core entity customization of Termination Reason option set fields.



Click OK to start the process. A message will appear displaying the number of memberships that will be terminated. Verify that this number matches the number of terminations shown on the UX Membership Termination Report. If the numbers do not match, click Cancel to stop the process. Resolve the discrepancy before proceeding with the process. If the numbers match, click OK to continue.

Move the mouse to the button **OK**



6.15. Upgrade Downgrade Membership

Important considerations

- Upgrade/Downgrade Membership is available for benefit rate setups with a single annual installment only. It does not support multiple installment rates.
- If you are changing only the rate, join date, or quantity, do not use Upgrade/Downgrade. See Re-calculating a renewal membership invoice for more information.
- The current join date entered in the Upgrade/Downgrade process should always be the first day of a month. It represents the effective date of the change and is used to calculate the number of months used under the original benefit. It is used again to establish the cycle start date for the new membership benefit.
- When using Upgrade/Downgrade, the system will calculate the cycle start date for the new benefit based on the setup for benefit you select and the current join date you enter. The current join date for the new benefit should always be a date within the same Cycle Year as the benefit you are upgrading/downgrading.
- Charges for the new benefit are calculated in the same manner as those for a new membership. If the new benefit is anniversary-based, charges are not prorated. If the new benefit is calendar-based, the charges might be prorated.
- Upgrades/Downgrades will update the related renewal billing record based on the invoice balance due using standard system logic. For example, the renewal billing record for a new member who paid their new member dues invoice in full prior to the Upgrade/Downgrade will lose benefit status, expiration date, paid through date, and date renewed if the recalculated invoice balance is greater than $0.00. This, in turn, would also trigger an update to the Price Level and Member flag until the invoice is paid in full.
- Since recalculating the invoice is included in the Upgrade/Downgrade process, using the recalculate button on the renewal billing transaction **Record toolbar** is not required.

Mid-year v. full year changes

This process accommodates mid-year benefit changes when a member wants to change their membership after the beginning of the renewal cycle but before the end of the renewal cycle. In this scenario, charges for the original benefit should be partially discounted, so that the member is charged a prorated amount for the number of months used. The member is charged for the new benefit by creating new invoice detail in a manner that mirrors calculating dues for a new membership.

- Updates the original invoice detail line item by calculating a discount amount for the number of unused membership months for the original benefit. See Calculation Methodology for additional details.
- Cancels the benefit entry in the original invoice detail line item – "Benefit Cancelled" (the invoice detail line is not cancelled as it contains the updated charges for the original benefit).
- Creates new invoice detail line item with charges based on the new benefit, rate and, join date selected.
- Recalculates the invoice totals.
- Updates the related renewal billing record based on the new benefit, rate and join date selected, and the recalculated invoice totals.

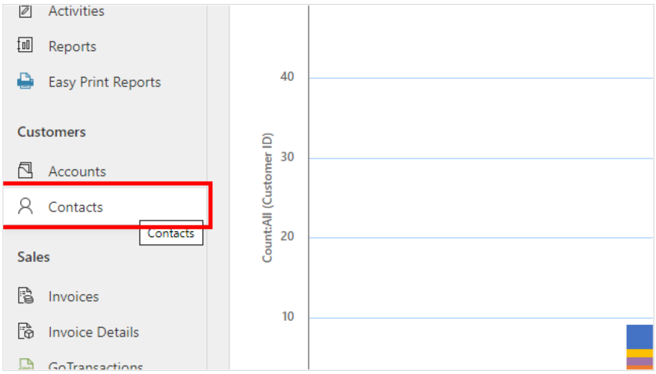
This process accommodates full year benefit changes when a member wants to change their membership for the entire renewal cycle. In this scenario, charges for the original benefit should be fully discounted, so that the member is not charged for the unused membership. The member is charged for the new benefit by creating invoice detail in a manner that mirrors calculating dues for a new membership.

- Updates the charges in the original invoice detail by calculating a discount amount based on the entire renewal cycle – this is essentially a 100% discount, bringing the charges for the original invoice detail to $0.00. See Calculation Methodology for additional details.
- Cancels the benefit entry in the original invoice detail line item – "Benefit Cancelled" (the invoice detail line is not cancelled, as it contains the updated charges for the original benefit).
- Creates new invoice detail line item with charges based on the new benefit, rate, and join date selected.
- Recalculates the invoice totals.
- Updates the related renewal billing record based on the new benefit, rate and join date selected, and the recalculated invoice totals.

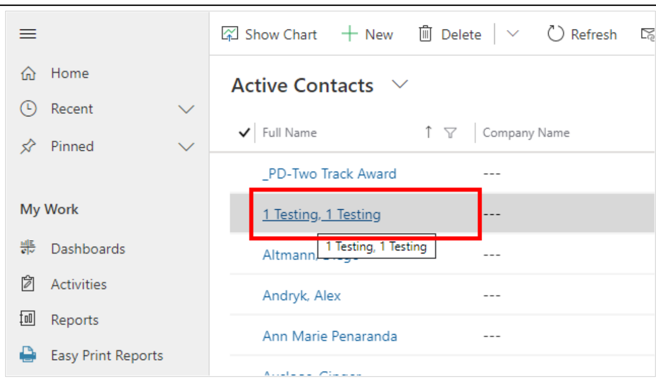
Important

If you have already generated renewals for the upcoming renewal year and are processing an Upgrade/Downgrade on the Current renewal invoice, you must also process the same Upgrade/Downgrade on the Upcoming renewal invoice. Cancelling the Upcoming renewal invoice and attempting to generate a new renewal invoice based on the upgraded renewal billing will not work.

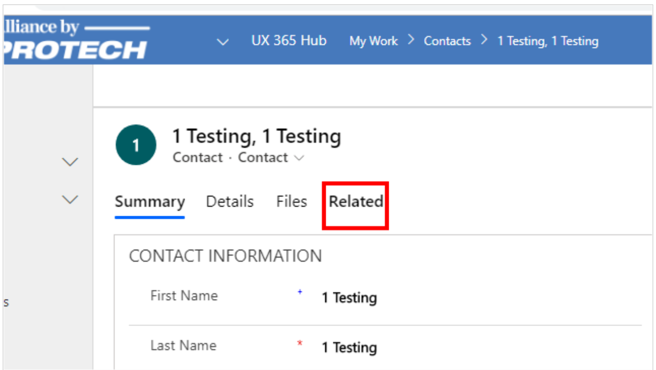
To Upgrade or Downgrade a Contact or Account's Membership, first navigate to the current renewal billing invoice.



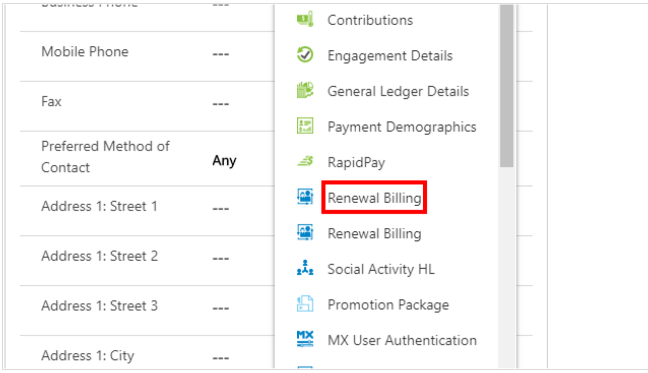
Click into the desired Contact or Account record



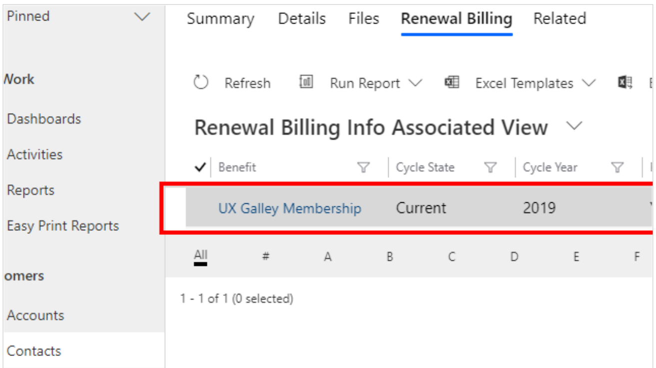
From the account or contact's record, select the item 'Related'



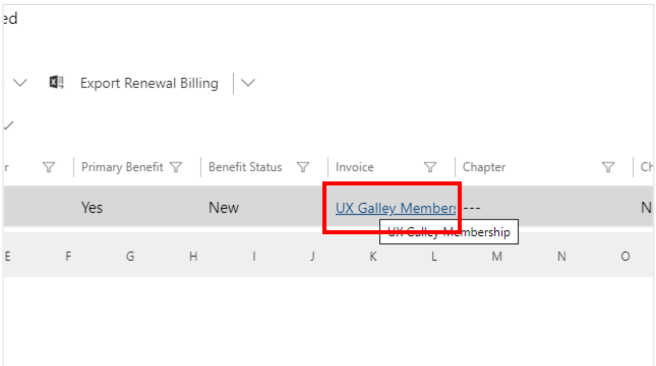
When the dropdown menu appears, select 'Renewal Billing'



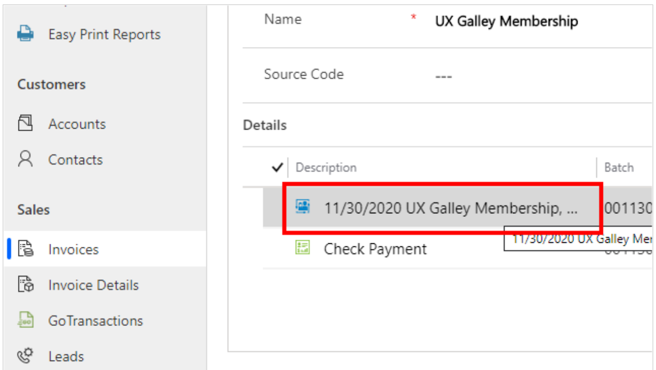
When on the Renewal Billing Associated View, find the Benefit/Membership you would like to upgrade or downgrade.



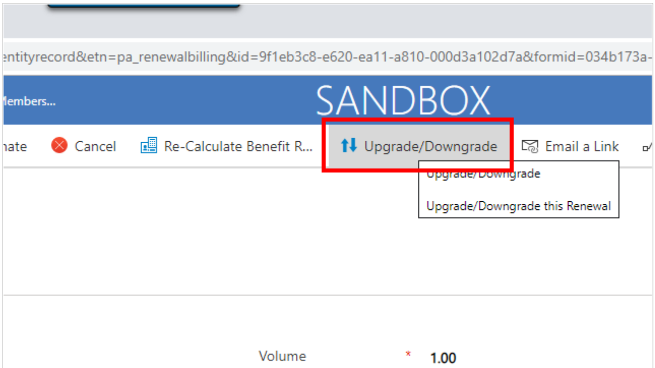
Once found, click into that benefit's invoice



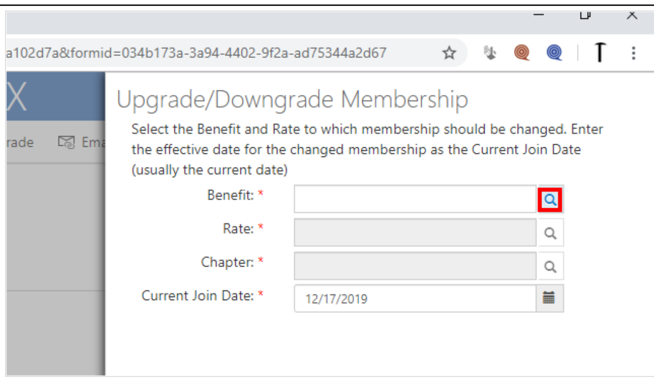
Once in the invoice, double click on the membership to open up the record.



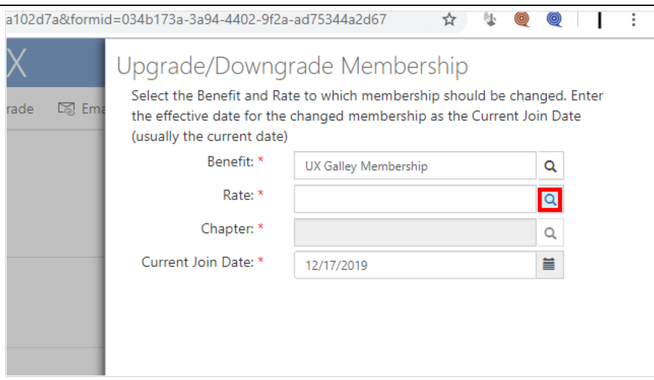
To upgrade or downgrade this membership, select the 'Upgrade/Downgrade' button on the toolbar at the top.



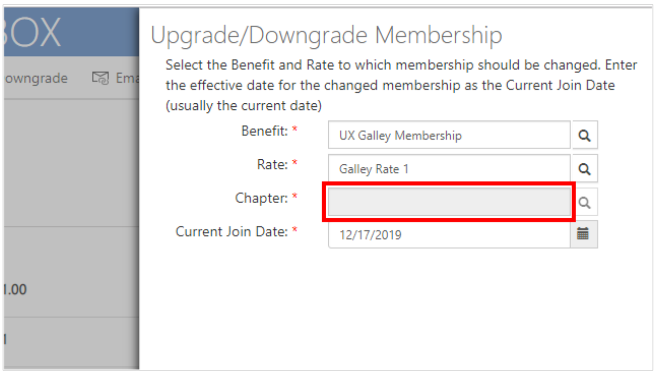
Click the lookup icon on the right of 'Benefit' to select the new benefit



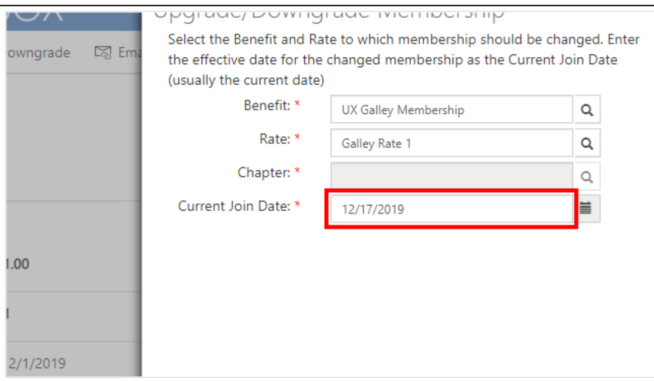
Click the lookup icon on the right of 'Rate' to select the new rate



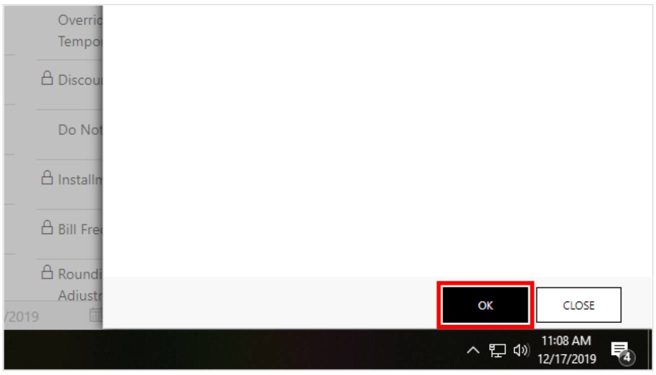
If this is a chapter benefit, select the chapter by pressing the lookup icon on the right of 'Chapter.'
If it is not a chapter benefit, do not worry about populating this field.



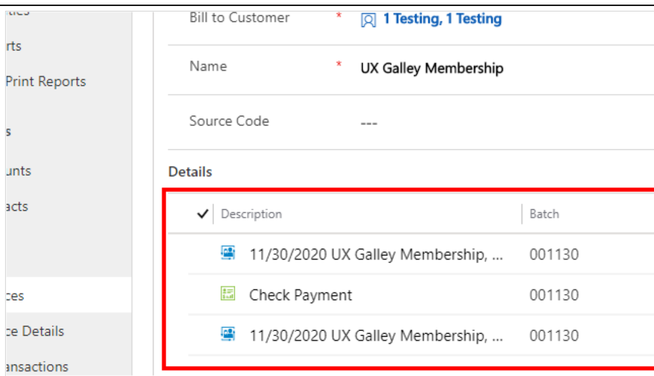
In the Current Join Date field, enter or select the effective date for the membership upgrade or downgrade. Select a date that is within the current renewal cycle.
Please note: The Current Join Date field will display the first day of the next month by default. For any date that you enter, the system will use the first day of that month for its calculations. For example, if you enter 10/15/13, the system will use 10/01/13.



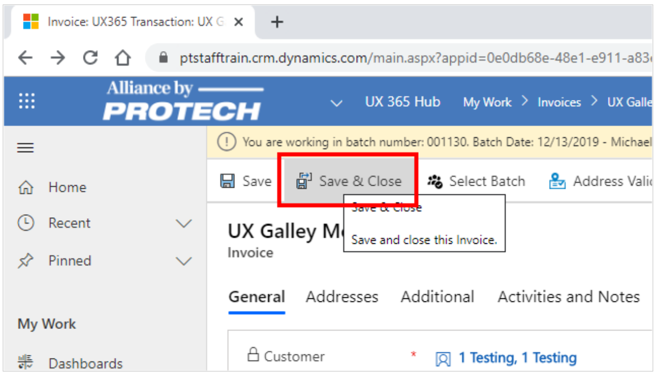
After verifying your entries for benefit, rate, and current join date, click OK. The system will recalculate original dues invoice detail line item and create a new invoice detail line item for the new benefit, rate, and join date.



You can see here that the system automatically adds the Upgraded/Downgraded membership to the invoice.



Click Save or Save & Close to save the record.

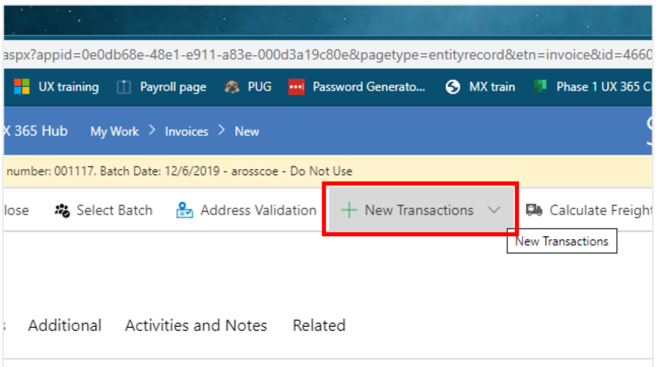


7. Product Sales

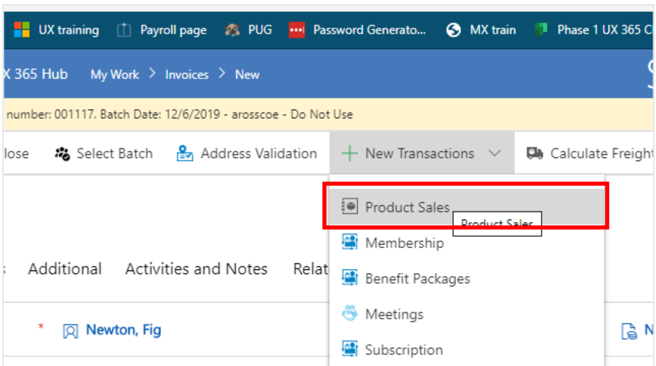
7.1. Back Orders on Product Sales Invoices

As you enter product sales line items on an invoice, you may be required to deal with item quantity shortages by back ordering the product. Note - You can back order an item only if the Allow Back Order option on the product record is marked. You can partially back order an item only if both the Allow Back Order and Allow Partial Back Order options are marked.

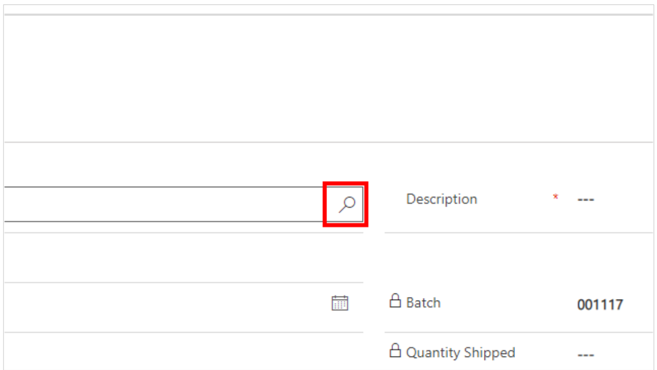
Click on the menu item **New Transactions**



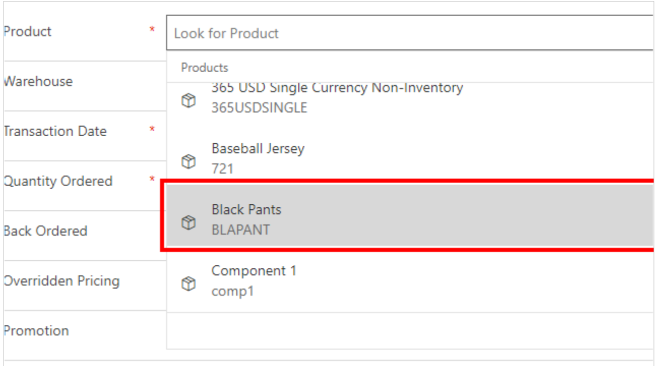
Click on the menu item **Product Sales**



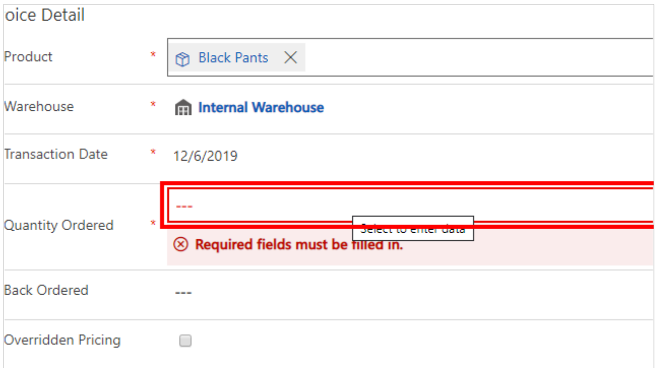
Click on the link **Product**



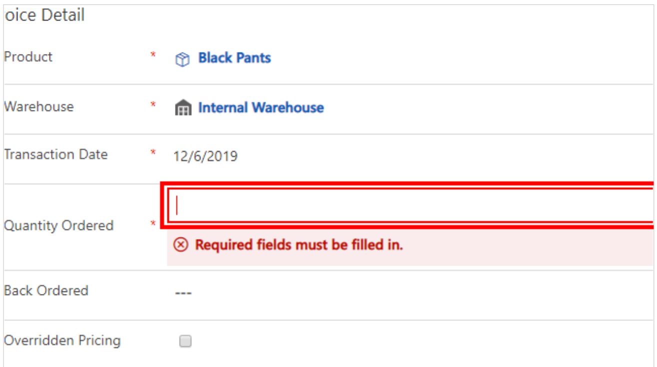
Select the desired product.



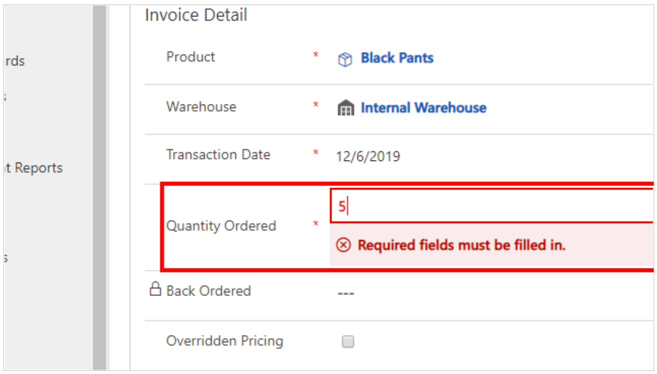
Click on the text field **Quantity Ordered**



Enter **Quantity Ordered**.

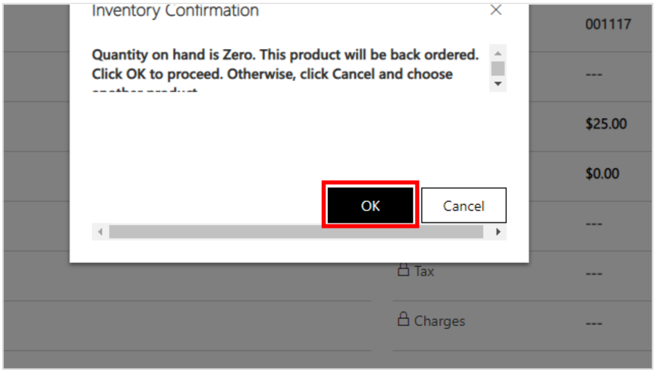


Click off the quantity ordered box.



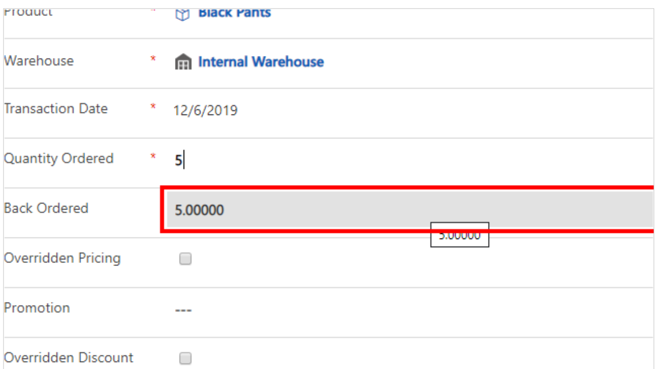
If a Sales Inventory product is set up for back orders or partial back orders, the option to back order or partially back order an item occurs when you enter the Quantity Ordered. If the available quantity for an item (calculated as the quantity in inventory less any quantities on unposted transactions) is zero, a message will appear asking if you want to back order the item. If the available quantity for an item is greater than zero, but less than the quantity ordered, a message will appear asking if you want to partially back order the item.

Click on the button **OK**

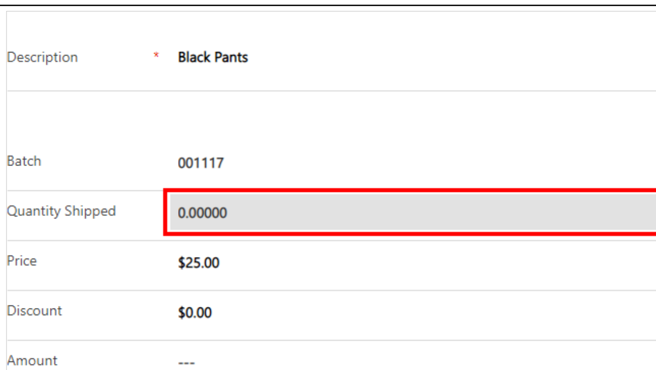


In either case, the following fields on the product sales invoice will be automatically adjusted to account for the quantity difference:

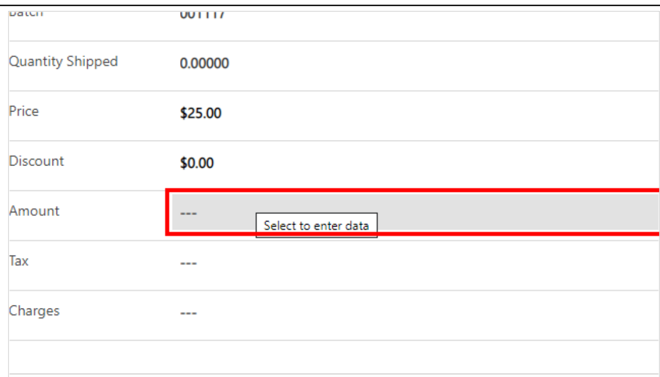
Back Ordered – Displays the result of the quantity ordered less the available inventory. For example, if the available inventory is zero, the back-ordered amount displayed is the quantity ordered.



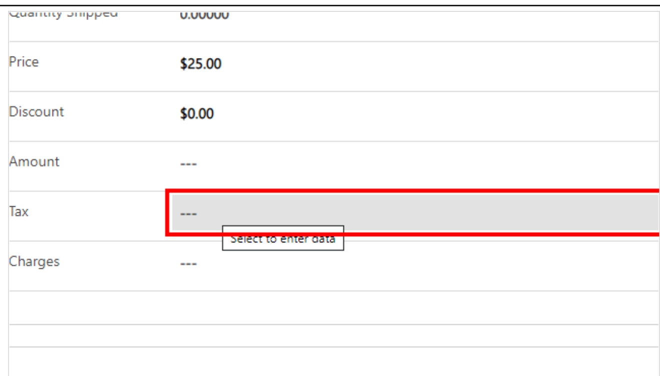
Quantity Shipped – Displays the result of the quantity ordered less the quantity back ordered. For example, if the available inventory is zero and the item is fully back-ordered, the quantity shipped will be zero.



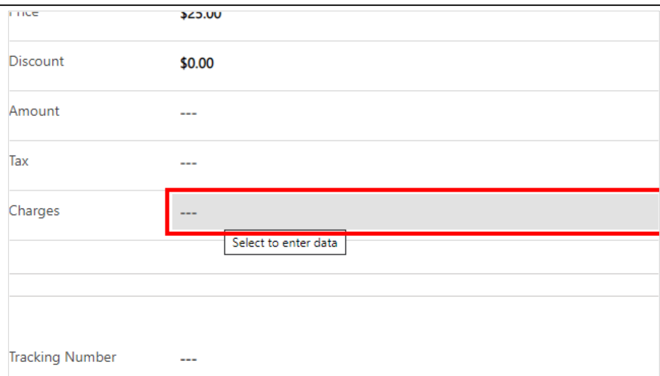
Amount – Displays the extended amount of this line item, adjusted to account for items back ordered. (The amount is calculated from the quantity shipped and the price per unit.) In the case of a full back order where the quantity shipped is zero, the amount is 0.00.



Tax – The calculated tax amount for the item does not include the back-ordered items, because it is based on the quantity shipped, not the quantity ordered.

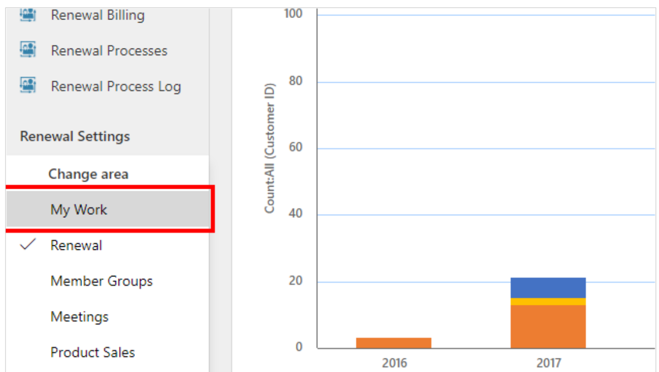


Charges – Displays the extended amount after you save the invoice transaction detail. The extended amount is the result of the amount, less the discount and tax, if applicable. The extended amount for the item does not include the back-ordered items, because it is based on the quantity shipped, not the quantity ordered.

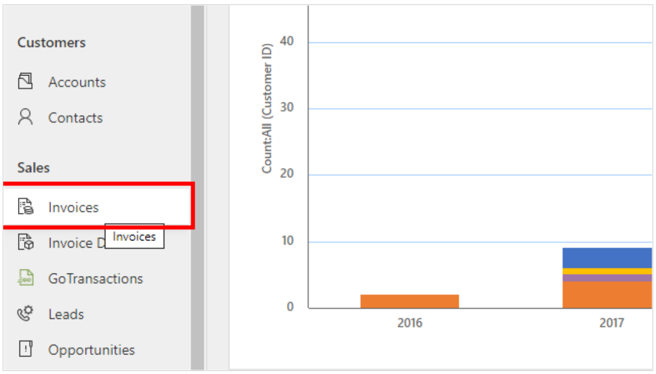


7.2. Calculating Freight Charges for a Product Sale

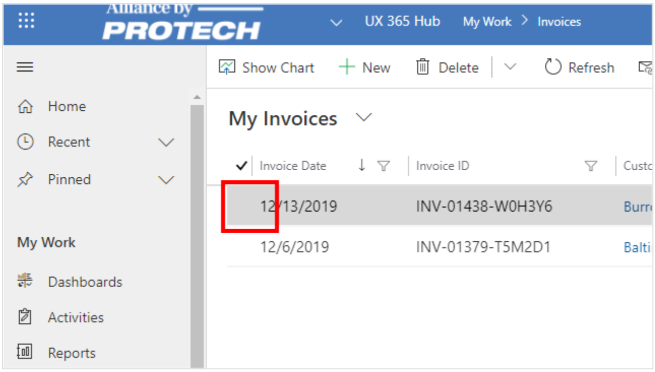
Click on the item **My Work**



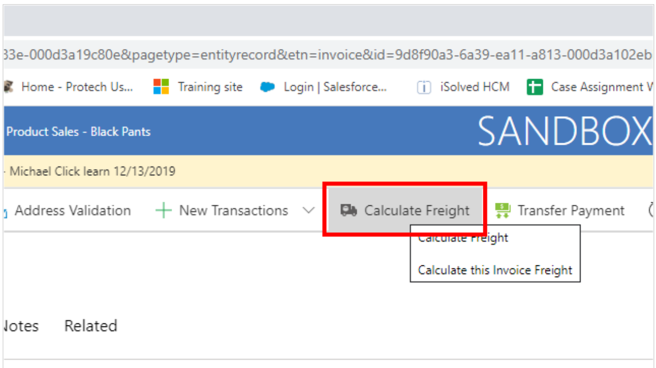
Click on the item **Invoices**



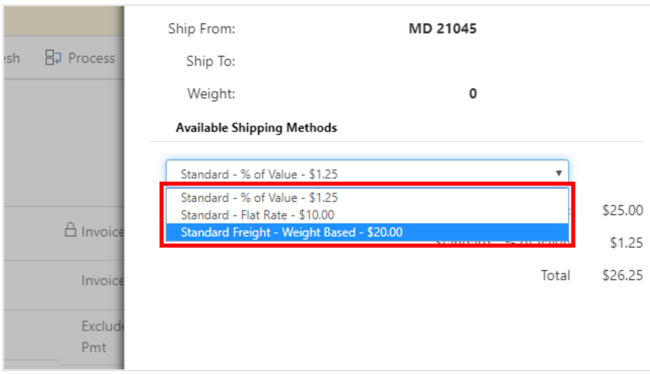
Select the invoice you need to apply freight to



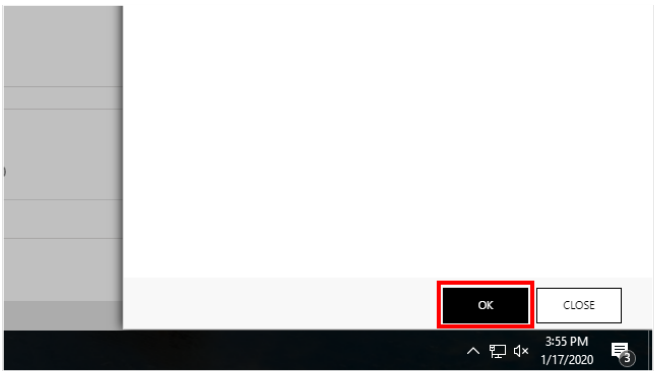
Click on the menu item **Calculate Freight**



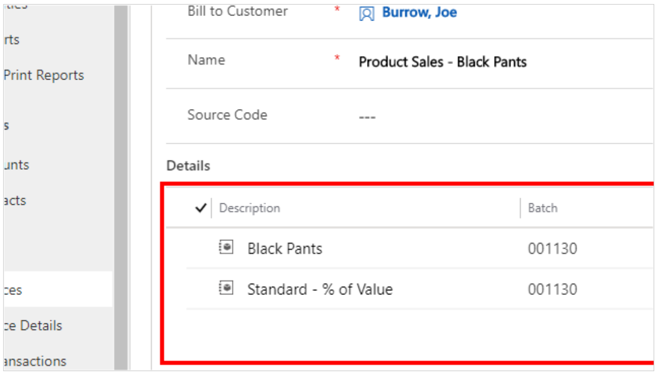
Select the type of freight you would like to apply



Click on the button **OK**



A new line item should be created and display the amount charged for freight

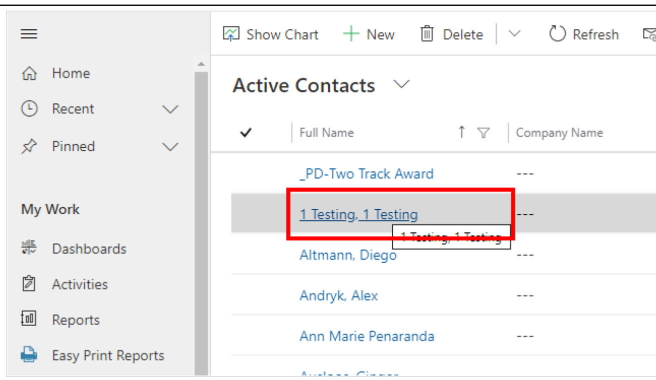


7.3. Canceling or Deleting a Product Sales Transaction

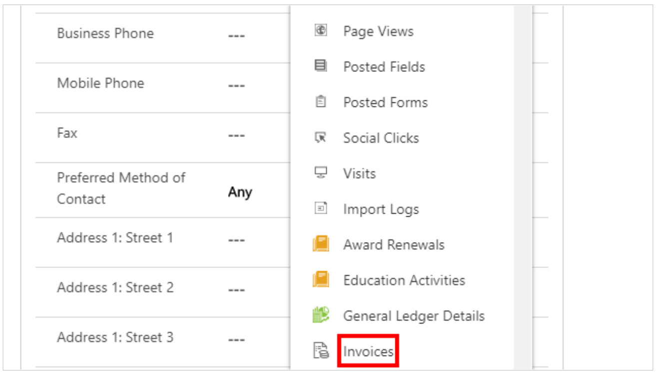
This section describes how to cancel or delete a product sales invoice transaction and the system rules that apply, based on batch status and payments within the invoice. This procedure reverses the original charges to create the appropriate reversing general ledger entries.

Click on the item **Contacts**

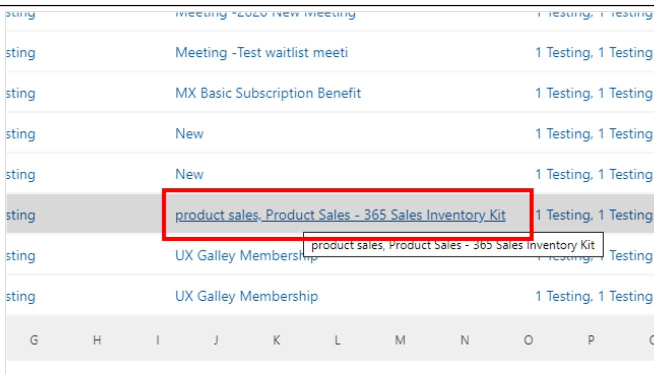
Select the contact that has the product sales transaction invoice.



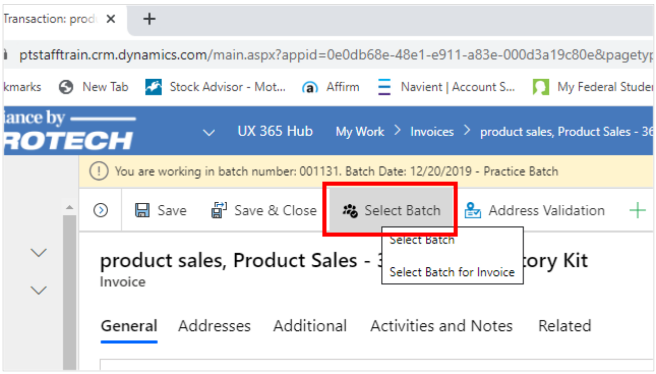
After clicking on the menu item Related, click on invoices.



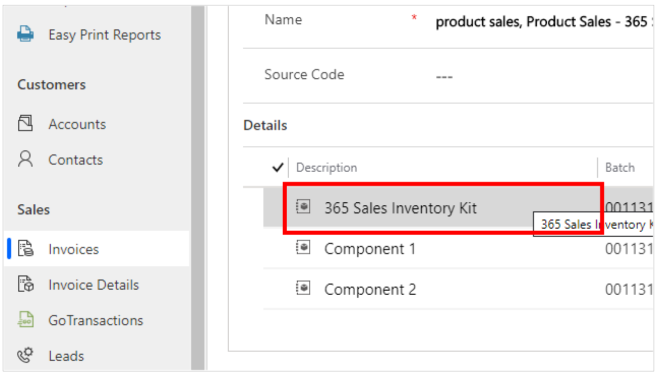
Select the invoice that contains the product sales transaction.



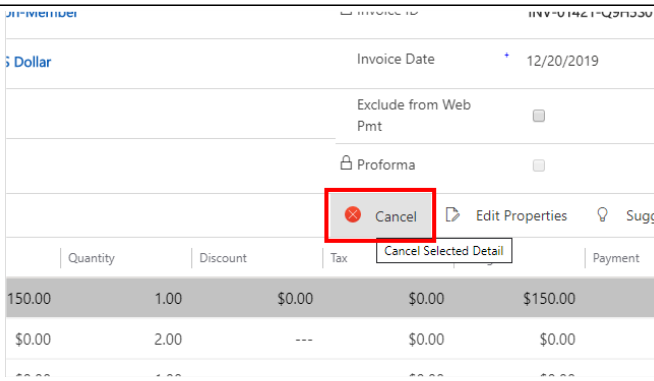
Select the appropriate batch.



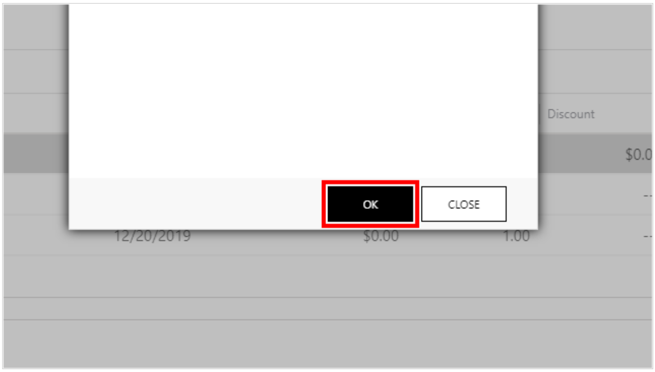
Click the product sales line item in the list of invoice detail line items to select it.



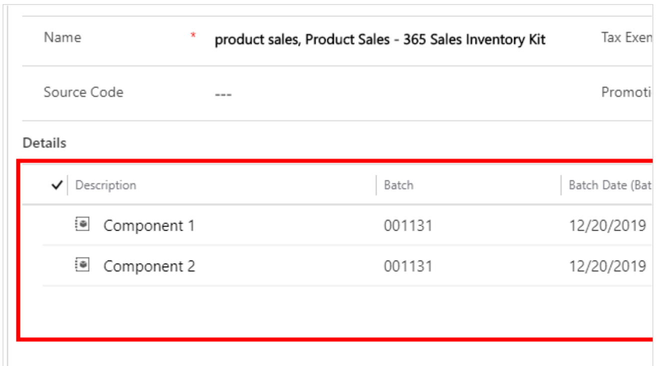
Click on the menu item **Cancel**
You will cancel a product sales transaction if its originating batch has been closed. You will delete a product sales transaction if its originating batch is still open. When the application parameter PAOrders.DisableCancelOnFulfilled is set to True, you will not be able to cancel a product sales transaction using the delete button if the product has been processed through order fulfillment (where the Shipped On date inside the invoice detail for the product transaction contains data).



Click on the button **OK**

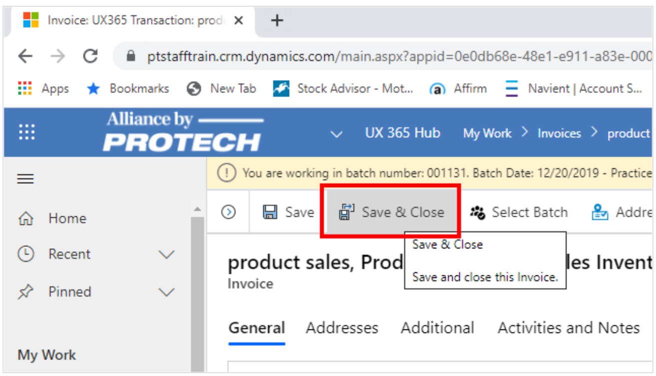


The product sales transaction is now deleted.
If the batch where this line item was originally entered is still open, the line item will be deleted and will no longer appear on the invoice. If the batch where this line item was originally entered is closed, the line item will be canceled and you will see a red X next to the product sales invoice detail line item.



If there was a payment on the invoice, you may either refund the credit card or cash/check payment, or you may enter another transaction of any type. Another option is to transfer the remaining money to another invoice if appropriate.

Click on the menu item **Save & Close**

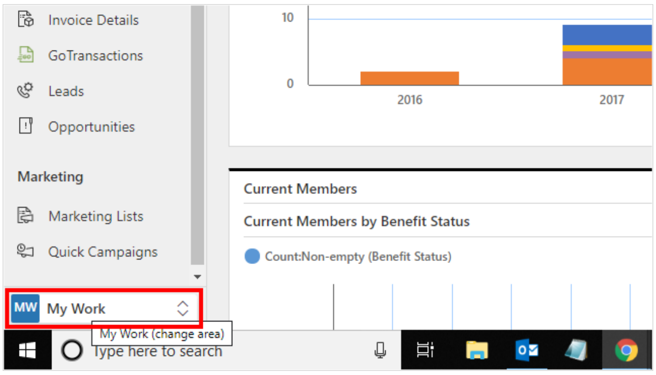


7.4. Creating a Kit Product

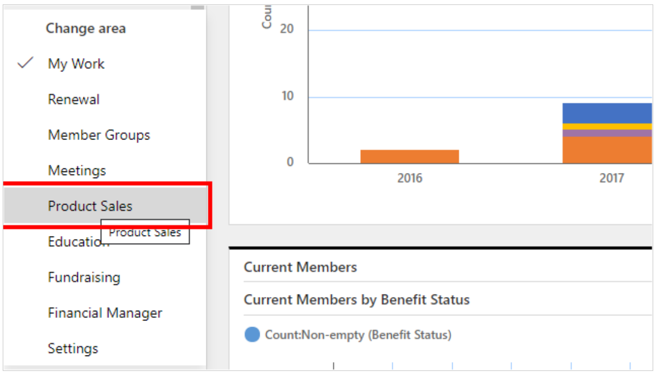
7.4.1. Creating a KIT Product

You can set up kit products, which you can use to sell several products as a single package. For example, you may want to sell several manuals with a particular workshop video as a kit, but you also want the video and each manual to be available for purchase individually. In addition, you may want to track inventory for each individual product. UX 365 does not support CRM Product Bundles for managing product kits and kit components. A kit product can also be a component of another kit. For example, you can set up a kit of basic training materials that are used with several workshops, and then include that kit in the kits for each of those workshops. In order to set up kit products, you must first set up the product records for each component of the kit. You then can create the kit product, and associate each of the components with it. If you are managing inventory for the kit, the kit and all of its components must have a product type = Sales Inventory.

Click on the button **My Work (change area)**

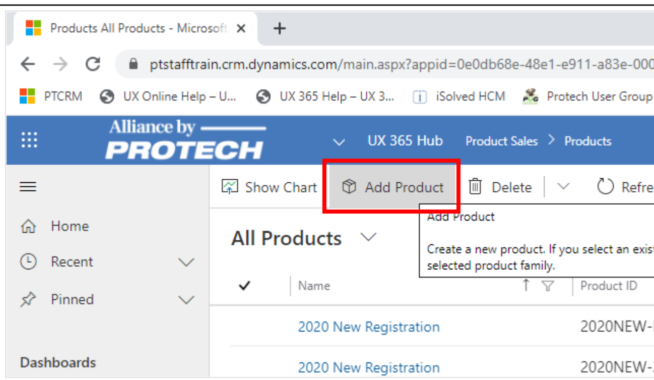


Click on the item **Product Sales**

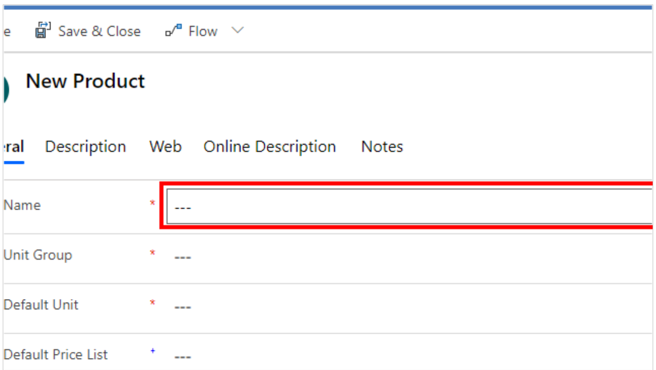


Click on the item **Products**

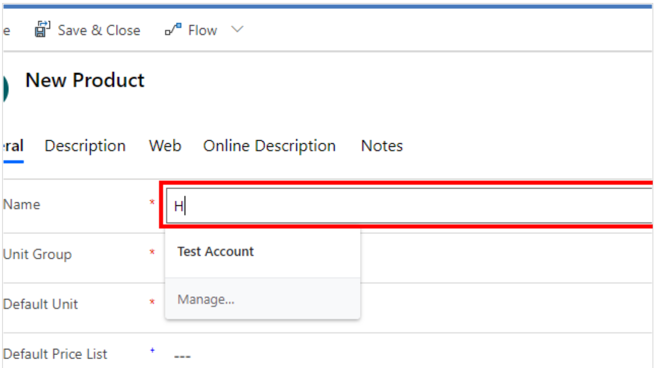
Click on the menu item **Add Product**



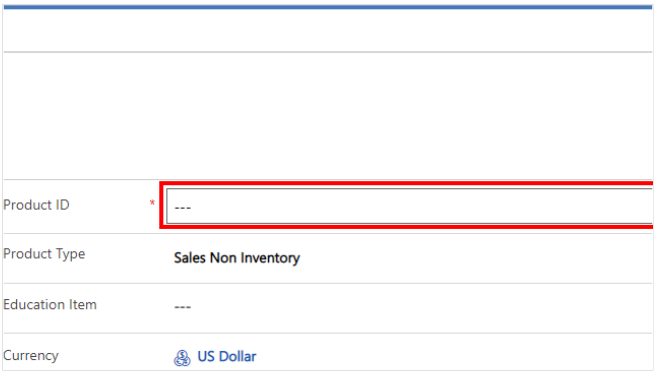
Click on the text field **Name**



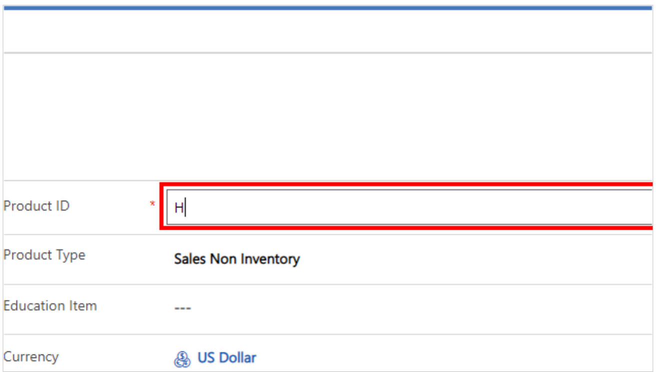
Enter name of KIT product



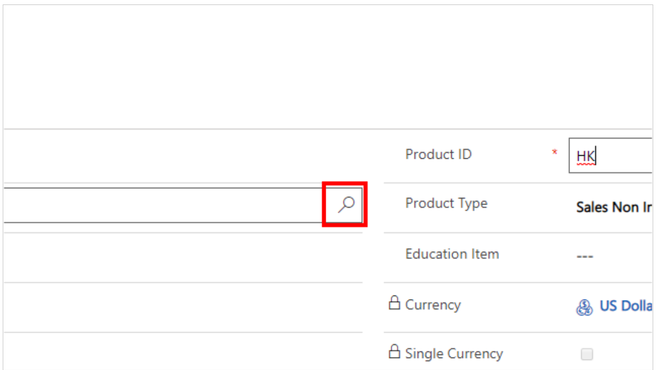
Click on the text field **Product ID**



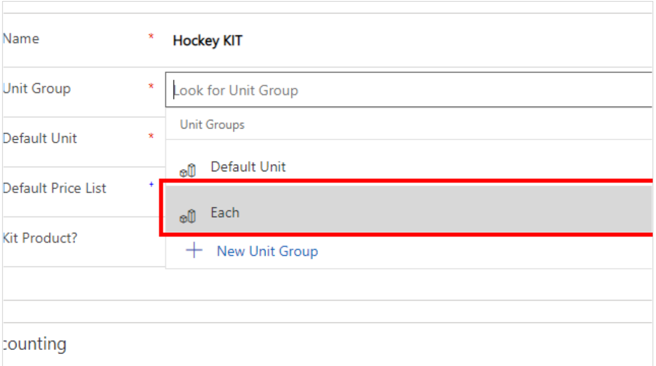
Enter the Product ID



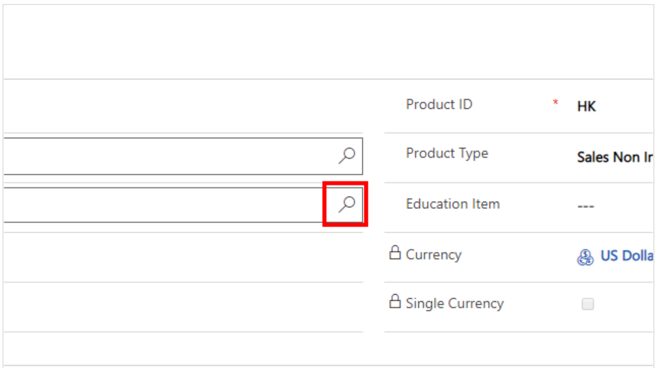
Click on the link **Unit Group**



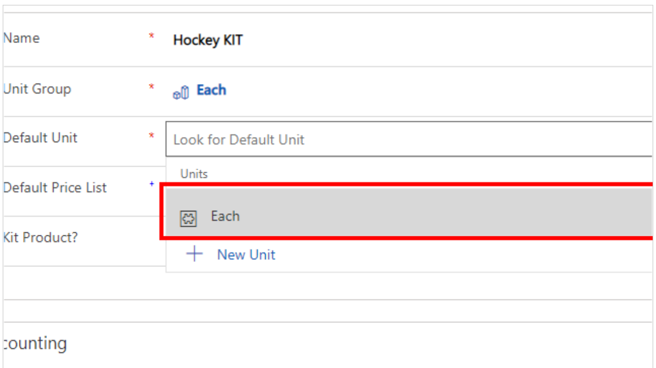
Click on the item **Each**



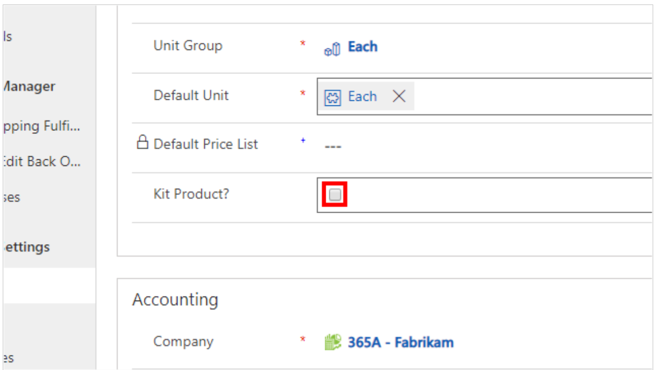
Click on the link **Default Unit**



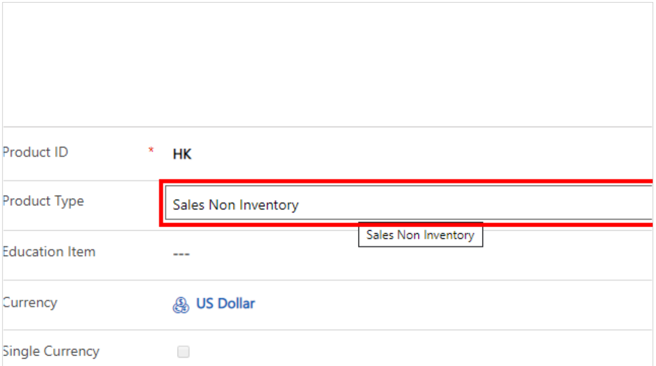
Click on the item **Each**



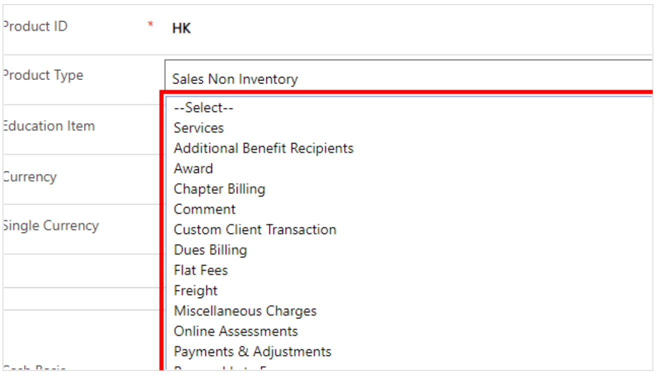
Click on the checkbox **Kit Product?**



Click on the field **Product Type**

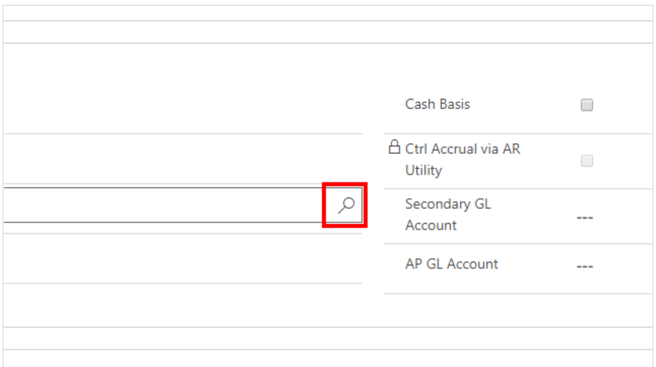


Click on the item **Sales Inventory** in the list

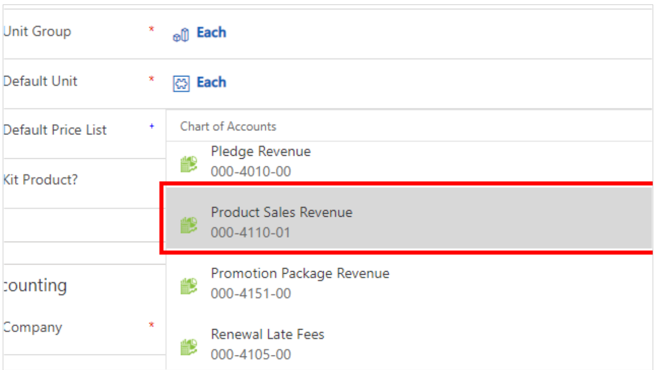


If you are managing inventory for the kit, select Sales Inventory for the kit product type. If you are not managing inventory for the kit, select Sales Non-Inventory as the product type.

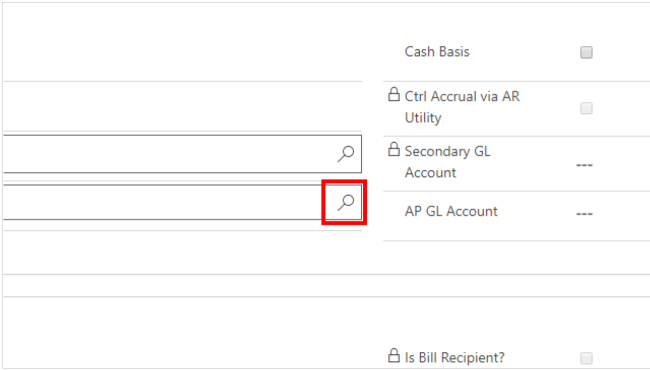
Click on the link **Primary GL Account**



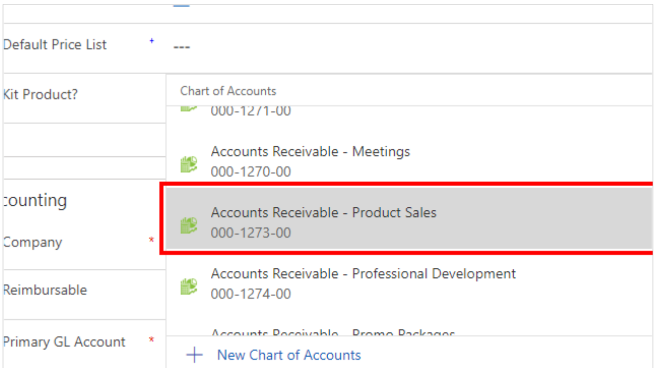
Click on the item Product Sales Revenue



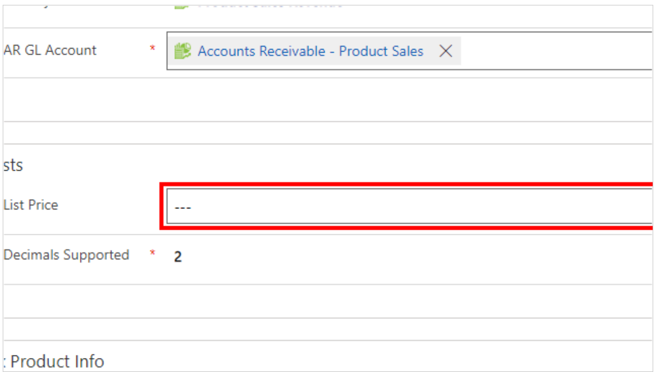
Click on the link **AR GL Account**



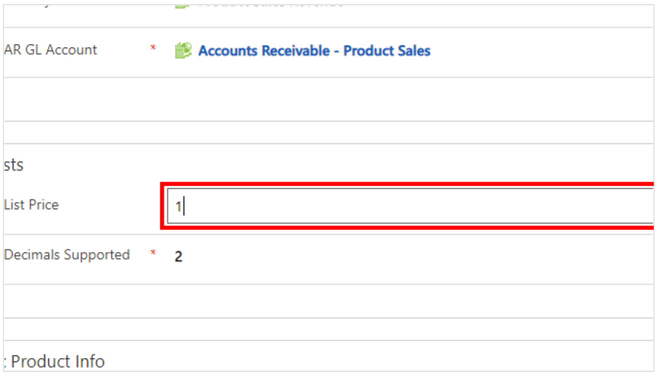
Click on the item Accounts Receivable



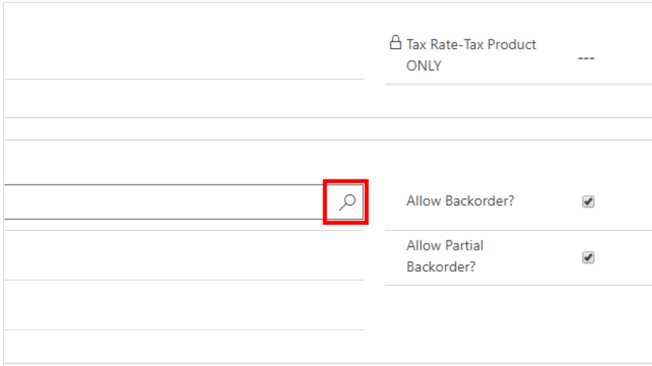
Click on the text field **List Price**



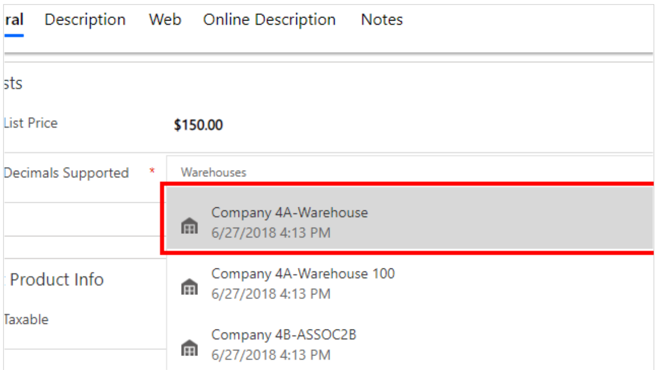
Enter price for KIT product



Click on the link **Warehouse**

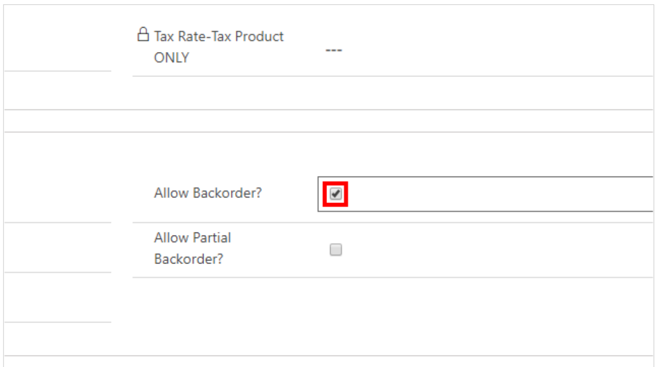


Select appropriate Warehouse, this field is required for product type = sales inventory.

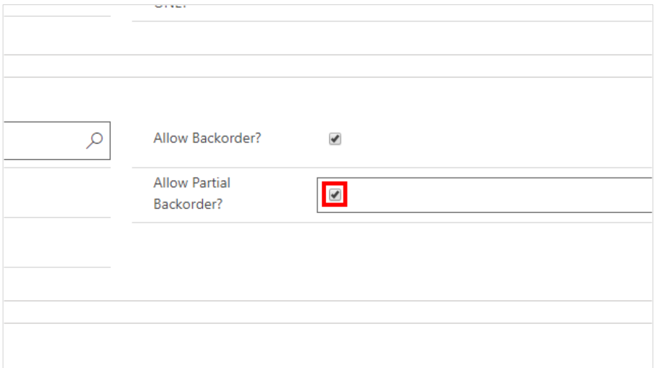


Allow Backorder

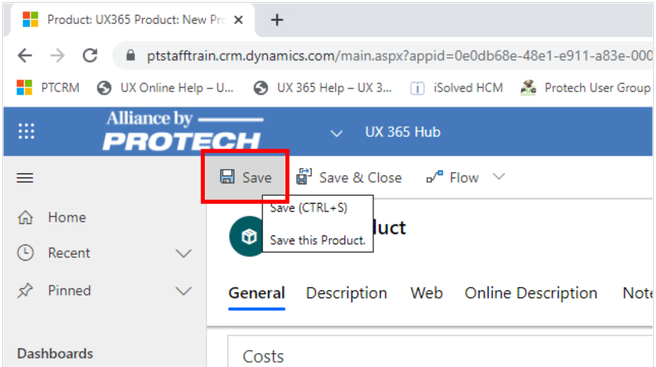
If the kit product type = Sales Inventory, and you want to enable backorders for the kit, mark the Allow Backorder check box in the Backorder and Inventory Info section of the new product form.



Allow Partial Backorder
Do not check Allow Partial Backorder – partial backorder is not supported for product kits.

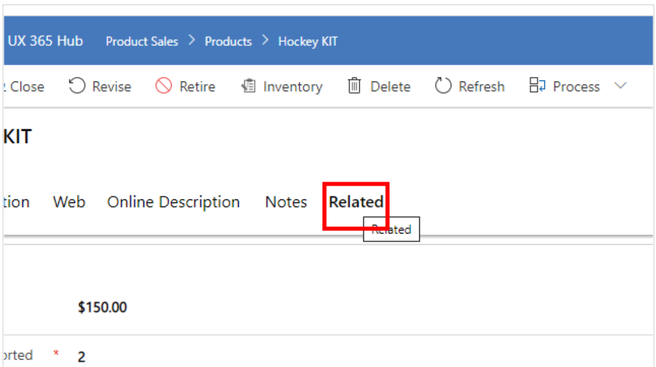


Click on the menu item Save

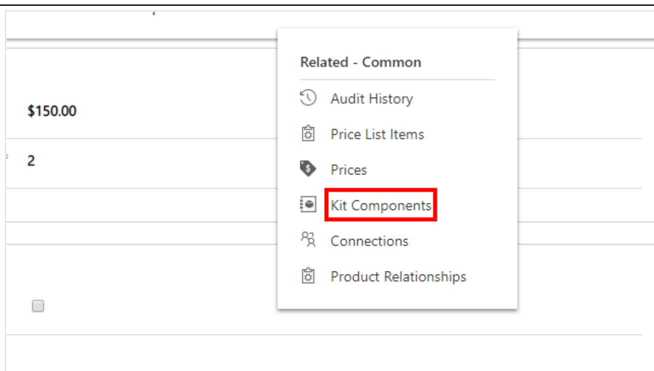


7.4.2. Adding KIT Components

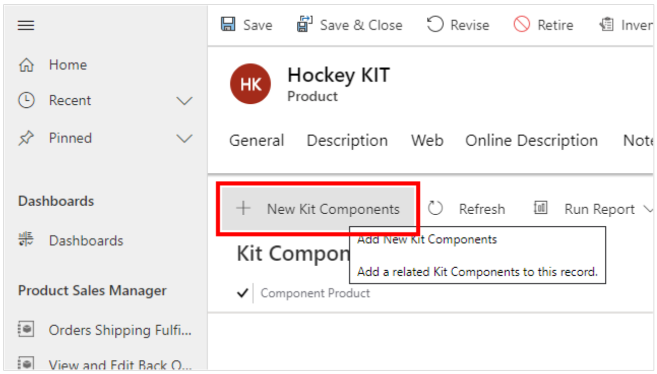
Click on the item **Related**



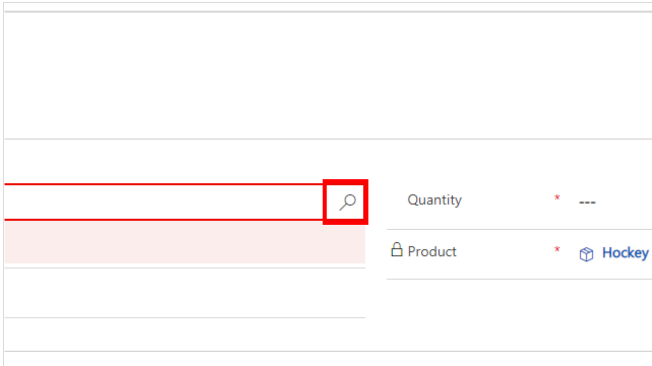
Click on the menu item **Kit Components**



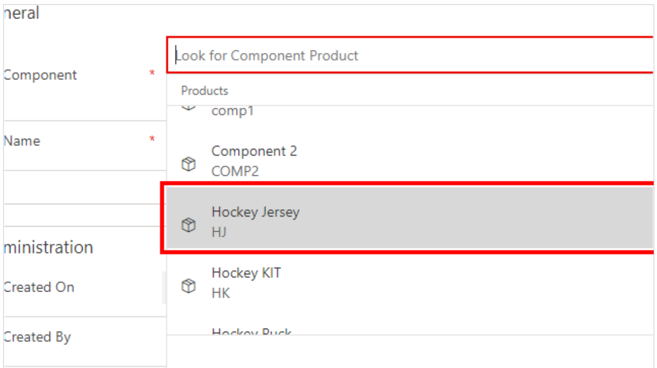
Click on the menu item **Add New Kit Components**



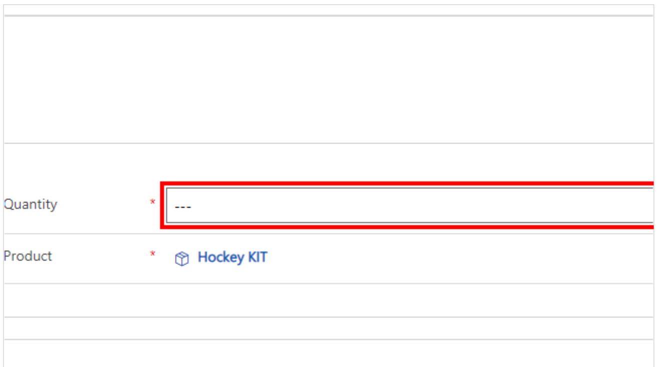
Click on the link **Component**



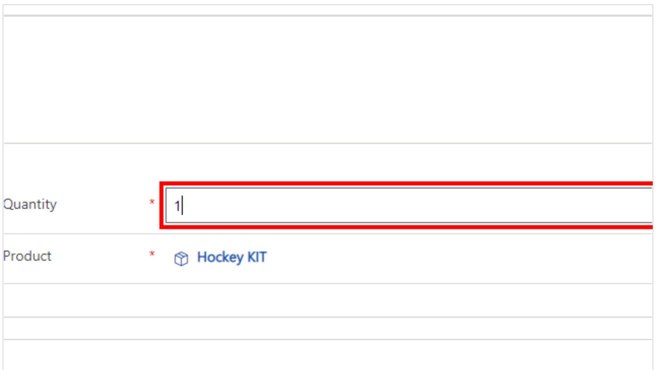
Select the product you wish to be part of the KIT



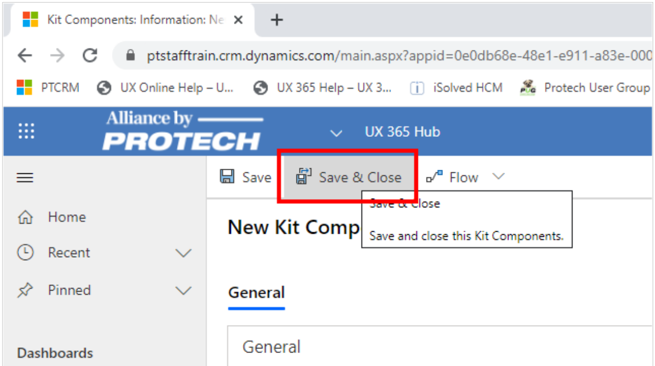
Click on the text field **Quantity**



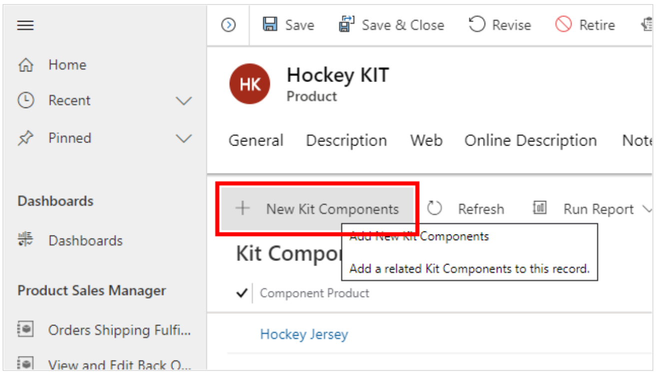
Enter the quantity that will be included in the KIT product



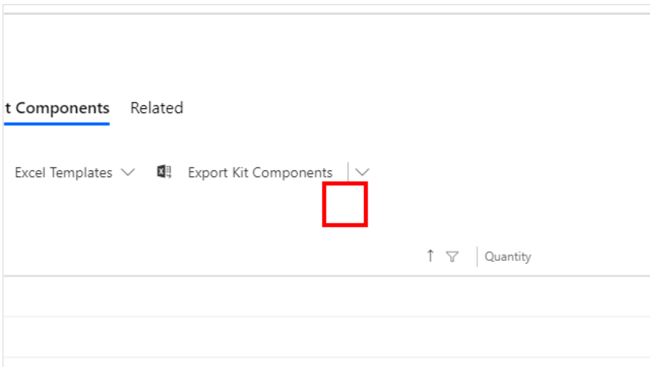
Click on the menu item **Save & Close**
Repeat this process for all products that you would like to be included in the KIT Product.



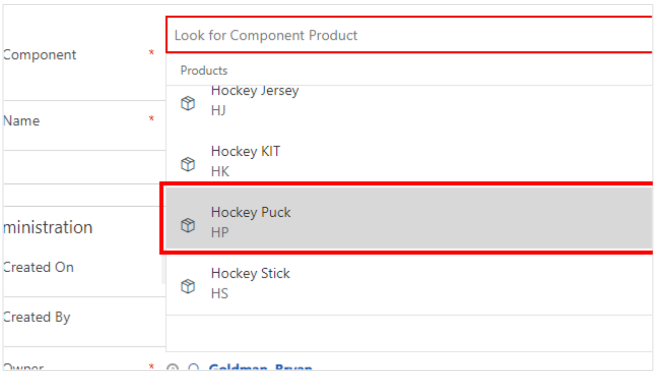
Click on the menu item **Add New Kit Components**



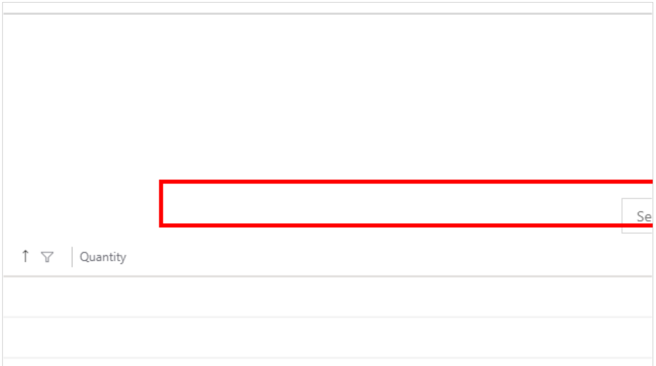
Click on the link **Component**



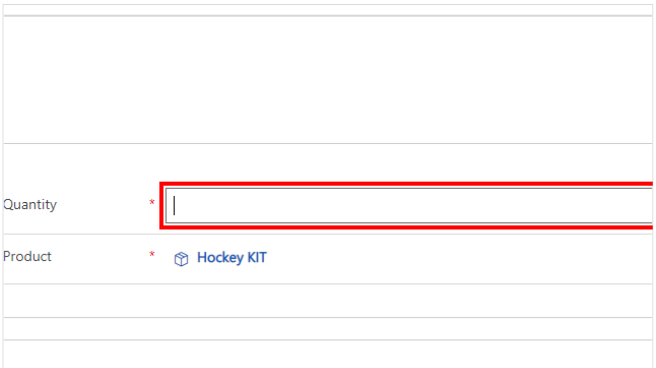
Select the product you wish to be part of the KIT



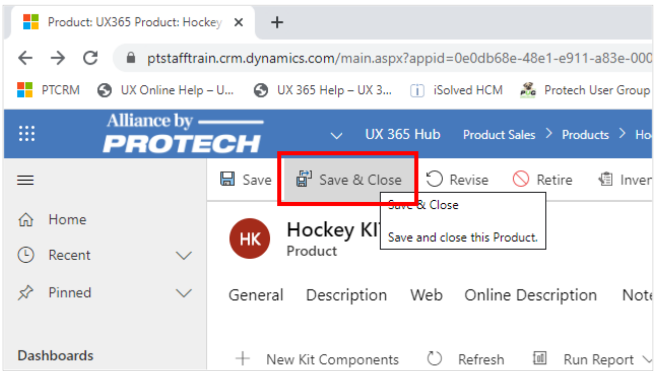
Click on the text field **Quantity**



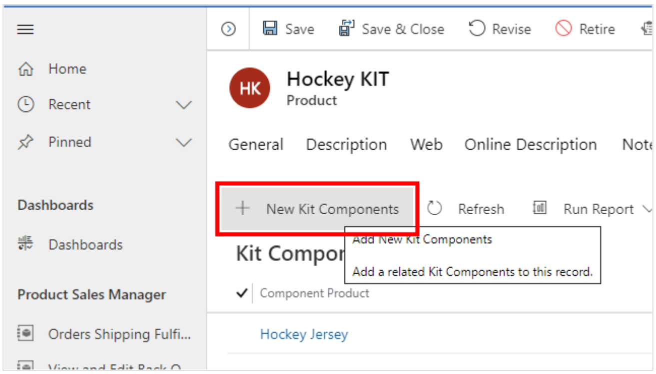
Enter the quantity that will be included in the KIT product



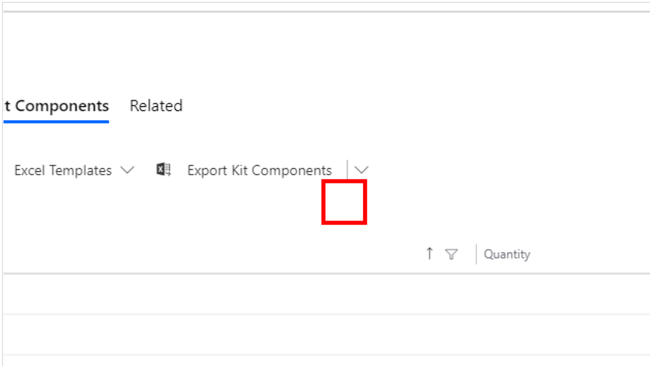
Click on the menu item **Save & Close**



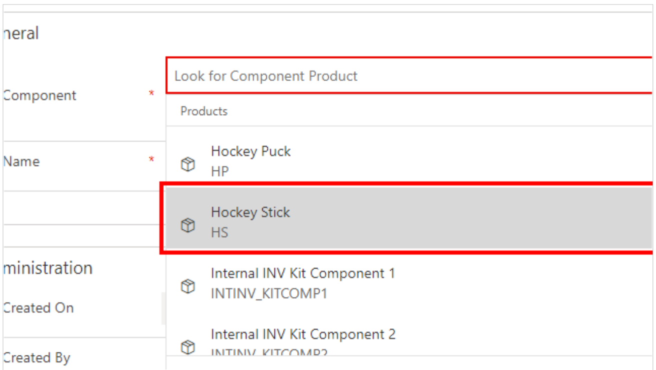
Click on the menu item **Add New Kit Components**



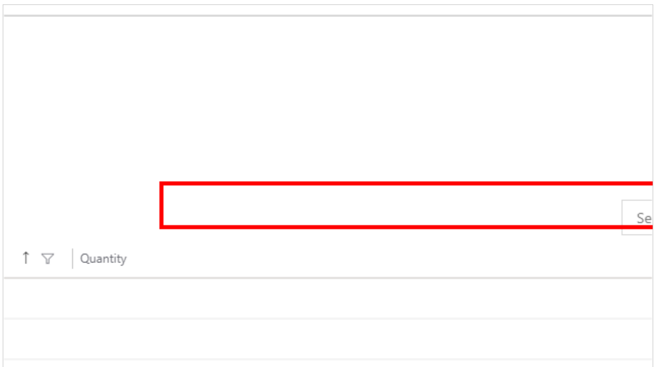
Click on the link **Component**



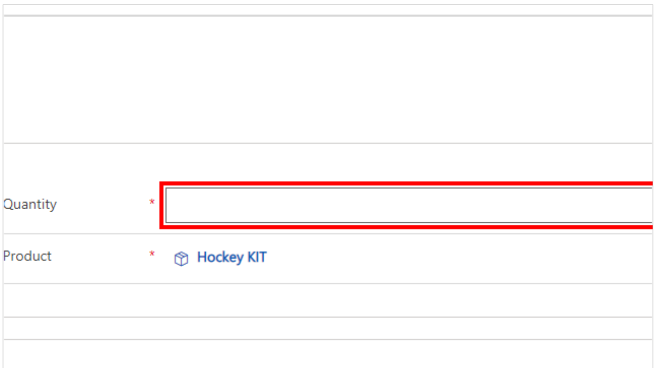
Select the product you wish to be part of the KIT



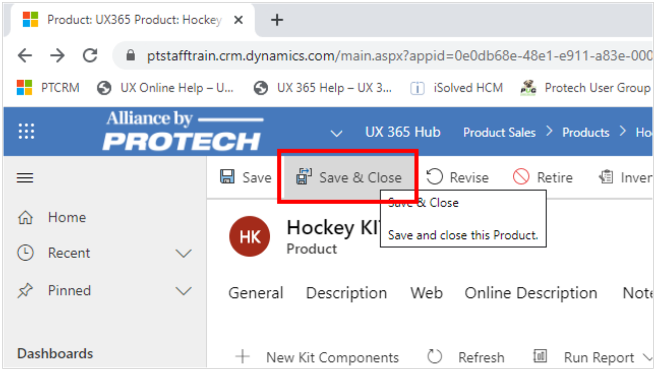
Click on the text field **Quantity**



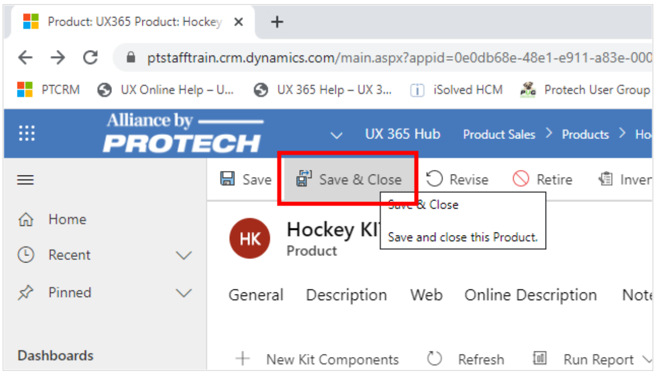
Enter the quantity that will be included in the KIT product



Click on the menu item **Save & Close**



Click on the menu item **Save & Close**

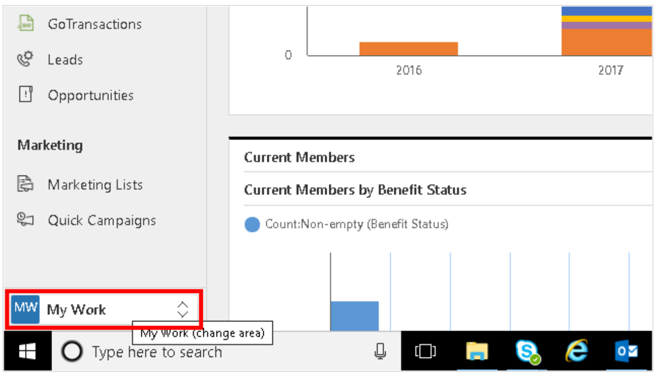


7.5. Creating a New Product Sales Order Product

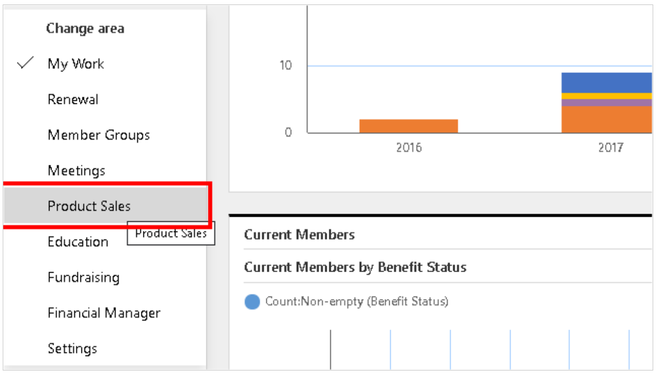
7.5.1. Sales Non Inventory Product Setup

When setting up products, the choices you make will affect the integration to your accounting system (including the inventory module), transaction processing, freight, tax, and fulfillment processing. Prior to setting up a product, review your product characteristics and plan the setup that will best support your business processes.

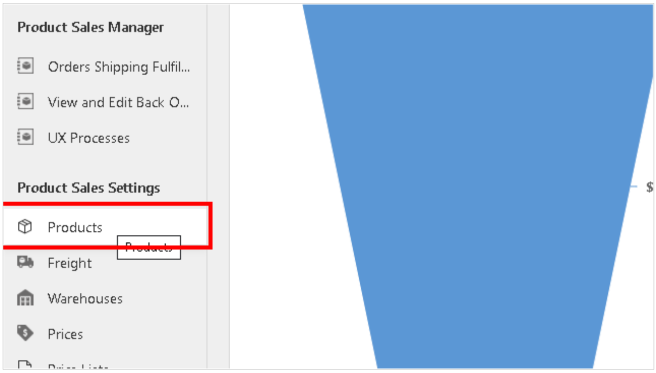
Click on the button **My Work (change area)**



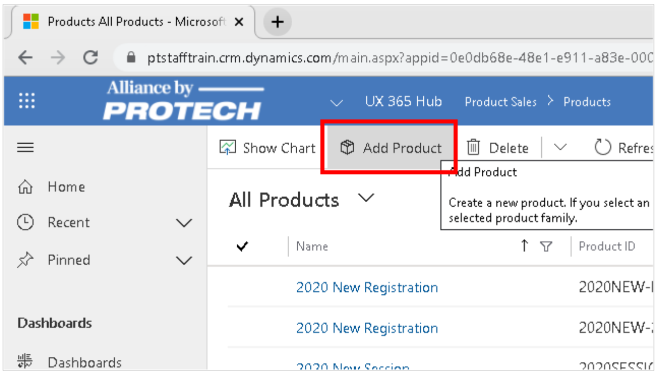
Click on the item **Product Sales**



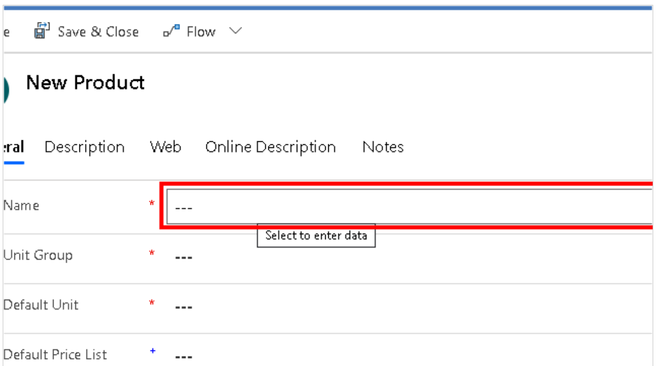
Click on the item **Products**



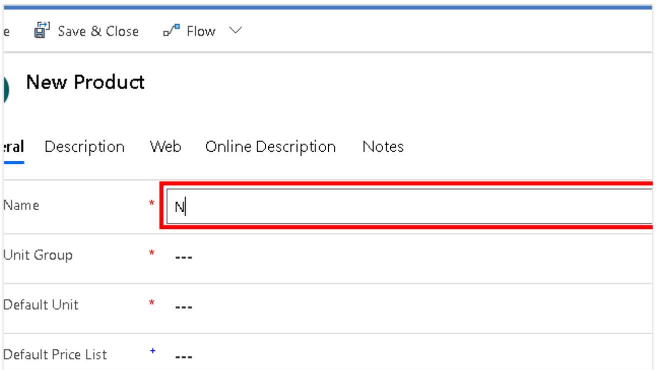
Click on the menu item **Add Product**



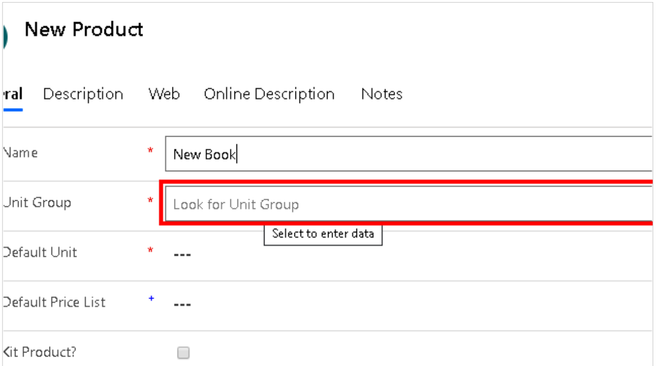
Click on the text field **Name**



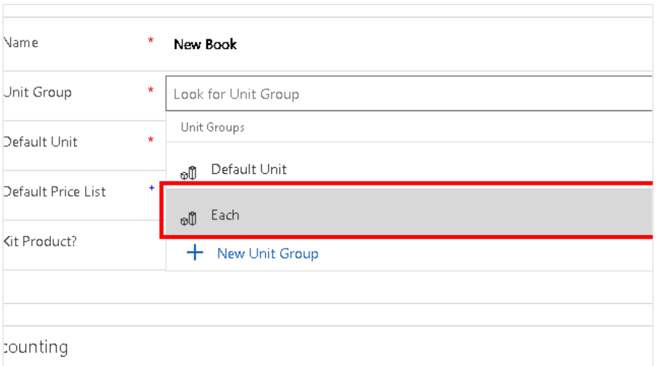
Enter the name of the product



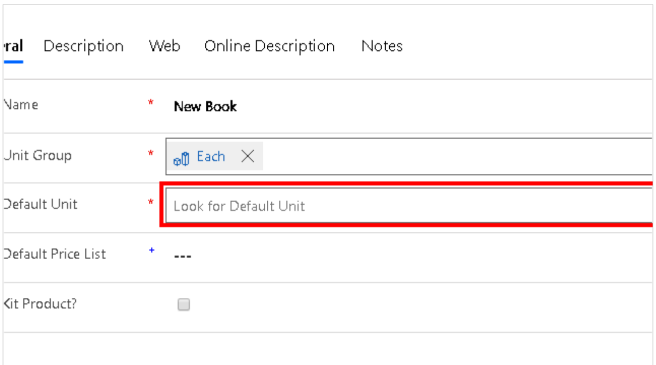
Click on the lookup field **Unit Group**



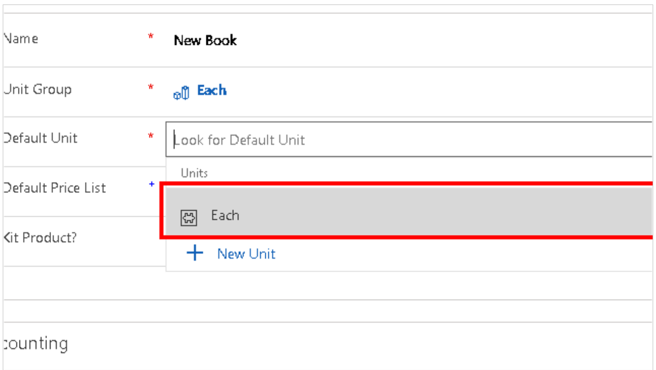
Click on the item **Each**



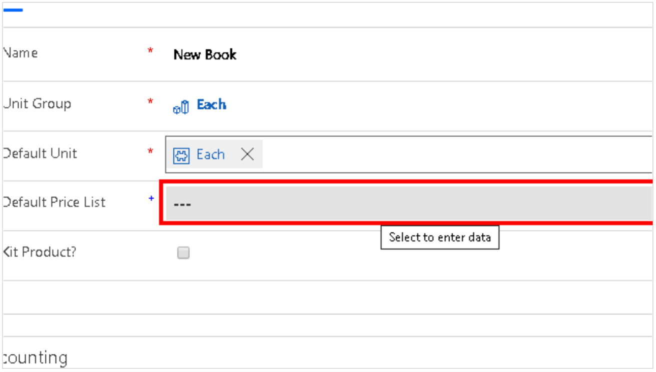
Click on the lookup field **Default Unit**



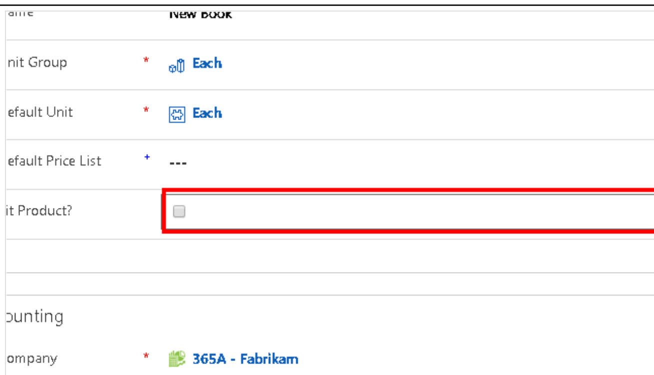
Click on the item **Each**



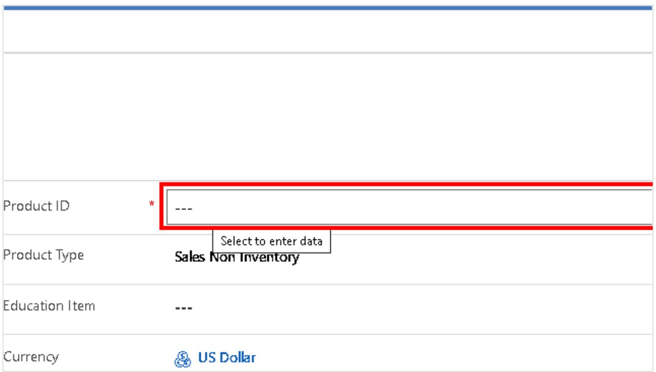
Click on the lookup field **Default Price List**
Leave this field blank. When you save this product record for the first time, this field will automatically display the Non Member price list. Product pricing is not controlled by this field



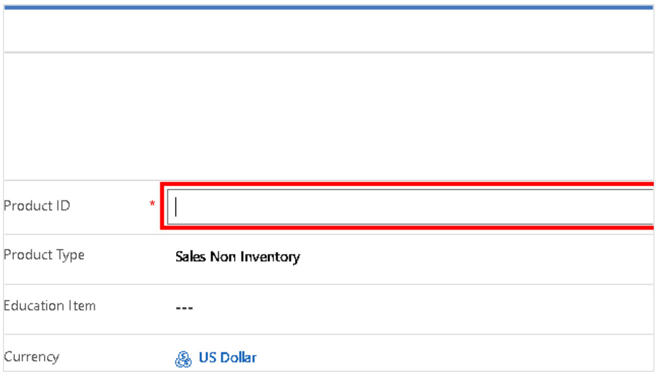
Click on the field Kit Product?
Leave this field unchecked



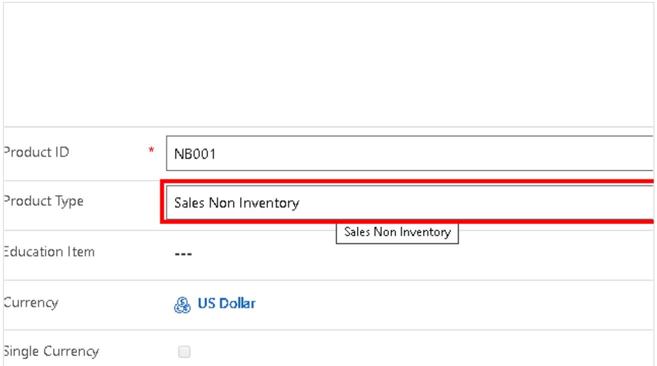
Click on the text field **Product ID**



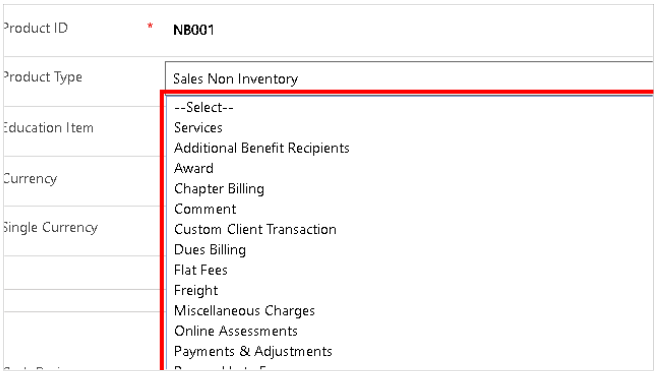
Enter Product ID. Please note, this must be unique



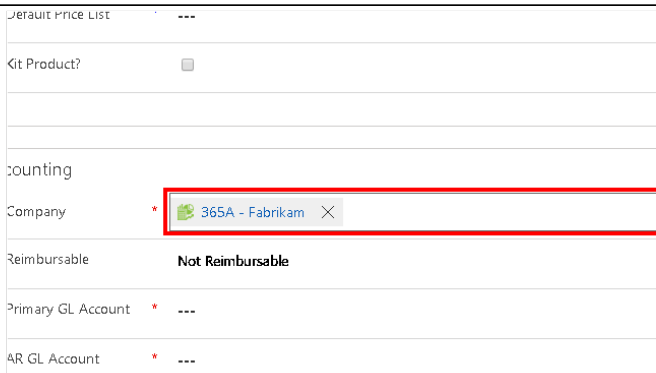
Click on the field **Product Type**



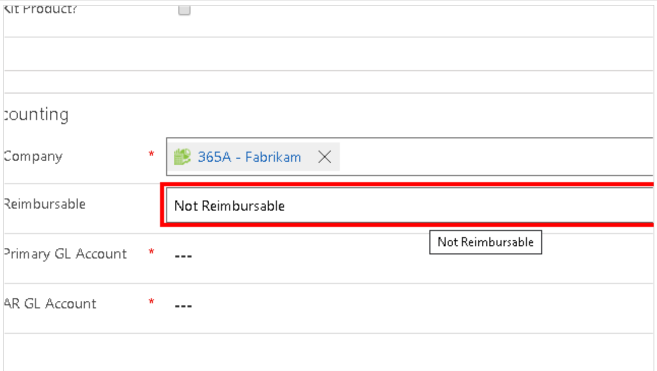
Click on the item **Sales Non Inventory** in the list
Please Note: The product type you choose is important because it triggers special program logic during transaction processing. While there are multiple options available in this list, when creating a sales order product, you must choose either Sales Inventory or Sales Non-Inventory. Sales Inventory – Select this option if you are setting up a product that is integrated with the accounting system inventory control, or if it is using internal (UX 365) inventory control. Sales Non Inventory – Select this option if you are setting up a product that is not integrated with the accounting system inventory control, and it is not using internal (UX 365) inventory control.



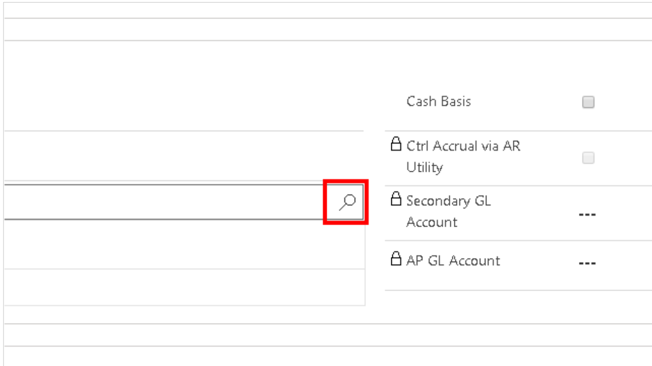
Click on the lookup field Company. This will default to the company from your accounting setup.
The system will automatically populate this field with the company record flagged as the default company in your set up. If you need to make a change, click the Lookup button to select the appropriate accounting system company for this product. This controls where accounting data will post during the posting process and controls the display of GL accounts available in the GL account lookup fields.



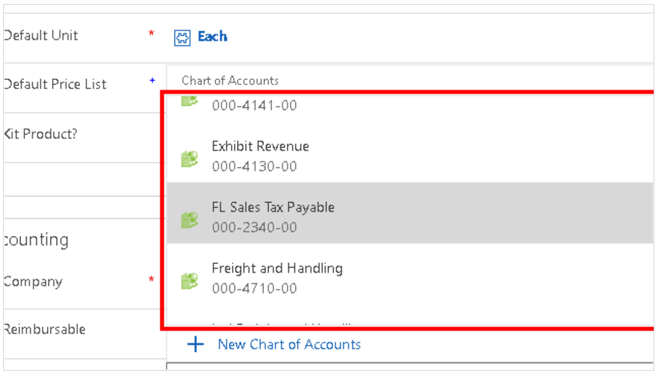
Click on the field Reimbursable. Select Not Reimbursable. Do not select any of the other options for sales order products.



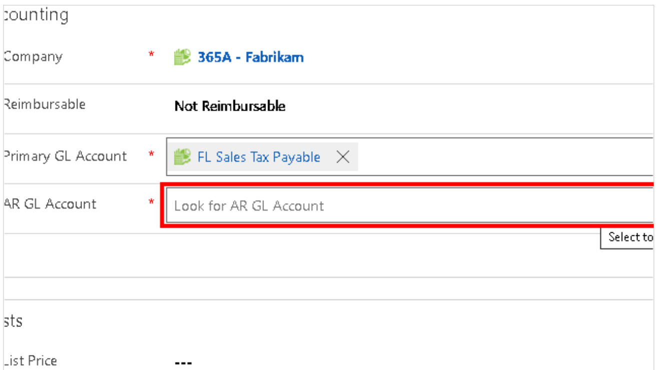
Click on the Primary GL Account look up. This is typically a revenue account for product sales products.



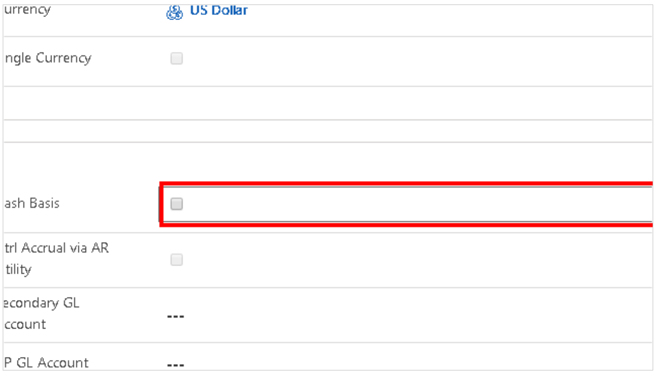
Click on an option from the list



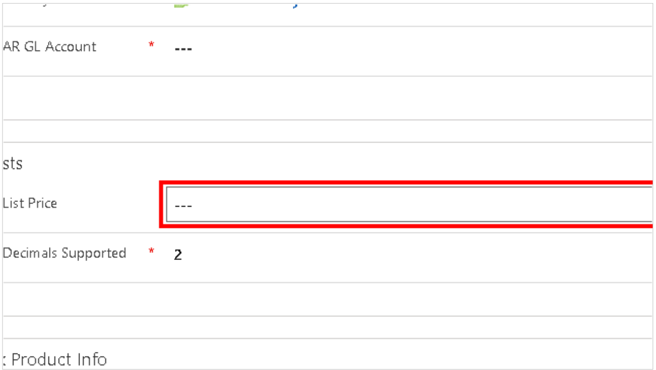
Click on the lookup field **AR GL Account**
Click the Lookup button to select the correct AR account



Click on the field Cash Basis. Leave the default setting of No or Unchecked

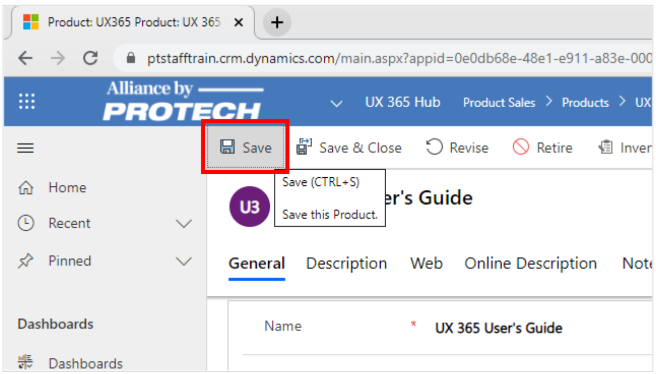


Enter the List Price or cost of the product
This value is used in conjunction with the price record for products that use the Percentage calculation method and is the default value for price in system created price records.



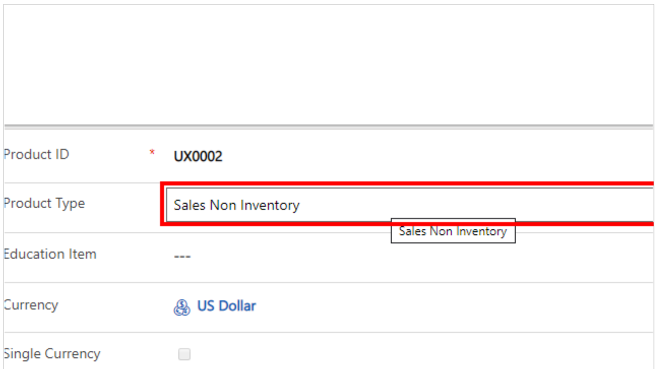
Click on the field **Taxable**
If this product is taxable, mark the Taxable checkbox ☐. If this option is checked, UX 365 calculates tax when the Ship To State field contains a State with sales taxes.

Click on the menu item Save to complete the setup

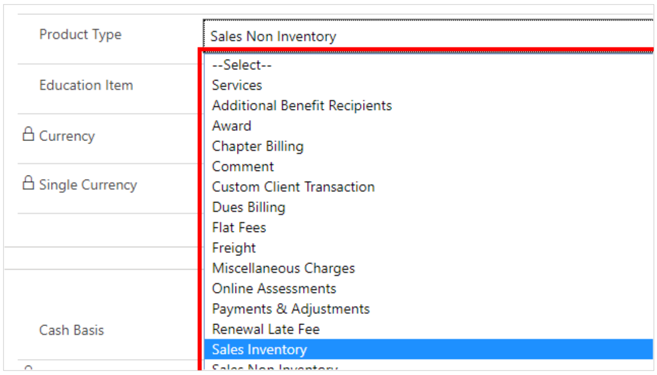


7.5.2. Sales Inventory Product Setup

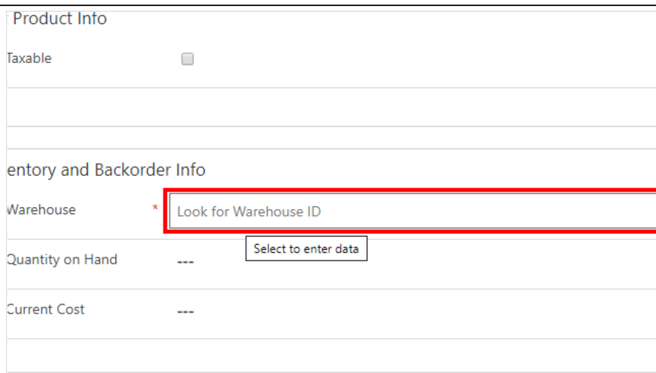
Click on the field **Product Type**



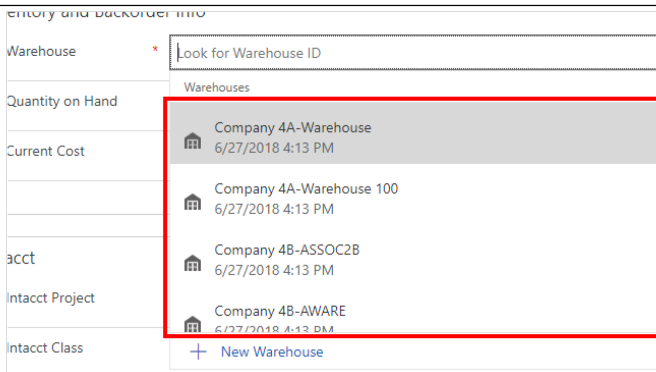
Set product type to Sales Inventory



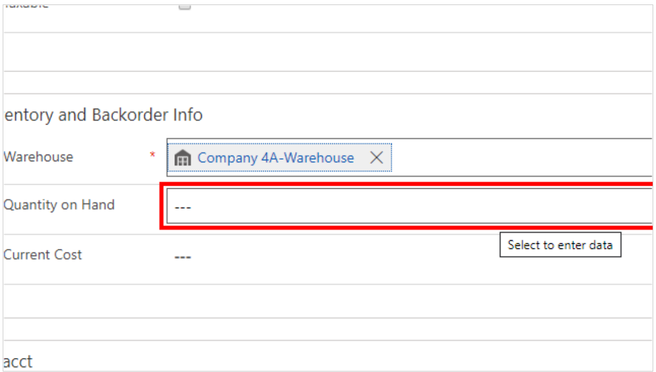
Click on the lookup field **Warehouse**
This field is required for product type = sales inventory. Click the Lookup button to select the default warehouse that will be used to fulfill sales for this product.



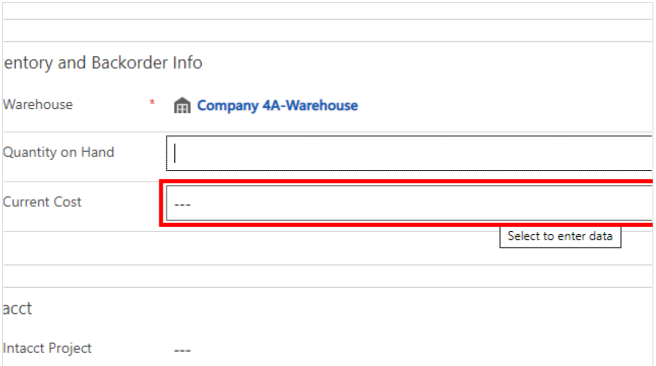
Click on an option from the list



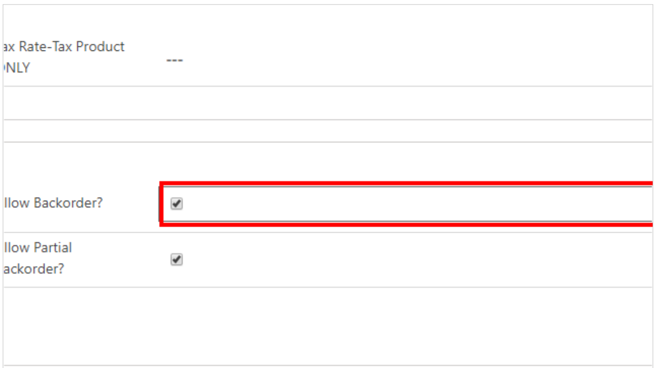
Click on the text field **Quantity on Hand**
If you are using internal UX 365 inventory control for this product, enter the quantity on hand. If you are using the accounting system inventory module for this product, this field is not used.



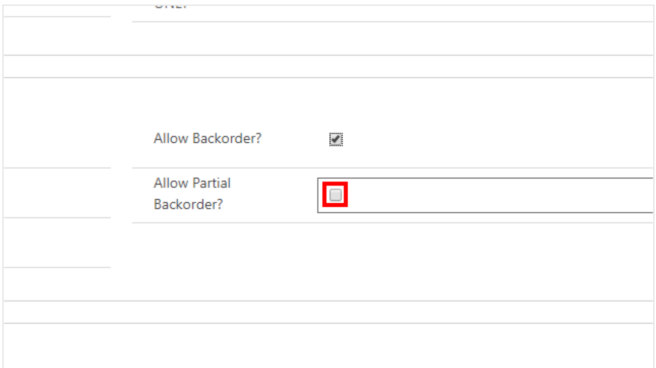
Click on the text field **Current Cost**
Leave this field blank



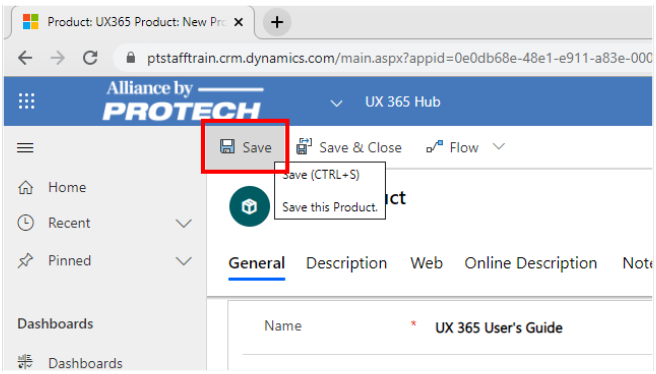
Click on the field **Allow Backorder?**
Mark this checkbox if the product type = Sales Inventory and you want to allow back order processing with this product in the back office



Click on the checkbox **Allow Partial Backorder?**
Mark this checkbox if you marked the Allow Backorder? option, and you want to allow partial back orders for this product in the back office. If your organization does not allow partial backorders, do not mark this option.

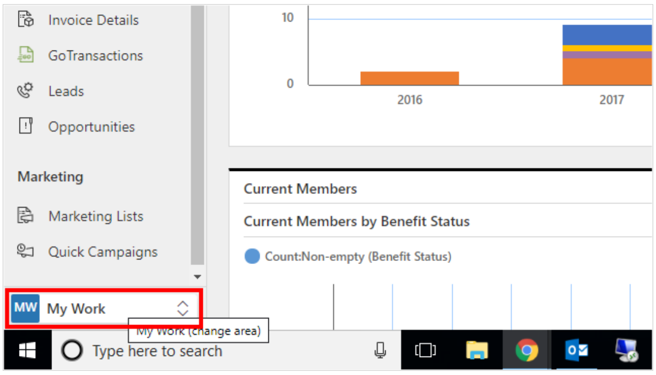


Click on the menu item Save to complete the setup

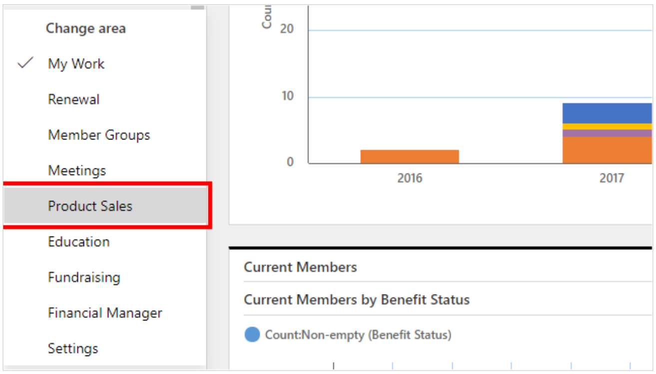


7.6. Creating a Standard Freight Product

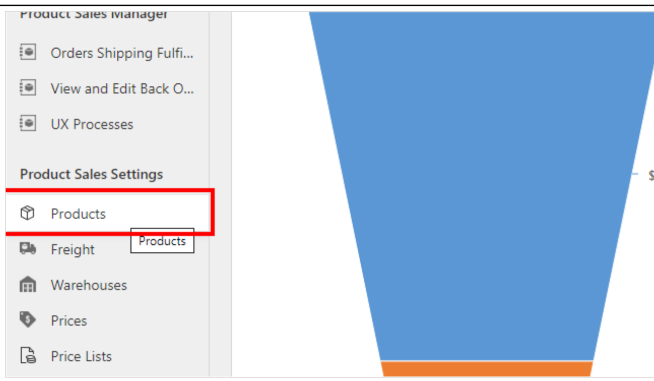
Click on the button **My Work**



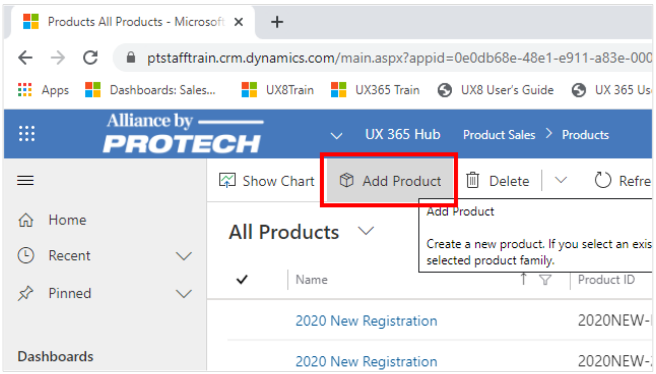
Click on the item **Product Sales**



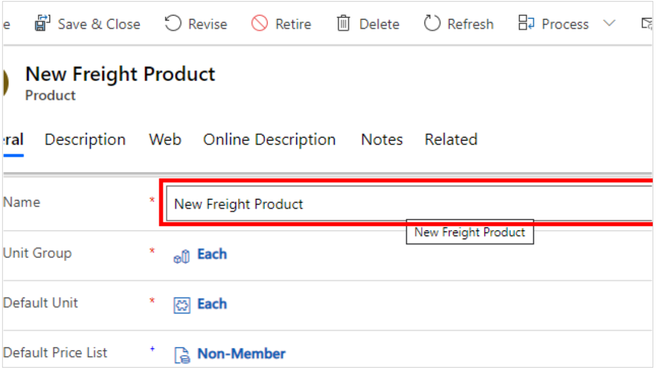
Click on the item **Products**



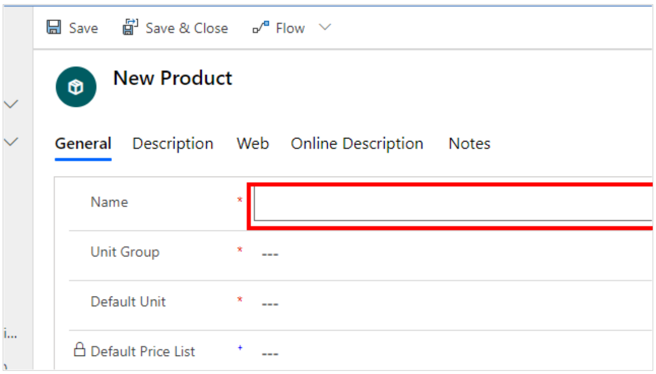
Click on the menu item **Add Product**



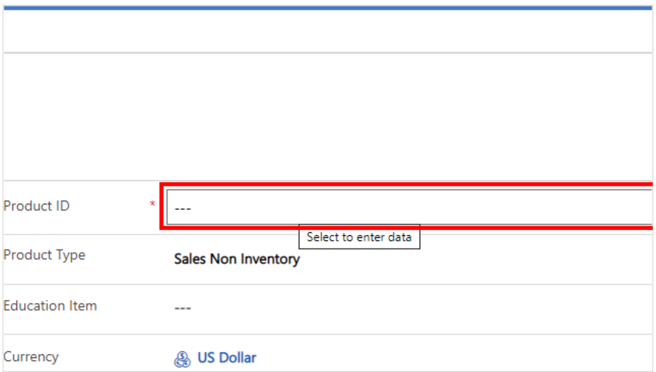
Click on the text field **Name**



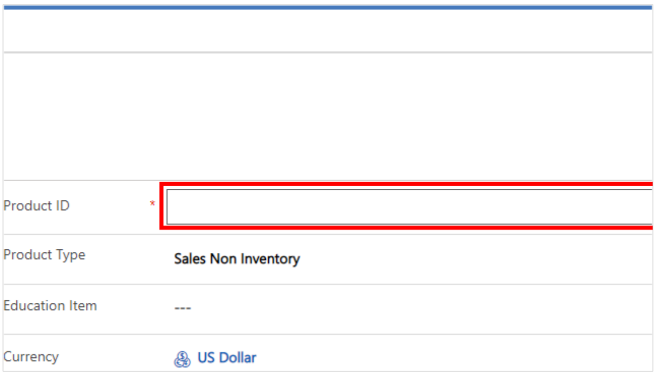
Enter **Name**.



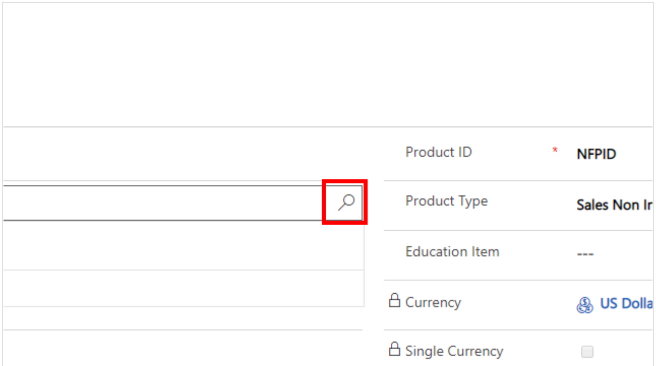
Click on the text field **Product ID**



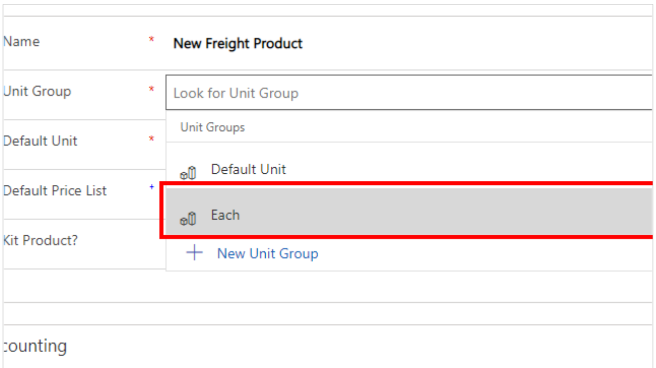
Enter **Product ID**.



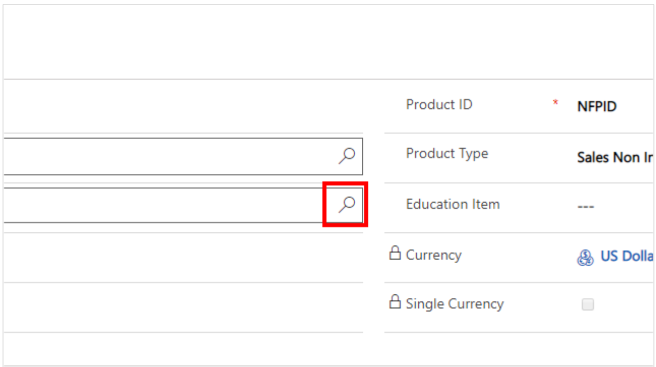
Click on the link **Unit Group**



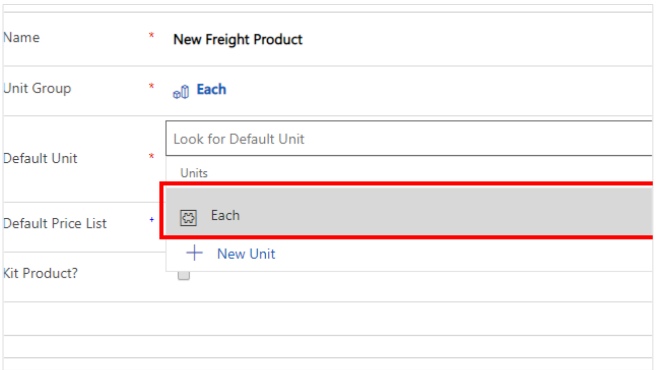
Click on the item **Each**



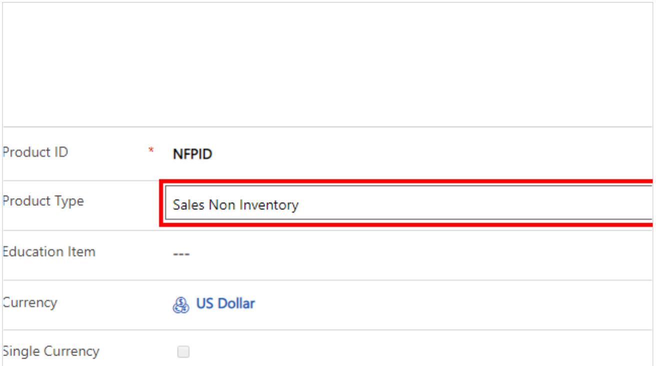
Click on the link **Default Unit**



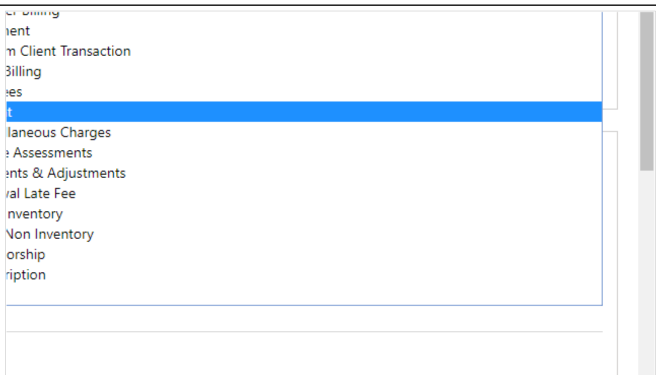
Click on the item **Each**



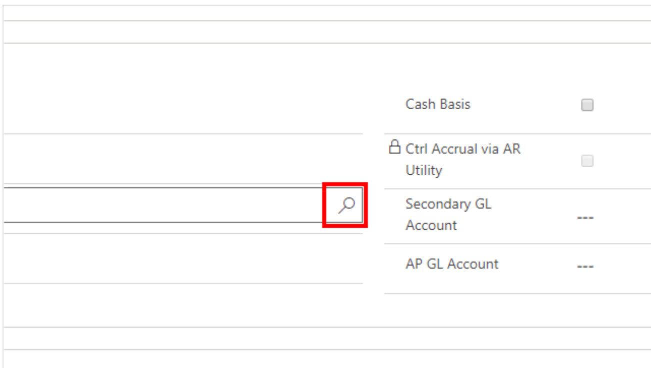
Click on the field **Product Type**



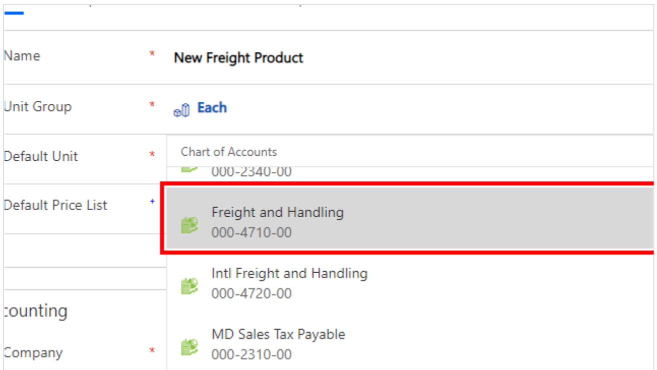
Select the option, Freight



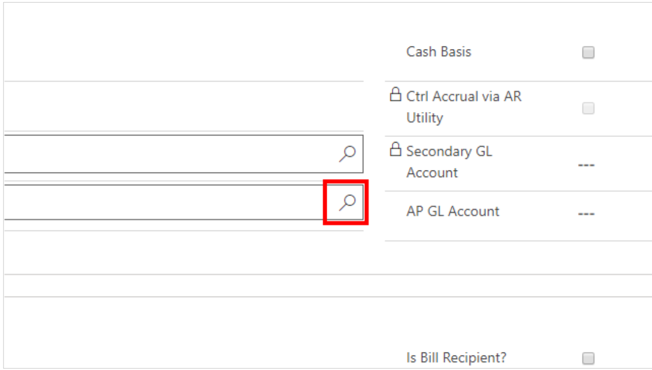
Click on the link **Primary GL Account**



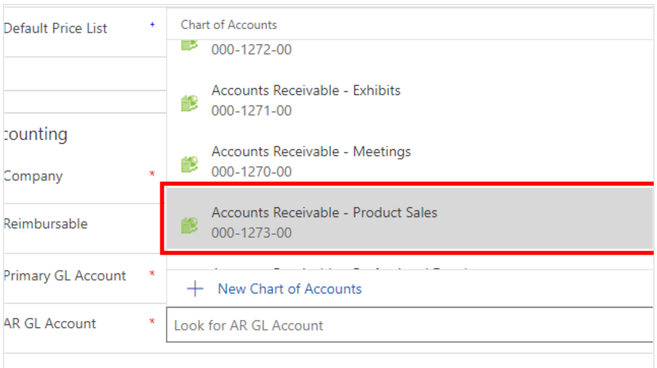
Select your Primary GL Account



Click on the link **AR GL Account**

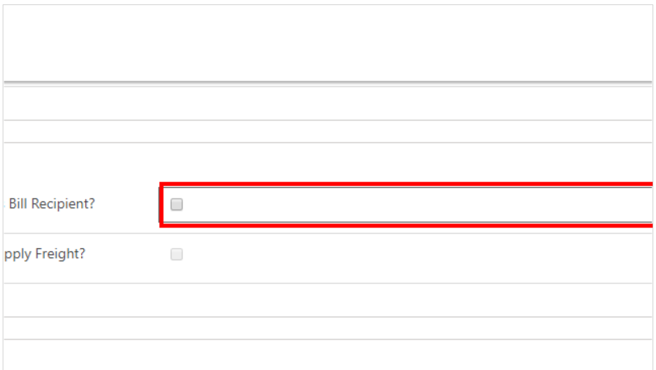


Select your AR GL Account

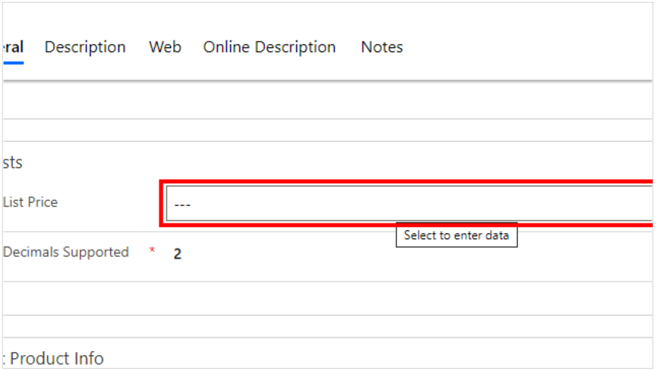


Move the mouse to the field **Taxable**
If shipping charges are taxable, mark the Taxable checkbox. Otherwise, leave this box unmarked. If this option is checked, and the tax rate 'Freight Taxable' = True, UX 365 calculates tax on shipping charges when the Ship To State field contains a State with sales taxes.

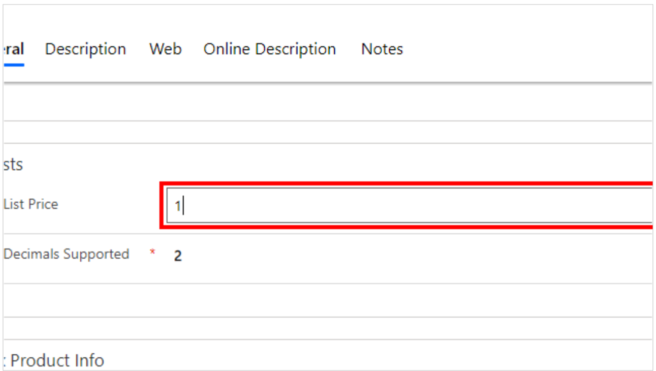
Move the mouse to the field **Is Bill Recipient?**
If you are creating a Bill Recipient freight product to charge a flat fee for using the recipient's freight carrier account for shipping the product, mark this checkbox ☐. For all other freight products where charges are calculated by UX 365 based on the shipment value or shipment weight, leave this checkbox unmarked.



Click on the text field **List Price**

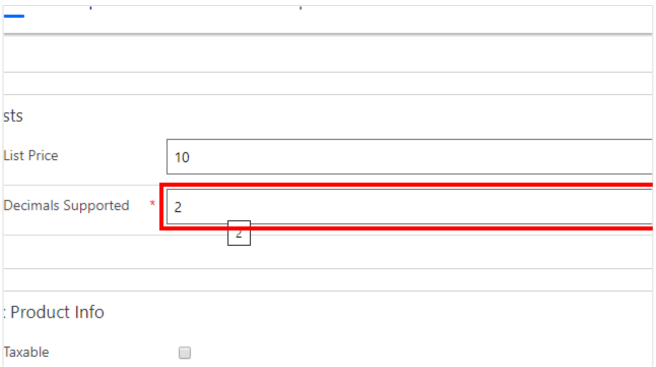


Enter **the List Price amount**.

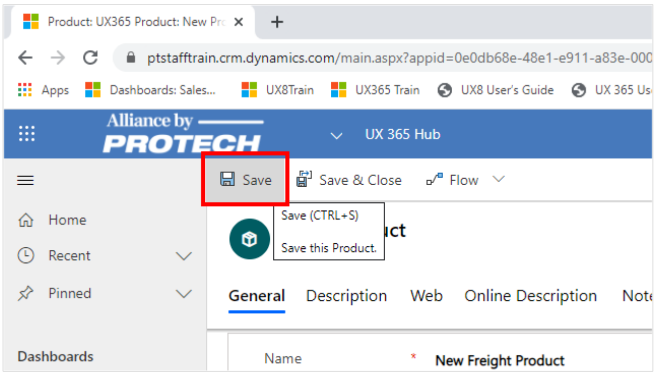


The List Price is the amount entered here will be the amount used for all system-created price records.

Move the mouse to the text field **Decimals Supported**

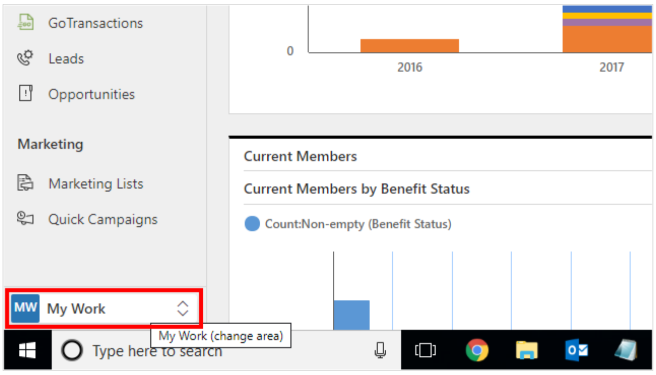


Click on the menu item **Save (CTRL+S)**

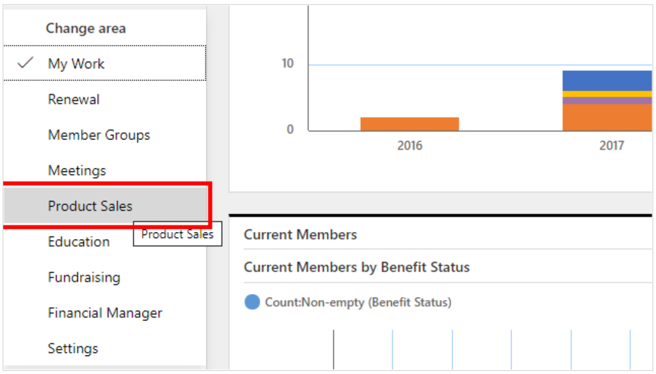


7.7. Creating Product Prices

Click on the button My Work

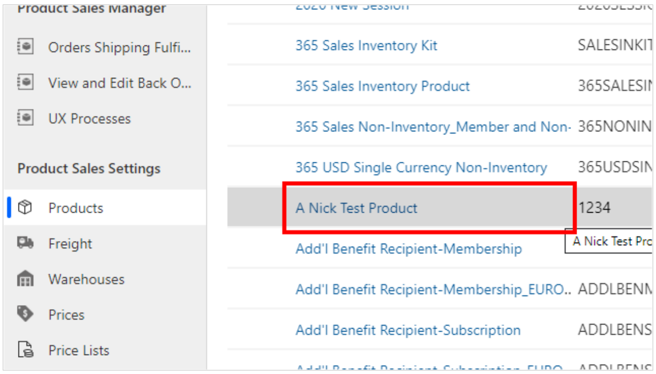


Click on the item **Product Sales**

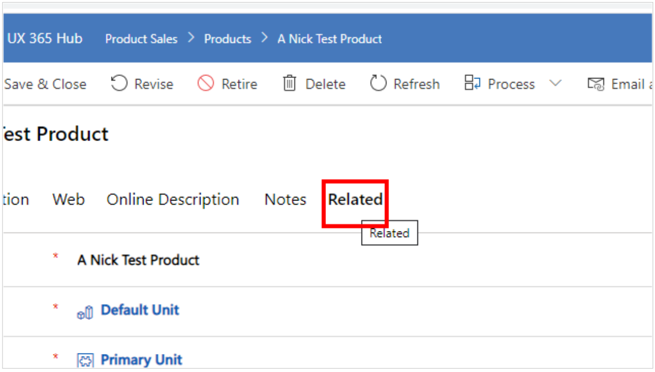


Click on the item **Products**

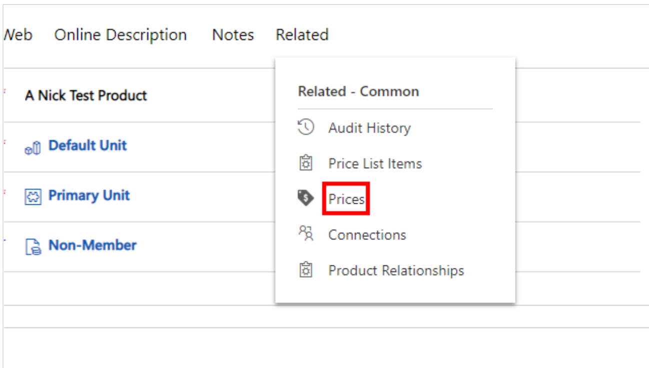
Double click on the Product your would like to create a price for.



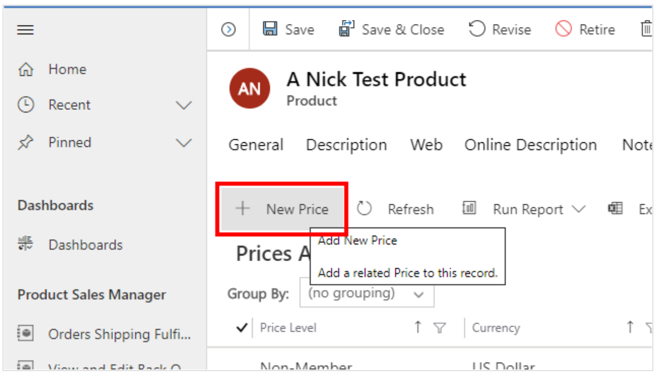
Click on the item **Related**



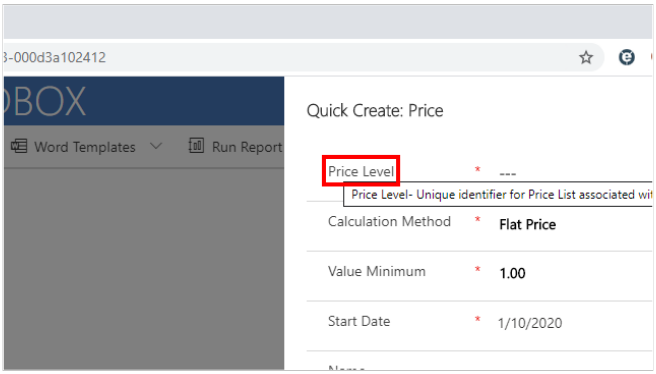
Click on the menu item **Prices**



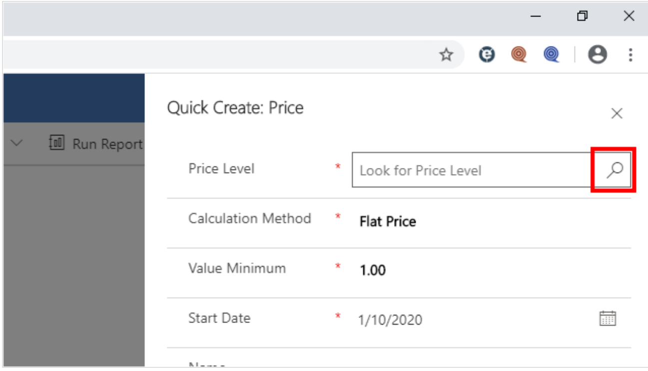
Click on the menu item **Add New Price**



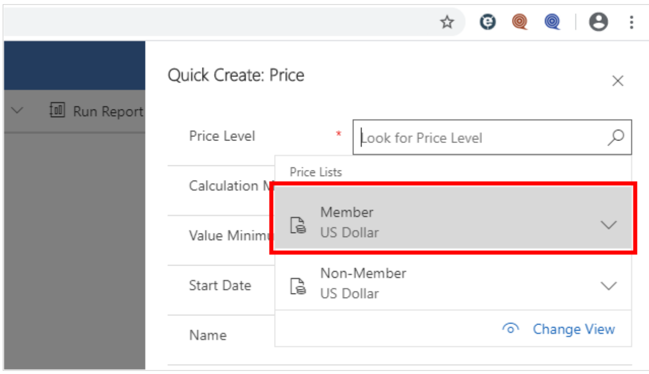
Price Level- Click the Lookup button to select the price level for this price record.



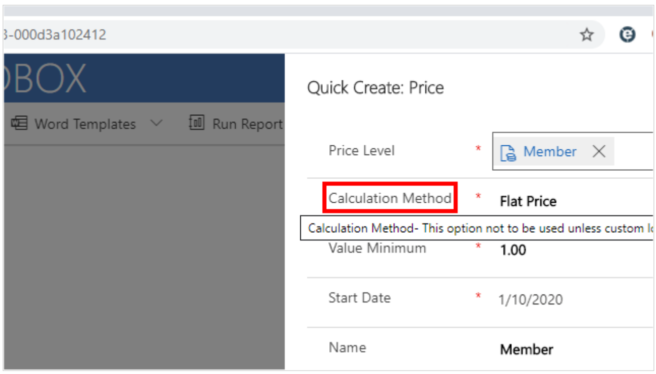
Click on the link **Price Level**



Select the Price Level you would like to create for this price record.

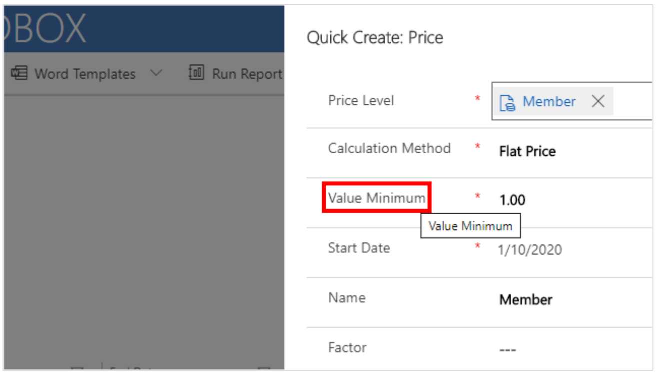


Calculation Method – Select the price calculation method for this product: Flat Rate or Percentage.

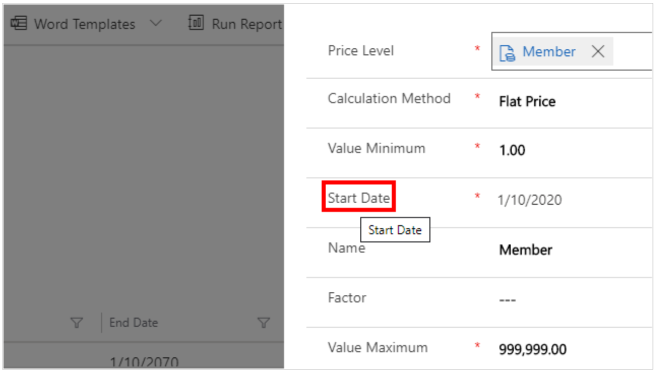


Select Flat Rate if the price is a flat amount. Select Percent to calculate the price as a percentage of the List Price entered in the product setup General section. Both calculation methods apply pricing to the product.

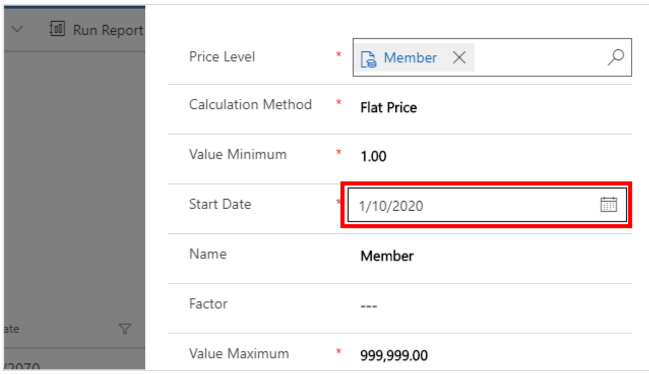
Value Minimum – Enter the lowest quantity for which this price record applies. The minimum acceptable value is 1.



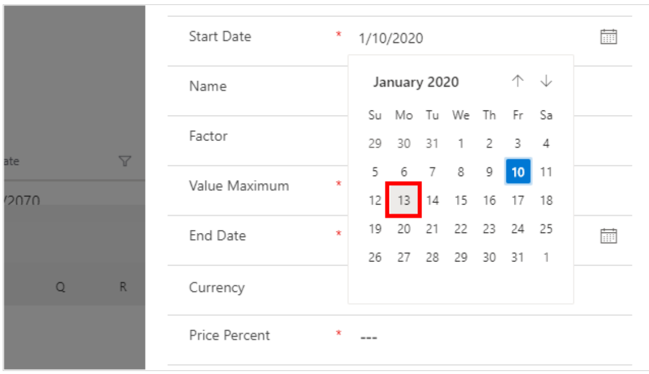
Start Date – Enter the starting date for which this price record applies. During transaction processing, this date is compared to the transaction date.



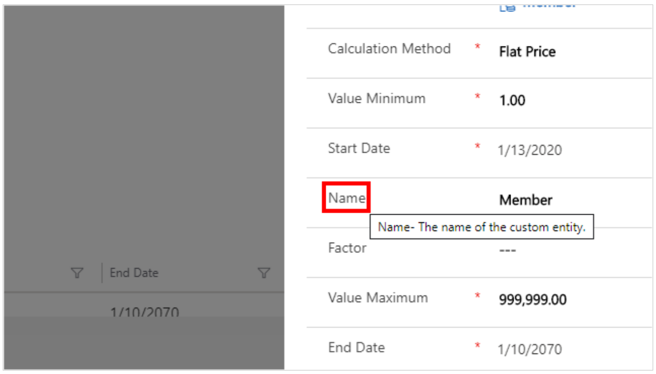
Click on the field **Start Date**



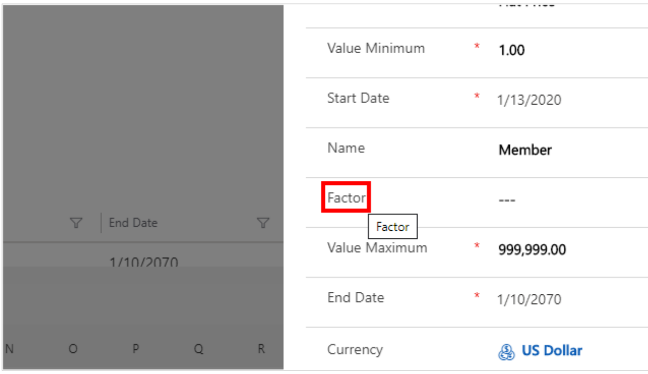
Select your preferred start date



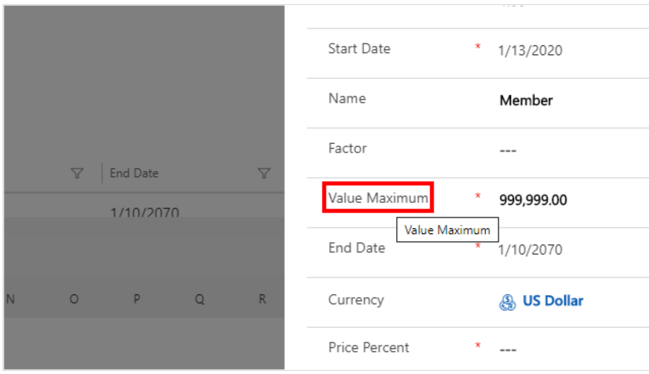
Name – Defaults to the name of the selected Price Level record.



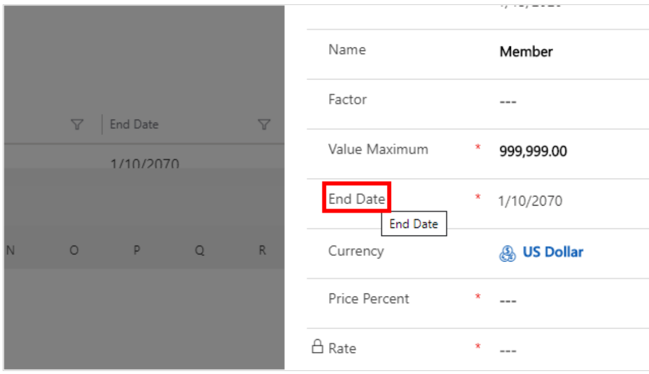
Factor – Leave this field blank. It does not apply to product sales price records.



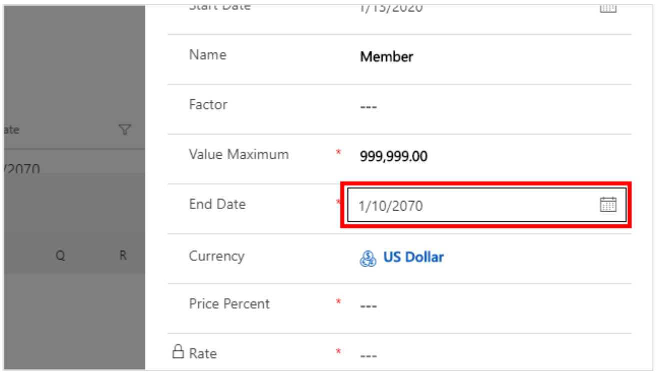
Value Maximum – Enter the highest quantity for which this price record applies.



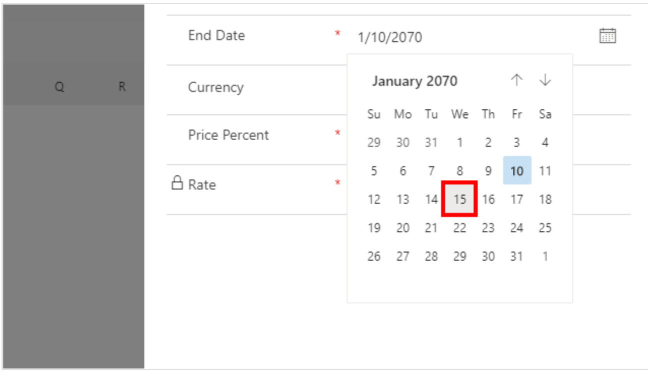
End Date – Enter the ending date for which this Prices record applies. During transaction processing, this date is compared to the transaction date.



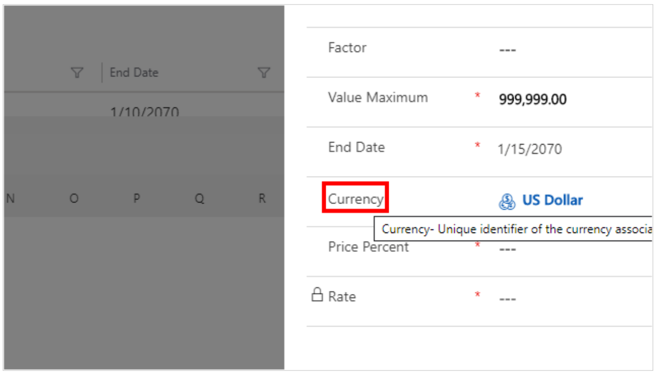
Click on the field **End Date**



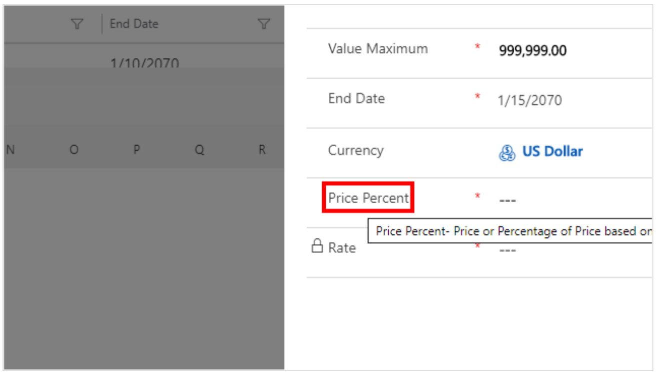
Select your preferred end date.



Currency – Defaults from the product setup currency.

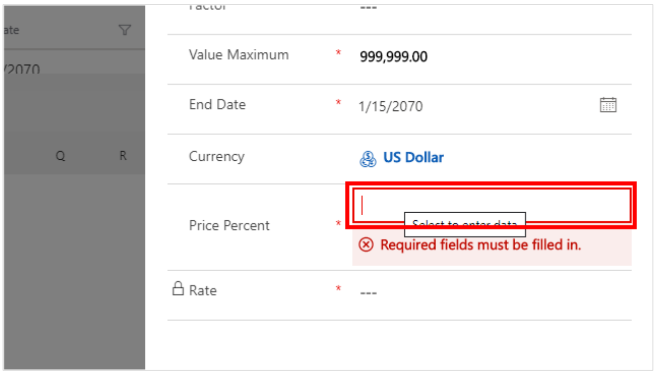


Price and Percent of List Price – Enter the price or the percentage to multiply by the list price for this item.

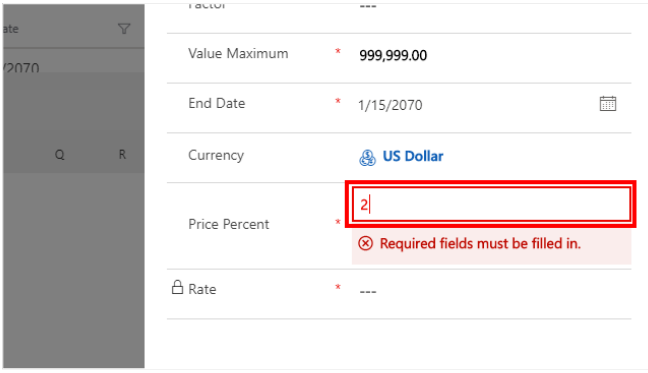


- If the Calculation Method for this price record is Flat Rate, enter the price of the product during the date range and for the value range set for this price record. For example, if you want to charge a flat rate of $100.00, enter 100.00 in this field. -If the Calculation Method for this price record is Percentage, enter the percentage that will multiplied by the List Price entered on the Product record. For example, if you want to charge 30% of the List Price, enter 30.00. If the list price is $100.00, the price returned will be $30.00. If you want to charge 150% of the list price, enter 150.00. If the list price is $100.00, the price returned will be $150.00.

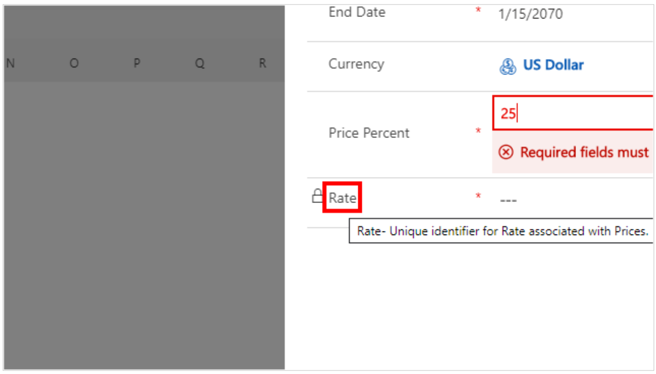
Click on the text field **Price Percent**



Enter the price or percent

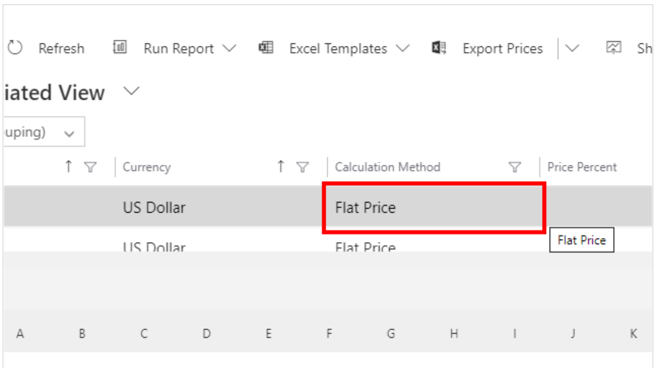


Rate – Leave this field blank. It is not used for sales order products.

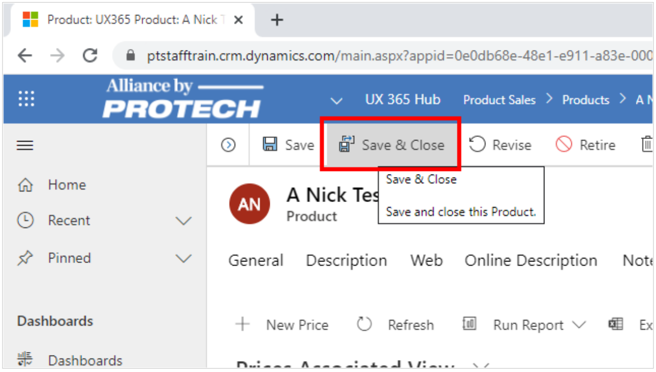


Click on the button **Save and Close**

Verify that the price records you create do not conflict with one another.



Click on the menu item **Save & Close**

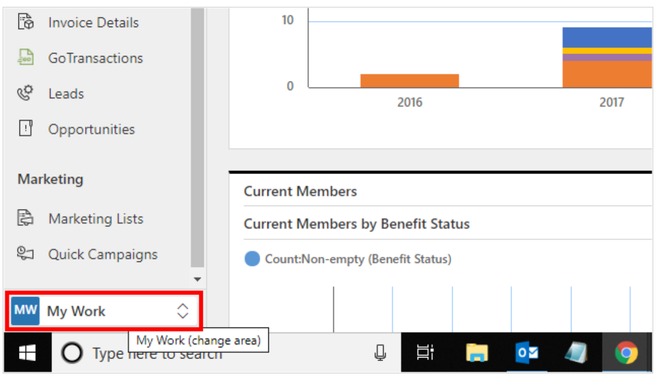


7.8. Processing Back Ordered Invoices Flagged for Fulfillment

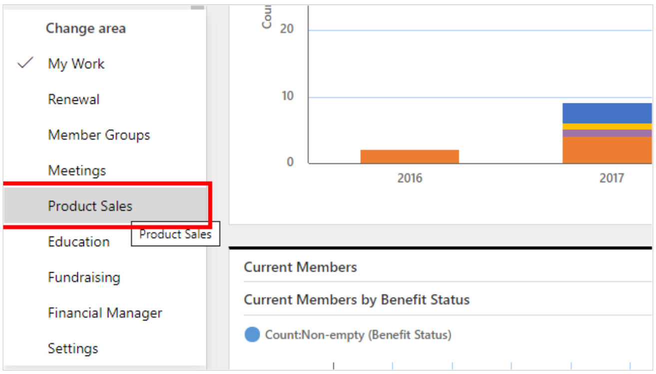
7.8.1. Flagging back-ordered invoices for fulfillment

When you have replenished your inventory and updated your product records with the new quantity on hand information, you can begin the processing back-ordered invoices. The first step in this process is to flag the invoices that you want to fulfill. You must close and post all product sales batches and replenish inventory before you begin processing back orders. You can use the UX Backorder Report to view back-ordered invoices. Because the order processing system does not differentiate between back-ordered invoices that are flagged to fulfill and those that are flagged to cancel, we recommend that you complete the back-ordered invoice fulfillment process separately from the back-ordered invoice cancellation process. Flag all of the back-ordered invoices that you want to fulfill, and then process them. Then you can flag and process the back-ordered invoices that you want to cancel.

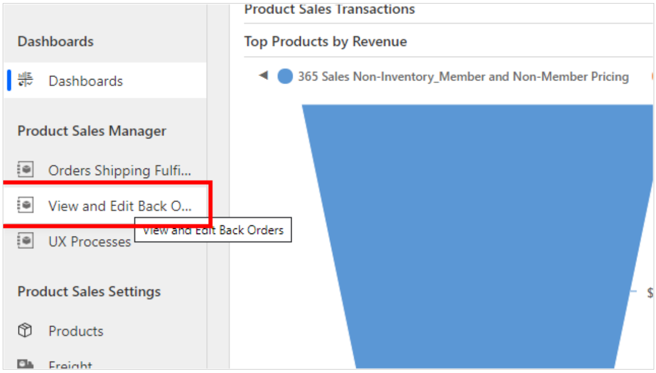
Click on the button **My Work (change area)**



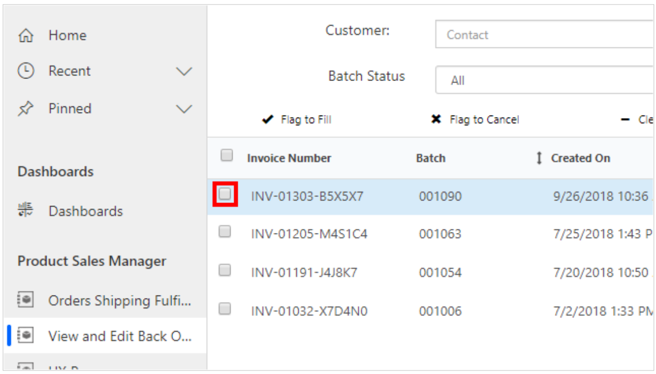
Click on the item **Product Sales**



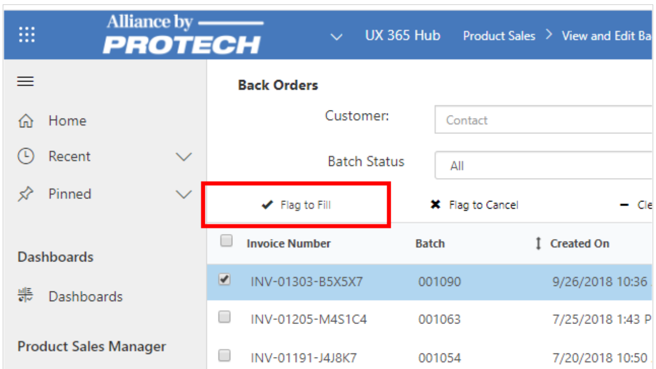
Click on the item **View and Edit Back Orders**



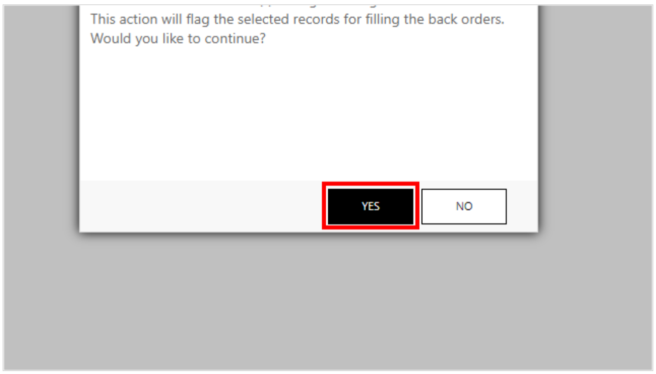
Click on the checkbox on invoice(s) to fill.



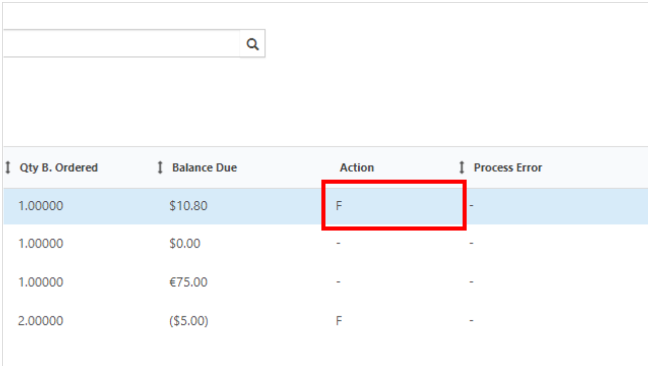
Click on **Flag to Fill**



Click on the button **YES**



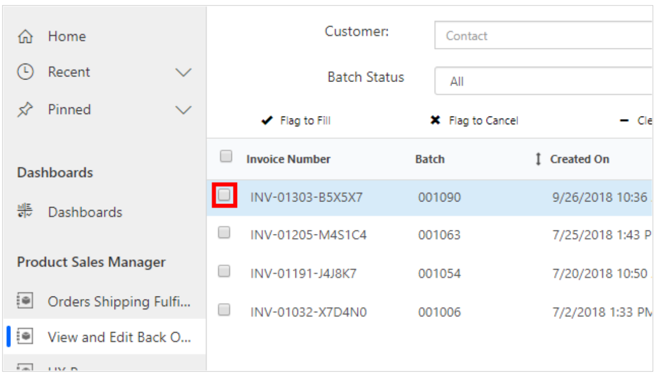
The system adds a flag to the invoice indicating that this record is now eligible for processing. Note that an F appears in the Action column for each flagged record in the Back Orders list.



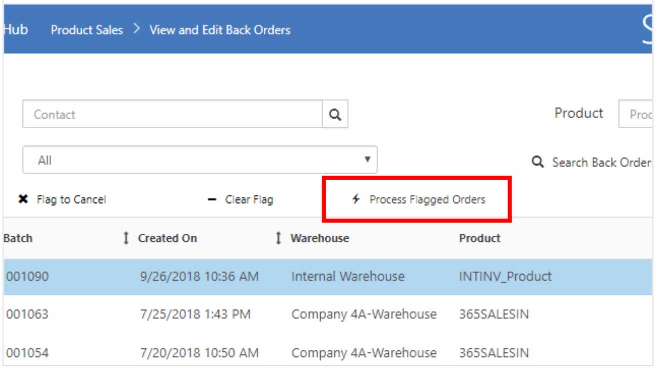
7.8.2. Processing back-ordered invoices flagged for fulfillment

After flagging the back-ordered invoices that you want to fulfill, you must launch the actual fulfillment process, which creates a new invoice for each flagged back-ordered invoice. The new invoice will include a product sales line item for each back-ordered line item on the original invoice. You can launch the fulfillment process from two locations: 1. By clicking the 'Process Flagged Orders' button on the toolbar in the View Back Orders list. 2. By returning to the Product Sales Manager side navigation menu and selecting UX Processes > Back Order Processing. The process is the same for both. The following procedure shows the steps beginning from the View Back Orders list. The order processing system does not differentiate between back-ordered invoices that are flagged to fulfill and those that are flagged to cancel. If you have flagged some invoices to fulfill and some to cancel, they will both be processed. To maintain better control, Protech recommends that you flag and process each type of invoice separately: Flag invoices to fulfill and then process them, and then do the same for invoices that you want to cancel. Use the column sort functionality on the Action column to view all flagged invoices to make sure there are no invoices flagged to cancel before starting this process. Before you begin this process, be sure you have created a batch for the new invoices that will be created, closed, and posted.

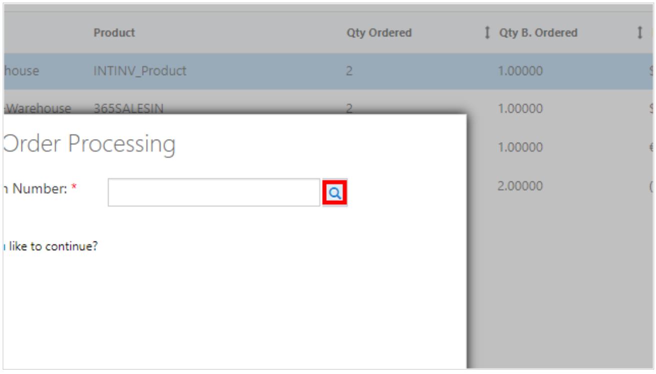
Click on the checkbox on invoice(s) to flag for fullfillment.



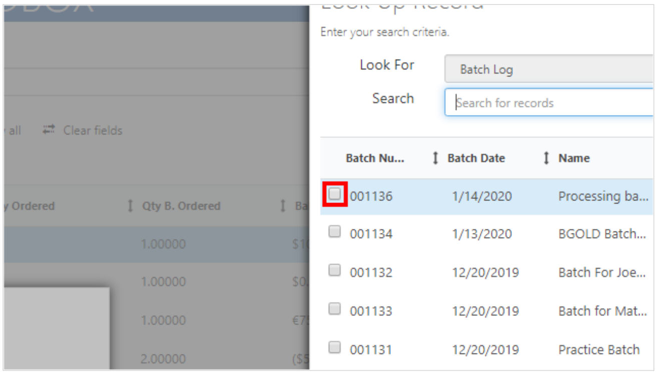
Click on **Process Flagged Orders**



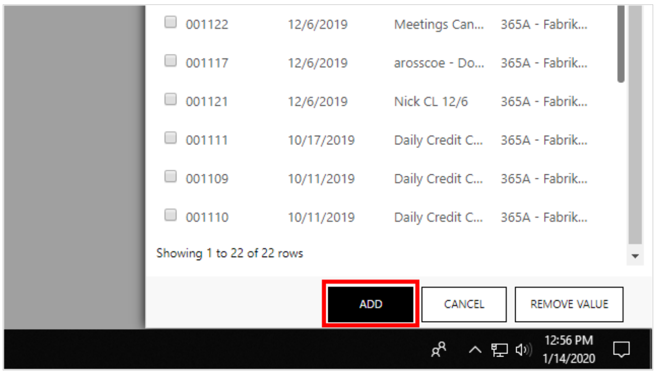
Click the Lookup button on the Batch Number field and select the batch you created for this process



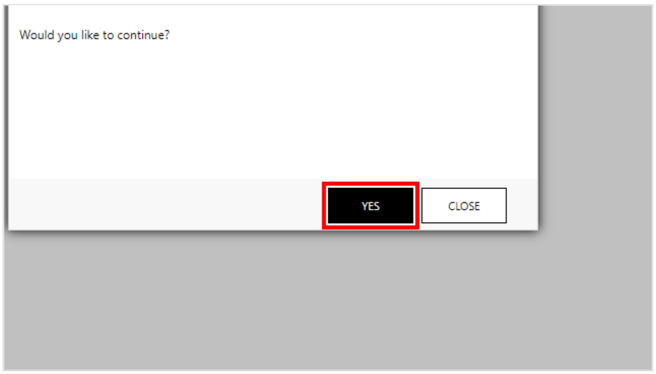
Select Batch.



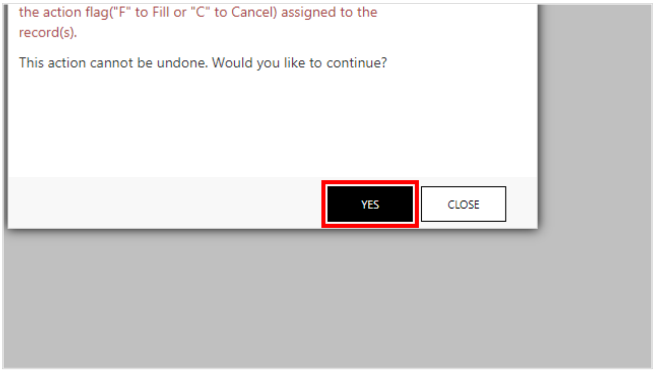
Click on the button **ADD**



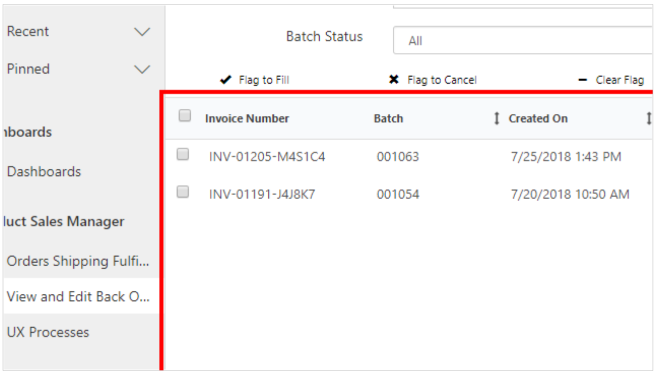
Click on the button **YES**



A confirmation message appears. If the number of records selected matches the number of records that you flagged, click Yes to process back orders.
If there are any quantity shortages found during this process, a message will appear in the Process Error column of the flagged item. If this occurs, the invoices that included these items will not be processed and will remain flagged for processing.



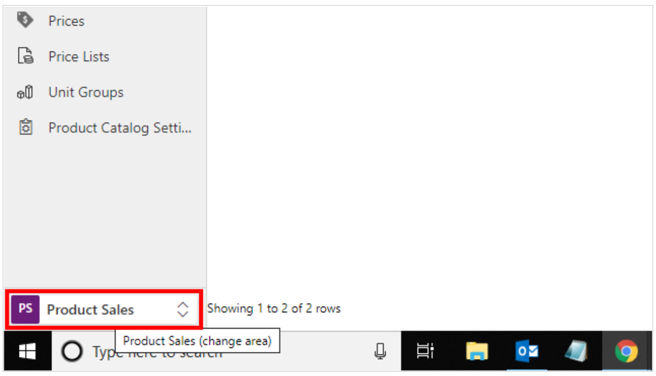
The system removes the processed invoices from the Back Orders list (you may need to refresh) and creates a new invoice for each back-ordered invoice. If the original backordered invoice had a credit balance, it will be transferred to the fulfillment invoice.



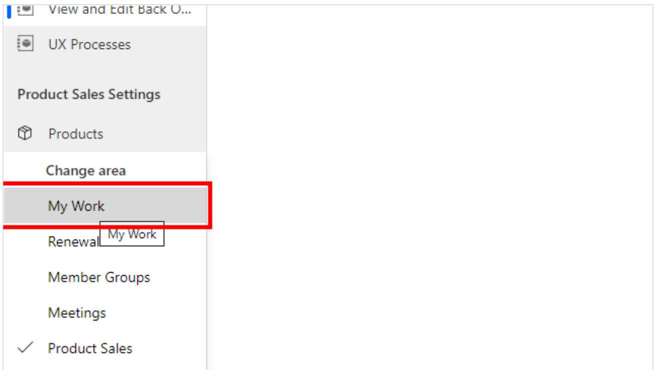
7.8.3. Verifying the new invoices created during back order processing

After processing back orders for fulfillment, we recommend that you review the new invoices that were created to verify that the product sales and payment amounts are correct. You can use the UX Backorder Fulfilled Invoices report to identify these invoices or you can verify the invoice in UX 365.

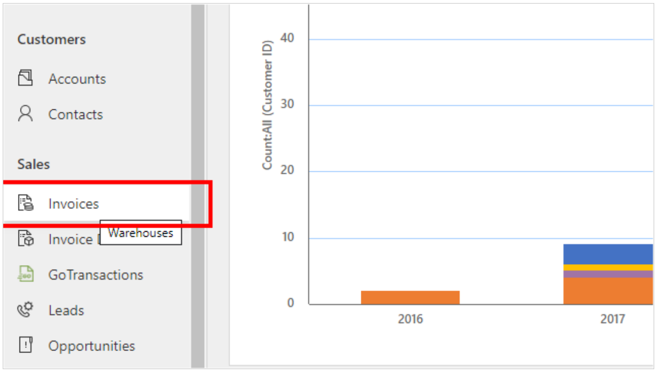
Click on the button **Product Sales (change area)**



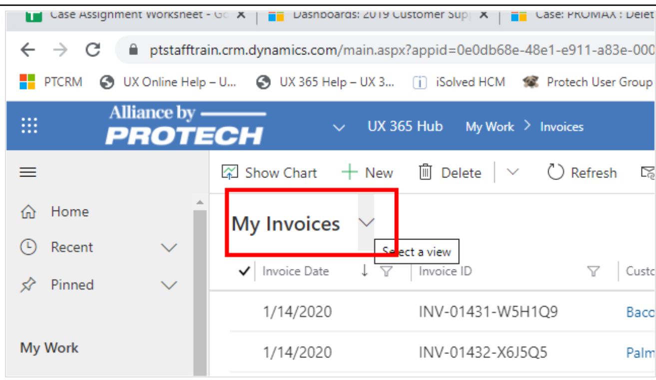
Click on the item **My Work**



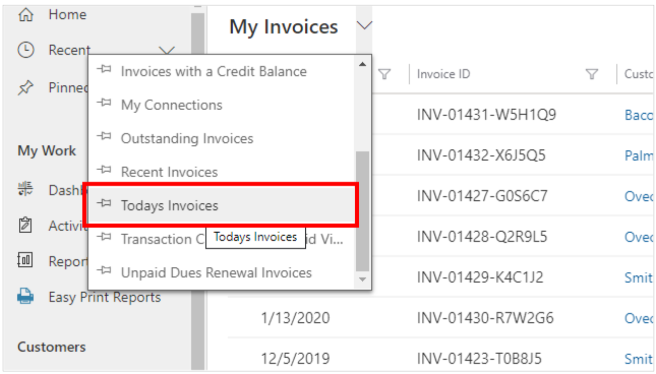
Click on the item Invoices



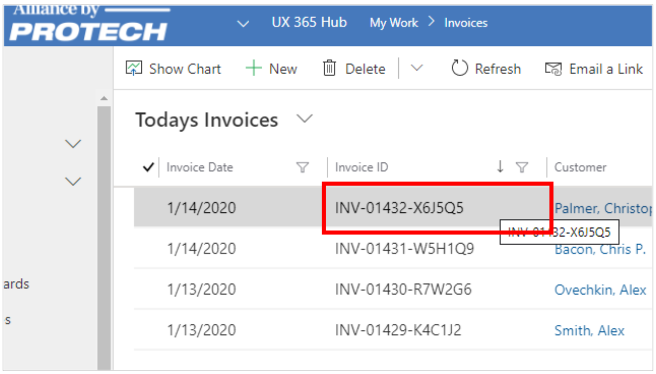
Click on **Select a view**



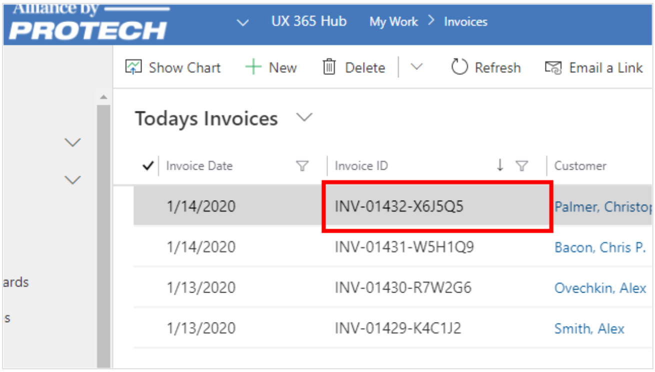
Click on the item **Todays Invoices**



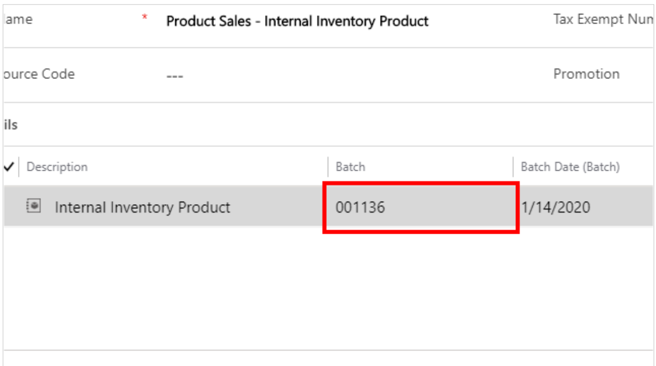
The newly created invoices will appear in the list of invoices created on that day.



Double click on the cell **Invoice ID**

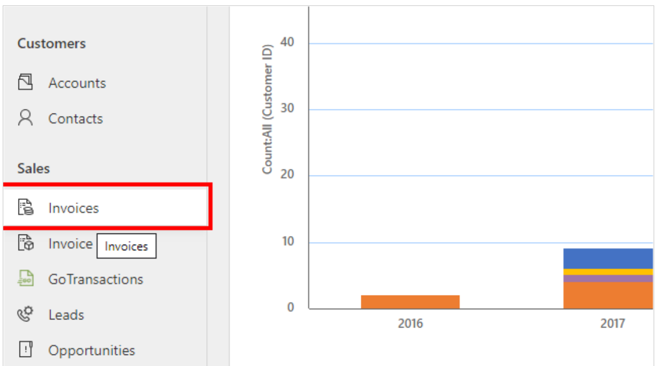


Verify the product sales and/or payment line items. Depending upon the payment entered in the original back-ordered invoice, the system automatically creates the payment for the new invoice.
Cash or check payments on the back-ordered invoice: The system automatically transfers the credit balance on the original invoice with a “Transfer From” payment and applies it to the new invoice with a “Transfer To” payment. Credit card payments on a partially back-ordered invoice: The system automatically creates a new credit card payment transaction in the new invoice and processes it for authorization. Credit card payments on a fully back-ordered invoice: If you have processed a fully back-ordered invoice that the customer wanted a credit card payment applied to, you should have held the credit card information in a secure location.

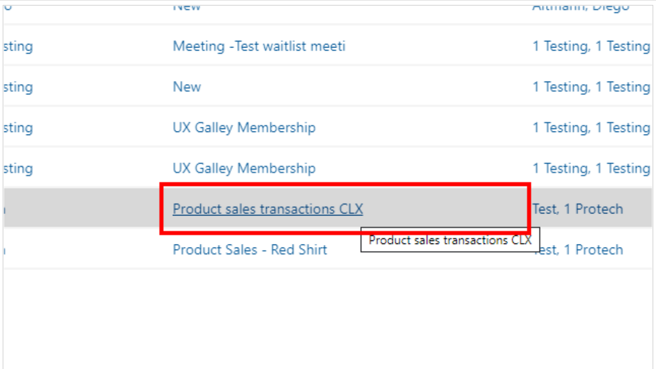


7.9. Product Sales Transactions

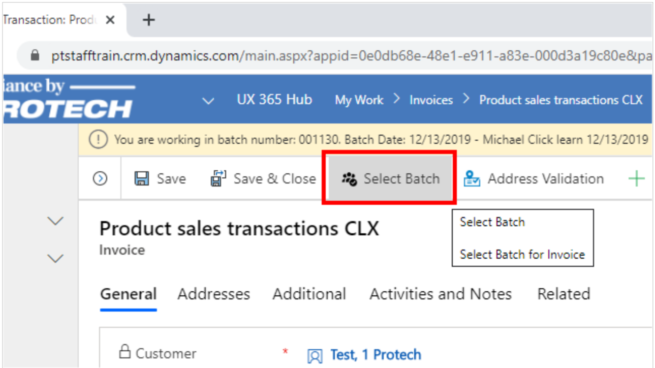
To add a product transaction, first navigate to My Work Area, Sales, Invoices.



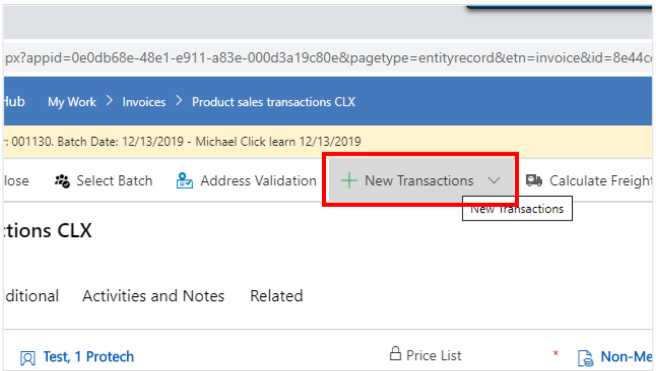
Locate the invoice you would like to add a product into, or create a new one by clicking on the New button in the menu header



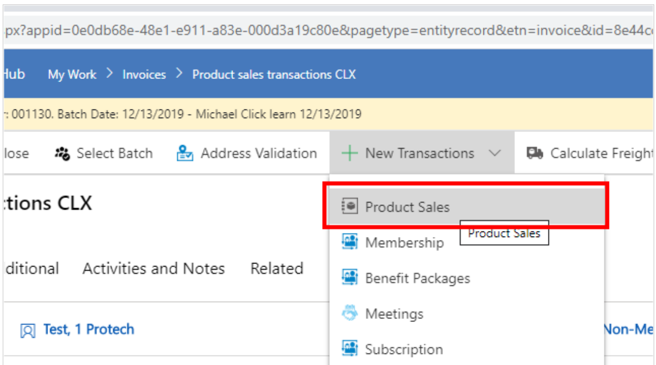
Be sure to select a batch if you are not already working in one.



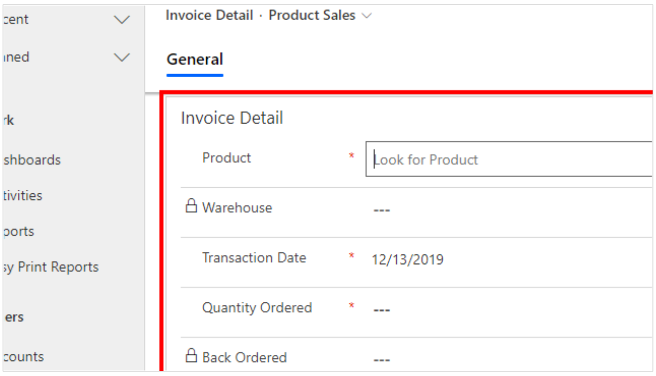
Click on the menu item **New Transactions**



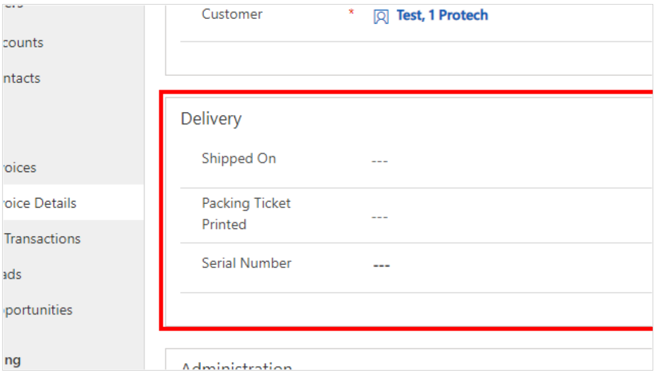
When the dropdown menu appears, click product sales.



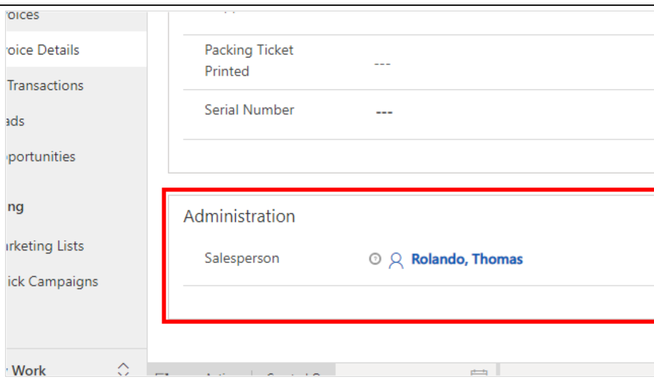
This is the invoice detail section where you can edit the basic info of the product sale



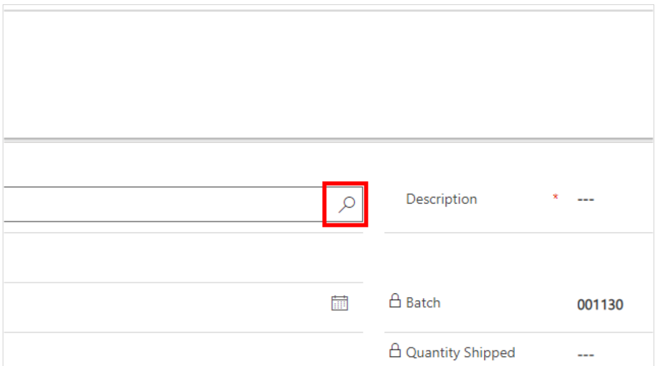
This section contains the delivery info such as shipped on date and whether or not the packing ticket has been printed.



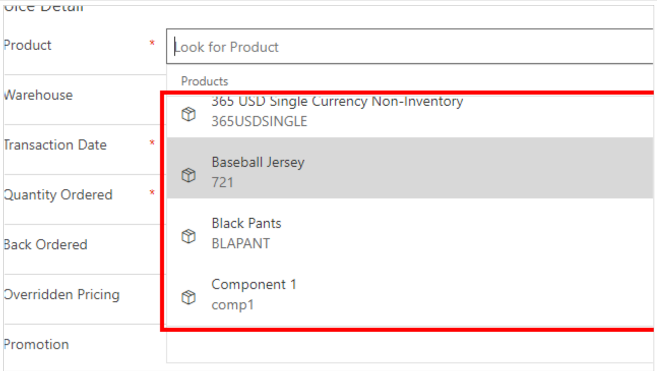
This is the administration section of the invoice detail.



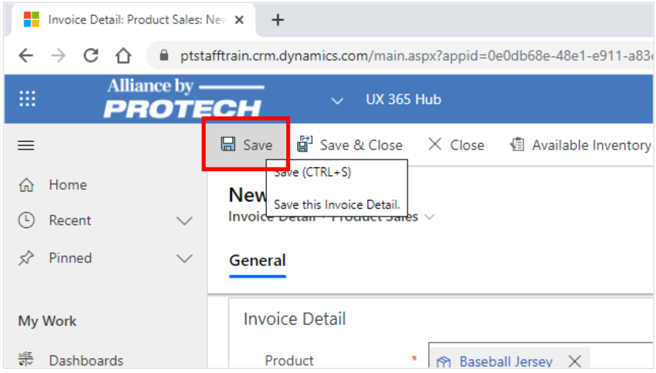
When you are ready to add your product, click on the lookup icon in the product field and select the product you wish to use.



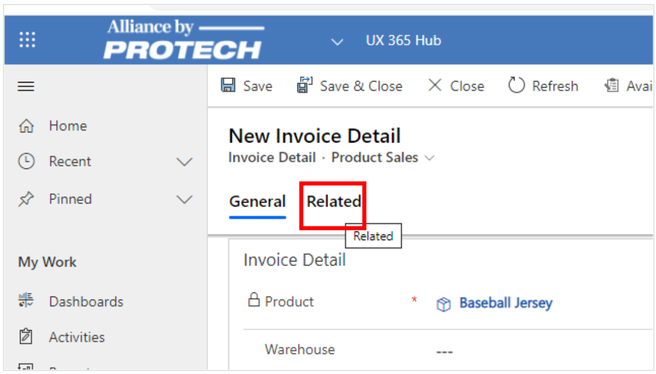
Click on an option from the list



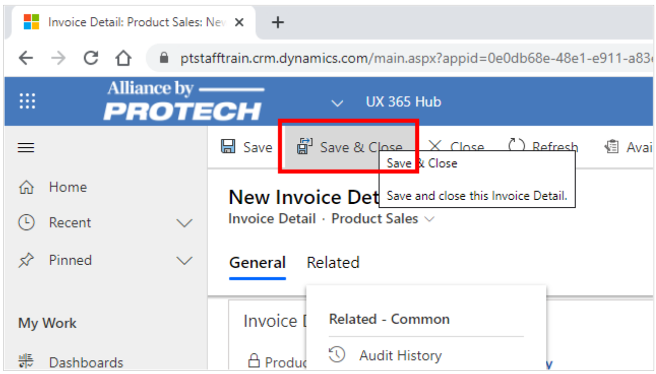
Click on the item save to save work.



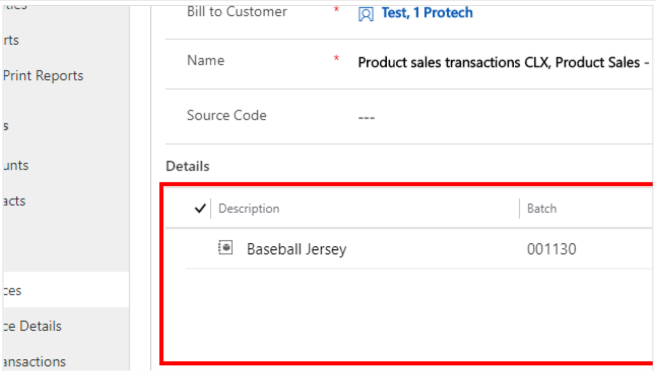
Once saved, a related tab will appear showing all associated records.



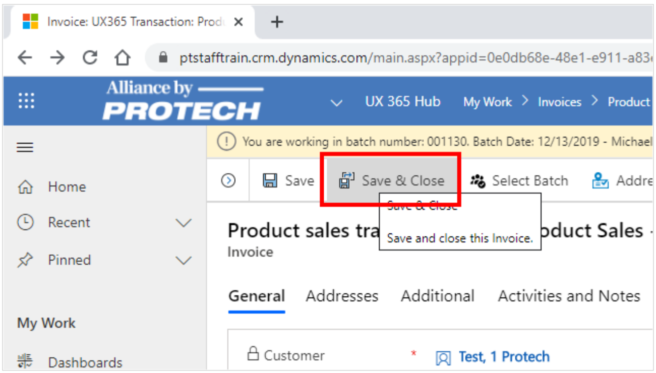
When you are done adding your product, click save and close.



You can now see your product added into the invoice.



Next, apply a payment or click, Save and Close to exit



7.10. Sales Order Fulfillment

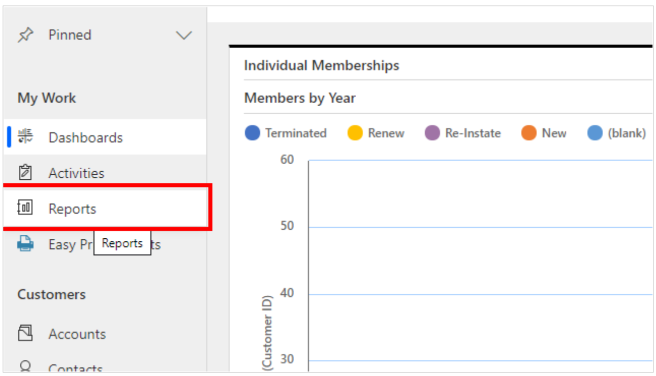
7.10.1. Sales Order Fulfillment

After the sale, UX Online Order Fulfillment processing provides your organization with the ability track the fulfillment of your product sales orders at both the individual invoice level and at a global level, where you can view all product sales invoices awaiting fulfillment.

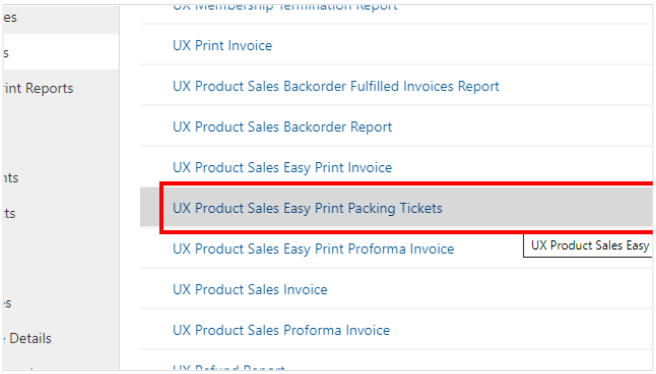
7.10.2. Printing Packing Ticket

The first step in sales order fulfillment is to print packing tickets, which automatically updates the invoice detail line items with the date you printed the ticket and the ticket job number. While your organization might not use packing tickets, this step is required to update the invoice detail line items.

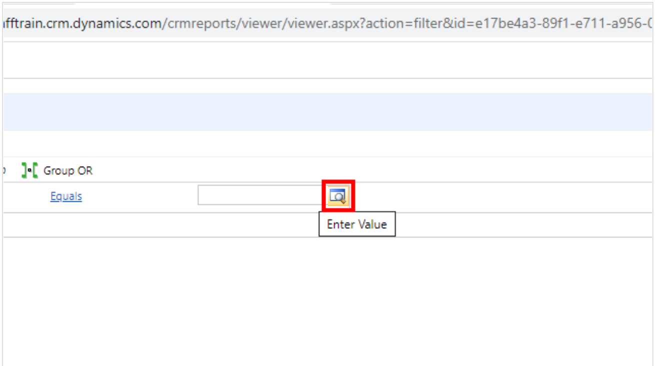
Click on the item **Reports**



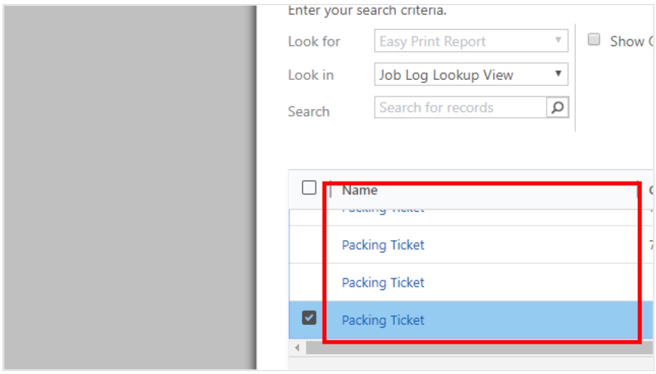
Select UX Product Sales Easy Print Packaging Tickets



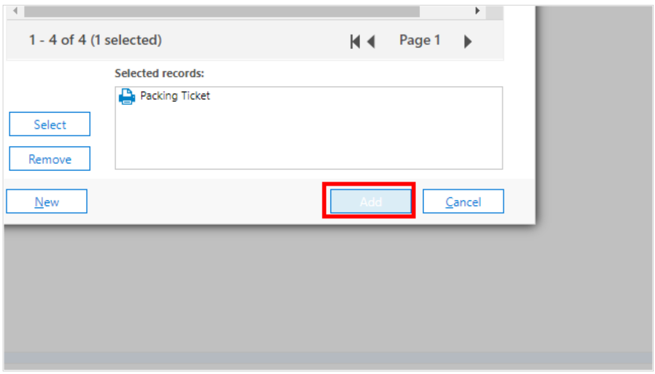
Select the search icon



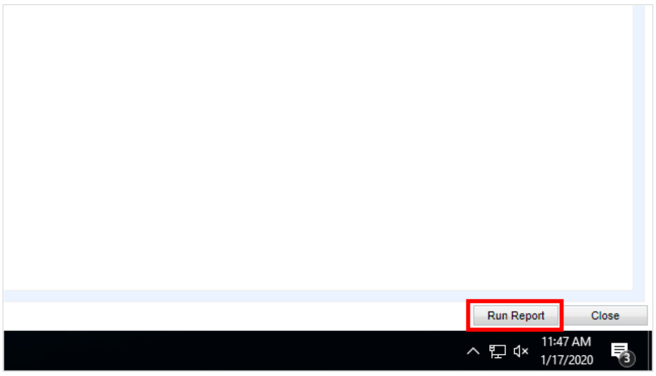
Click the cell you would like to use for the search



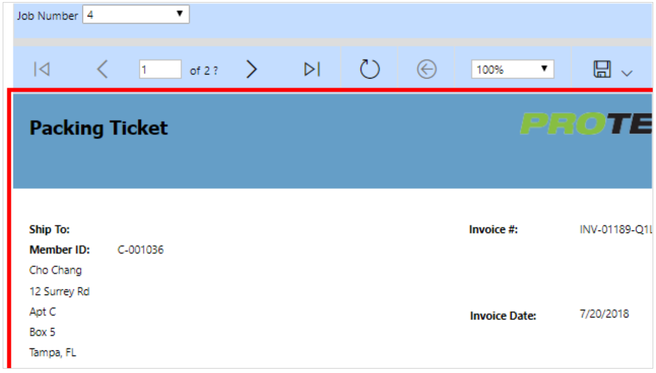
Click on the button **Add**



Click on the button **Run Report**



Export the packing tickets to PDF or Print. Either option is required for UX Online to trigger updates to the appropriate invoices with the system date and packing ticket job number.



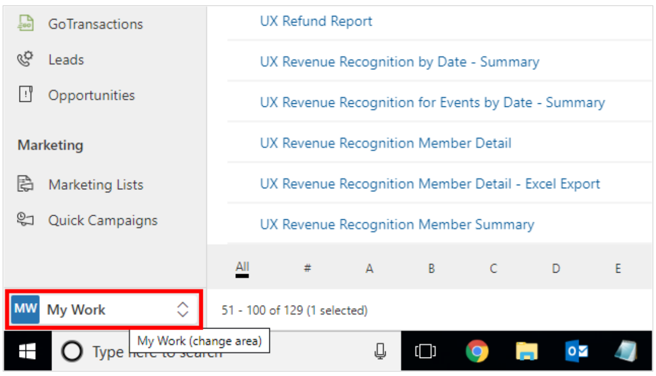
7.10.3. Preparing an Order for Shipping

After printing the UX EasyPrint Packing Tickets report, the next step in fulfilling orders is to prepare the order for shipping and ship the package. This step is not a UX Online activity but internal to your organization based on internal packing and shipping business requirements.

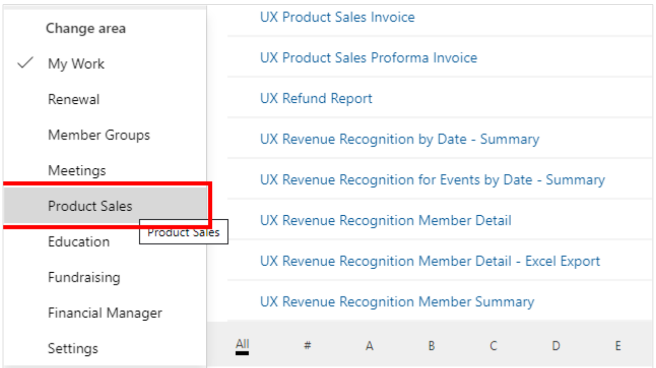
7.10.4. Marking an Order as Shipped

After you have packed and shipped orders, the next step is to mark each order as shipped in UX Online. You can use Orders Shipping Fulfillment View to see which orders have been shipped and which orders are still awaiting fulfillment. Only those orders where the Packing Ticket Printed field was updated by the UX EasyPrint Packing Tickets report will appear on list of orders awaiting fulfillment.

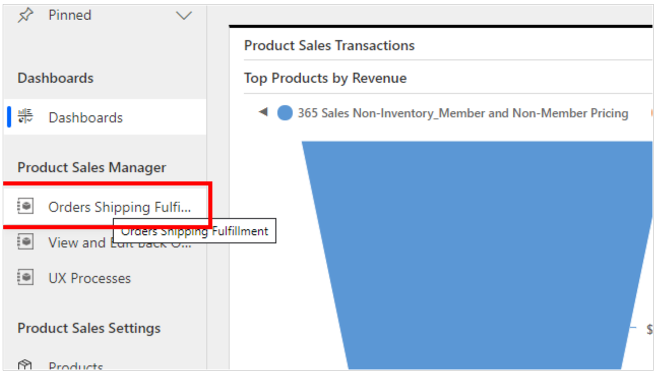
Click on the button My Work



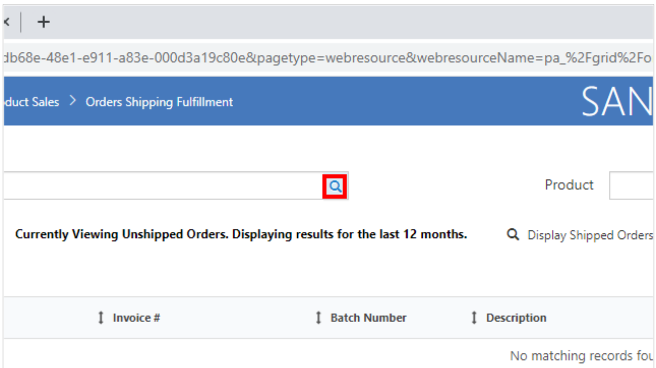
Click on the item **Product Sales**



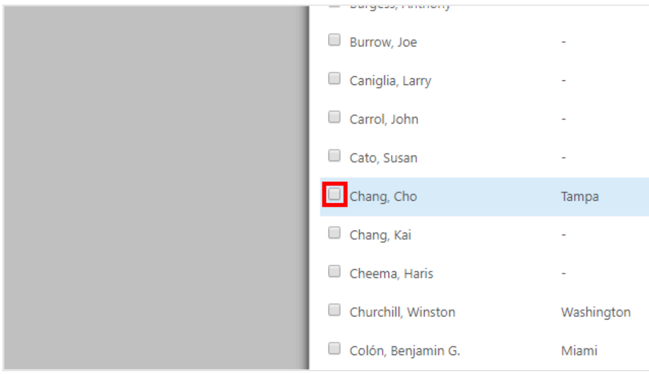
Click on the item **Orders Shipping Fulfillment**



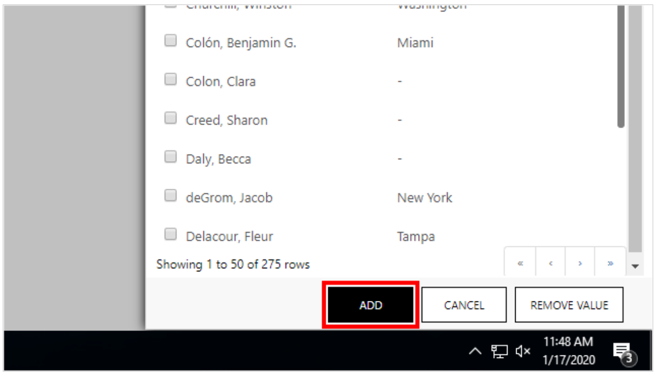
Click on the search icon



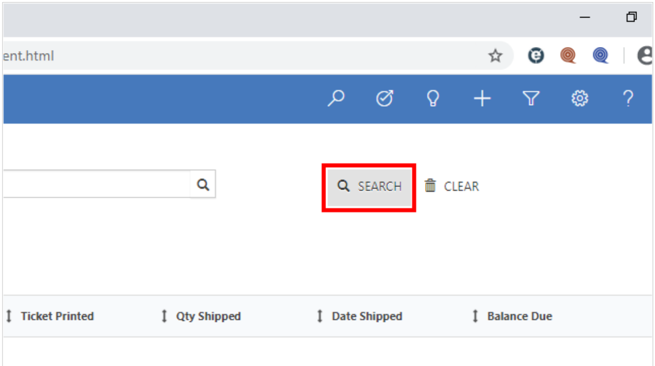
Select the customer to Display their Unshipped Orders



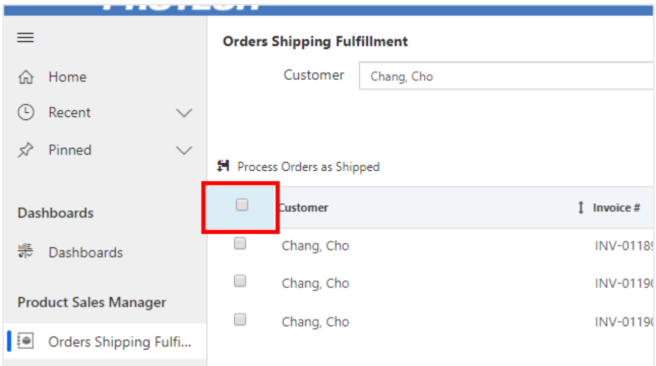
Click on the button Add



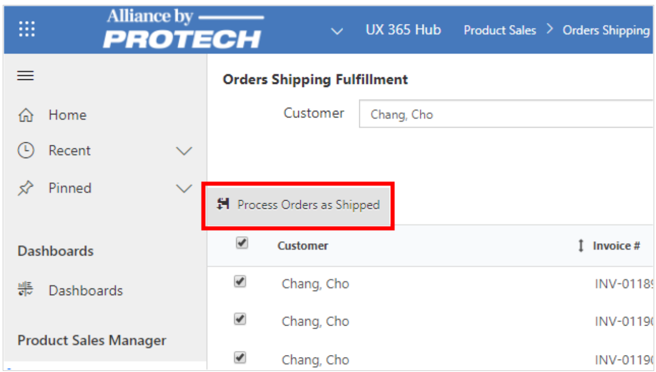
Click on Search



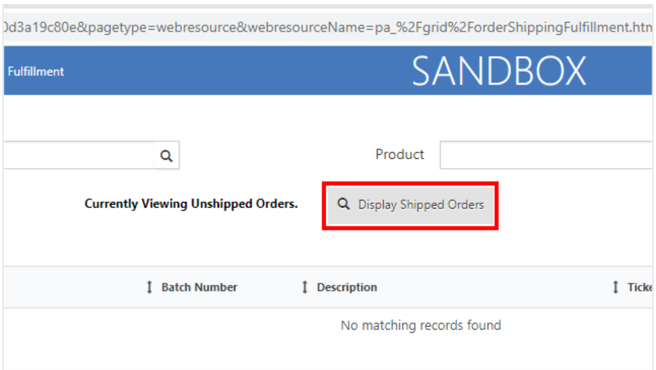
Select which items you would like to Process



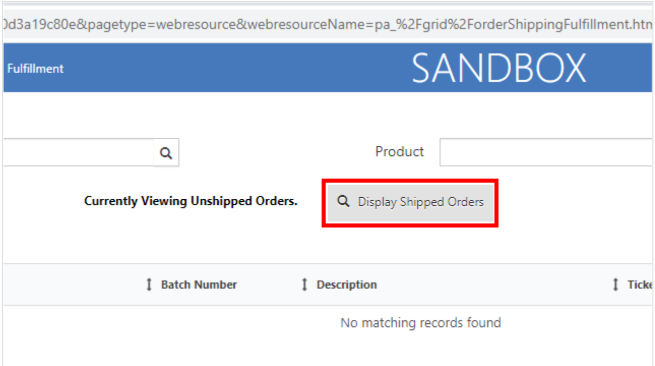
Click on **Process Orders as Shipped**



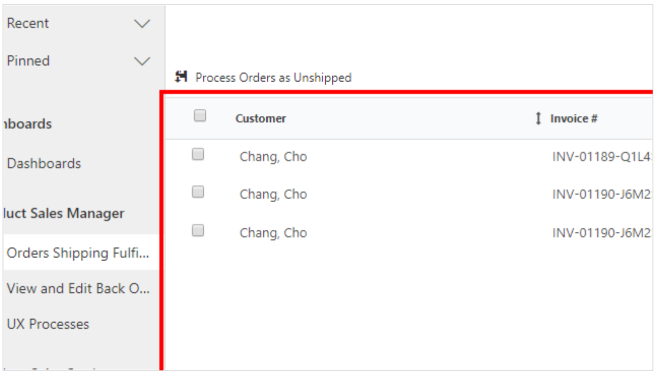
To confirm the results of this process, click Display Shipped Orders to view the list of invoice records that have been processed for shipment. Click the Date Shipped column header to sort the records by date to view your processed records.



Click on **Display Shipped Orders**



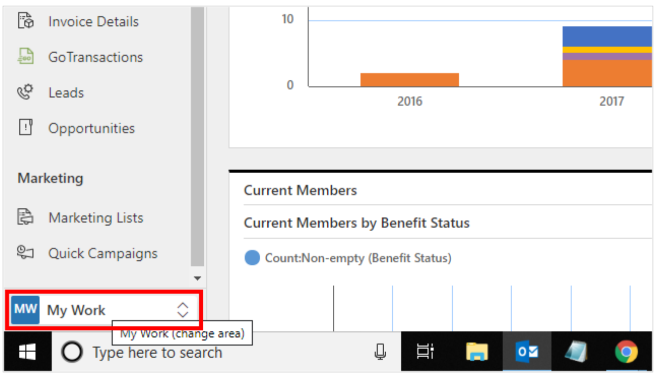
Here you will see your Processed Shipped Orders



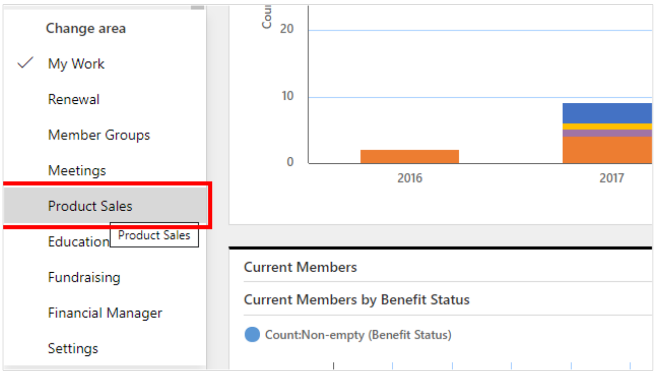
7.11. Warehouse Records

UX 365 uses the relationship between sales inventory products and your warehouse records to keep track of the item quantities available to sales order transactions. You must set up warehouse records in UX 365 in the following circumstances: If you have integrated accounting system inventory control, you can set up as many warehouse records in UX 365 as you have available sites in your accounting system. If you have internal inventory control, UX 365 logic supports a single warehouse record. If you have no inventory control, you do not need to set up warehouse records and you can skip this procedure.

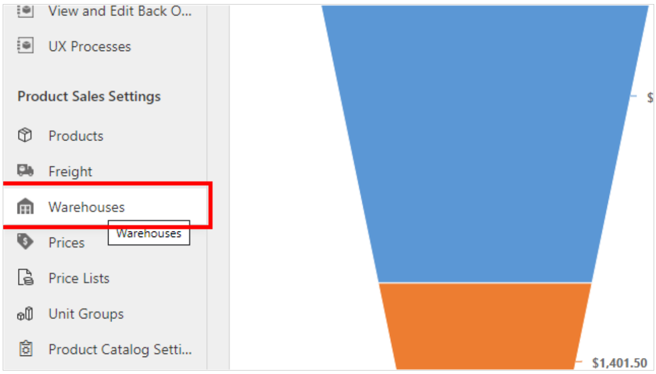
Click on the button **My Work (change area)**



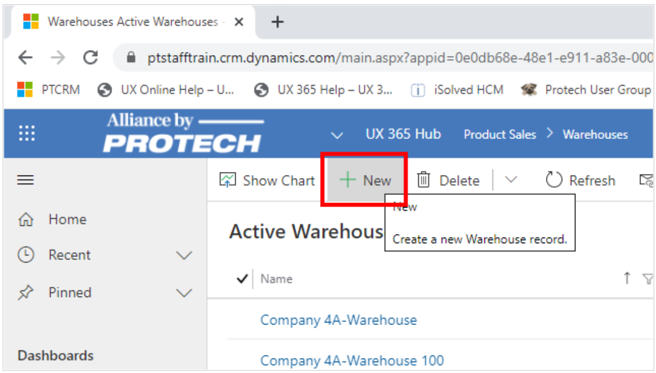
Click on the item **Product Sales**



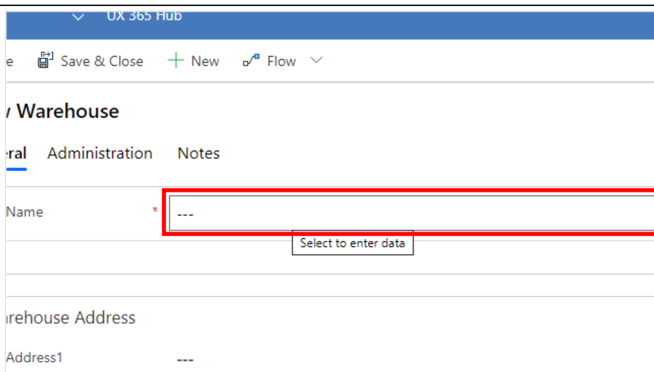
Click on the item **Warehouses**



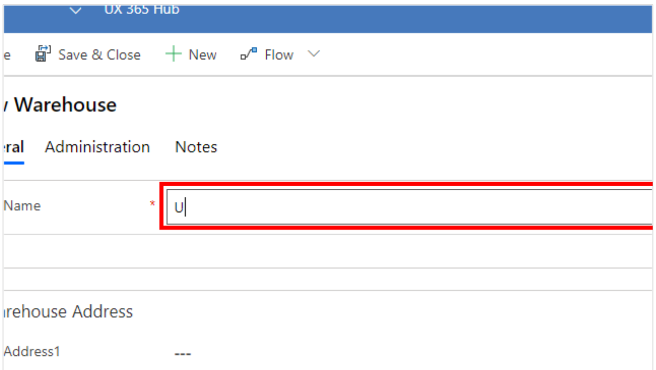
Click on the menu item **New**



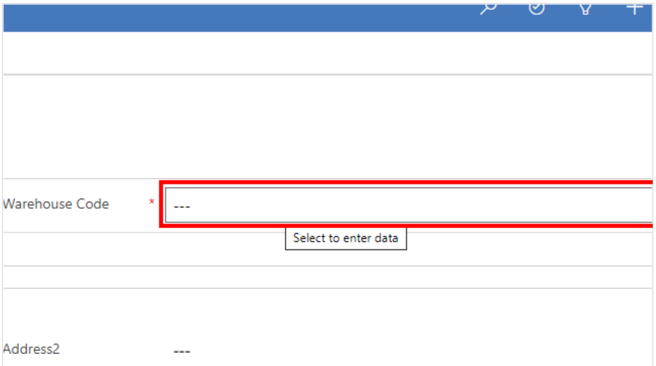
Click on the text field **Name**



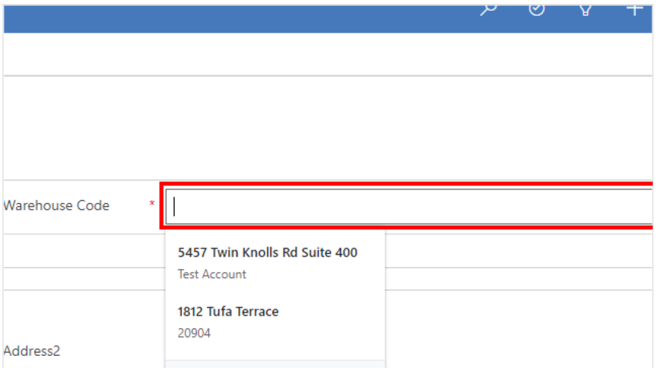
Enter **Name**.



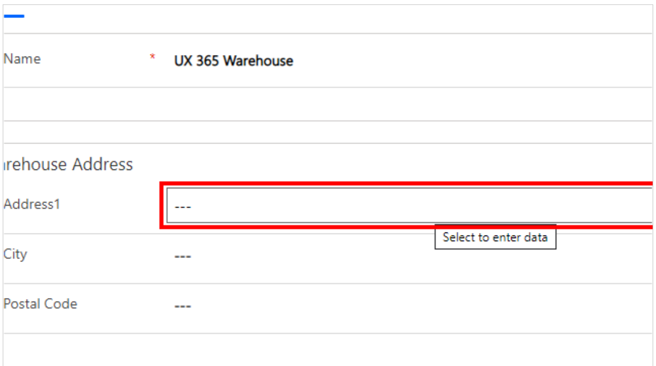
Click on the text field **Warehouse Code**



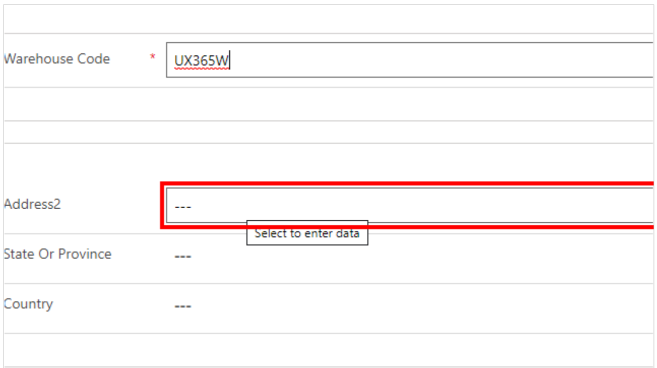
Enter **Warehouse Code**.



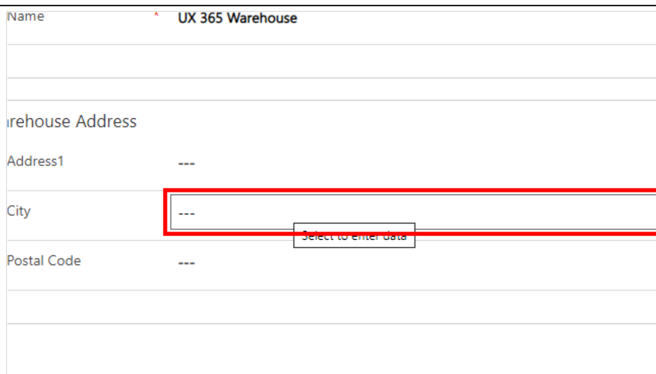
Address1
Enter the first address line for this warehouse. (This field is optional.)



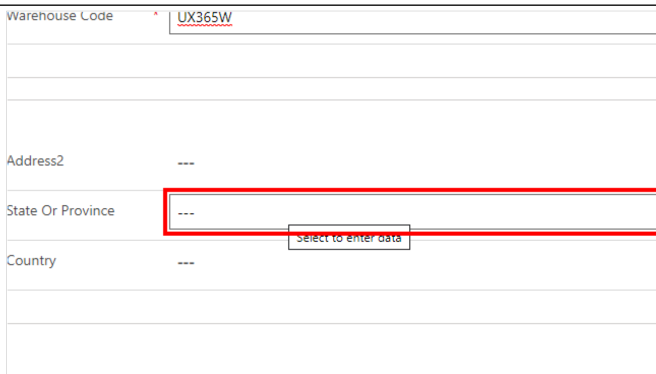
Address2
Enter the first address line for this warehouse. (This field is optional.)



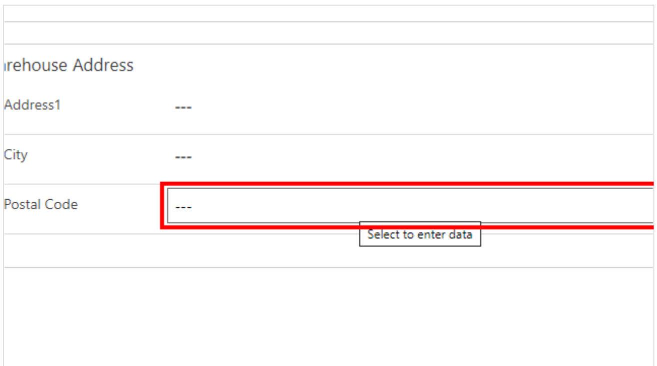
City
Enter the city where this warehouse is located. (This field is optional.)



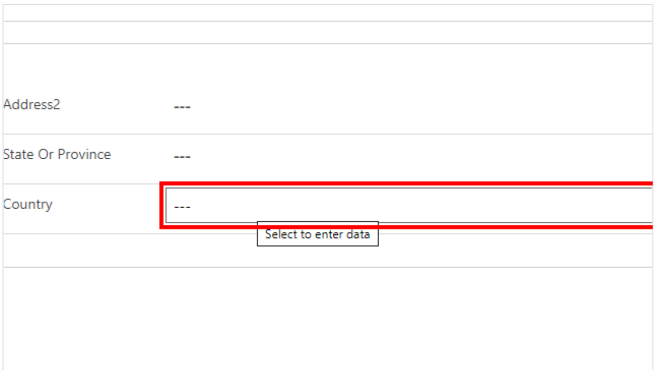
State Or Province
Enter the state or province where this warehouse is located. (This field is optional.)



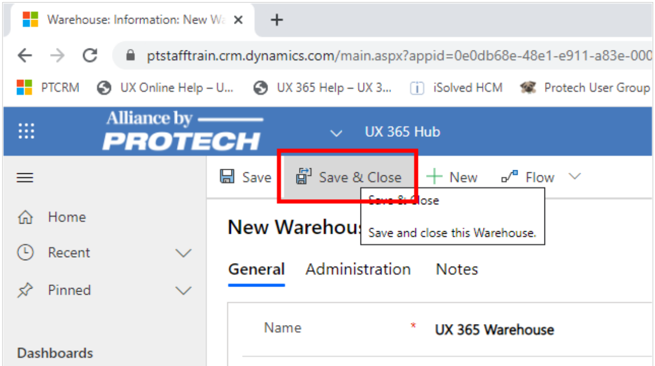
Postal Code
Enter the ZIP or postal code for this warehouse. (This field is optional.)



Country
Enter the country where this warehouse is located. (This field is optional.)



Click on the menu item **Save & Close**

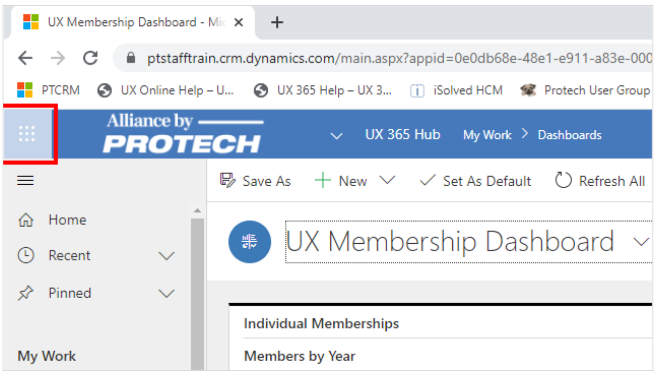


8. Professional Development

8.1. Creating a Credit Category

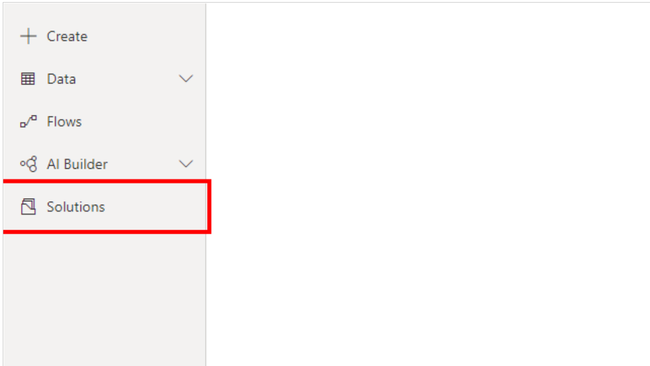
If your organization uses one or more credit category types that are not available in the UX 365 global option set of picklist values, customize the list in the client custom solution by creating new picklist values following standard guidelines for customizing picklists.Do not delete or relabel out of the box values.   Out of the box global option set values include: 1 – Default 2 – CEU 3 – CPE 4 – CE 5 – EC 6 – CEC

Click on the **waffle** button

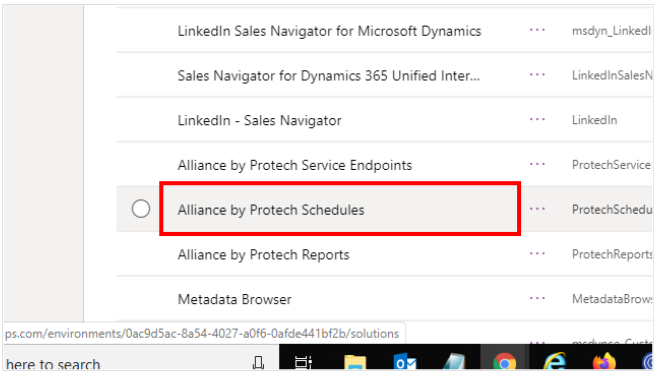


Click on the link **PowerApps**

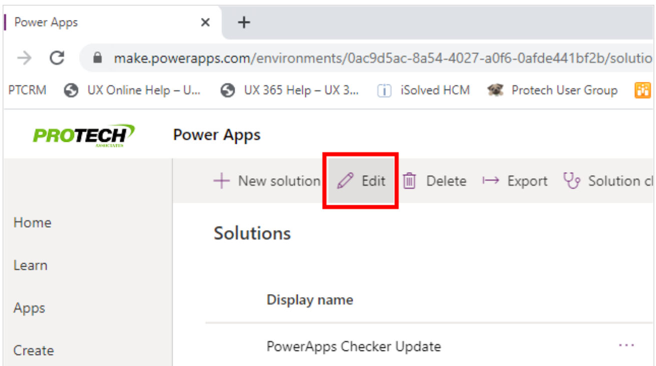
Click on the link **Solutions**



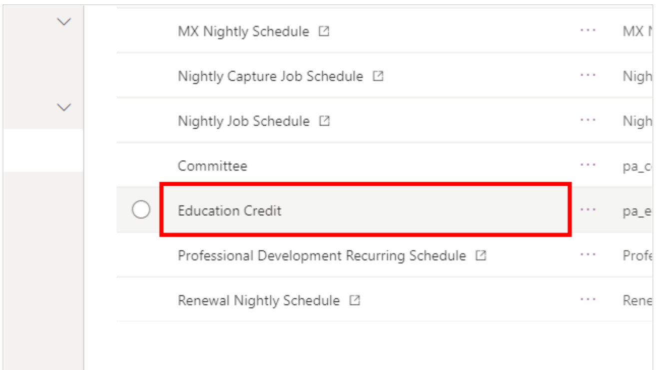
Locate and click on your organization's unmanaged solution.



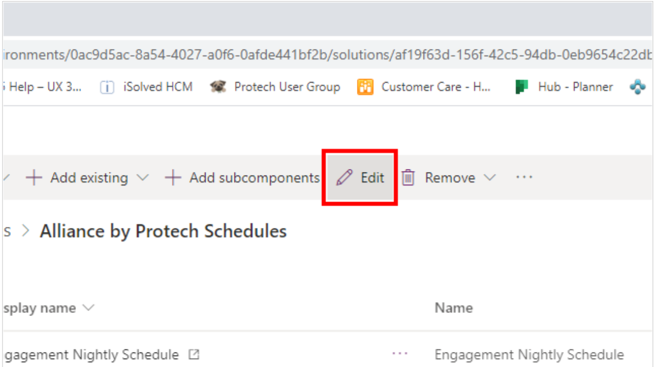
Click on the button Edit



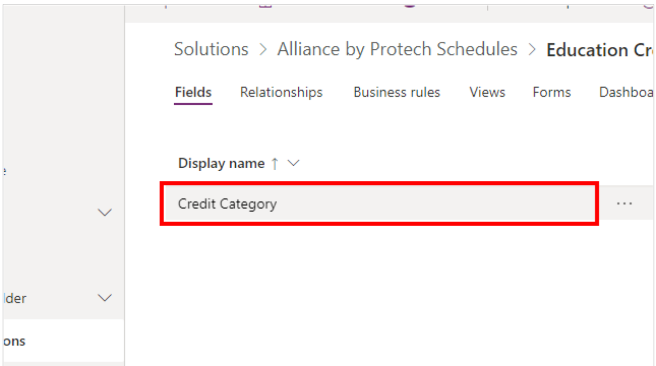
Click on **Education Credit**
If the Education Credit entity is not located in your unmanaged solution add it my using the Add existing button in the toolbar.



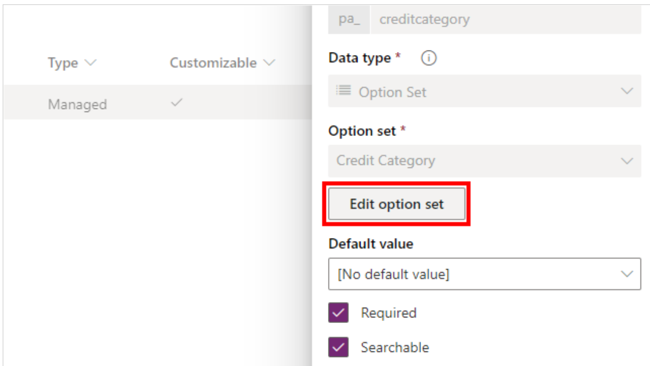
Click on the button Edit

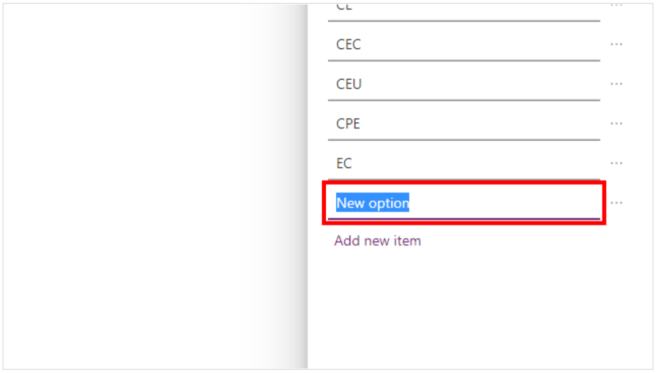
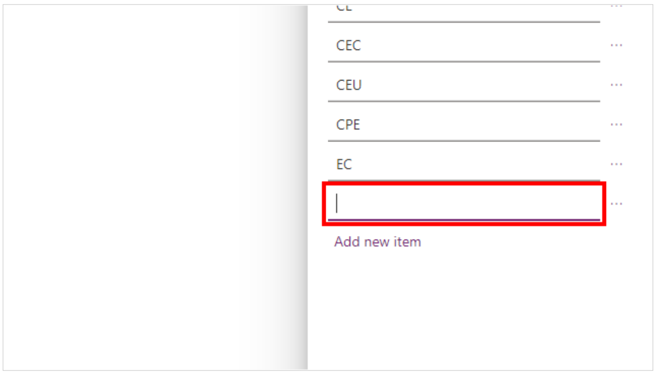
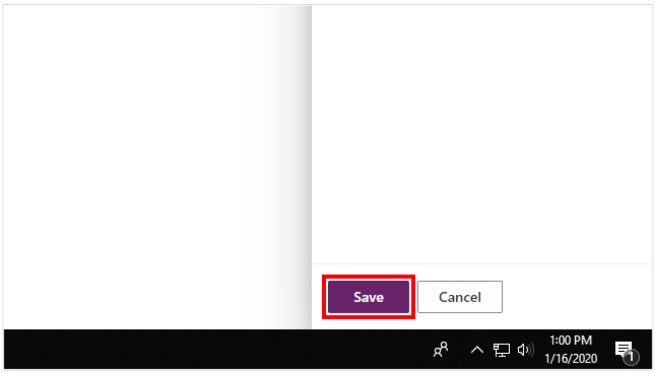


Double click on **Credit Category**

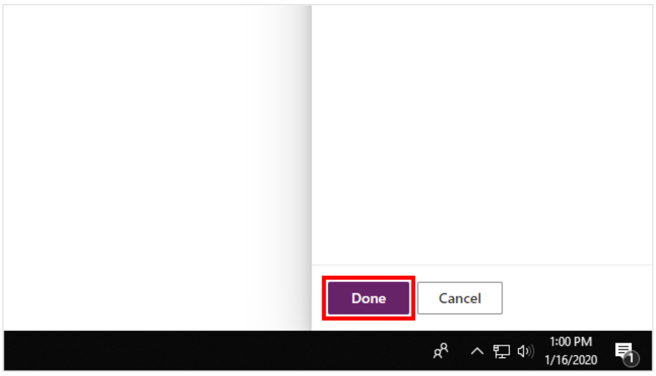


Click on the button **Edit option set**

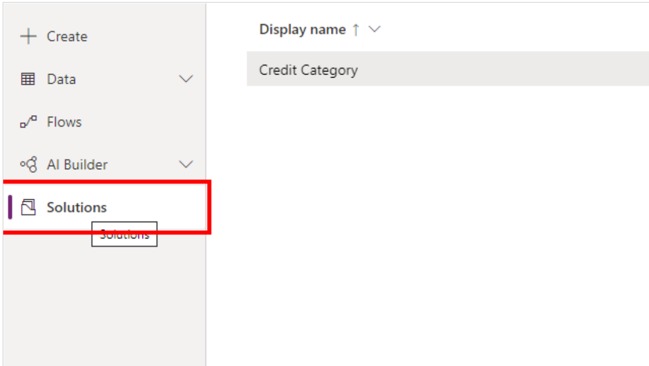


Click on the button **Add new item**	
Click on the input field **New option**	
Enter name of Credit Category	
Click on the button **Save**	

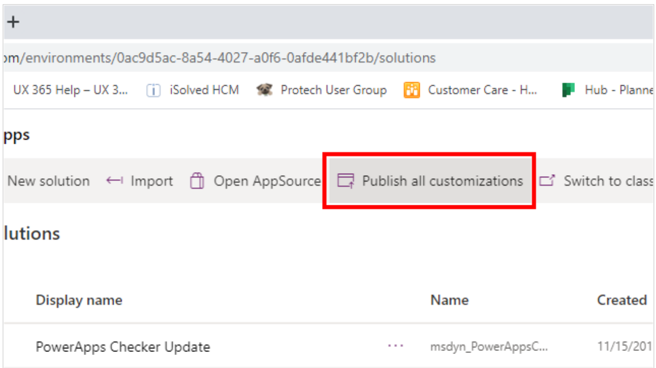
Click on the button **Done**



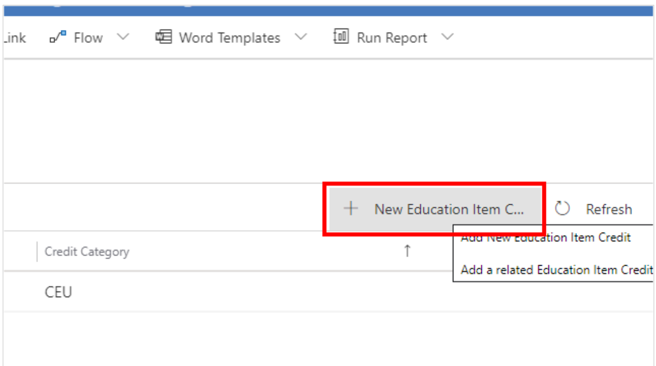
Click on the link **Solutions**



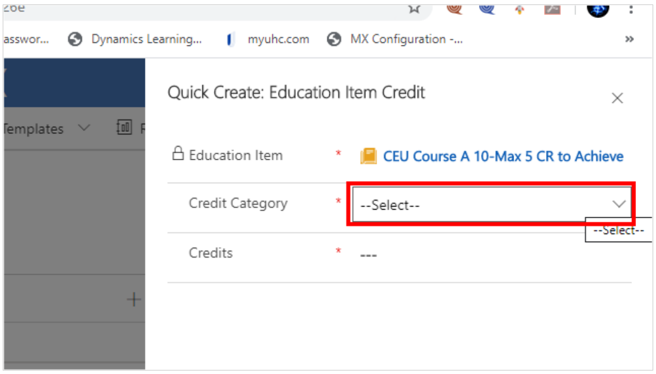
Click on the button Publish all customizations



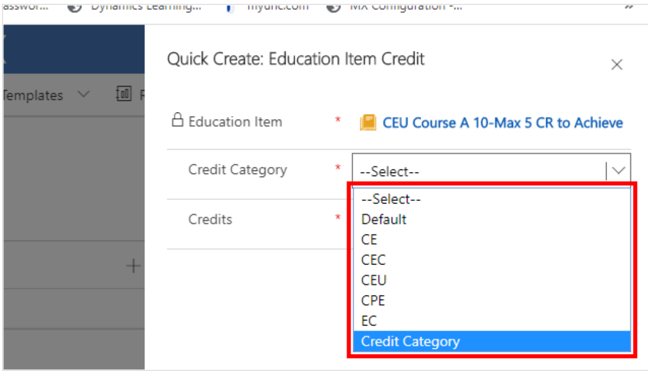
Now, when adding a New Education Item Credit



Credit Category



Your credit category will be available to select.



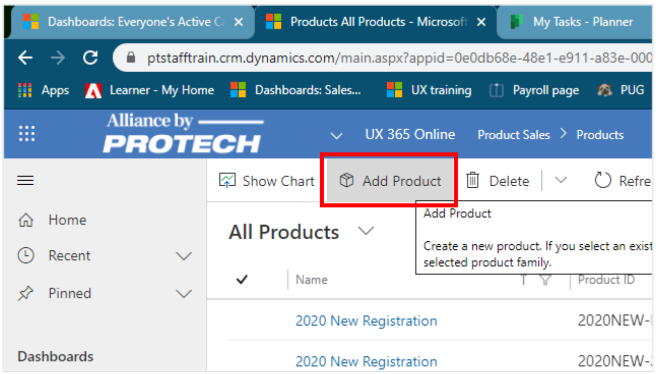
8.2. Creating a Renew Award Product

You can create one Award product to use with all Awards, if all Awards use the same accounting information and pricing records for renewal invoices. If there is a difference in any of the accounting information elements, or a difference in pricing for renewals among your Awards, you must create separate Award product for each. This documentation assumes a basic knowledge of creating products in UX 365.

To create an Award product, navigate to the Product Sales work area > Product Sales Settings > Products to open a list of existing products.

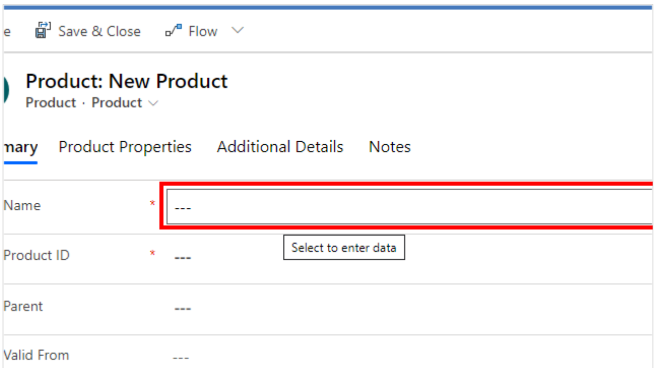
Click on the item **Products**

Click on the menu item **Add Product**

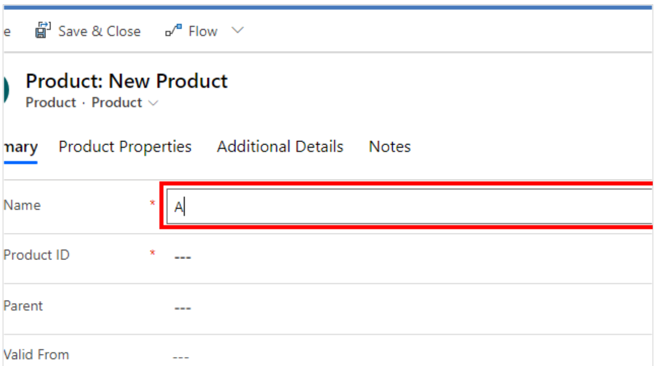


Name – Enter a descriptive name of the award product. This will be used on reports and confirmations.

Click on the text field **Name**

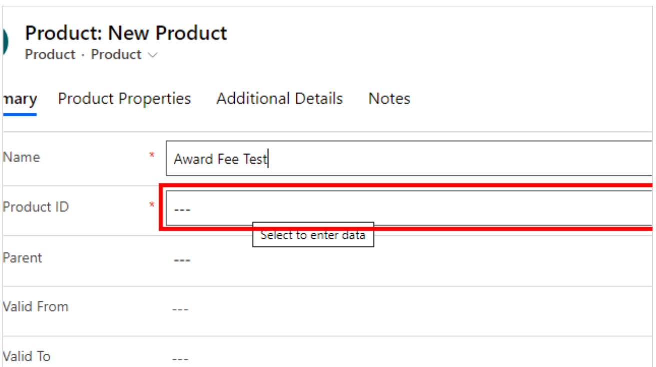


Enter the Name

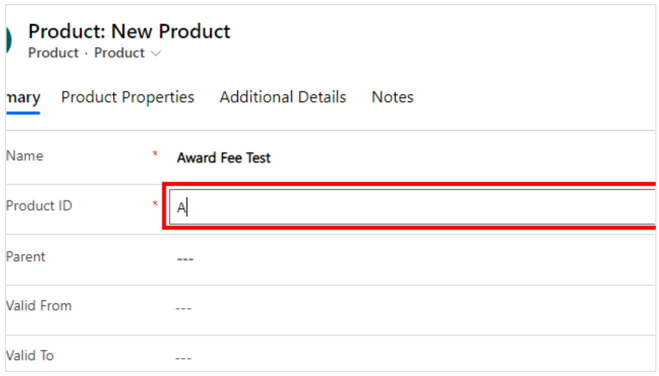


Product ID – Enter a short, meaningful code that identifies this Award product. It must be unique.

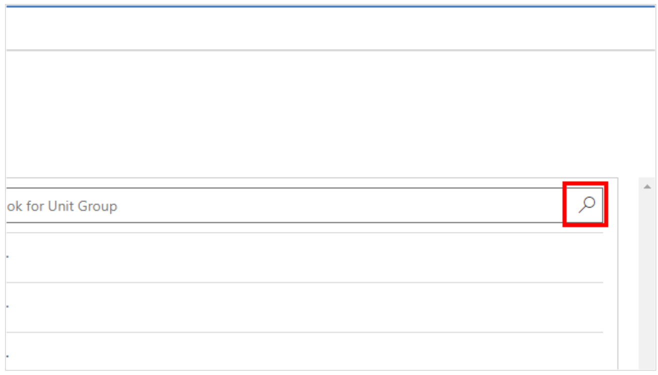
Click on the text field **Product ID**



Enter Product ID

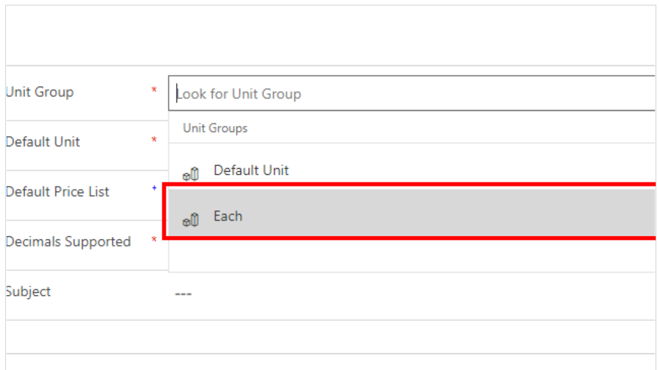


Click on the link **Unit Group**



Unit Group – Click the Lookup button, select Each, and click OK.

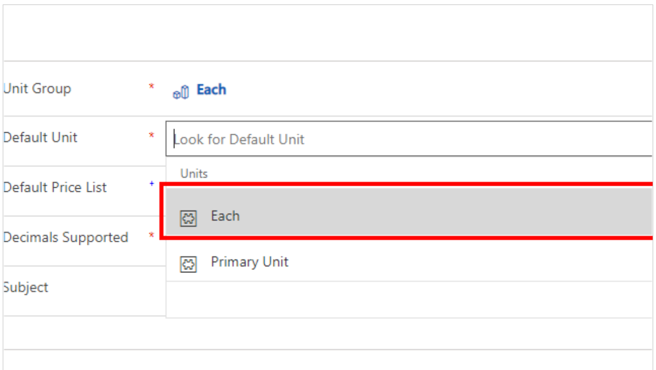
Click on the item **Each**



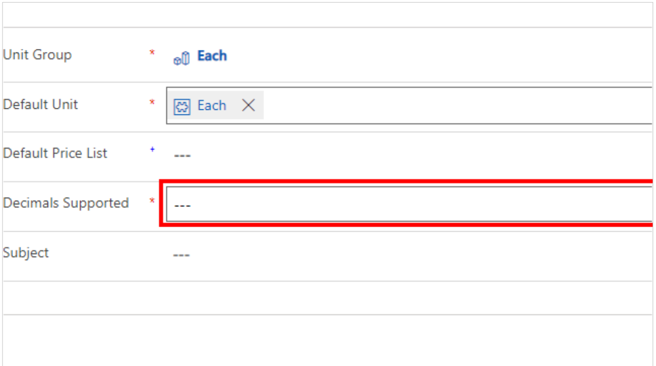
Click on the link **Default Unit**

Default Unit – Click the Lookup button, select Each, and click OK

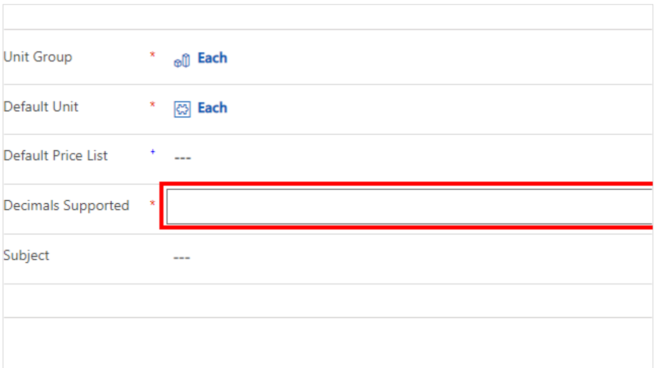
Click on the item **Each**



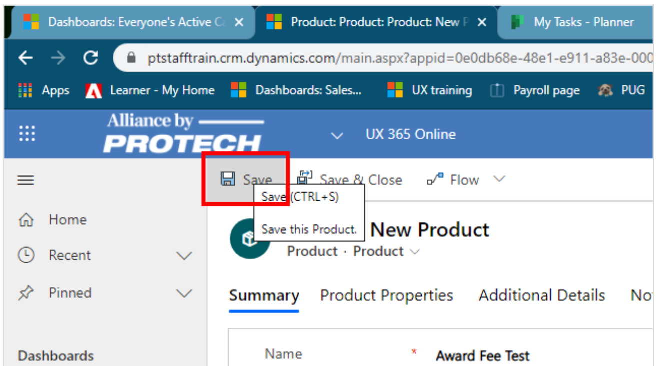
Click on the text field **Decimals Supported**



Enter **Decimals Supported**.

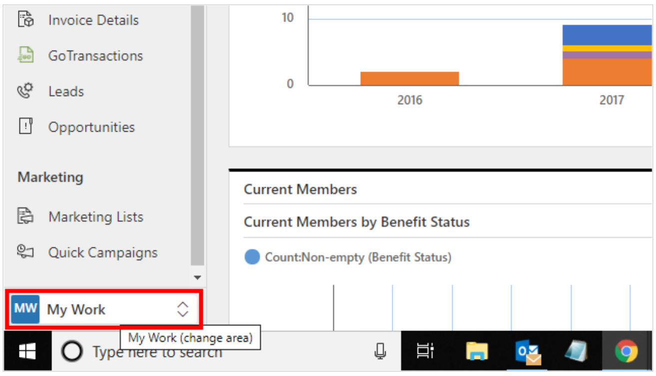


Click on Save

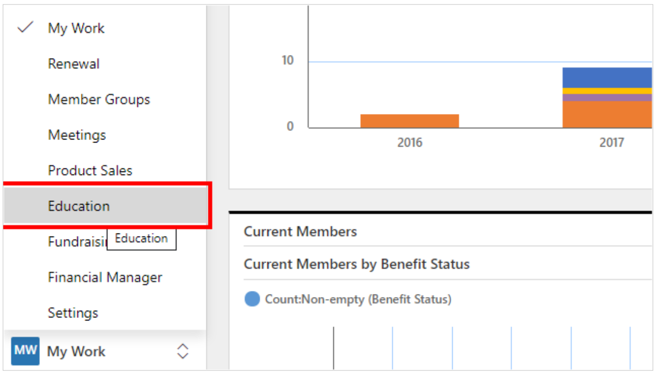


8.3. Creating an Award

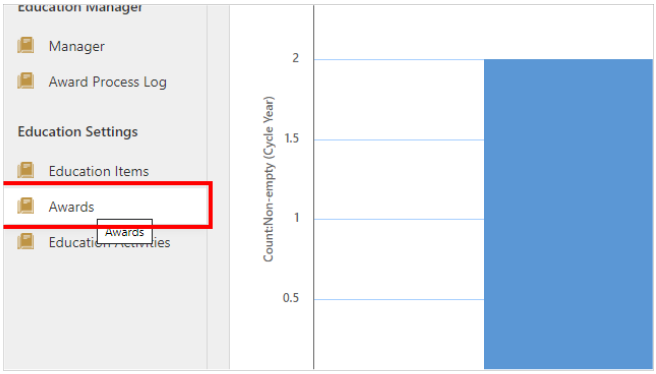
Click on the button **My Work (change area)**



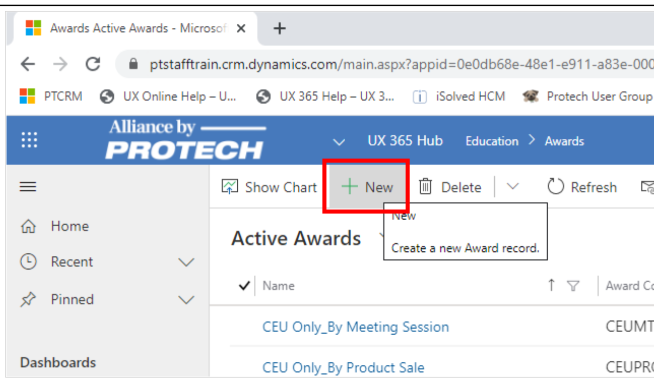
Click on the item **Education**



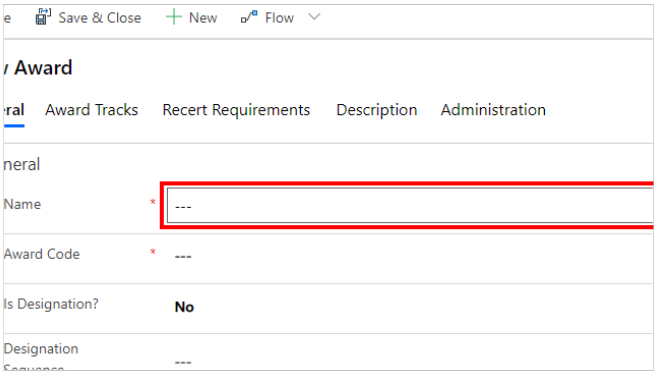
Click on the item **Awards**



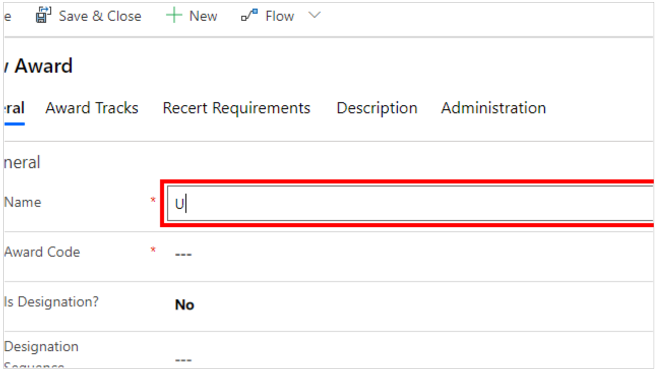
Click on the menu item **New**



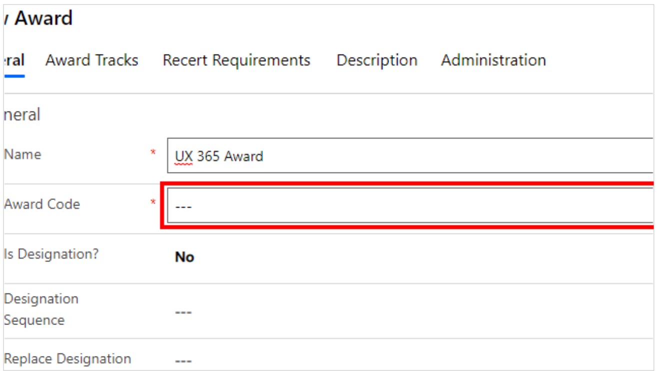
Click on the text field **Name**



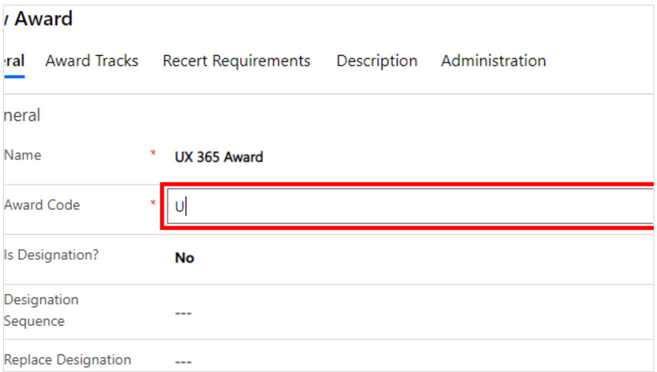
Enter **Name**.



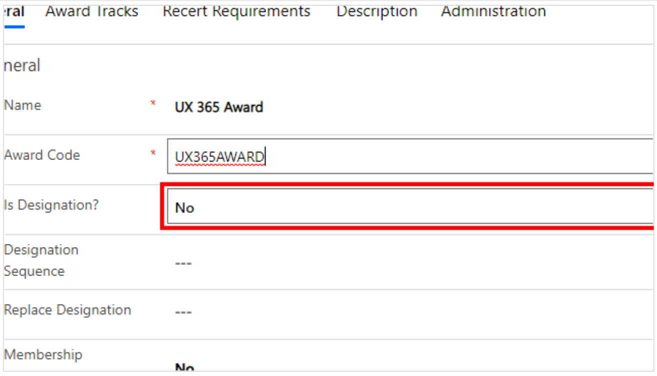
Click on the text field **Award Code**



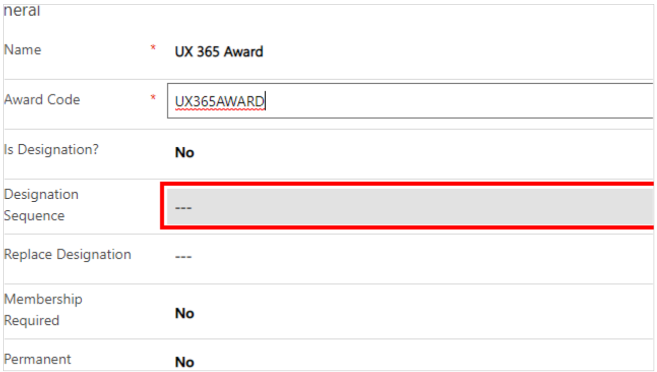
Enter a short code for the Award, avoiding special characters other than a hyphen or an underscore. Award Codes must be unique.
Enter **Award Code**.



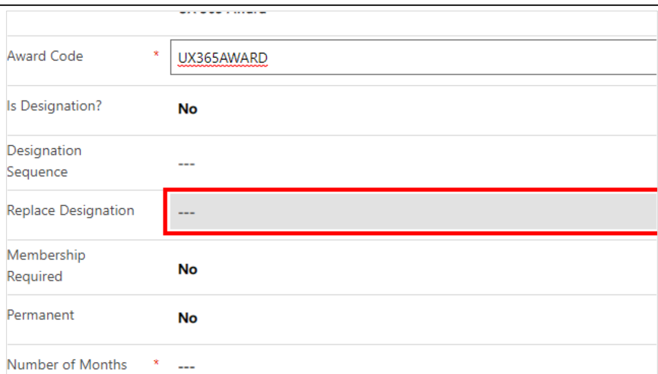
Is Designation?
If achieving this certification award updates an individual's designation, click Yes. UX will use the Award Code as the Professional Designation on a contact who achieves the Award. Click No if the award does not update the designation field on a contact record.



Designation Sequence
If achieving this Award updates a contact’s designation, you can enter a numeric value to determine the sequence that this designation is displayed in the Professional Designation field on the contact's record. If you do not set up a designation sequence for your certification awards, and your organization offers multiple certification awards for contacts, designations will appear in the Professional Designation field in the order they are achieved. If you use the Designation Sequence, a sequence number must be entered in all award setups.

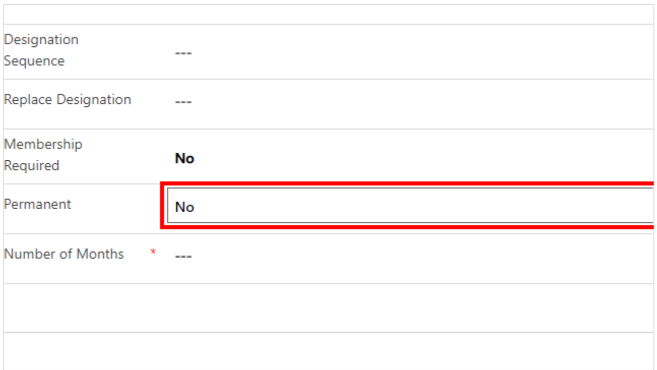


Replace Designation
If this designation should replace a prior designation, then enter the designation that should be replaced. If this designation should not replace any other designation, leave this field blank.

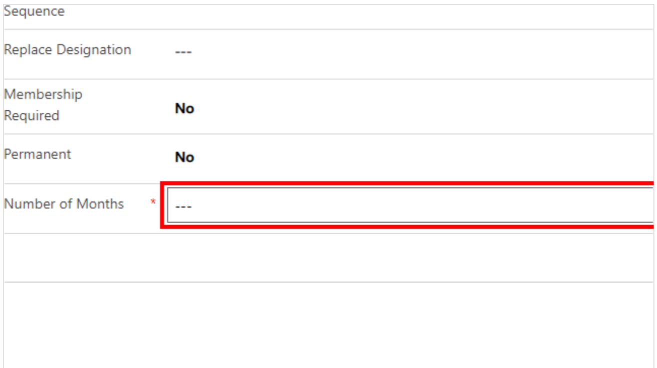


Membership Required
If a participant must be a member of your organization to achieve the Award, click Yes. If you select Yes, the system will verify a participant's membership status before creating a new award or renewing an existing award.

Permanent
If this Award should be a lifetime Award, not requiring periodic renewal, click Yes.



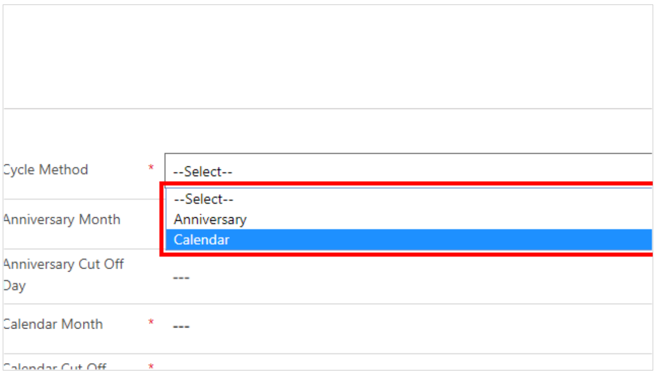
Click on the text field **Number of Months**



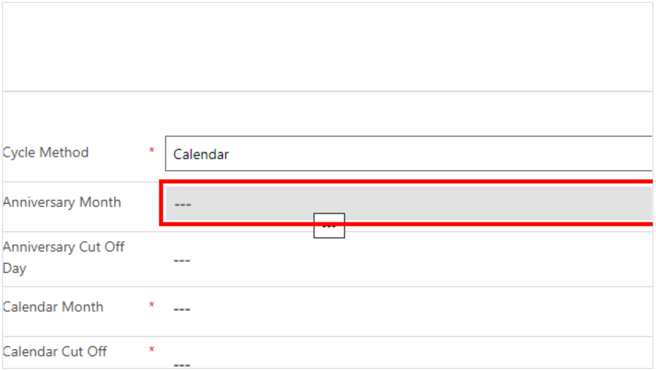
Enter the number of months for the Award cycle (i.e., enter 12 for 1 year; 24 for two years, etc.)
Enter **Number of Months**.

Click on the field **Cycle Method**

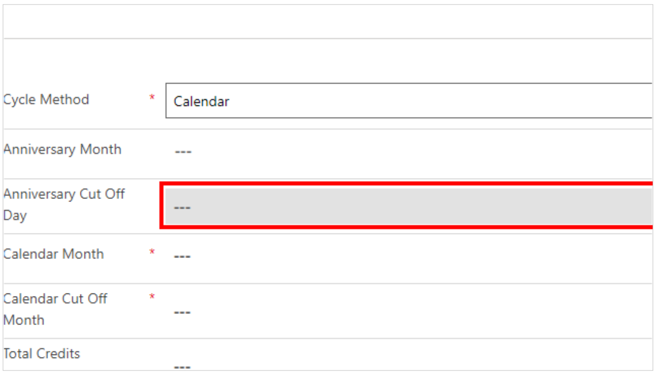
Select Anniversary or Calendar



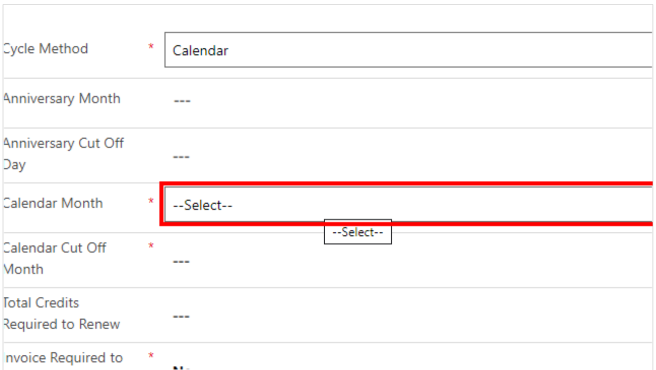
Anniversary Month
If the Cycle Method = Anniversary, select Current Month, Next Month, or Cut Off Day.



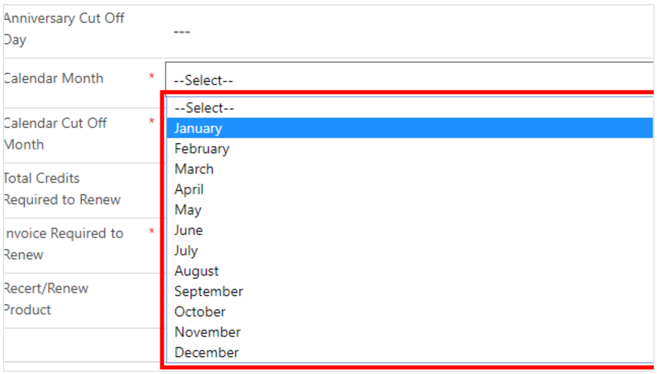
Anniversary Cut Off Day
If the Cycle Method = Anniversary and the Anniversary Month = Cut Off Day, enter the day of the month where the cycle start date should roll to the beginning of the next month. For example, if Anniversary Cut Off Day = 15, the Cycle Start Date for customers that earn the award between the 1st and the 14th day of the month will be the 1st of the Awarded On month. If customers earn the award on the 15th through the last day of the Awarded On month, the Cycle Start Date will be the 1st of the next month. If Anniversary Cut Off Day = 31, the Cycle Start Date will always be the 1st of the Awarded On month.



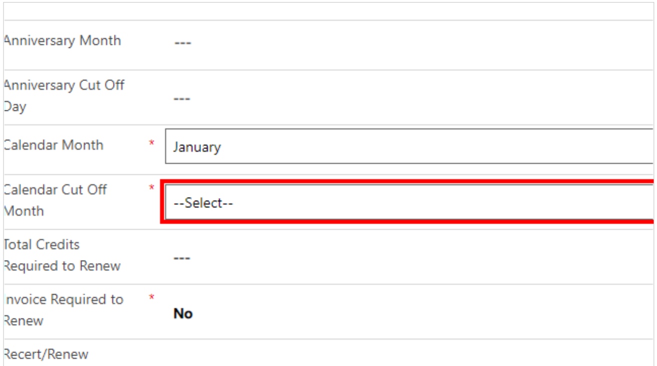
Click on the field **Calendar Month**



Select the month of the year when the Award Cycle will begin.

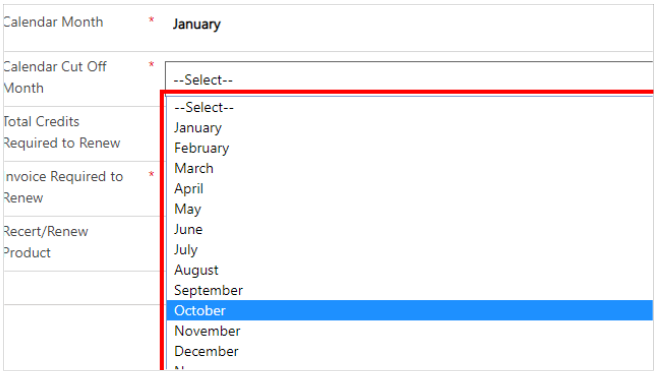


Click on the field **Calendar Cut Off Month**



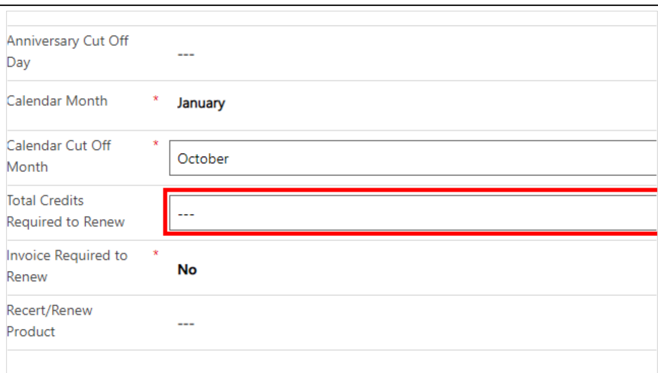
If Cycle Method = Calendar, select a Picklist value that manages the cut off month for the selected default cycle start date month. This allows you to configure your system to advance the cycle start date based on the Awarded On date and Cut Off Month selected. For example, if the Calendar Month = January, you can select October as the cut off month. The Cycle Start Date for contacts that earn the award between October 1 and December 31 will be advanced to January 1 of the next calendar year. If the Calendar Month = January and you select None as the cut off month, the Cycle Start Date for contacts that earn the award at any time between January 1 and December 31 will be January 1 of the current calendar year.

Click on the item **October** in the list

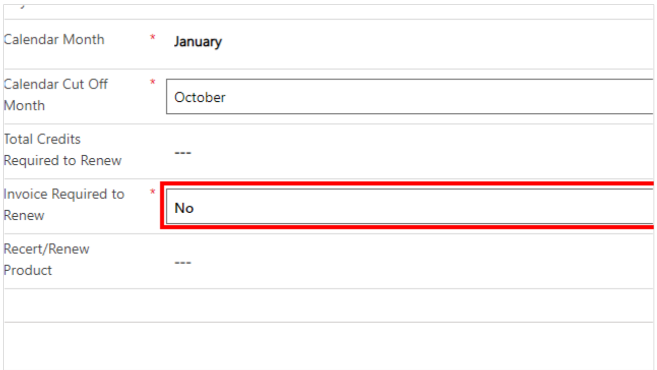


Total Credits Required to Renew

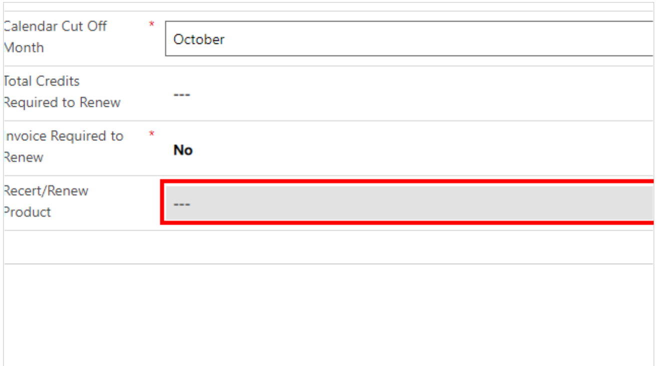
If Credits are required for renewal, enter the number of credits required.



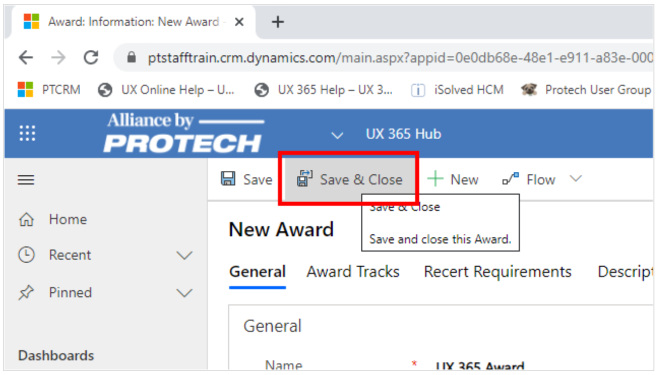
Invoice Required to Renew
If an invoice is required for renewal, select Yes.



Recert/Renew Product
If an invoice is required for renewal, use the lookup to select the Award Product that will be used to manage invoice pricing and GL Detail.

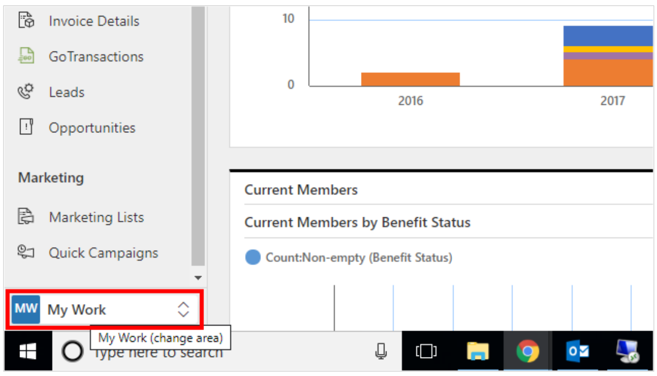


Click on the menu item **Save & Close**

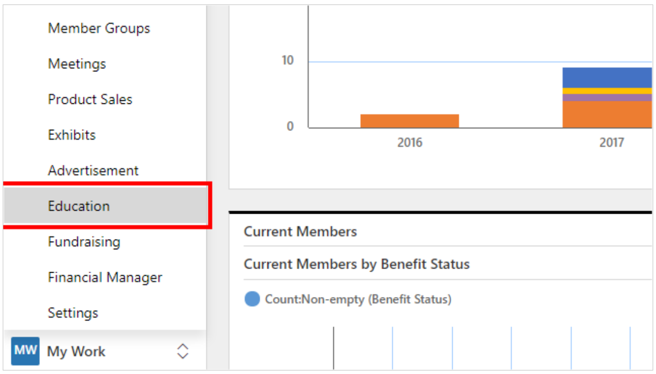


8.4. Creating Award Renewal Requirement Types

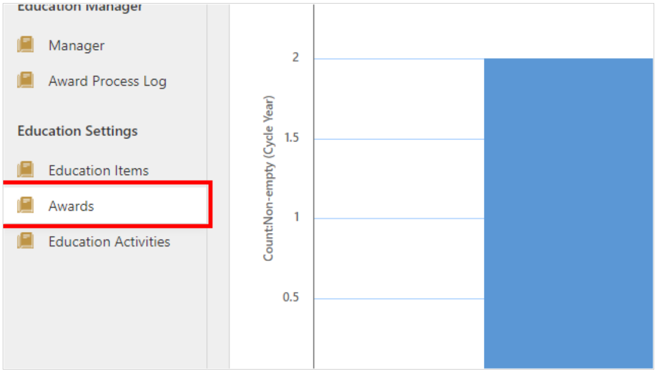
Click on the button **My Work**



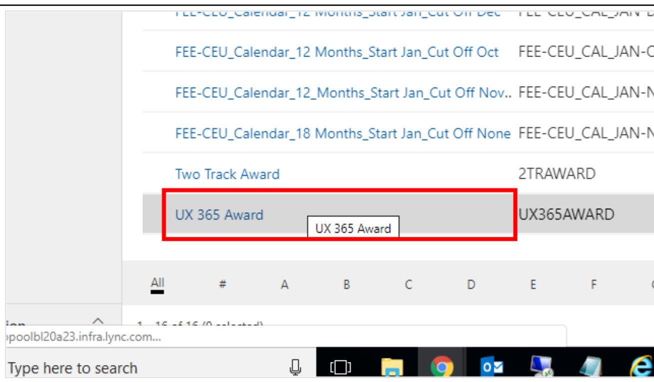
Click on the item **Education**



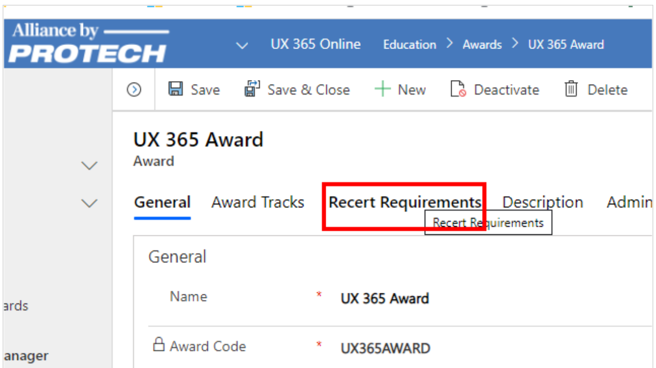
Click on the item **Awards**



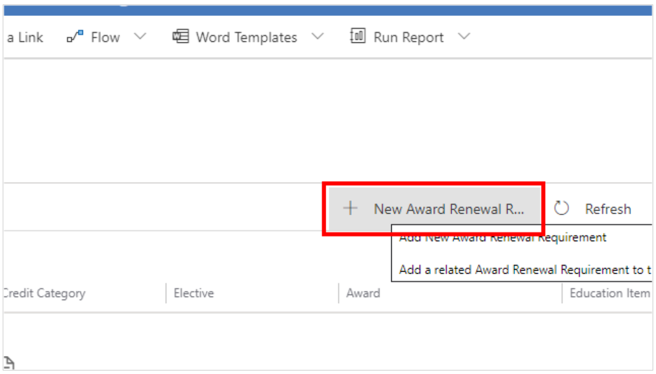
Select the Award



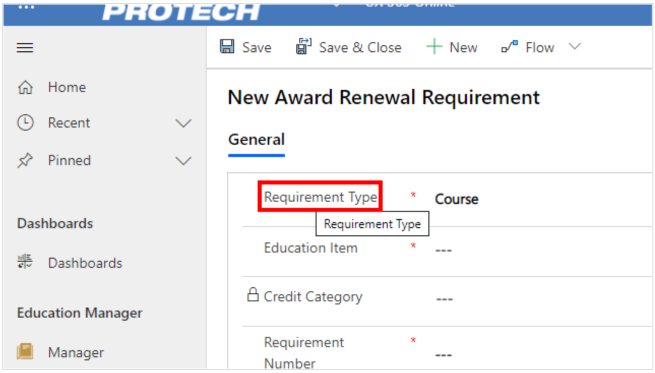
Click on the item **Recert Requirements**



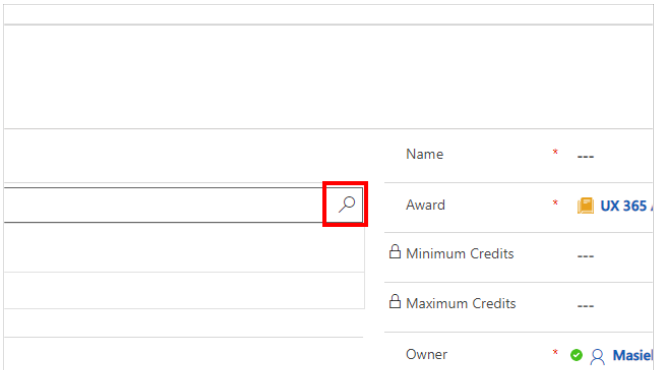
Click on the menu item **Add New Award Renewal Requirement**



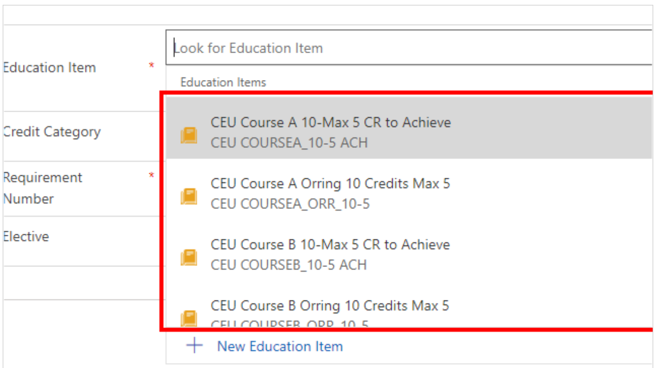
The Requirement Type field defaults to Course, but you may select any type other than ‘Credits’ that best describes the renewal requirement.

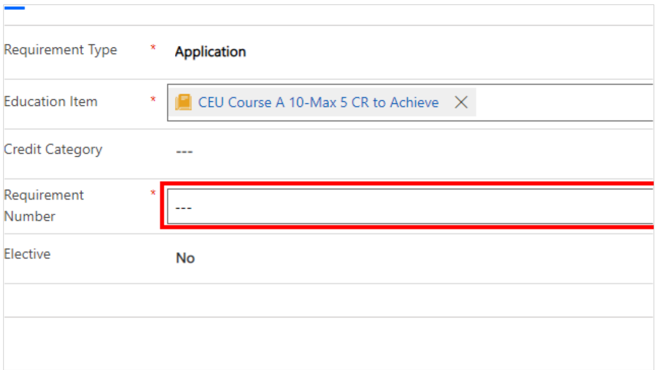
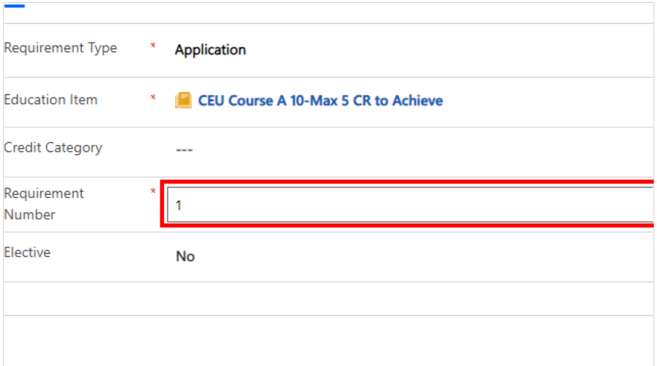


Click on the link **Education Item**

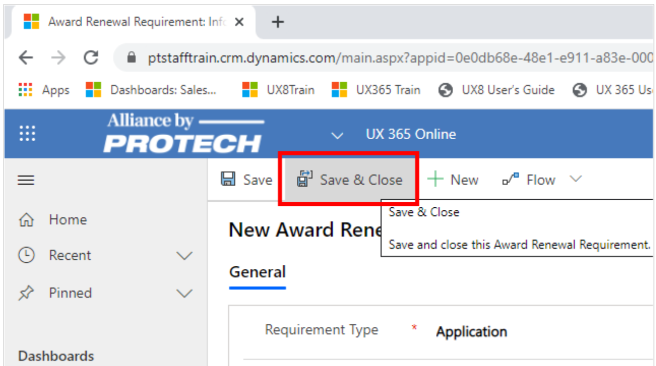
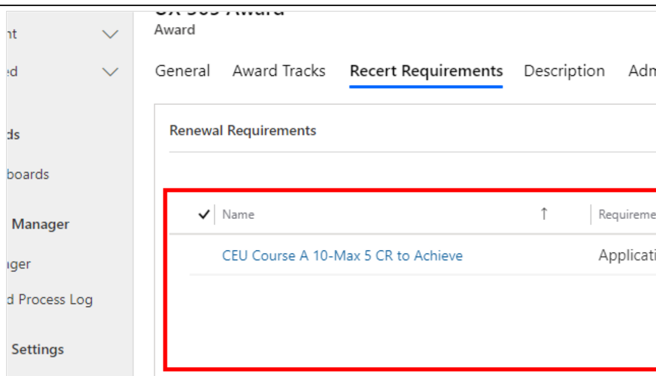


Click on an option from the list



Click on the text field **Requirement Number**	
Enter a whole number for the Requirement Number.	

If the number is distinct among all Recert Requirements, completion of the Requirement is a required component for renewal and the Elective field = No. If the number is the same as another Recert Requirement, completion of the Requirement is treated as an elective and UX updates the Elective field = Yes.

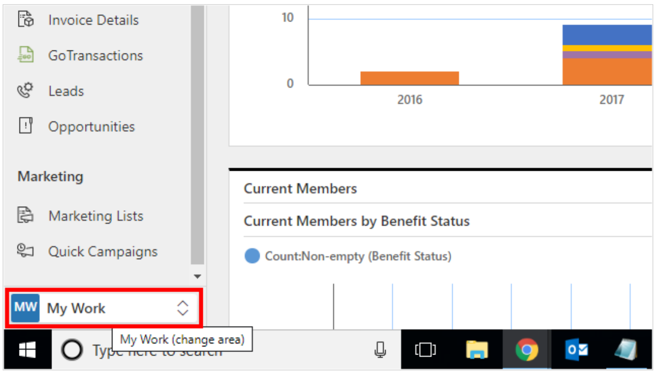
Click on the menu item **Save & Close**	
After completing all fields, click Save and Close on the form Tool Bar to save your Recert Requirement setup and return to the Recert Requirements tab of the Award setup. Repeat these steps if additional Recert Requirement Types 1 – 4 are required.	

8.5. Creating Award Tracks

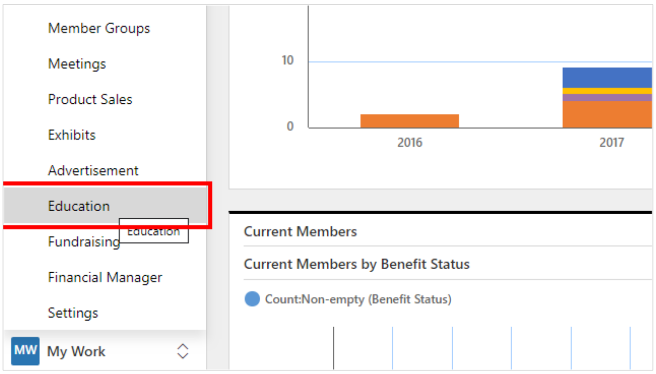
An Award Track and its related Track Requirements define the path toward achieving an Award. As described earlier, you can have one or more Tracks, but you must have at least one. After saving the Award setup, the next step to create an Award Track.

Using an analogy for achieving a BS Degree in Science, the Award is the BS Degree. There can be multiple Tracks with specific Track Requirements that can be followed toward earning that degree. One Track, or path, may focus on Biology, where the Track Requirements are specific to Biology. A different Track, or path, may focus on Anatomy, where the Track Requirements are specific to Anatomy. But fulfillment of the Track Requirements for either Track can be followed to earn the BS Degree in Science.

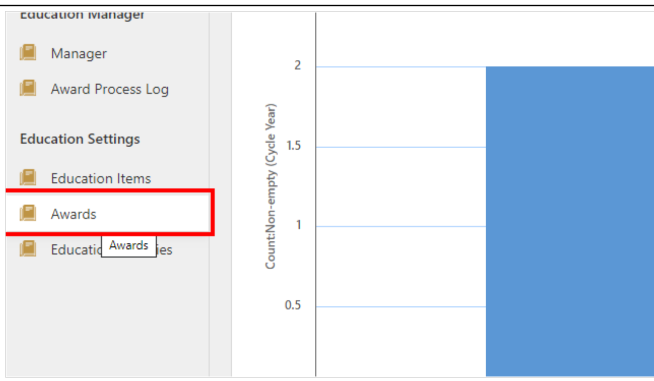
Click on the button **My Work (change area)**



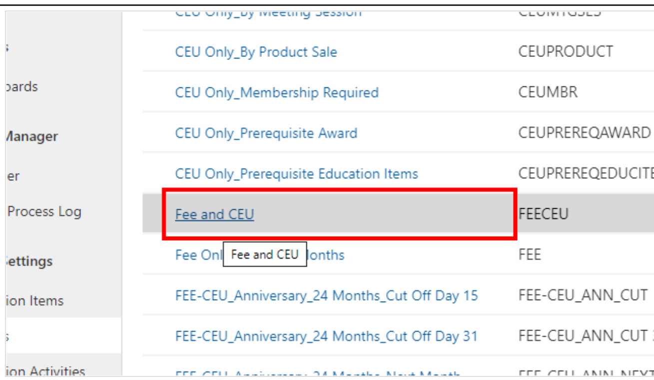
Click on the item **Education**



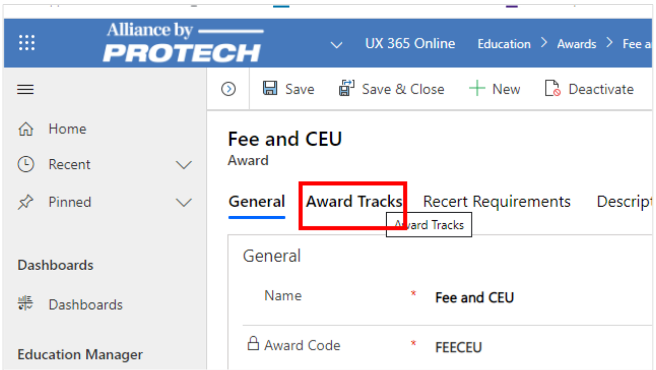
Click on the item **Awards**



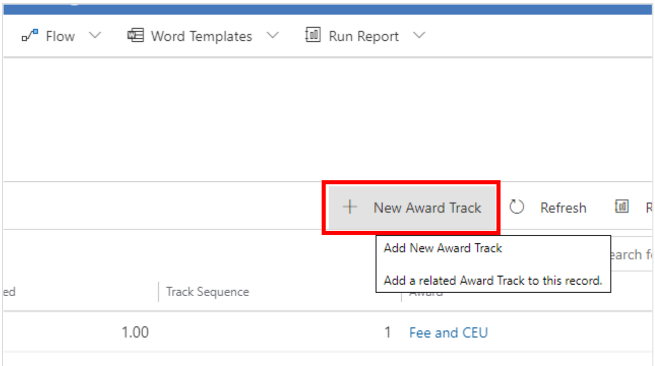
Open the Award you want to create a Track for.



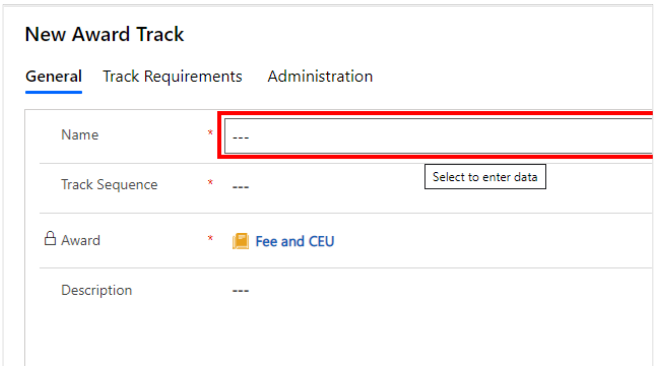
Click on the item **Award Tracks**



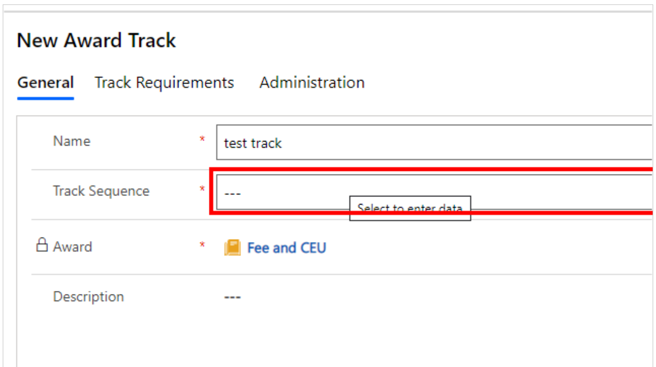
Click on the menu item **Add New Award Track**



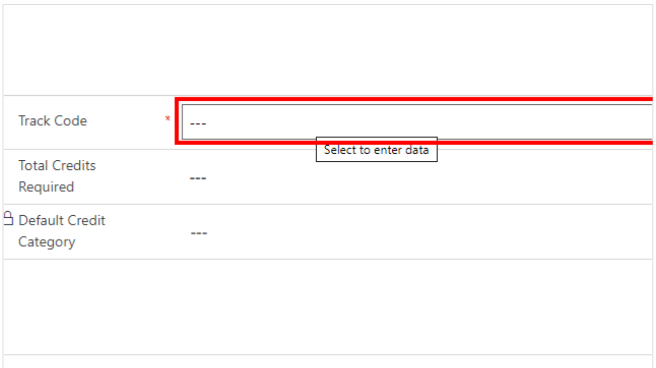
Enter a name for the Track.



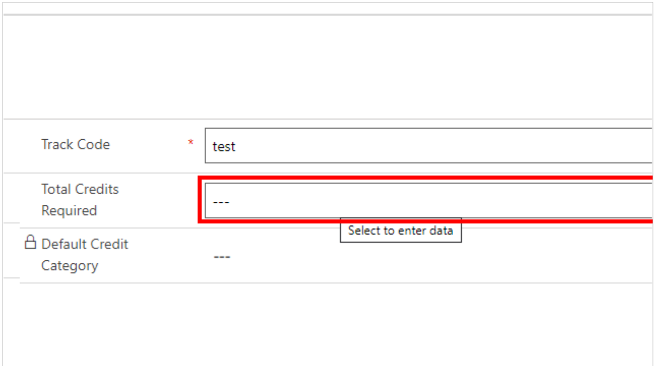
Enter a sequence for the Track. This is used for sorting when more than one Track exists. This is required even if there is only one Track.



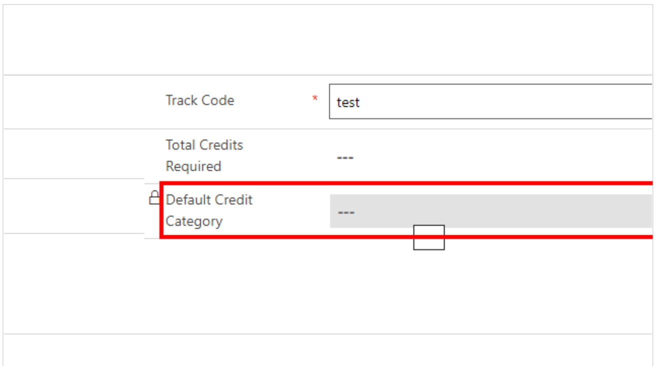
Enter a very short code for the Track, avoiding special characters. This is required.



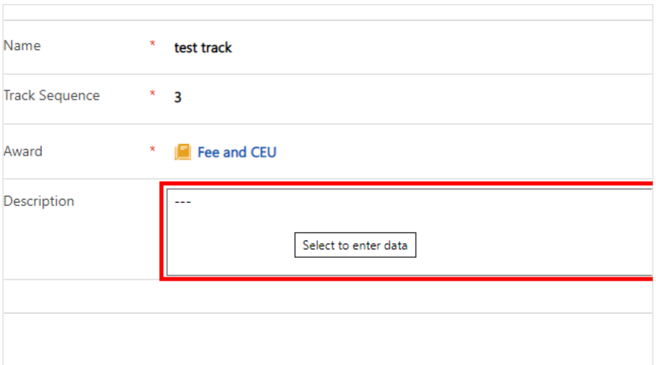
If credits are required to achieve the Award through this Track, enter the total credits required.



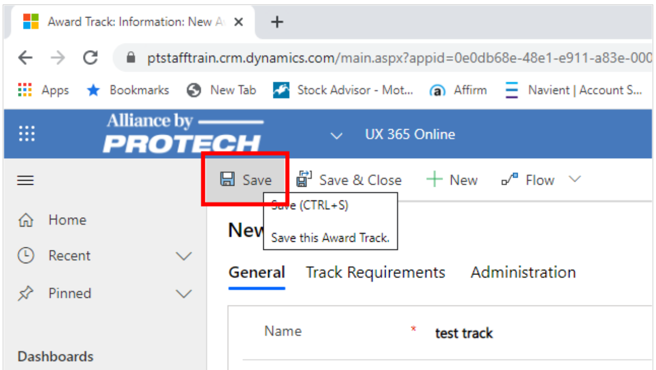
If you entered a value in Total Credits Required, this field is unlocked so that you can optionally enter the default Credit Category for the Track Requirement credits.



In the Description you can add any additional text.



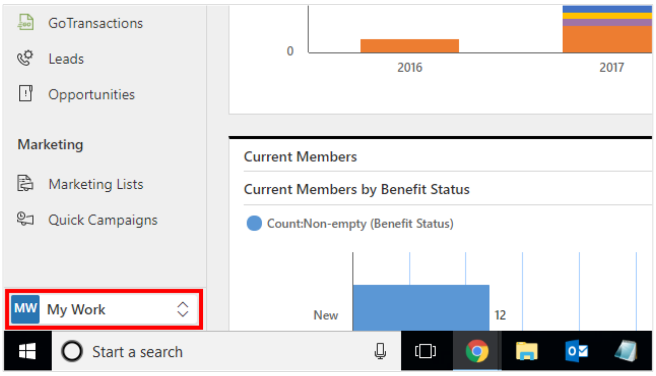
Click on the menu item Save



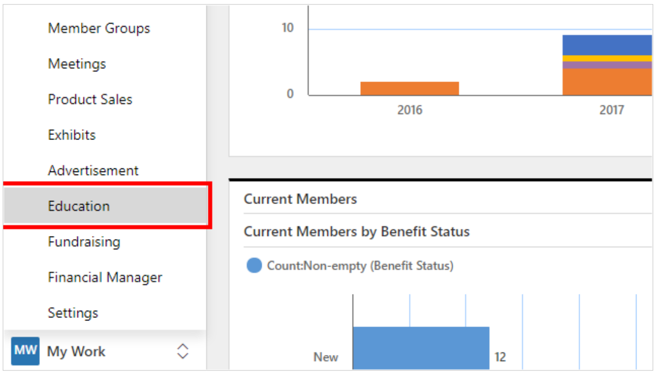
8.6. Creating Education Item

8.6.1. Creating an Education Item

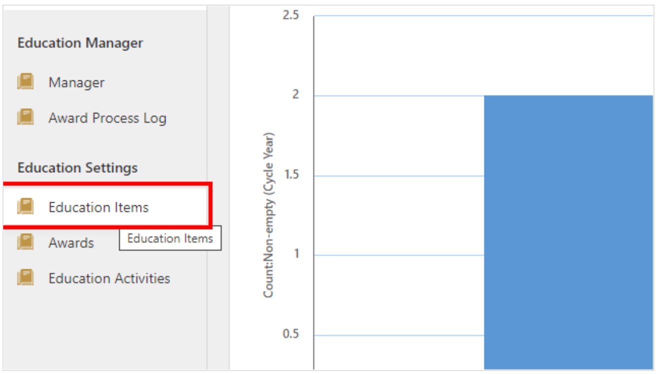
Click on the button **My Work (change area)**



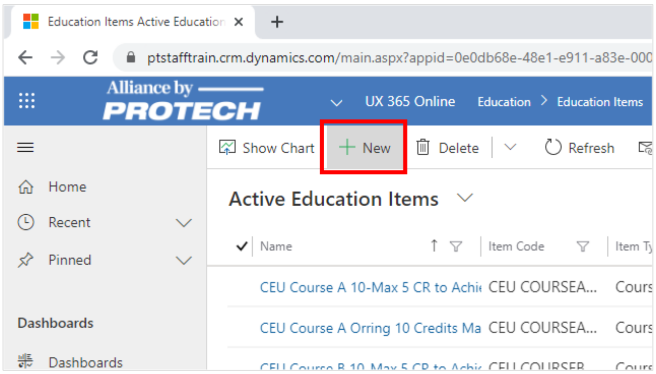
Click on the item **Education**



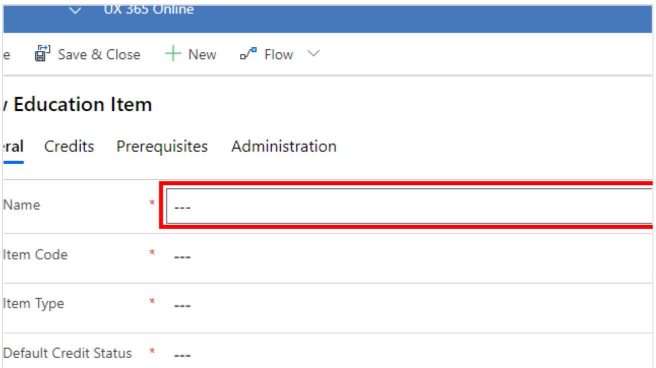
Click on the item **Education Items**



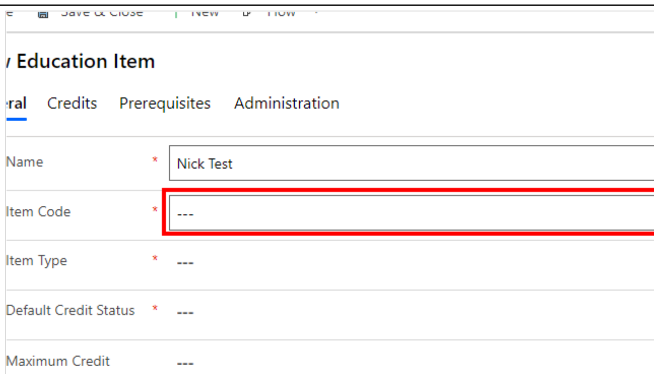
Click on the menu item **New**



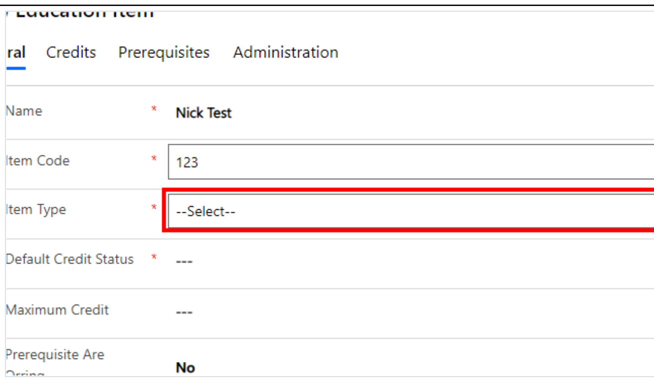
Click on the text field Name and enter a short descriptive name.



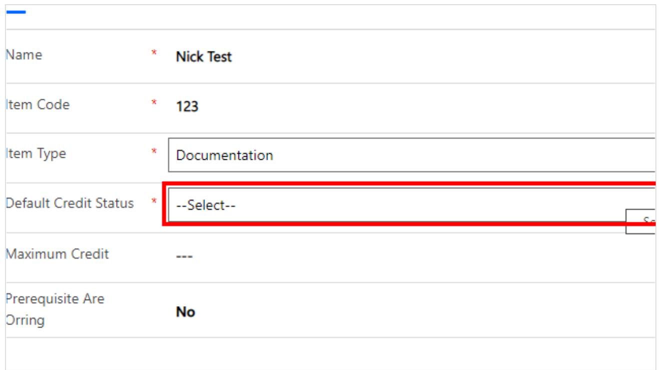
Click on the text field Item Code and enter a very short code and avoid special characters other than a hyphen or underscore.



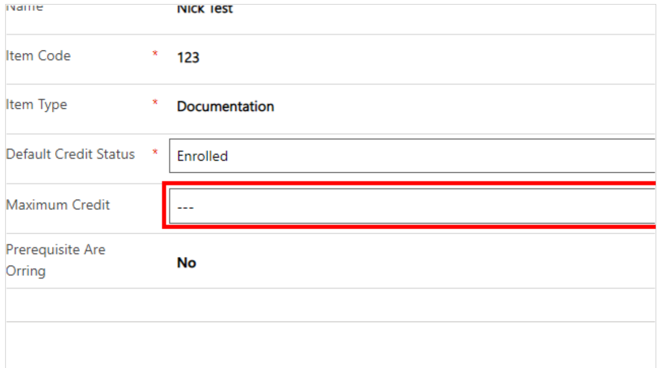
Click on the field Item Type and use the dropdown to select the Item Type. The options include Application, Course, Documentation and Fee.



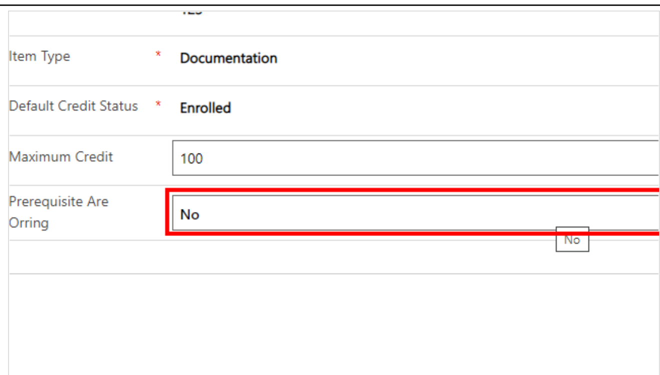
Click on the field Default Credit Status and select the default Education Activity status for this Education Item: Enrolled or Passed.



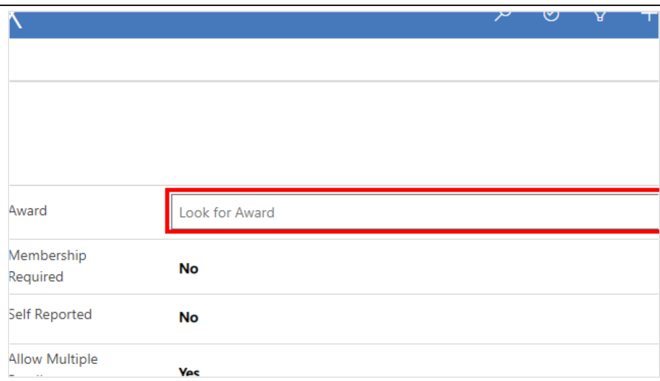
Click on the text field Maximum Credit-– Optional. Enter the maximum number of credits a participant can acquire for this Education Item, if any.



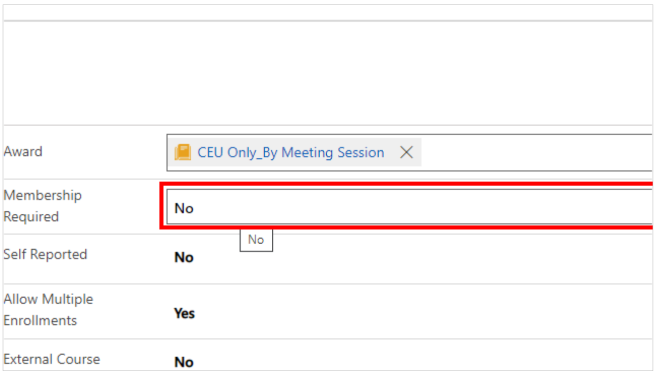
Prerequisites Are Orring – Defaults to No. If this Education Item has prerequisites for enrolling, leave the default value = No if the participant must fulfill all prerequisites before enrolling in this Education Item. Change to Yes if the participant only needs to fulfill one prerequisite before enrolling in this Education Item.



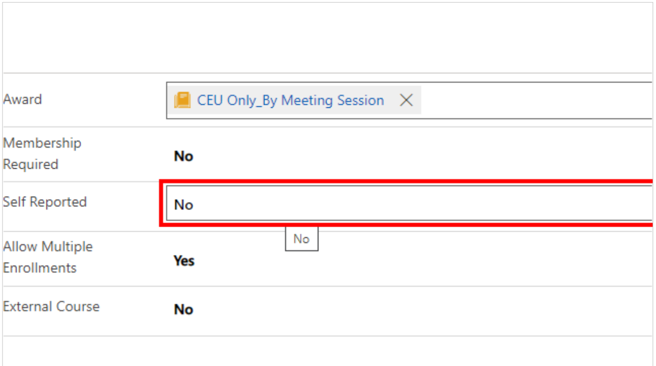
Award – If fulfillment of this Education Item results in achievement of an Award, without regard to the Award Tracks and Track Requirements, use the lookup to select the Award. This is only used for very simple Award setups and is not recommended.



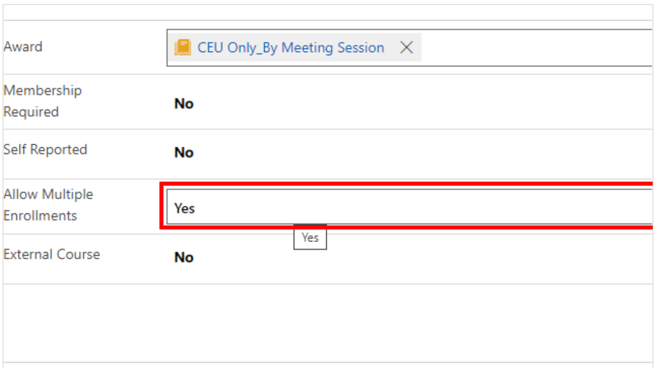
Membership Required – Defaults to No. Change to Yes if membership is required to enroll in this Education Item.



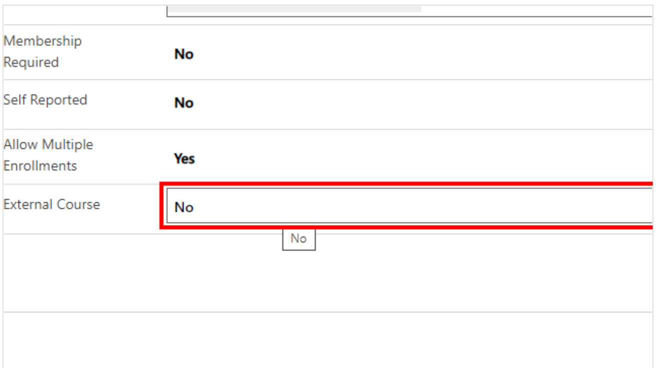
Self Reported – Defaults to No. Change to Yes if participants will self report Education Activity. This is a data tag for reporting only – there is no logic associated with this field.



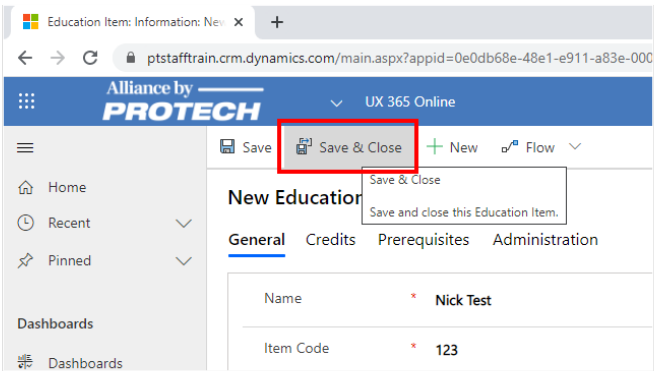
Allow Multiple Enrollments – Defaults to Yes. Change to No if participants are not allowed to enroll multiple times for this Education Item.



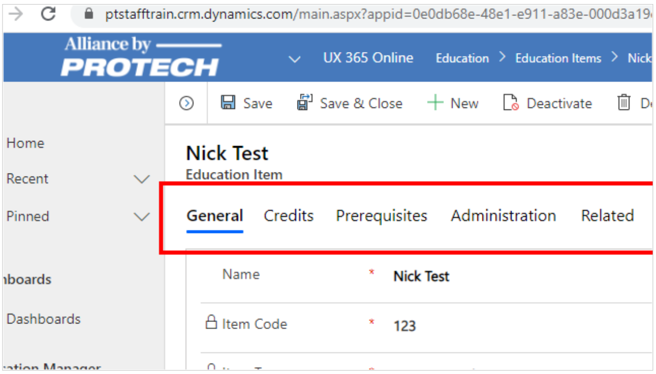
External Course – Defaults to No. Change to Yes if this Education Item represents an
external course. This is a data tag for reporting only – there is no logic associated with this field.



Click on the menu item Save & Close. or click Save on the toolbar to save the record and activate the remaining tabs on the form.

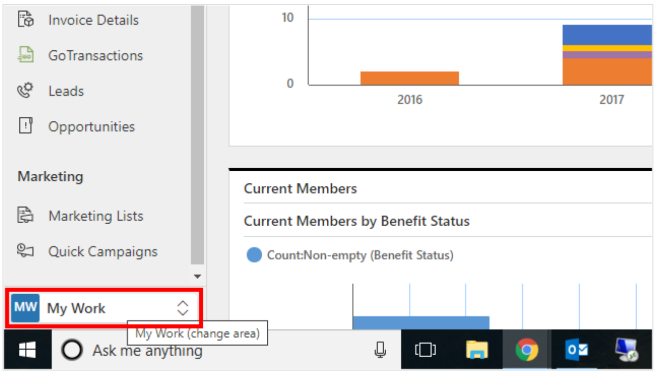


These are the activated remaining tabs on the form.

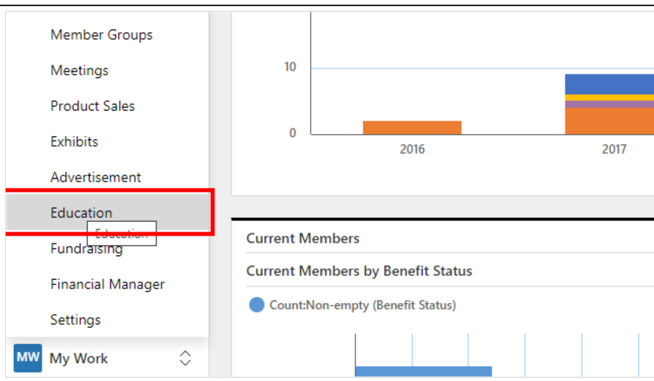


8.7. Creating Education Item Credits

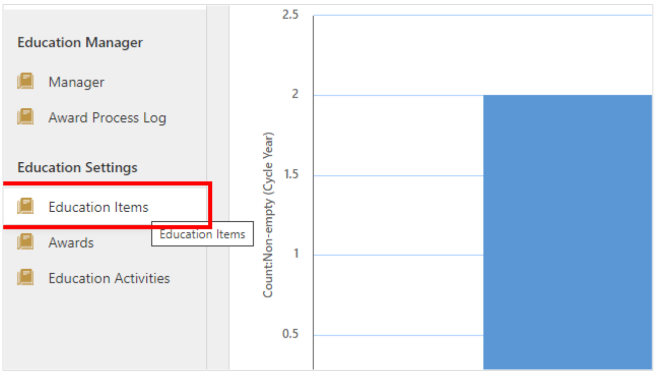
Click on the button **My Work (change area)**



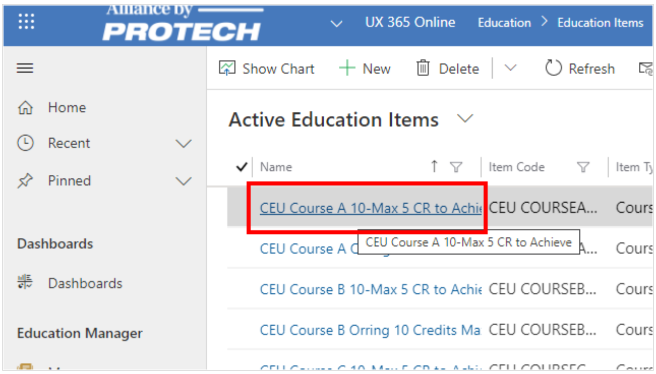
Click on the item **Education**



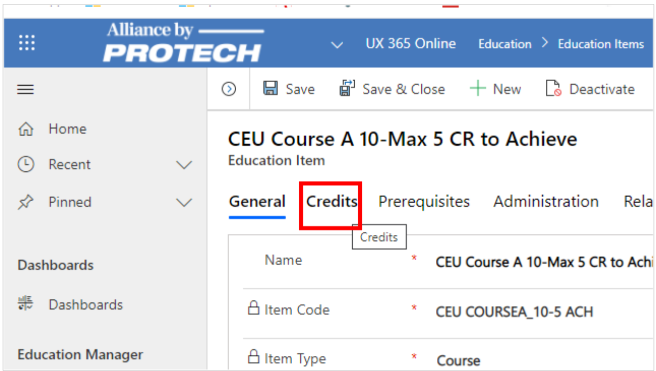
Click on the item **Education Items**



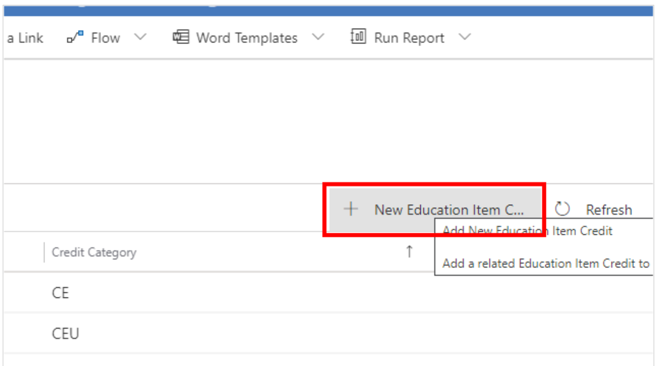
Select the course you would like to create an education item credit for



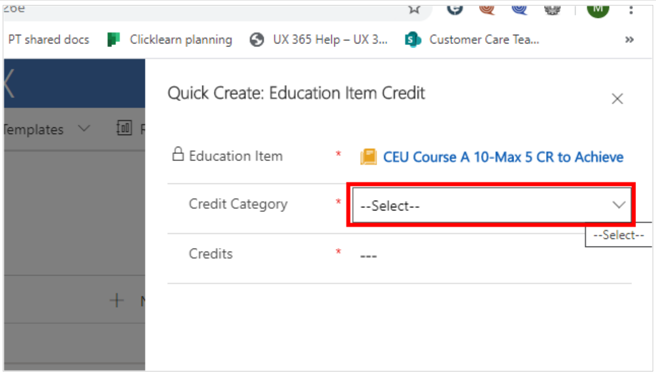
Click on the item **Credits**



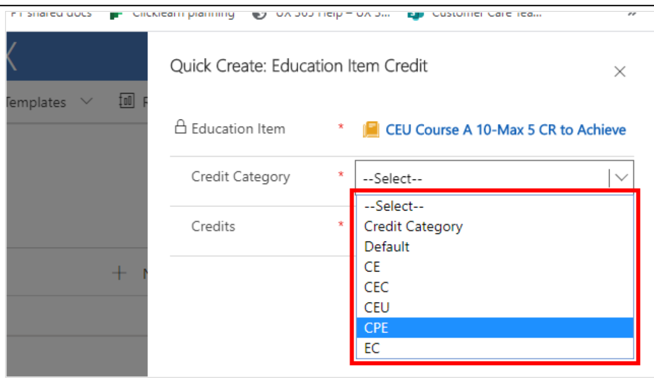
Click on the menu item **Add New Education Item Credit**



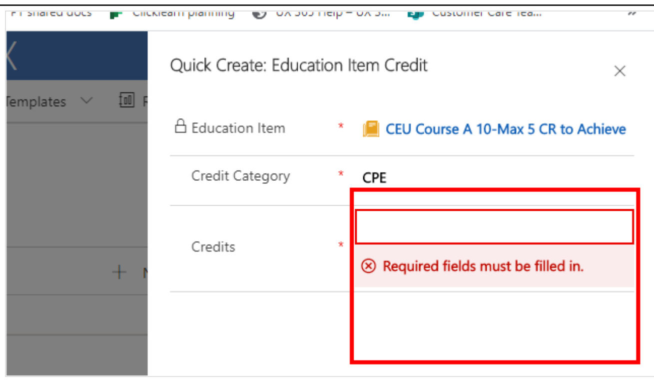
Select the credit category you would like to create



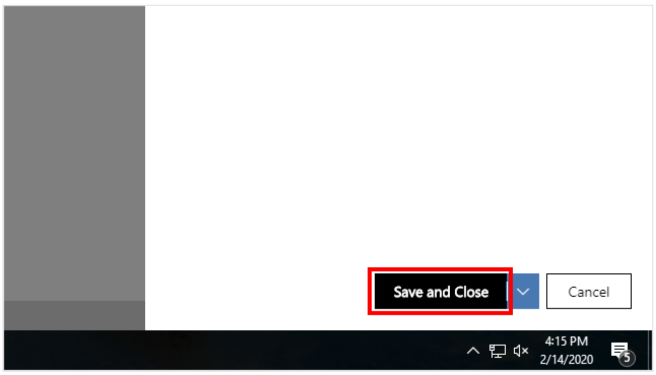
Select credit type



Enter the number of credits awarded

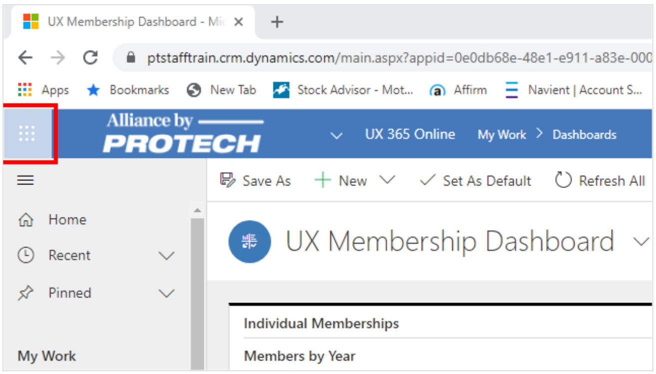


Click on the button **Save and Close**

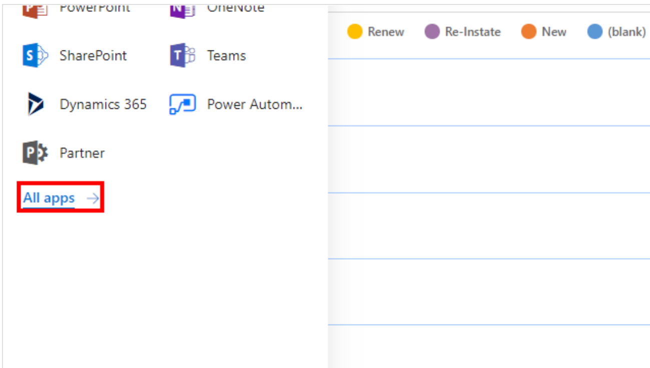


8.8. Creating Eductation Item Types

Click on the **waffle** button

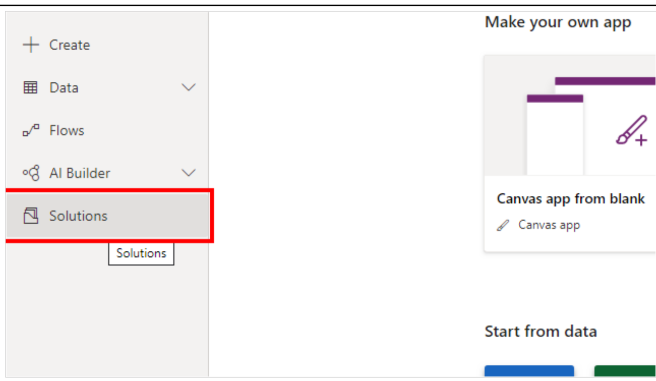


Click on the button **All apps**

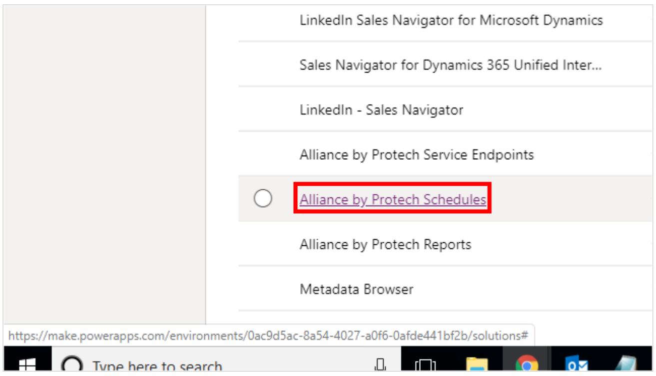


Click on the link **PowerApps**

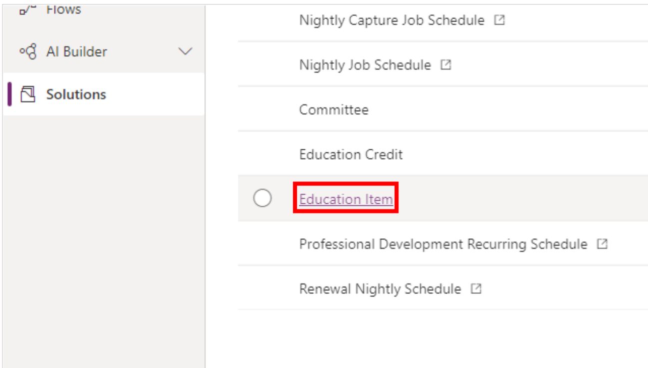
Click on the link **Solutions**



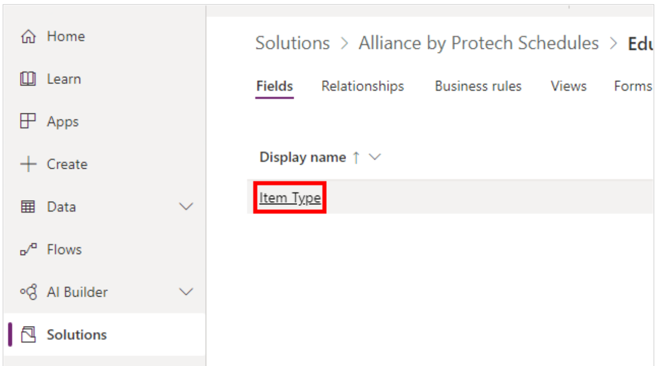
Open your organizations unmanaged solution



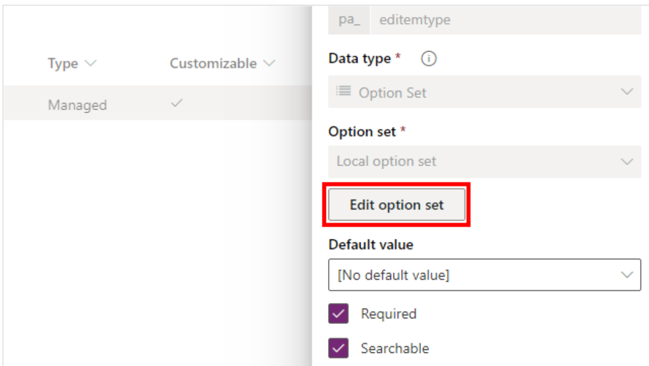
Click on the link **Education Item**



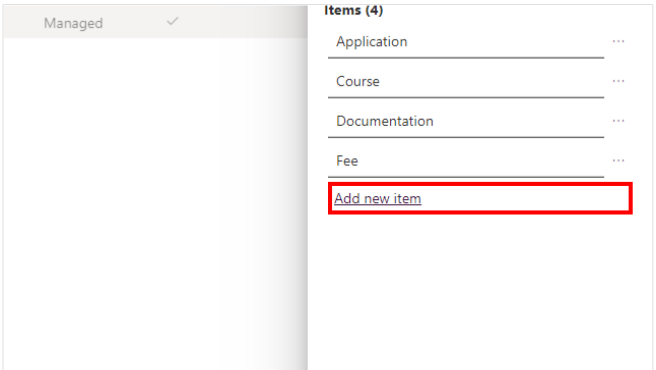
Click on the button **Item Type**



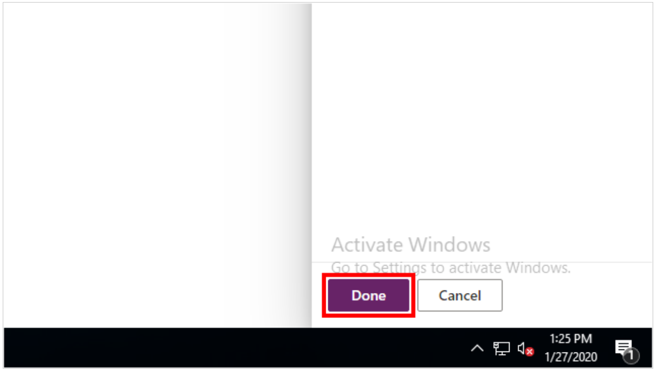
Click on the button **Edit option set**



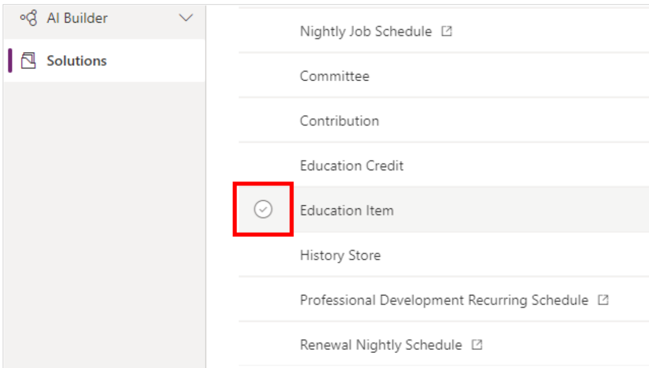
Click on Add new item to create new item types.



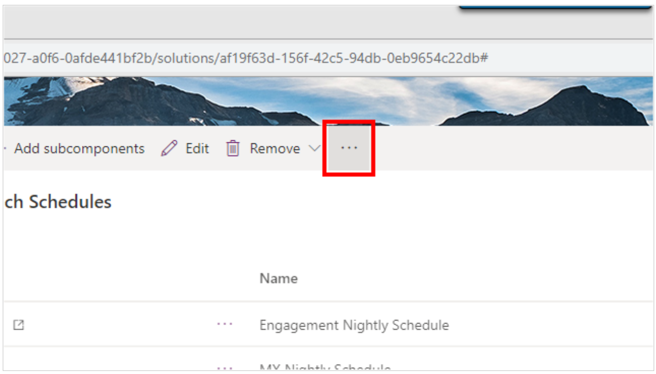
Click Done when you are finished.



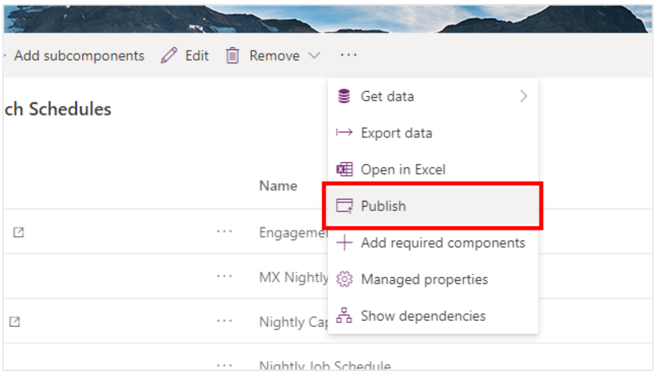
Check Eduction Item



Click on the more options button

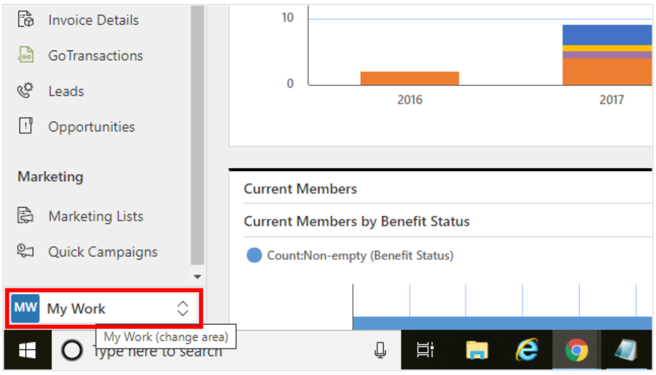


Click on the button Publish. You have successfully added your Eduction Type option sets

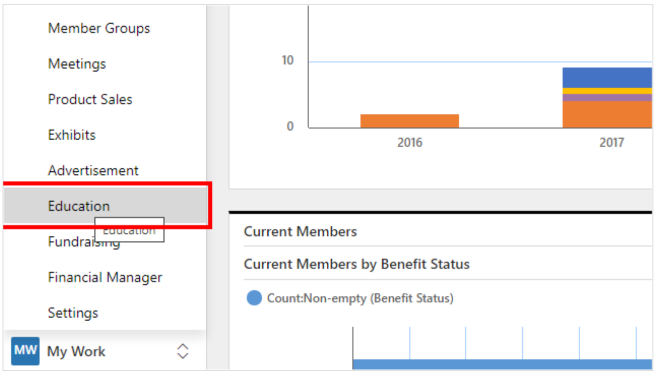


8.9. Creating Renew Recert Requirements

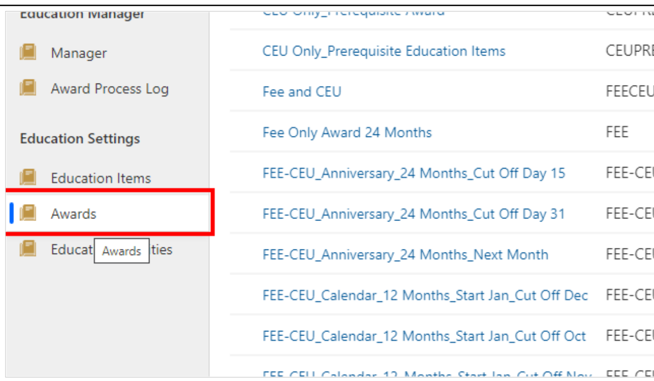
Click on the button **My Work (change area)**



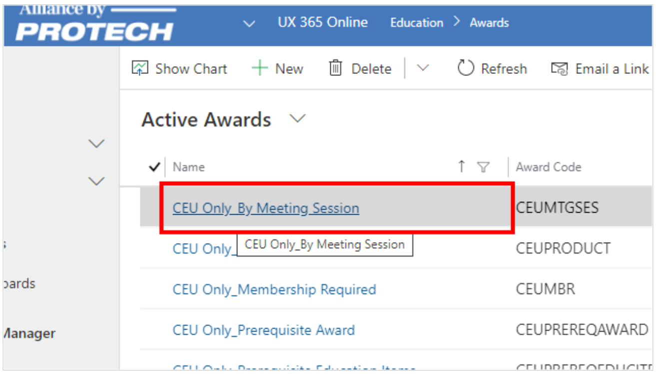
Click on the item **Education**



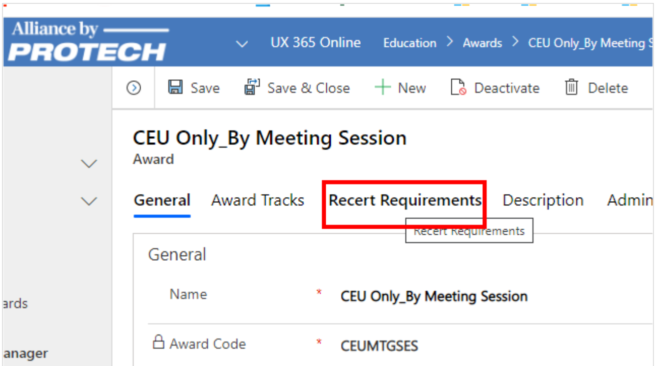
Click on the item **Awards**



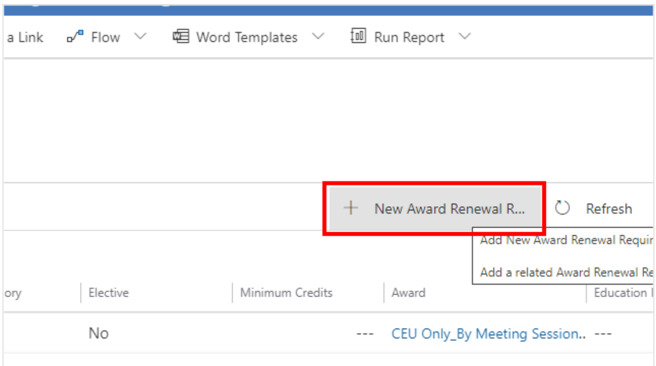
Click into the award youd like to add a requirement to



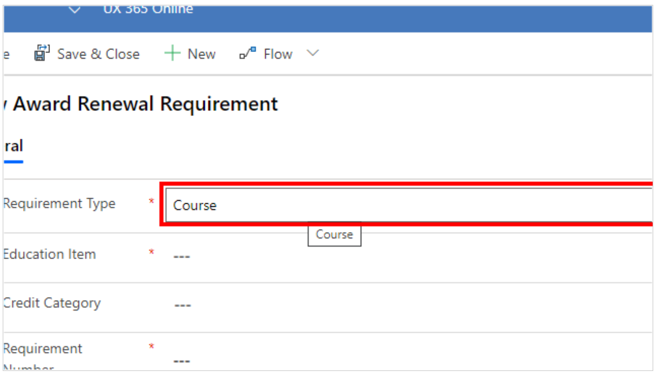
Click on the item **Recert Requirements**



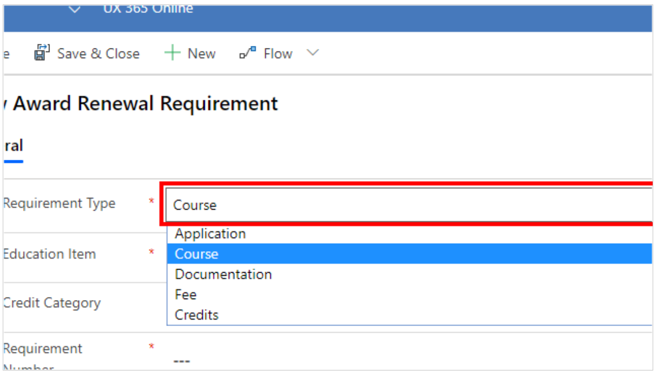
Click on the menu item **Add New Award Renewal Requirement**



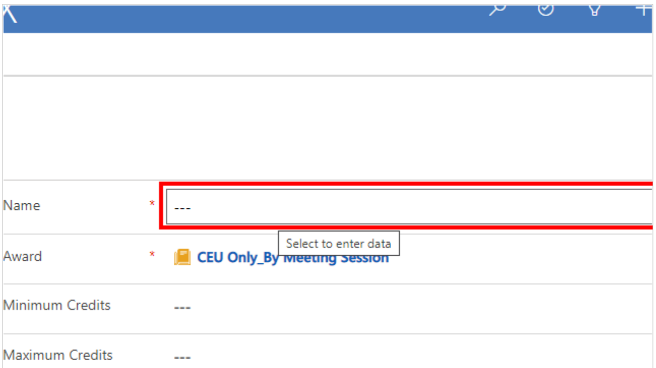
Click on the field **Requirement Type**



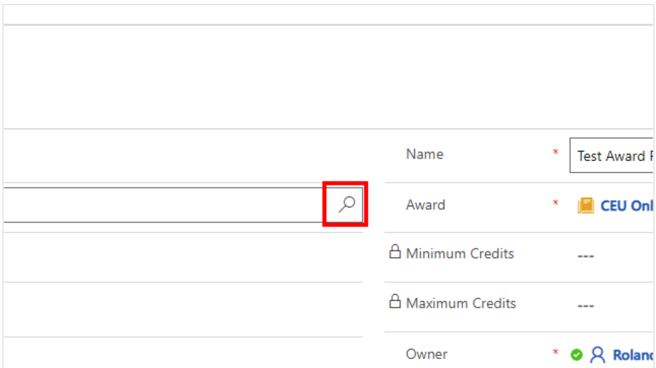
Select an option from the list



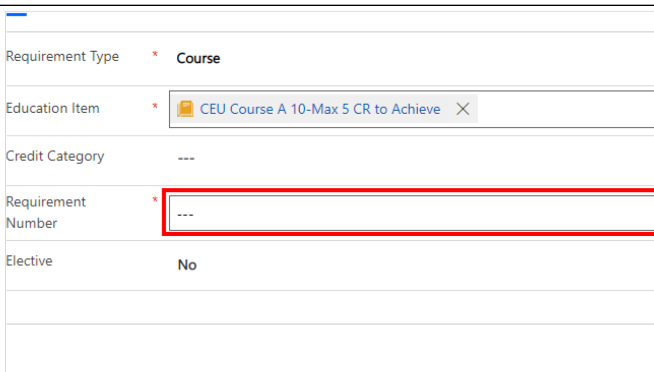
click on name to enter name



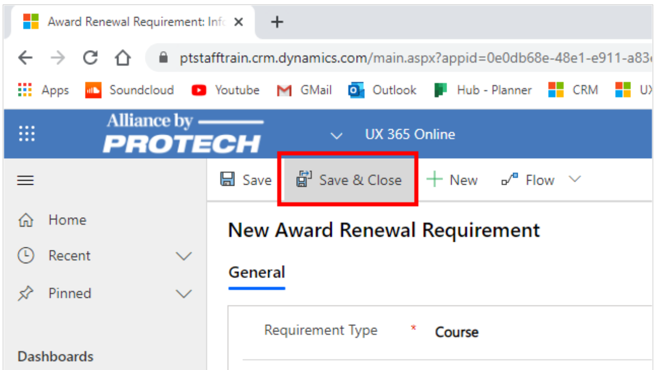
Select an Education Item



Enter a requirement number

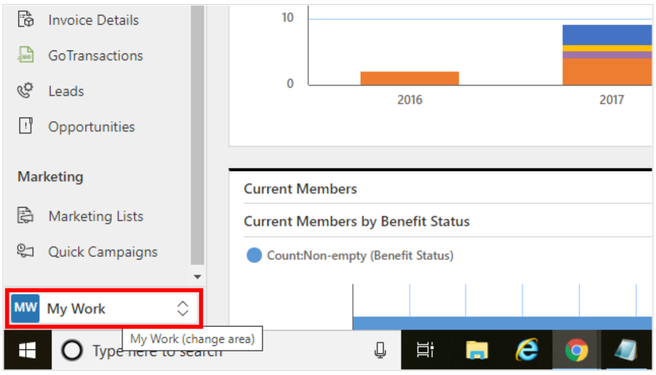


Click on the menu item **Save & Close**

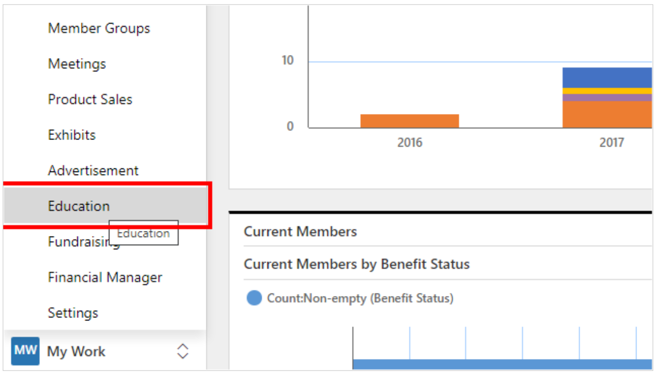


8.10. Creating Track Requirement Types

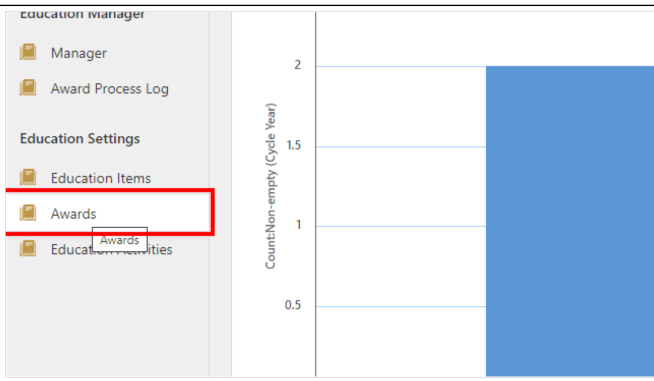
Click on the button **My Work (change area)**

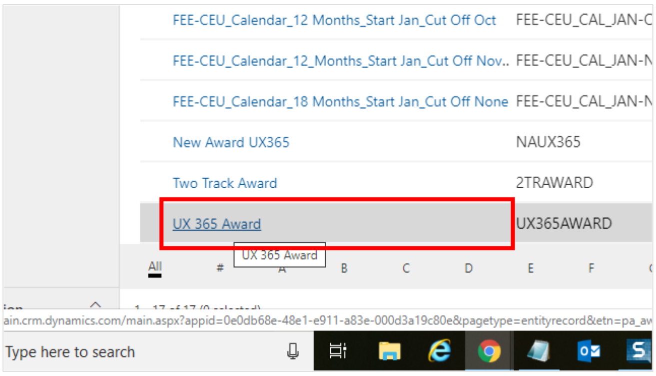
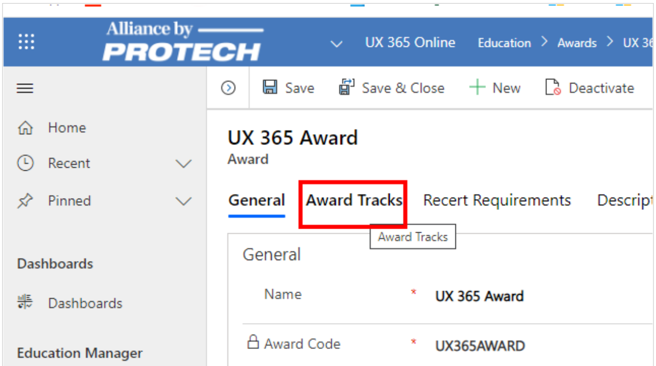
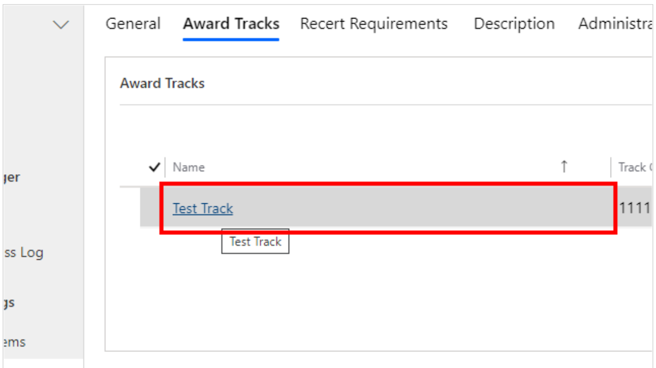
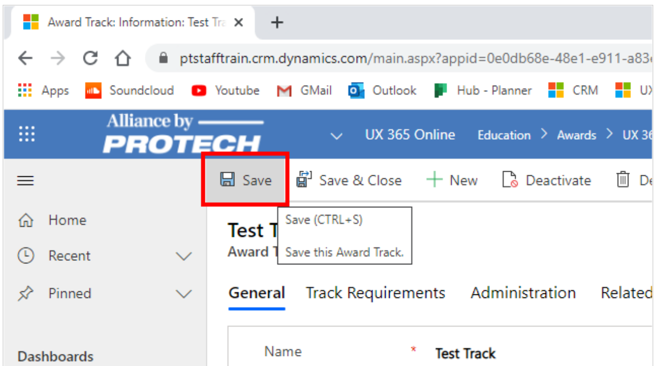


Click on the item **Education**

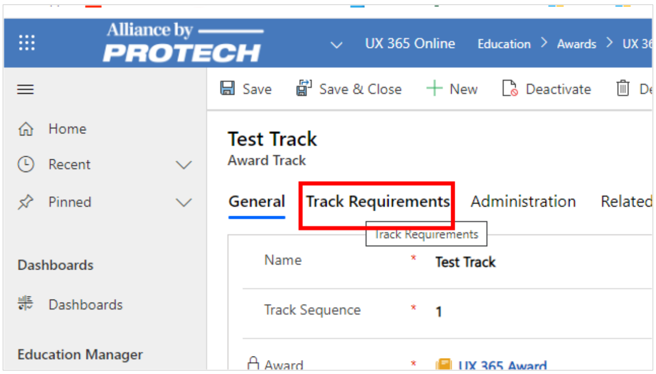


Click on the item **Awards**

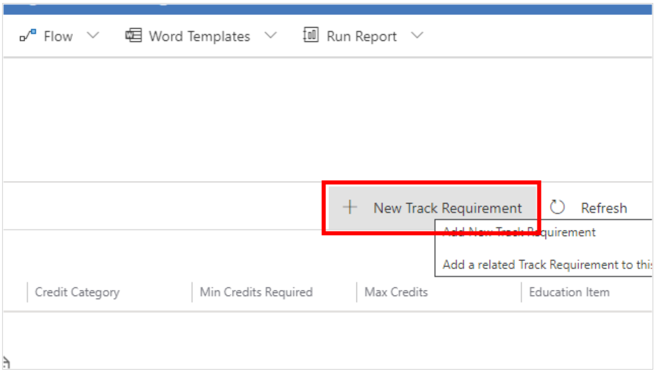


Navigate into the award you would like to make your track requirement in.	
Click on the item **Award Tracks**	
Click into the track you would like to add a requirement on.	
If it is a new track, you must save before adding requirements.	

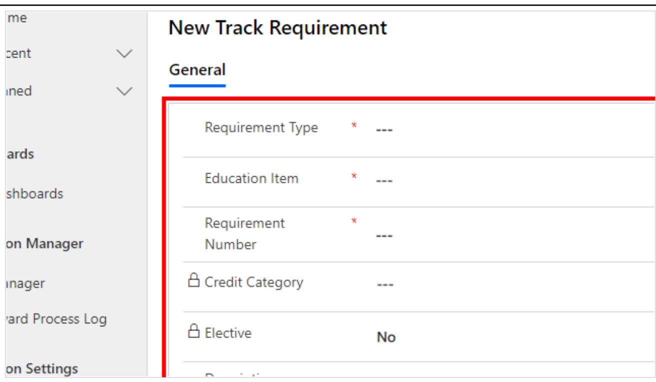
Click on the item **Track Requirements**



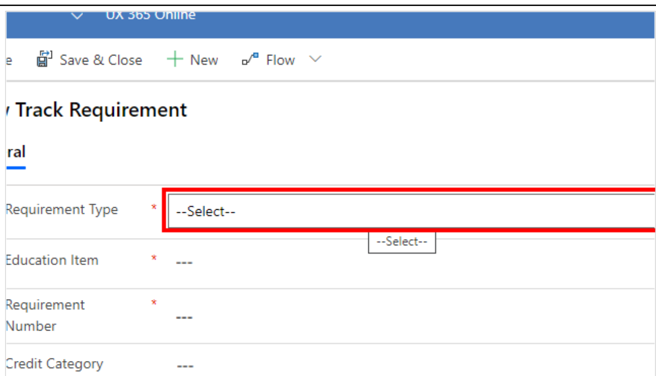
Click on the menu item **Add New Track Requirement**



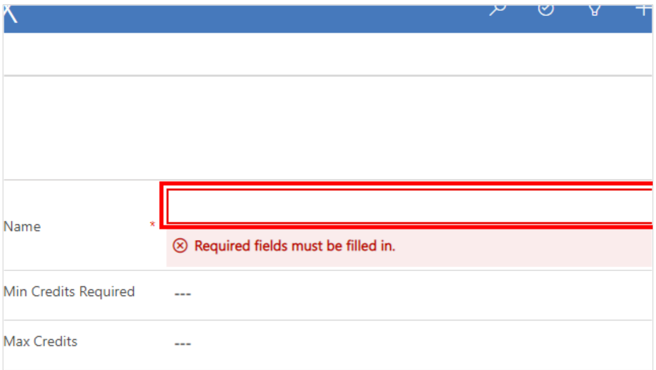
This is the general information section of the requirement record.



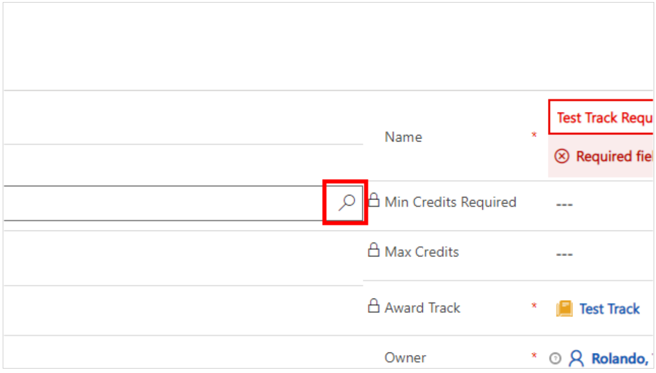
Click on the field Requirement Type to select in between the types.



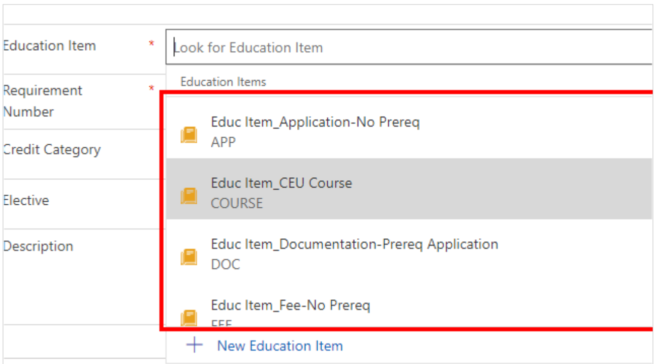
Click on name to add a name to the requirement.



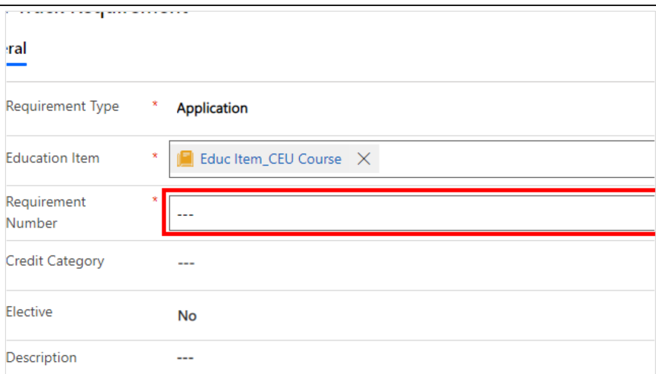
Click on the link **Education Item**



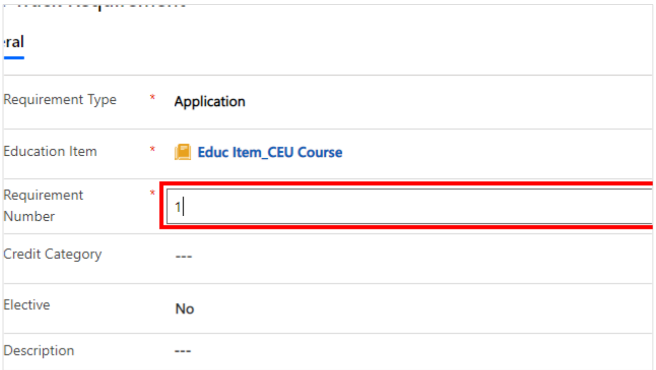
Click on an option from the list



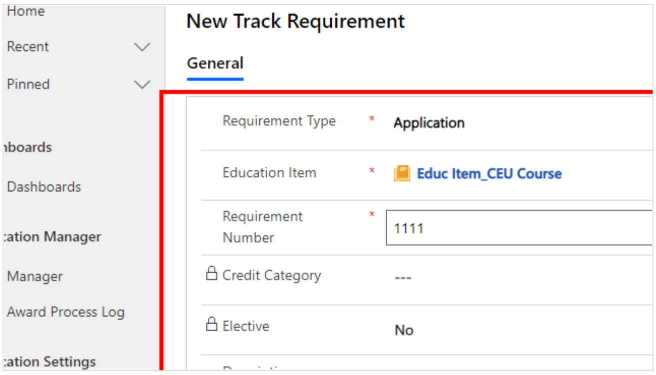
Click on the text field **Requirement Number**



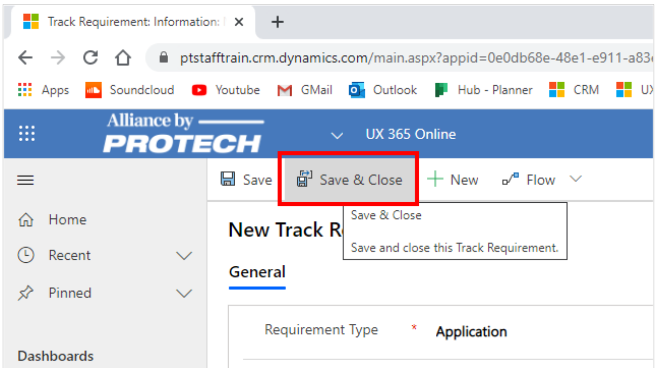
Enter Requirement Number.



The locked fields are automatically populated after selecting an education item



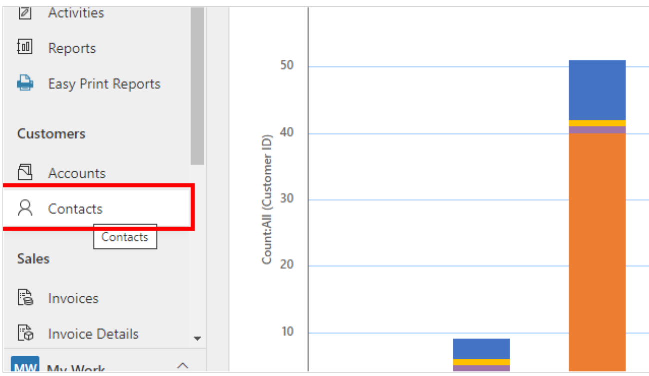
Click on the menu item **Save & Close**



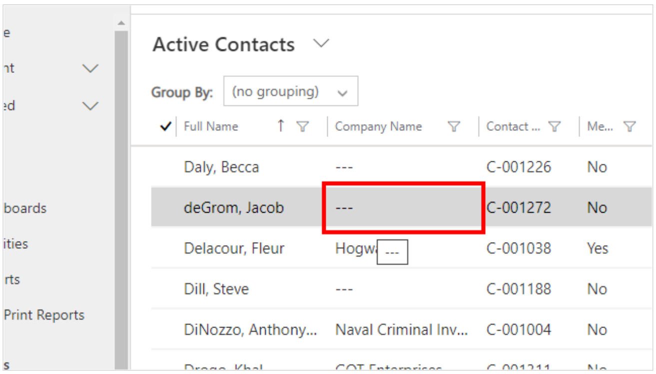
8.11. Education Activities that Initiate Award Enrollment

8.11.1. Education Activities that Initiate Award Enrollment

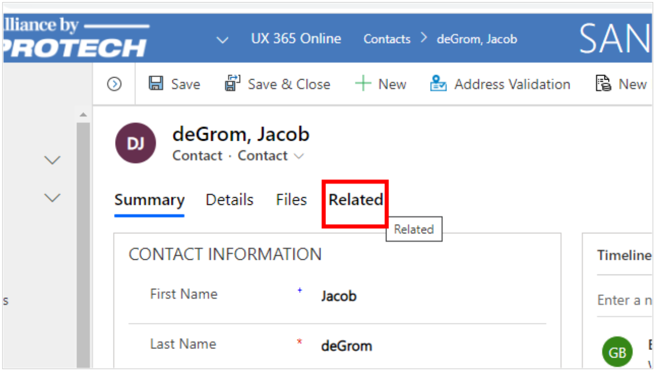
Click on the item **Contacts**



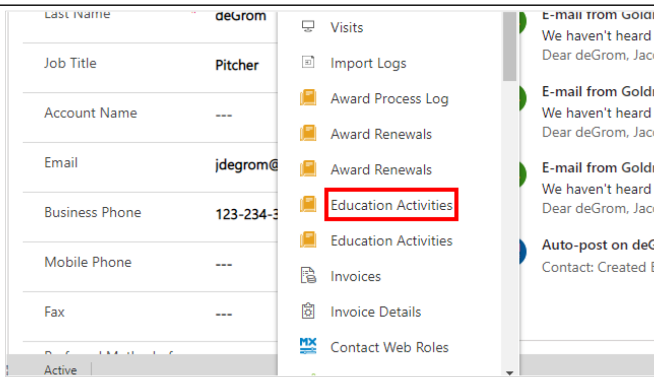
Double Click to Select Contact



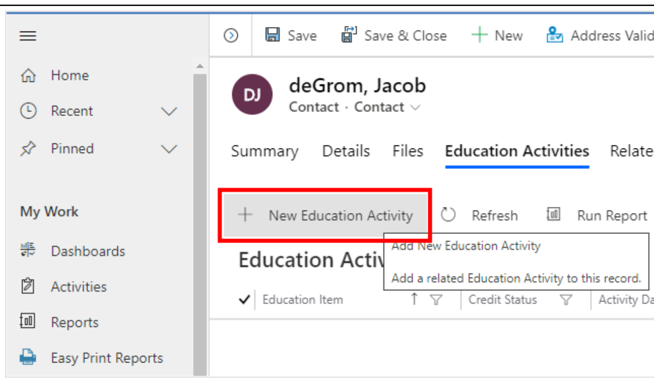
Click on the item **Related**



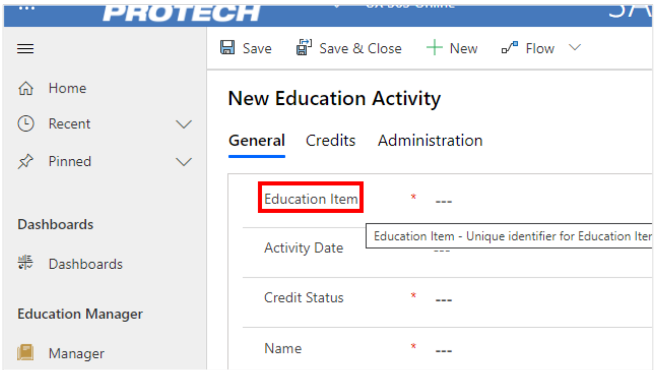
Click on the menu item **Education Activities**



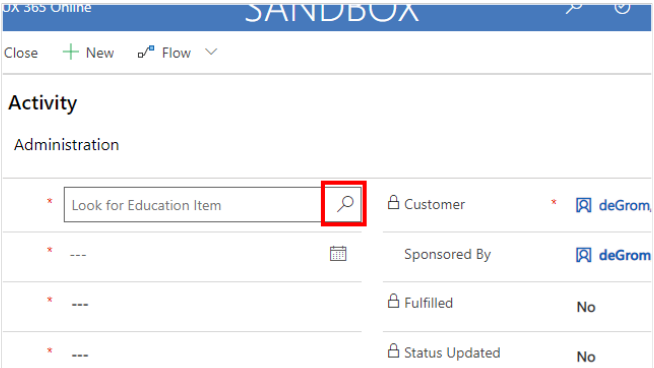
Click on the menu item **Add New Education Activity**



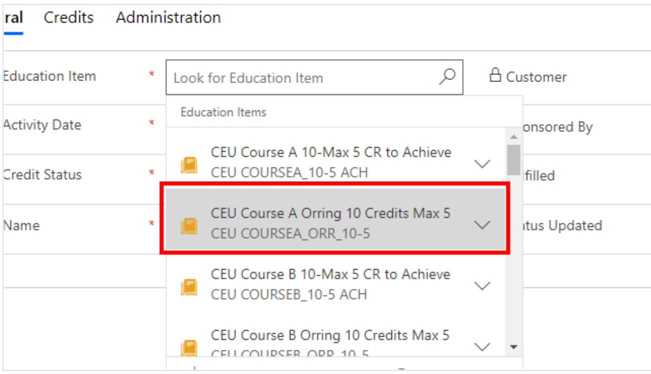
Education Item – Use the lookup to select the Education Item for this record.



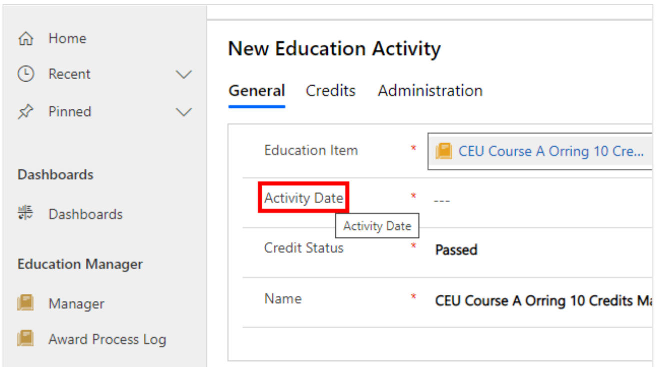
Click on the link **Education Item**



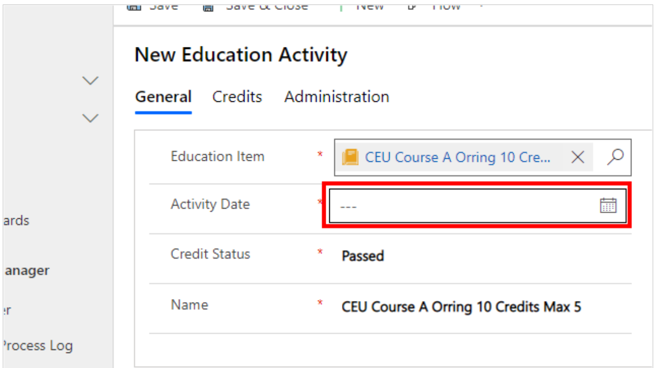
Select the Education Item



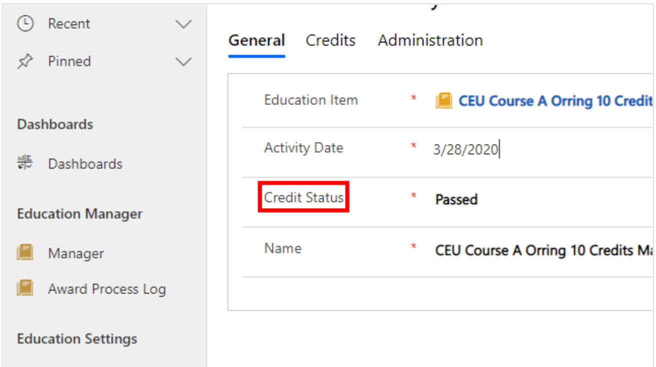
Activity Date – Use the calendar to select the date.



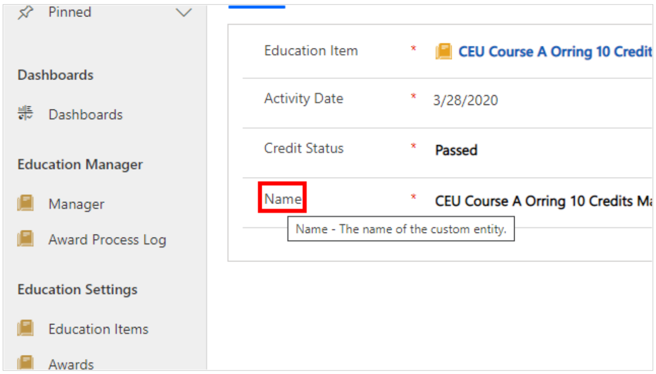
Click on the field **Activity Date**



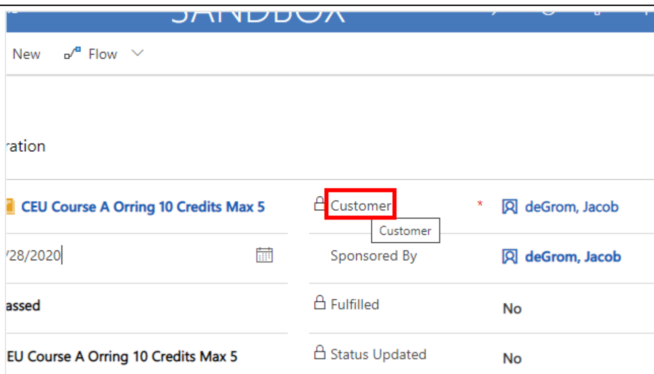
Credit Status – Defaults to ‘Passed’ or ‘Enrolled’ based on the setup of the Education Item selected.



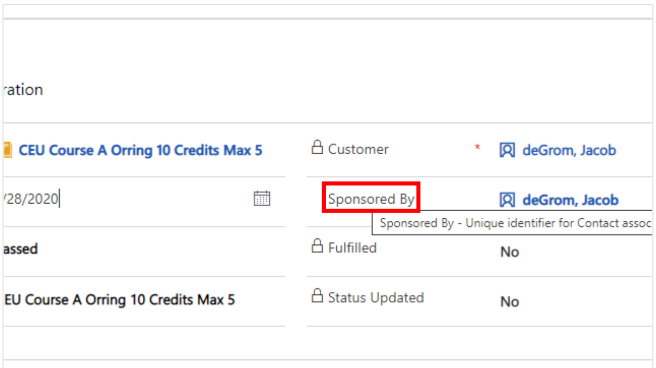
Name – Populated by UX based on the Education Item selected. This may be edited.



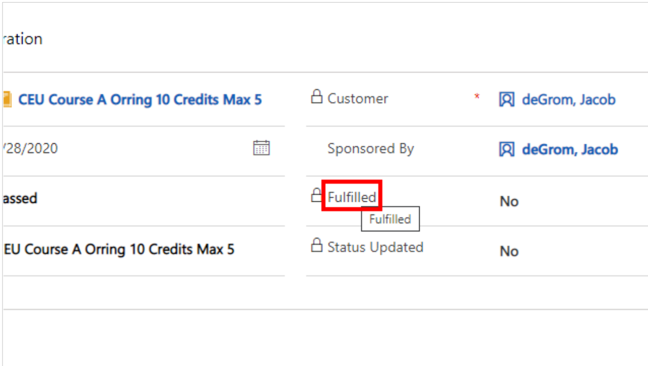
Customer – Defaults to the Customer and is locked.



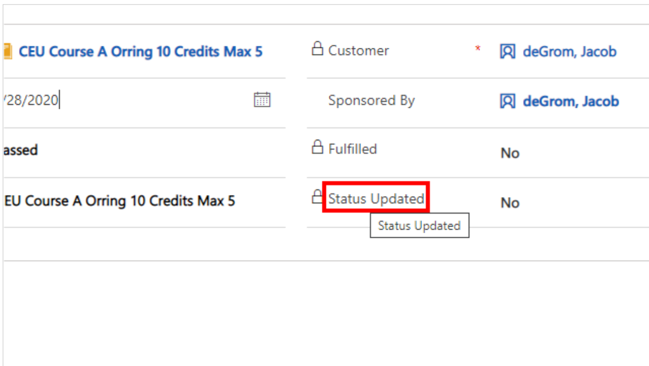
Sponsored by – Defaults to the customer and may be edited if your organization works with this data



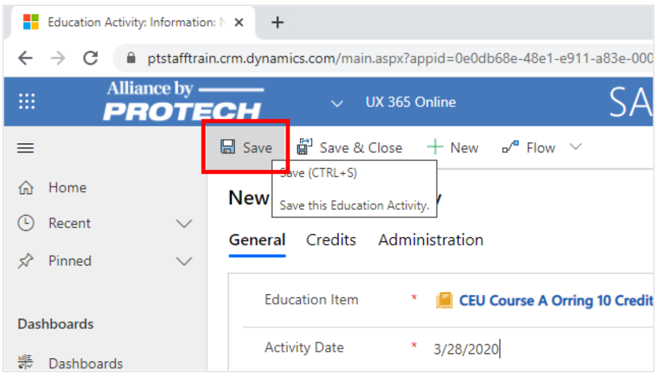
Fulfilled – This field is locked and defaults to No on a new record. If the default Credit Status in the Education Item setup = Passed, upon save of the record, UX will update this field to Yes. If the default Credit Status in the Education Item setup = Passed, upon save of the record, Fulfilled = No, and will not update to Yes until the Credit Status = Passed.



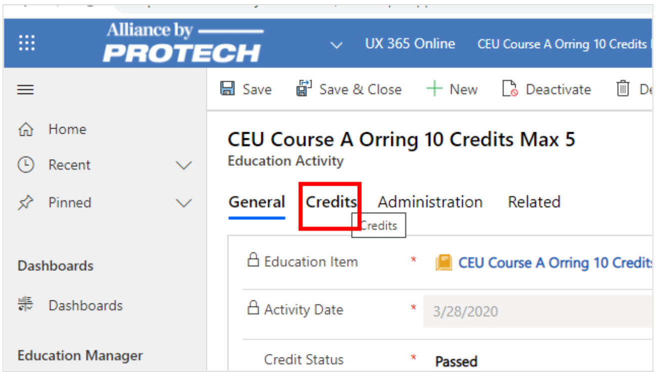
Status Updated – This field is locked and defaults to No on a new record. When the
Education Item Fulfilled = Yes, the record will be captured in the next recurrence of the UX Professional Development System Job and will update the value to Yes.



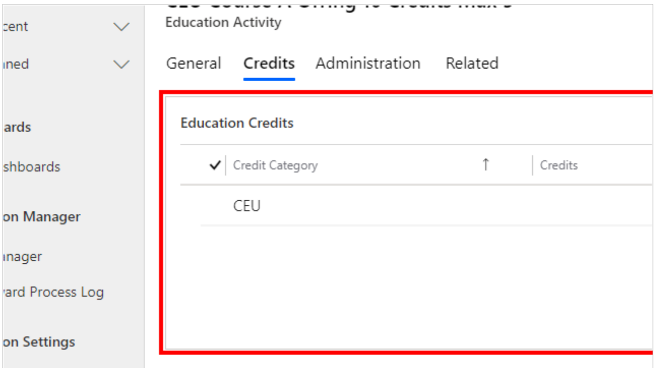
Click on the menu item Save



Click on the item **Credits**

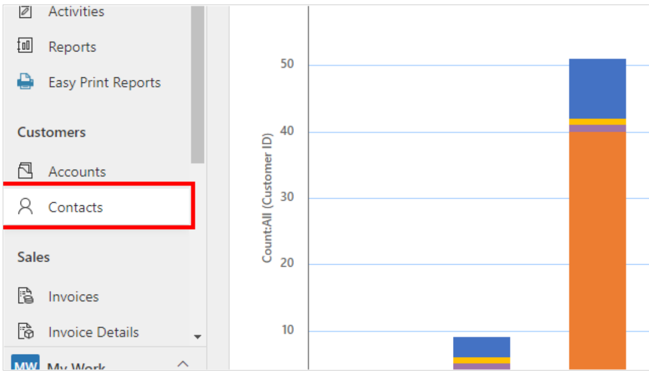


The records in this view are based on the Education Item Credits setup.

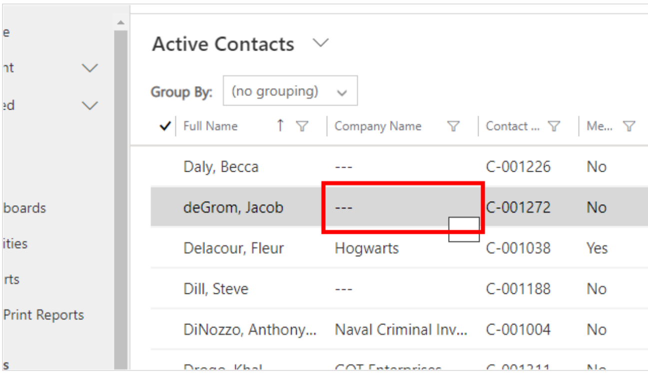


8.11.2. Updating Education Activity Credit Status

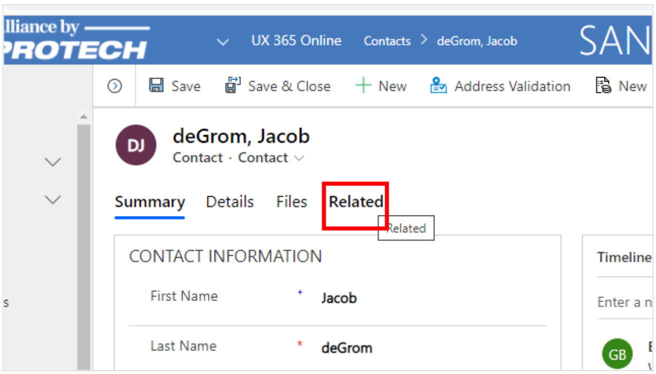
Click on the item **Contacts**



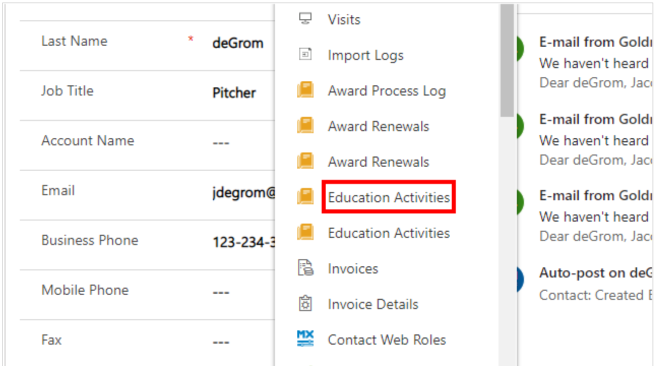
Double Click on the Contact



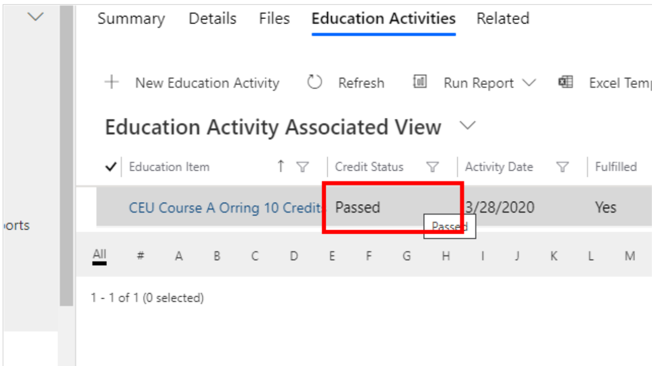
Click on the item **Related**



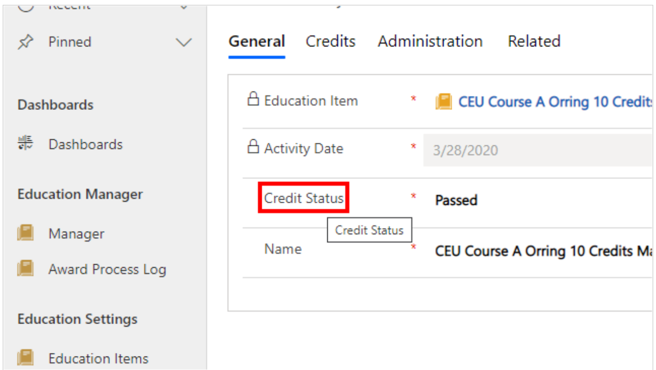
Click on the menu item **Education Activities**



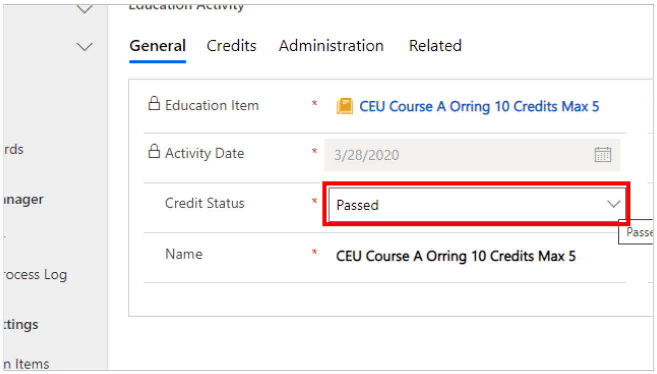
Select the Education Item



Check Credit Status

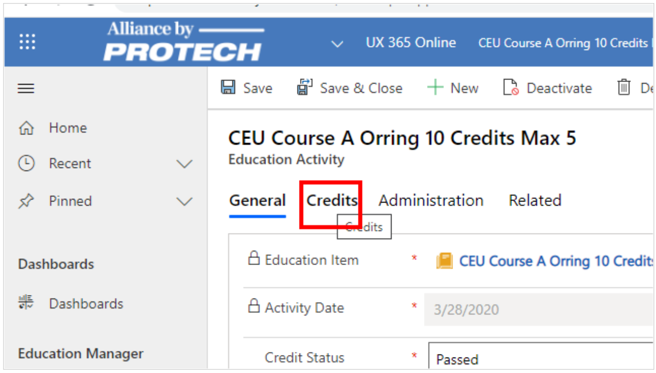


Click on the field **Credit Status**



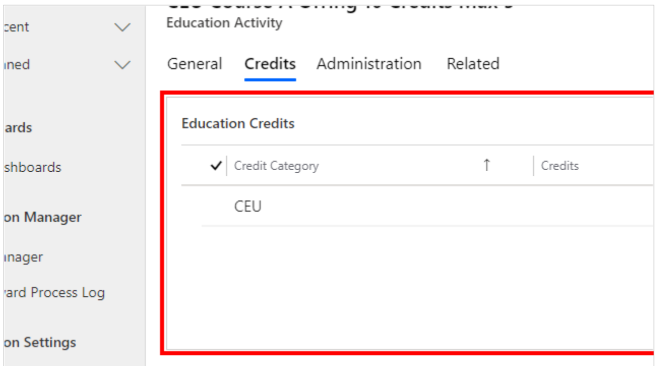
 If the customer has fulfilled the course requirement, change the Credit Status to Passed. This will automatically change the Fulfilled option to Yes. If the participant has failed to meet the course requirement, change the Credit Status to Failed to track their unsuccessful attempt to fulfill this course. The Fulfilled option will not change. If the participant did not attend the course, change the Credit Status to No Show to track their non-attendance. The Fulfilled option will not change.

Click the Credits tab on the Education Activity record to view credits earned for this Education Activity.



Do not create new Credit records or modify existing Credit records. There is no logic to re-evaluate eligibility once the Education Activity Status Updated = Yes.

The records in this view are based on the Education Item Credits setup.

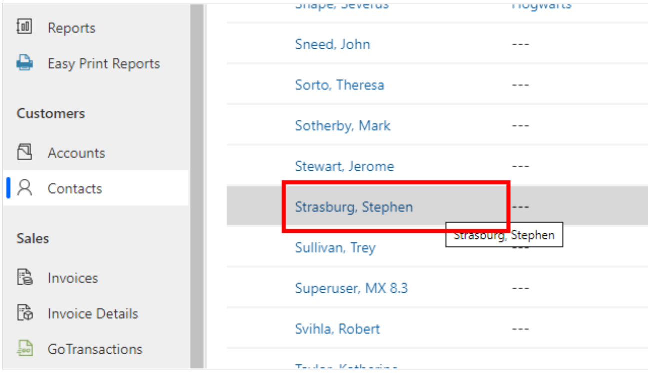


8.12. Eligibility View

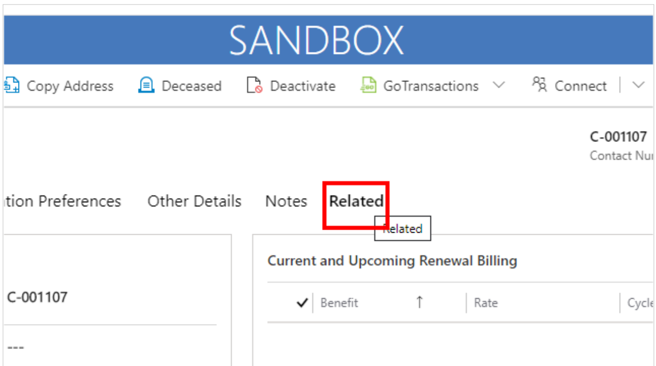
The Eligibility View in a customer's record displays the progress toward fulfilling the requirements for achieving an Award. The information is that same as that displayed in the Track Header Status and related Track Details, but the Eligibility view displays the Track and Track requirements status information that is grouped by Award in one quick, easy-to-read view of a customer's progress.

Click on the item **Contacts**

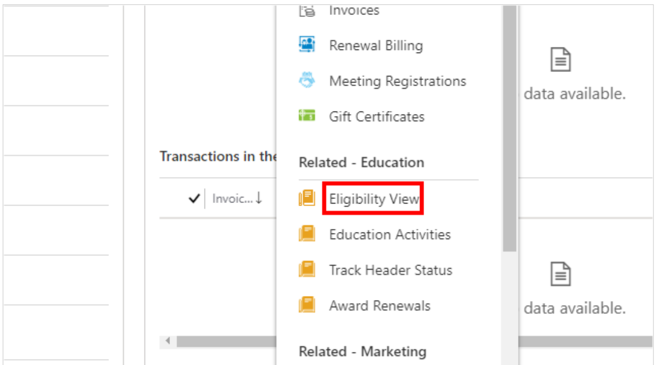
Double click on the cell **Full Name**



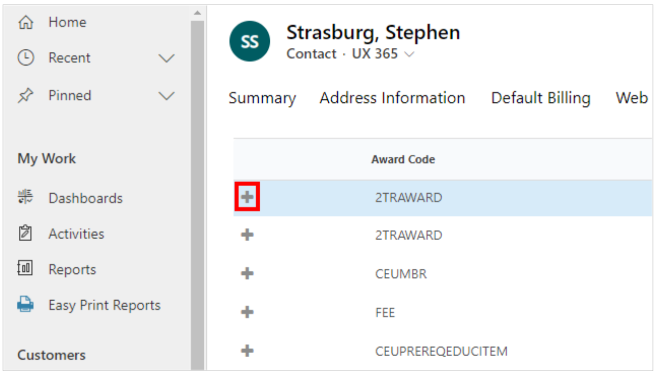
Click on the item **Related**



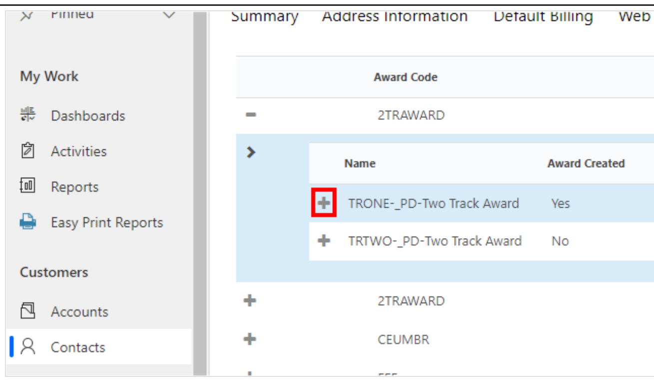
Click on the menu item **Eligibility View**



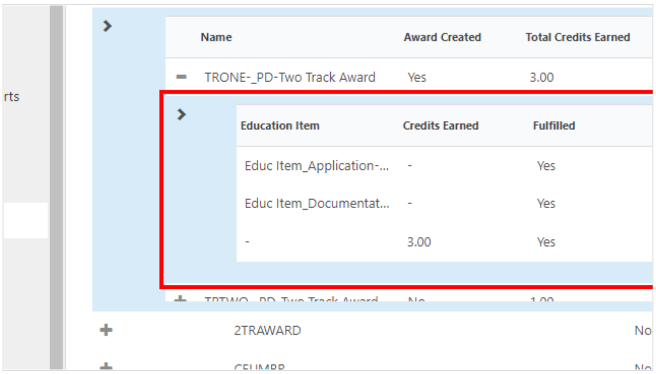
The View updates when the UX Professional Development System Job updates the Status Updated = Yes for Education Items where Fulfilled = Yes. In other words, when an Education Activity is a Track Requirement for one or more Awards, once the system job updates the Status Updated = Yes, then UX updates the Eligibility View that displays the Award, the related Track and Track Requirements. If the Education Item is related to a Track Requirement for more than one Award, the Eligibility View reflects the progress for both Awards when a customer has eligible Education. Click on the link to show the track(s) for the award.



Click on the link to show the track requirements.



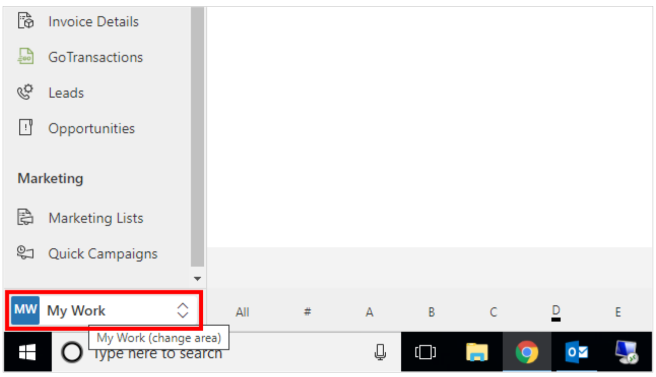
Track Requirements
If the Award has multiple Track Requirements with related Education Items, the View displays the status of each. For example, a Track may have three Track Requirements. Once one of the Track Requirements is satisfied toward achieving an Award, the View displays the Award, the Track, and all three Track Requirements. The Award is not created until all three Track Requirements are satisfied.



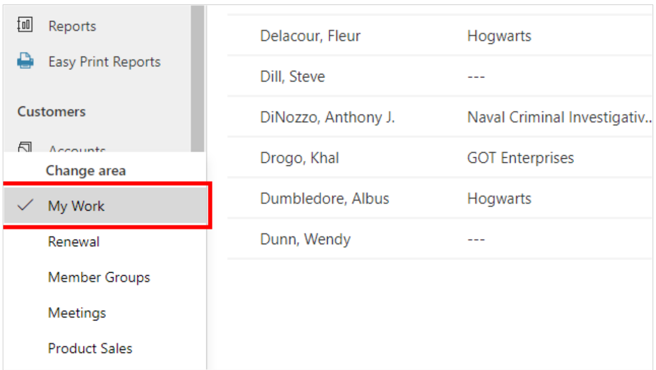
8.13. Reinstating an Award

8.13.1. Reinstating an Award, where Requirements are Met but the Invoice is unpaid

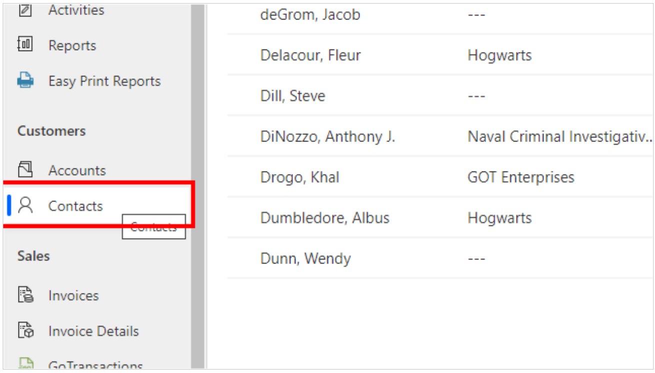
Click on the button **My Work (change area)**



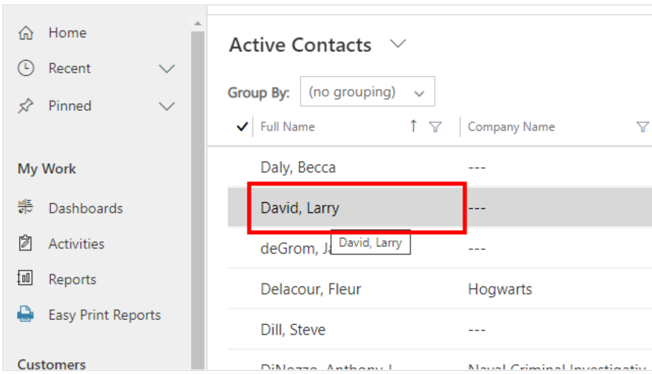
Click on the item **My Work**



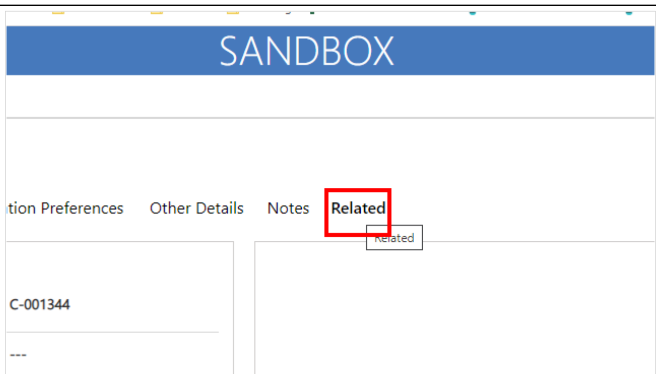
Click on the item **Contacts**



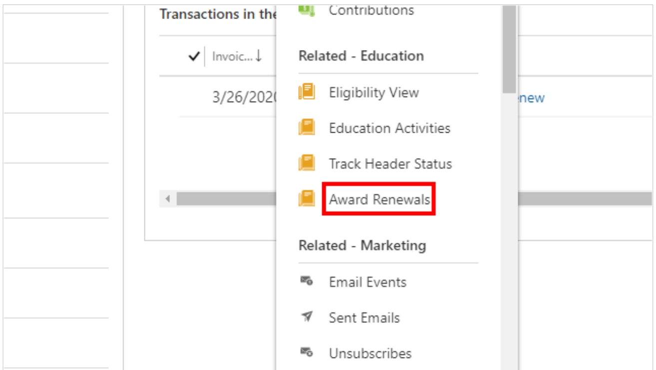
Select Award recipient



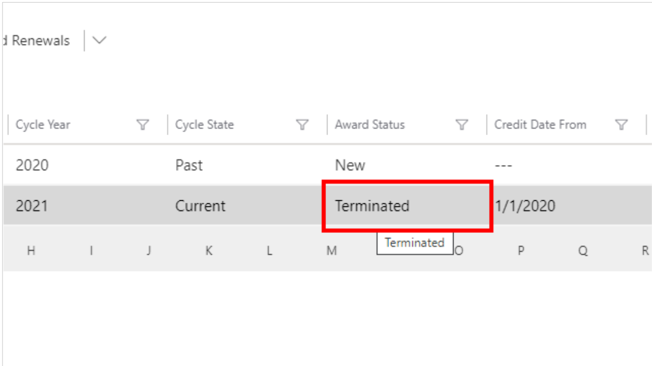
Click on the item **Related**



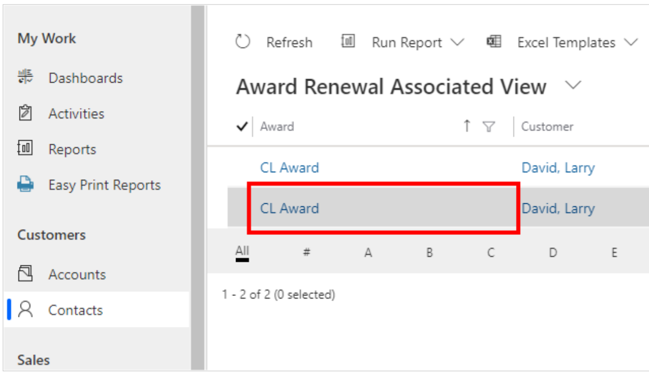
Click on the menu item **Award Renewals**



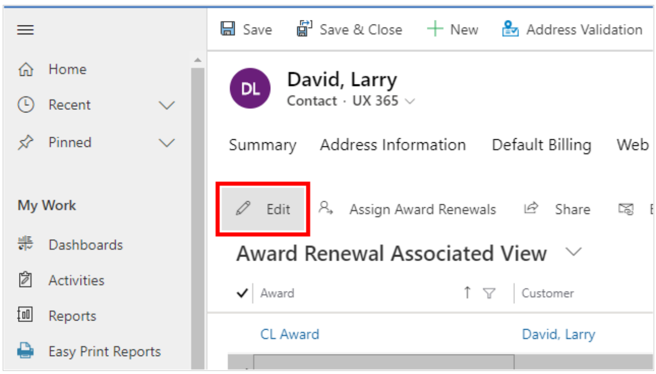
This customer has a Current, Terminated Award.



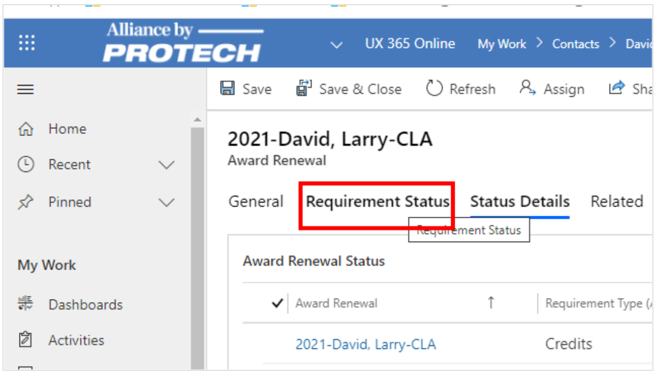
Click on **Award**



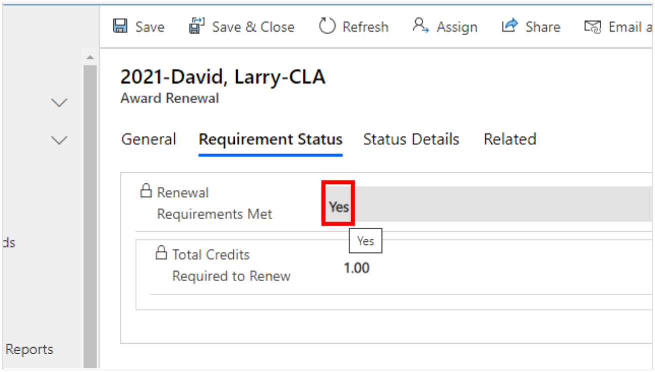
Click on the menu item **Edit**



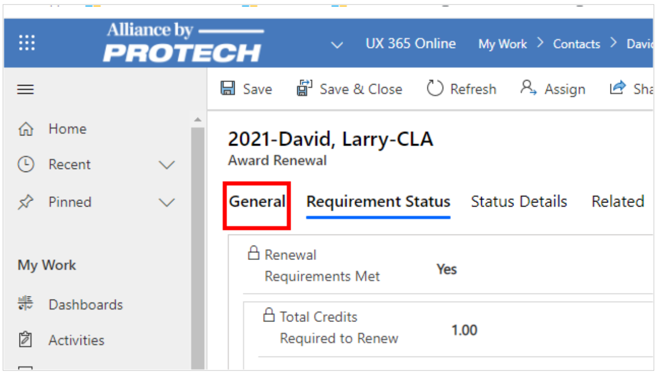
Click on the item **Requirement Status**



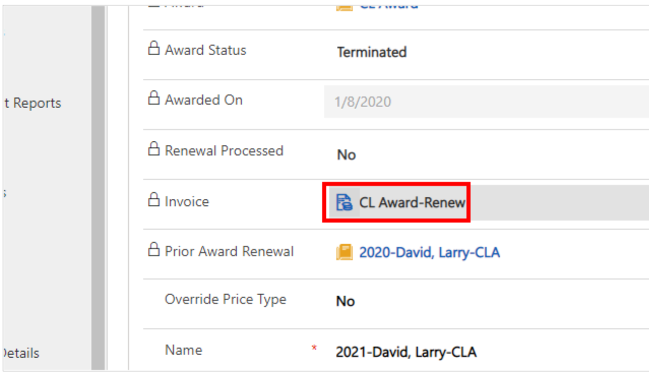
If the Renewal Requirements Met = true but Paid On = NULL, then pay the invoice.



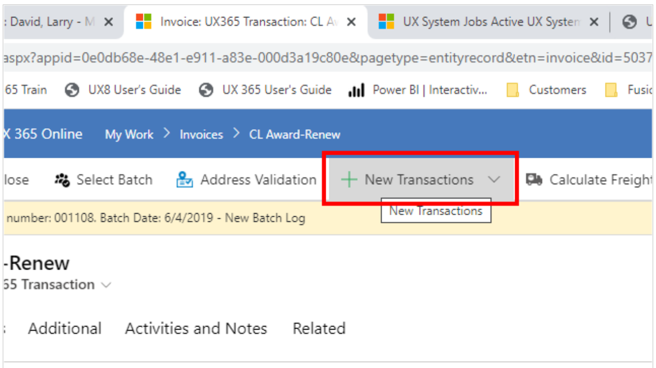
Click on the item **General**



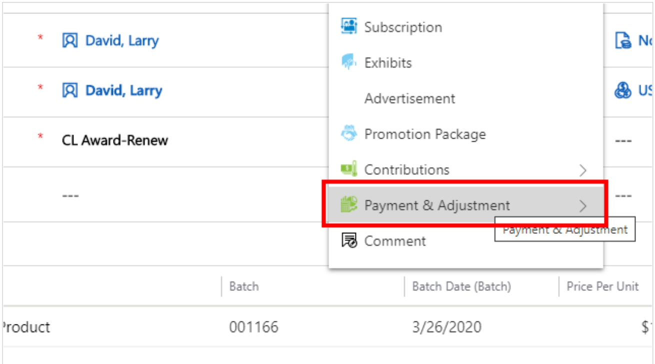
Click on **Invoice**



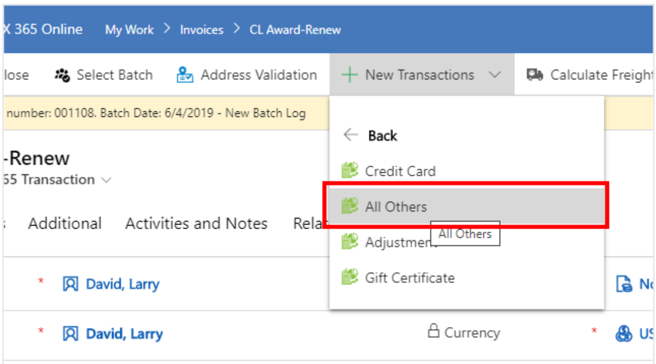
Click on the menu item **New Transactions**



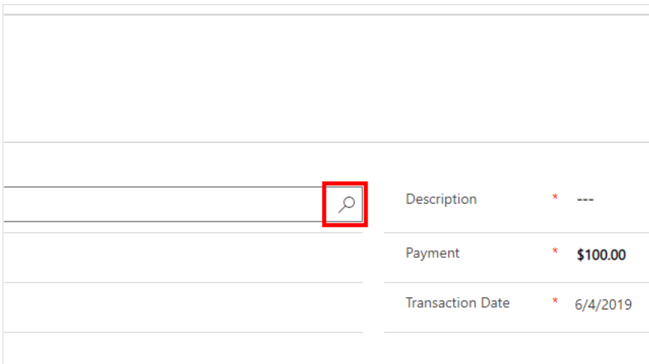
Click on the menu item **Payment & Adjustment**



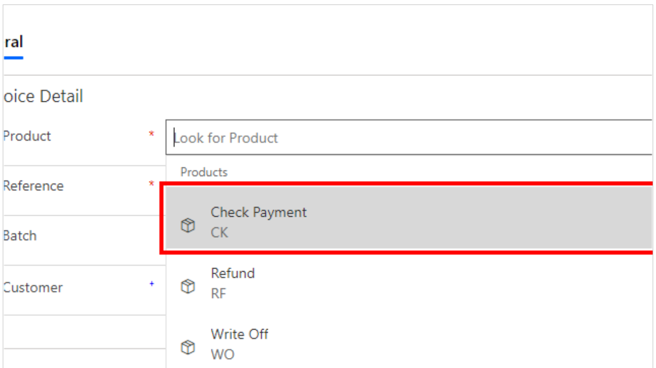
Click on the menu item **All Others**



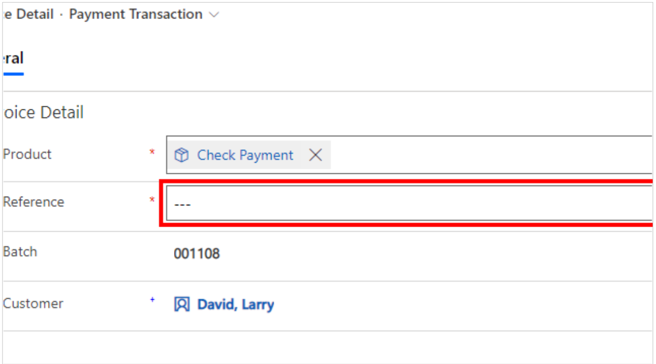
Click on the link **Product**



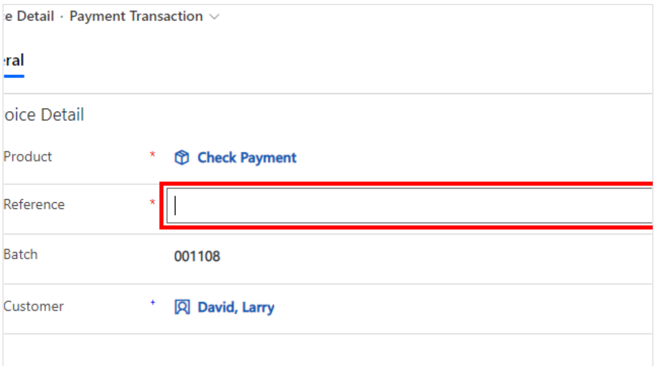
Add a payment product.



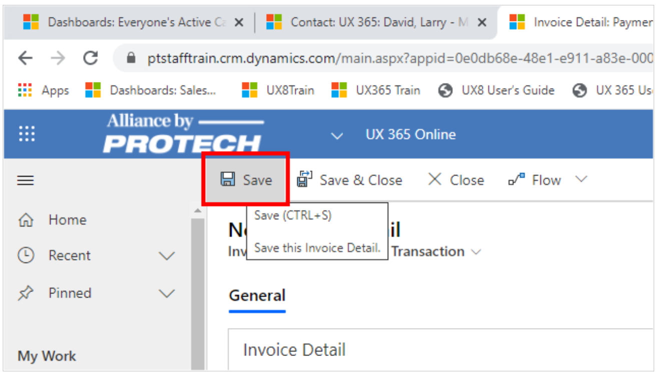
Click on the text field **Reference**



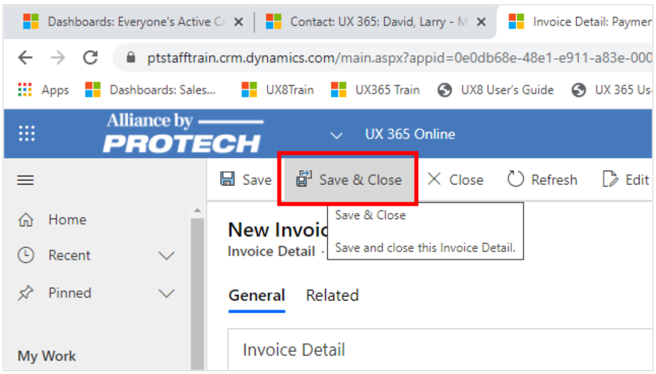
Enter **a Reference Number**.



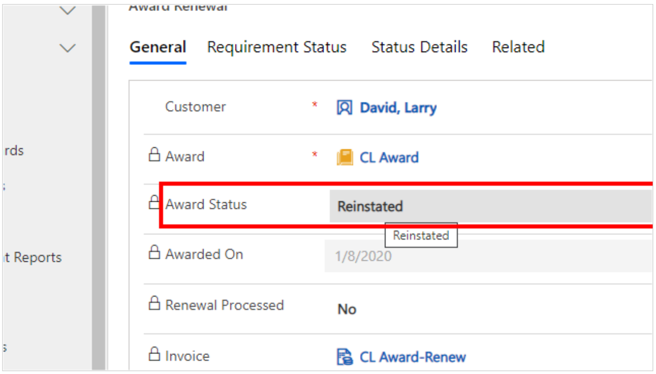
Click on the menu item **Save (CTRL+S)**



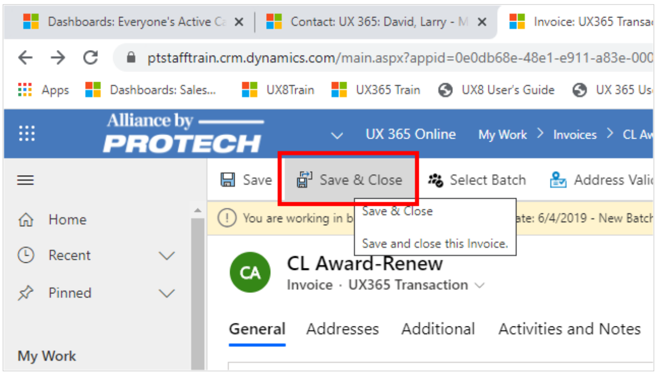
Click on the menu item **Save & Close**



Now the Award is Reinstated.

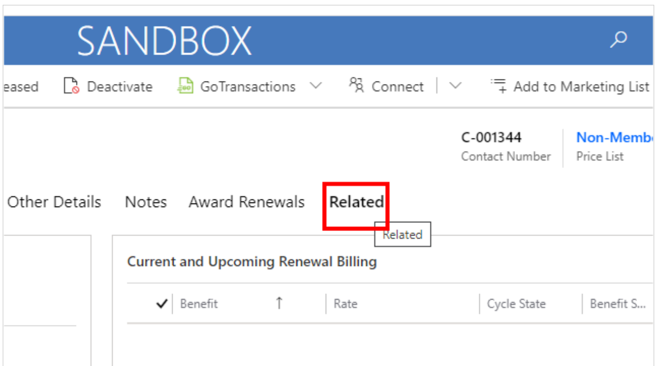


Click on the menu item **Save & Close**

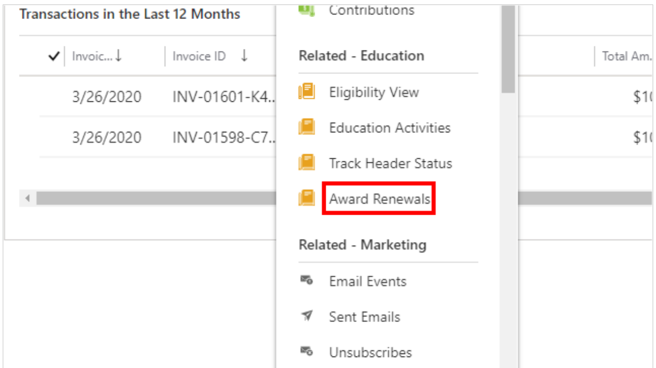


8.13.2. Reinstating an Award where Requirements are not Met AND Invoice is not paid

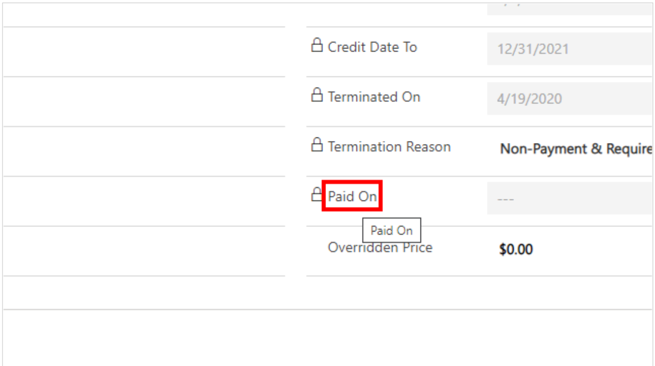
From the Customer record, click on Related.



Click on the menu item **Award Renewals**

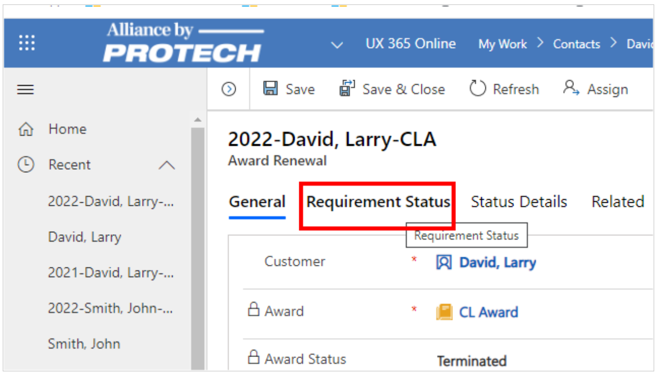


Note that the Paid On field is blank, the Invoice still needs to be paid.

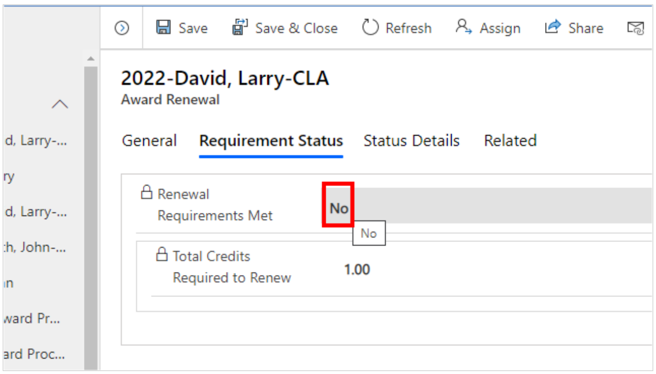


If the Paid On field contains data, ONLY the Education Activity is required to Reinstate the Award.

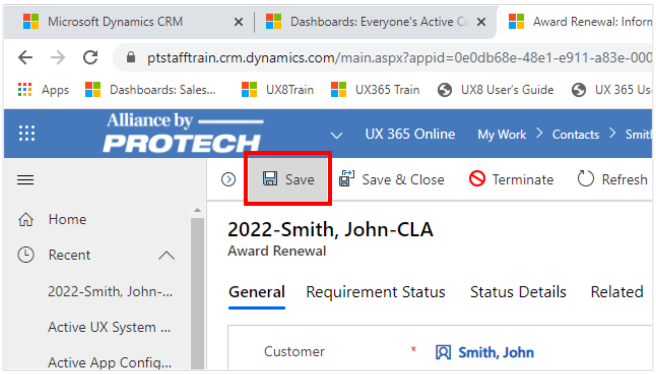
Click on the item **Requirement Status**



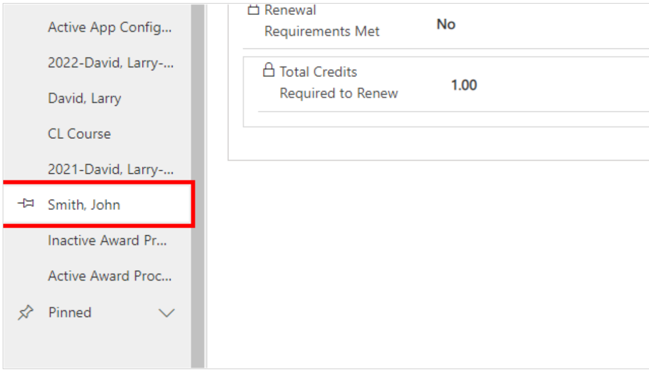
Note that the Renewal Requirements are also not met. Additional Education Activities are needed to meet requirements.



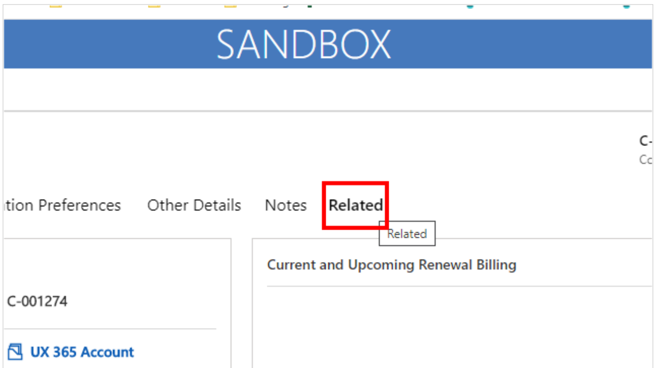
Click on the menu item **Save (CTRL+S)**



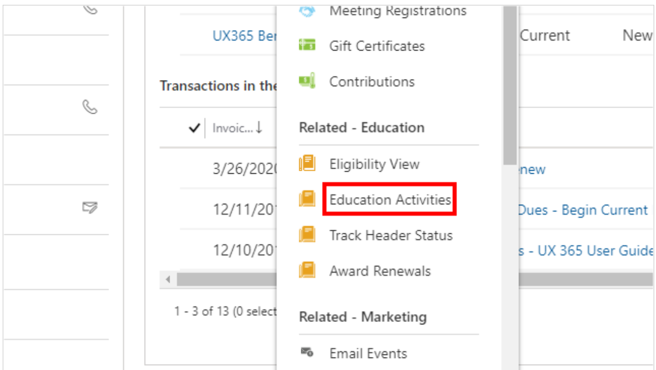
Click on the item **Smith, John**



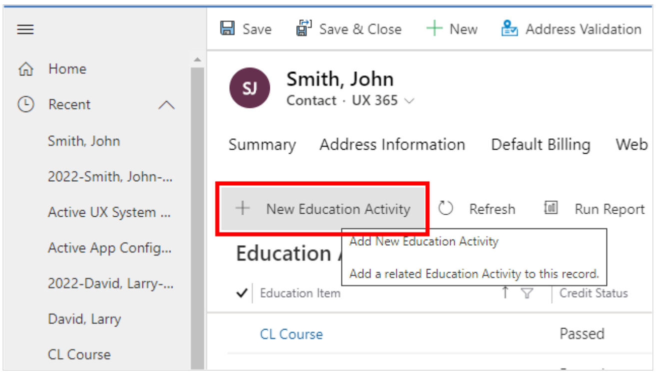
Click on the item **Related**



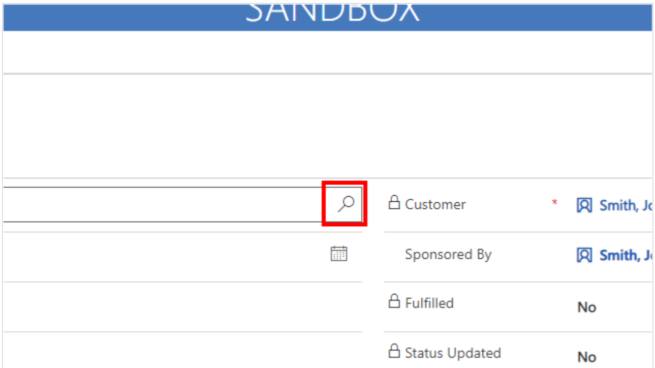
Click on the menu item **Education Activities**



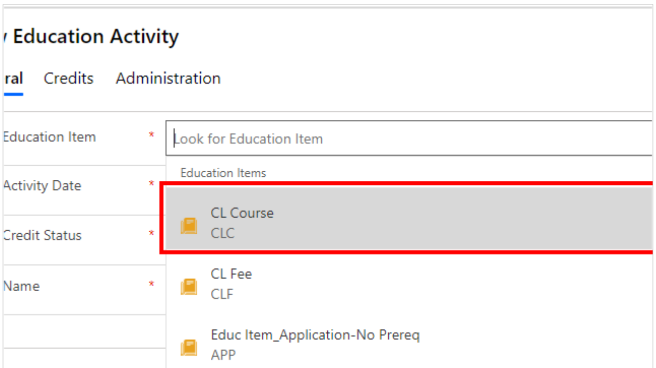
Click on the menu item **Add New Education Activity**



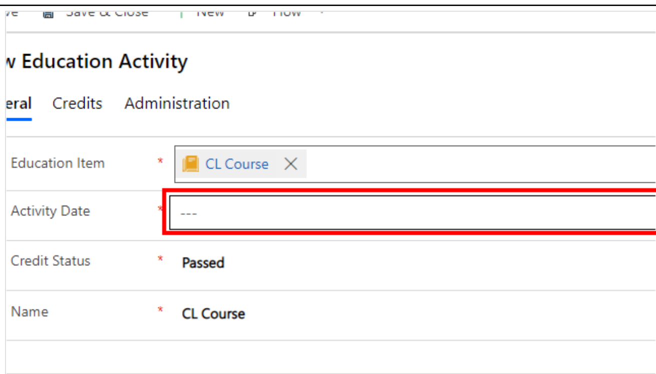
Click on the link **Education Item**



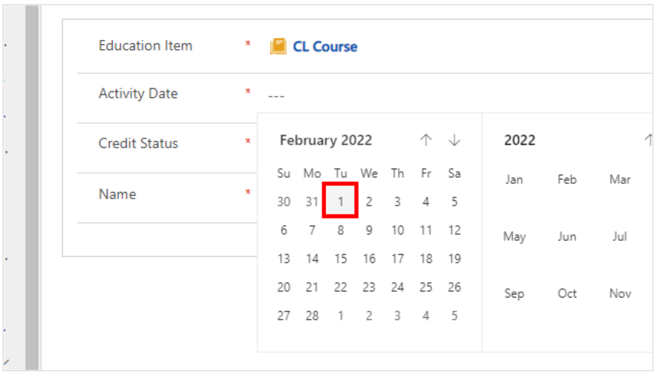
Add Education Activies that are required for the Award.



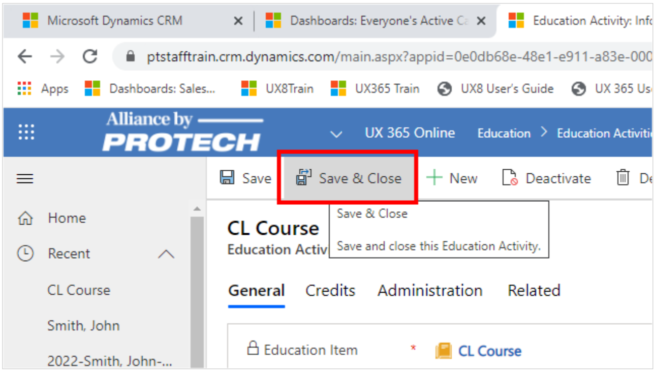
Click on the field **Activity Date**



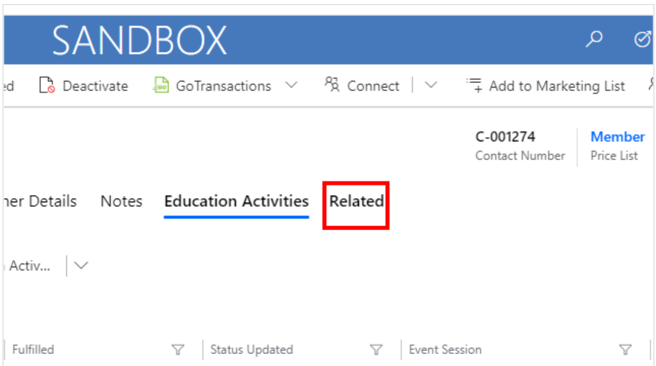
The Education Activity must be within the Credit Date From and Credit Date To period.



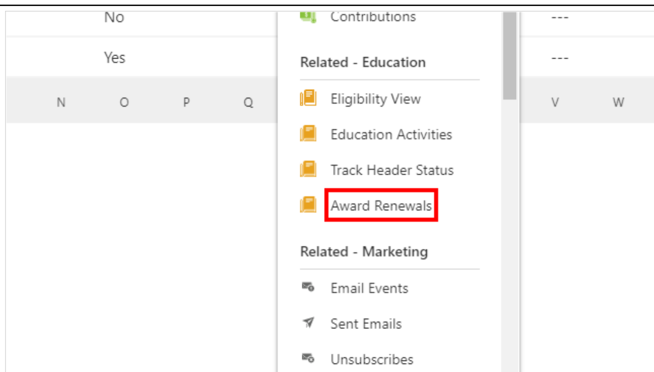
Click on the menu item **Save & Close**



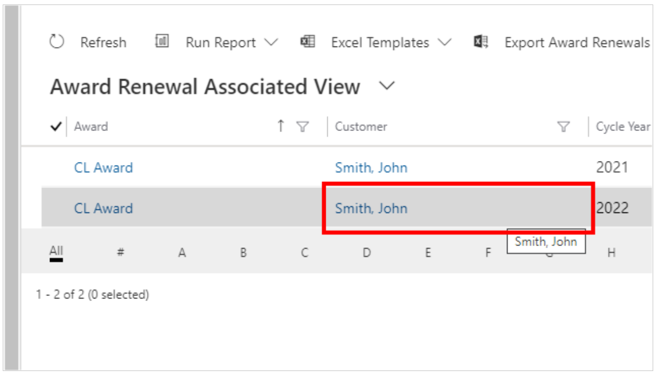
Click on the item **Related**



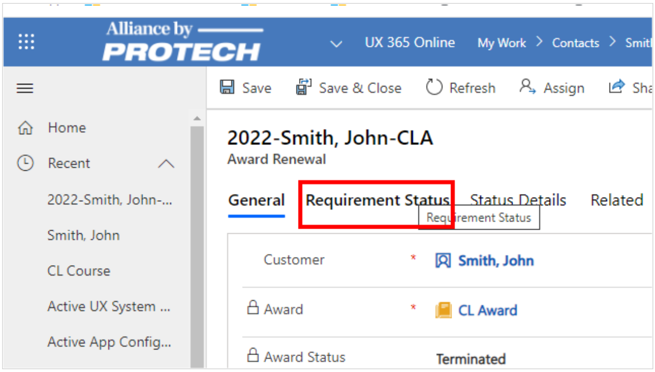
Click on the menu item **Award Renewals**



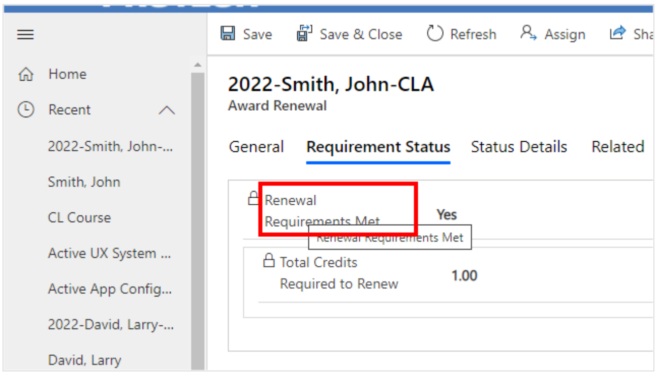
Select the Award Renewal



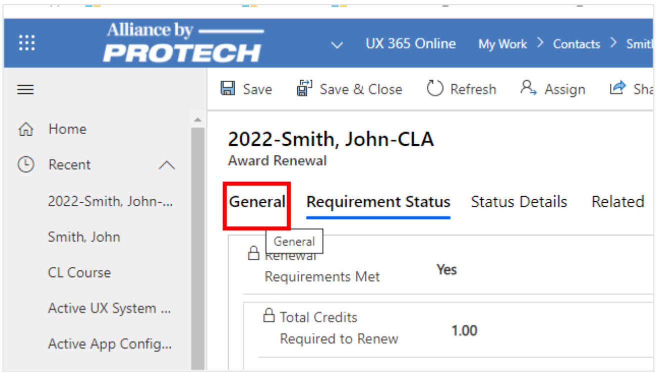
Click on the item **Requirement Status**



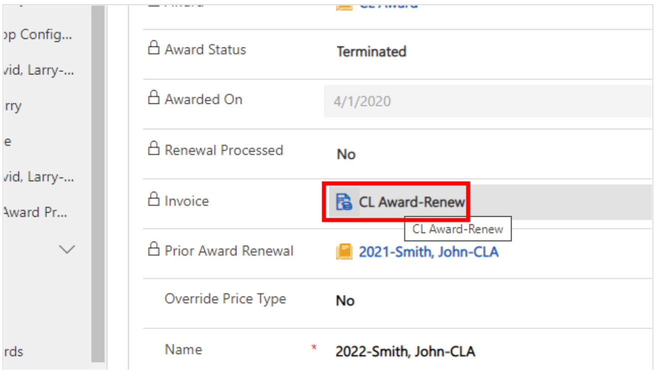
Once the Professional Development System Job runs, the Renewal Requirements Met flag will now equl Yes.



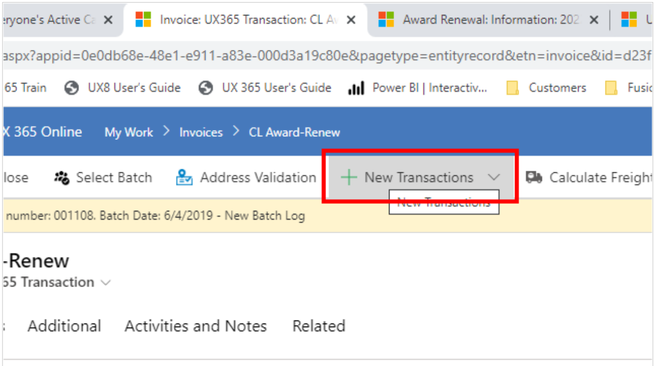
Click on the item **General**



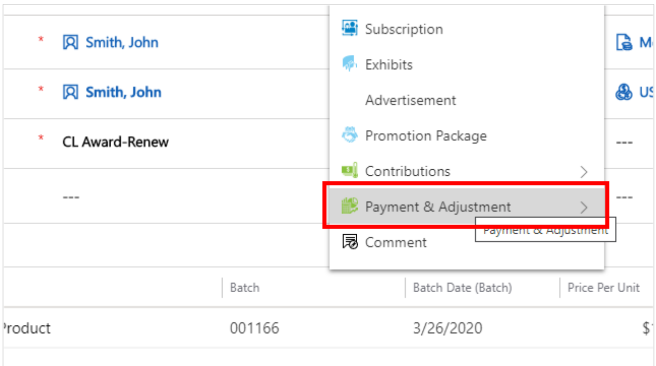
Click on **Invoice**



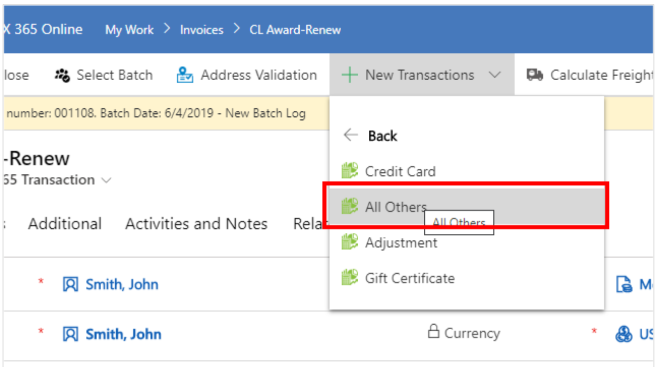
Click on the menu item **New Transactions**

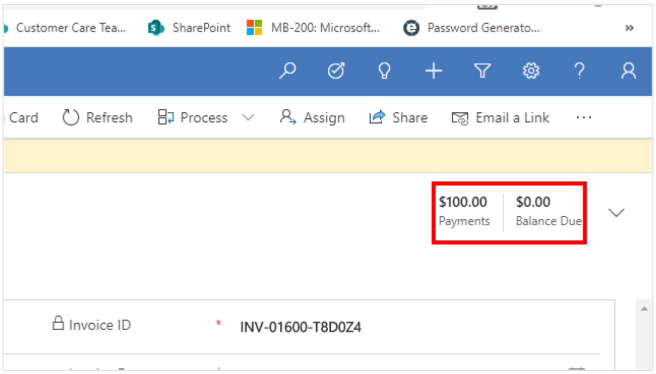
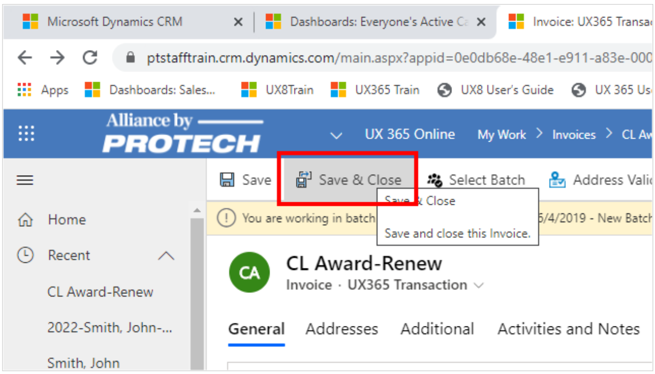
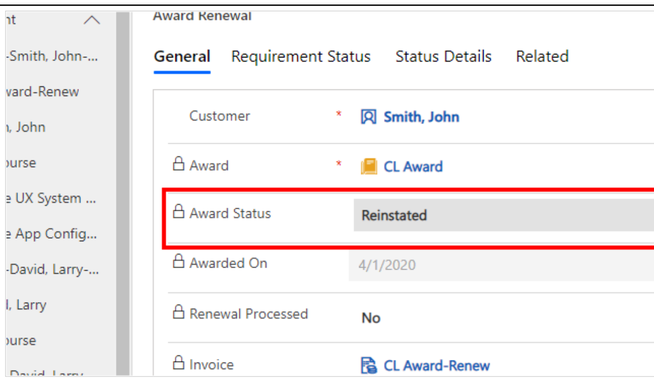
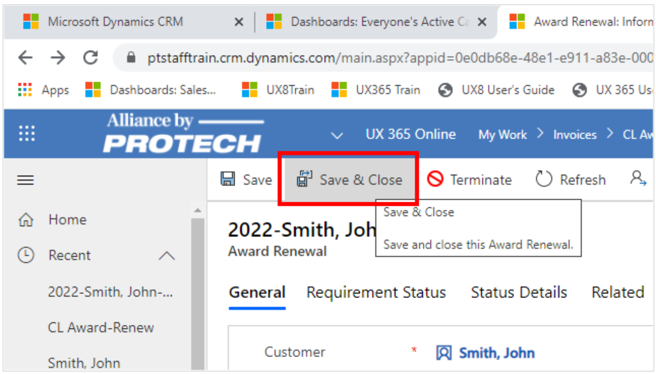


Click on the menu item **Payment & Adjustment**



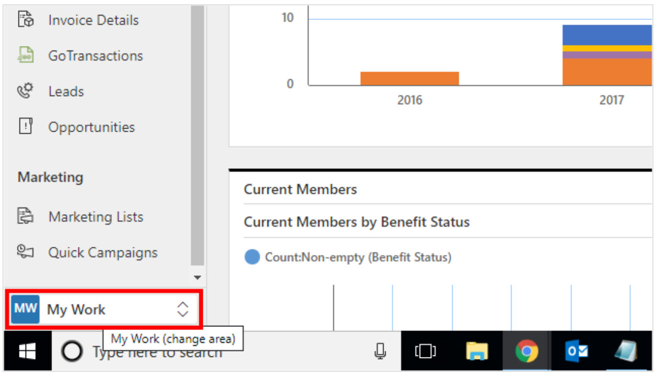
Select the payment option and pay the invoice.



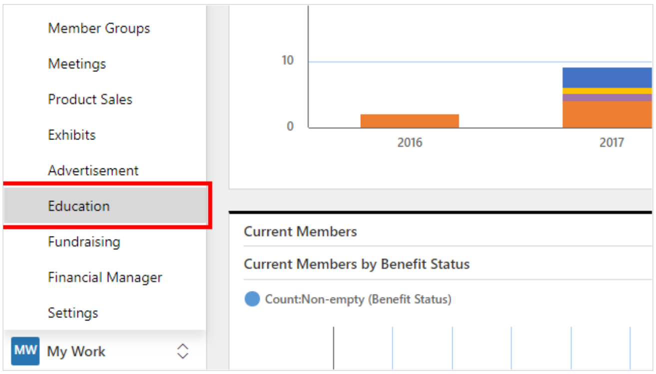
Once the invoice is paid, ensure the Balance Due is zero.	
Click on the menu item **Save & Close**	
Once the Requirments were met and the invoice is paid, the Award Status for the Award Renewal changes from Terminated to Reinstated.	
Click on the menu item **Save & Close**	

8.14. Renewing Awards

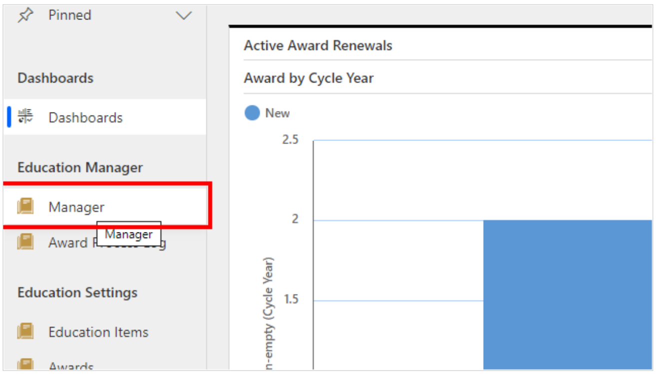
Click on the button **My Work (change area)**



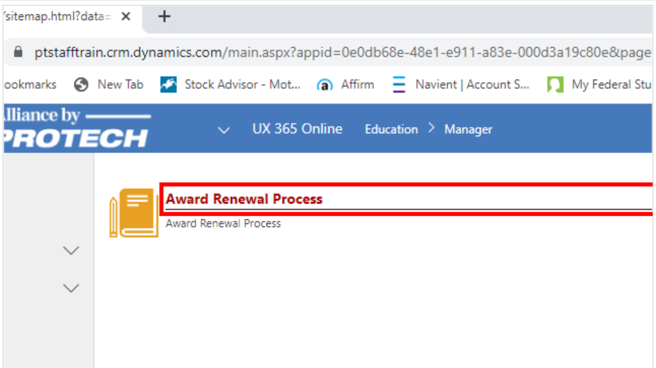
Click on the item **Education**



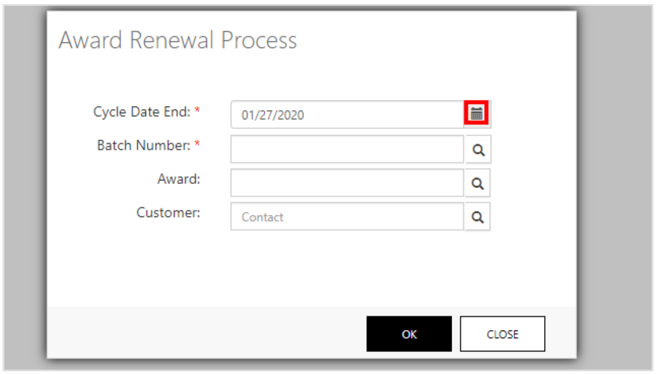
Click on the item **Manager**



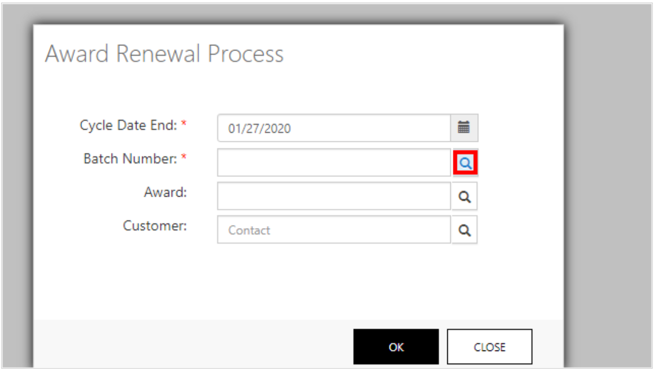
Click on **Award Renewal Process**



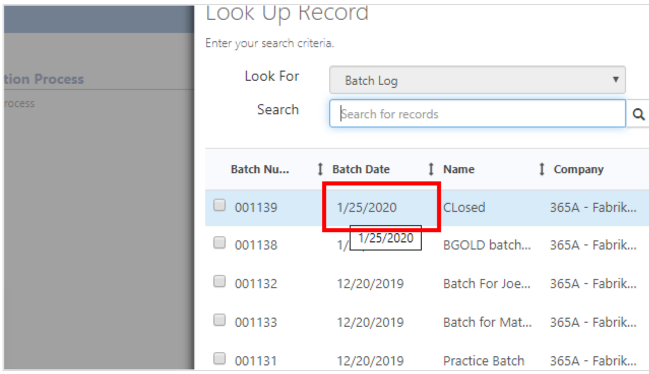
Use the calendar to select the date or enter the date. All cycles end on the last day of the month.



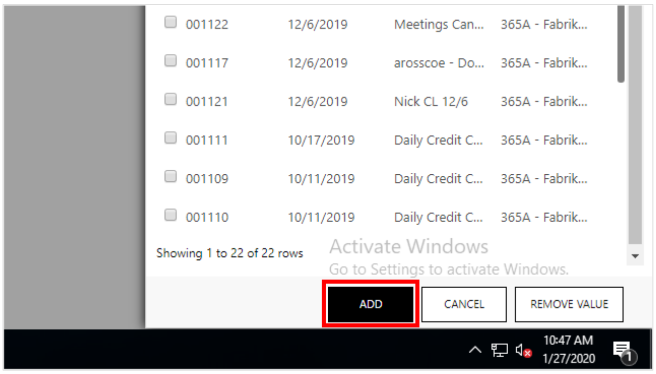
Use the lookup to select the batch for this process.



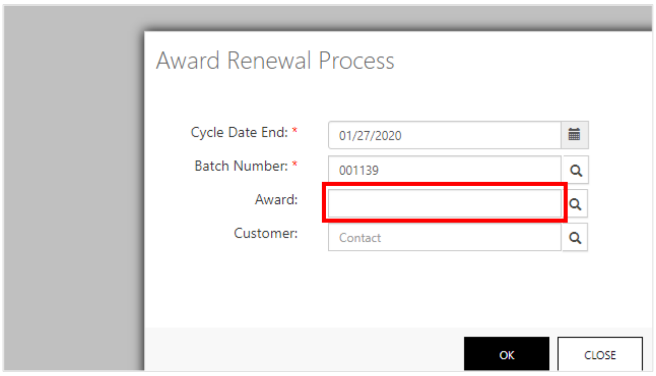
Select the appropriate batch.



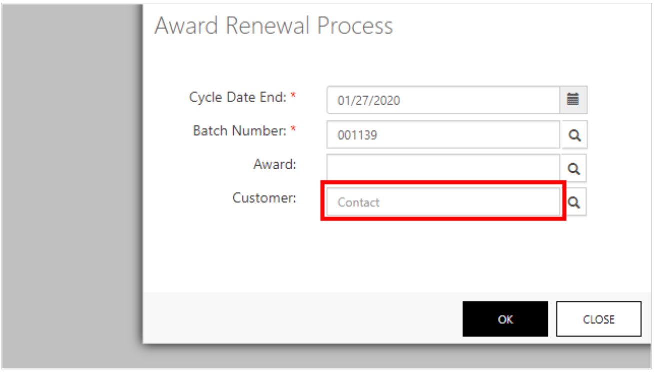
Click on the button **ADD**



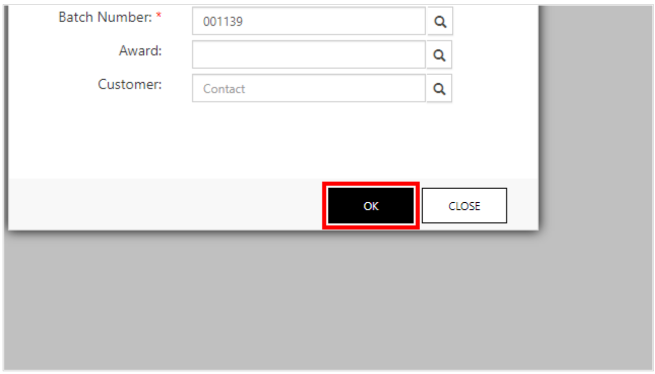
The Award field is optional. Leave blank to run the process on all Awards, or use the lookup to select one or more Awards.



The customer field is optional. Leave blank for all customers, or use the lookup to select a single customer account or contact record.

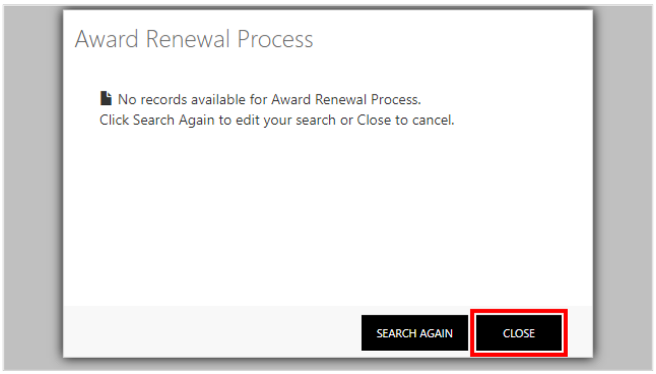


Click on the button **OK**



The process will update the Current Award Renewal record field, Renewal Processed, from No to Yes. It will create a related Upcoming Award Renewal record for the customer.

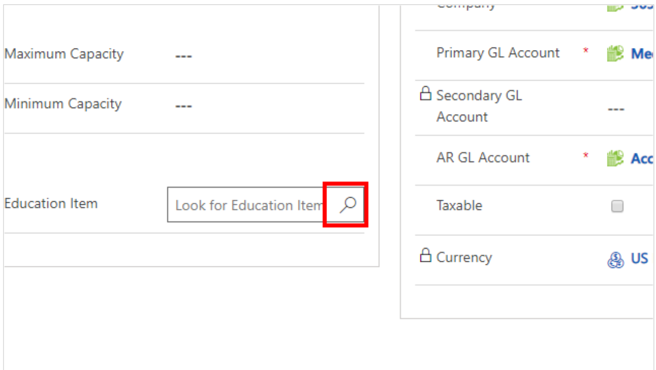
This dialog box will display the number of records eligible for renewal given the criteria you have entered. If records were found, click OK to run the process. If no records are found, search again or click Close.



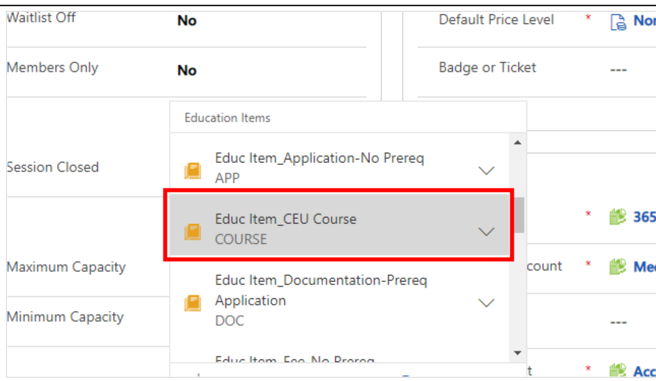
8.15. Setting Up Enrollment via Meeting Sessions

Your organization may allow enrollment in a course that takes place during a meeting session. For example, you may offer training sessions as part of your meetings. By associating an Education Item, such as a course, with a meeting session, meeting attendees can be enrolled for courses when they register for that meeting session. If your organization allows this, you must create the appropriate Education Item record, and then add the Education Item to the meeting session setup.

Click on the link **Education Item**



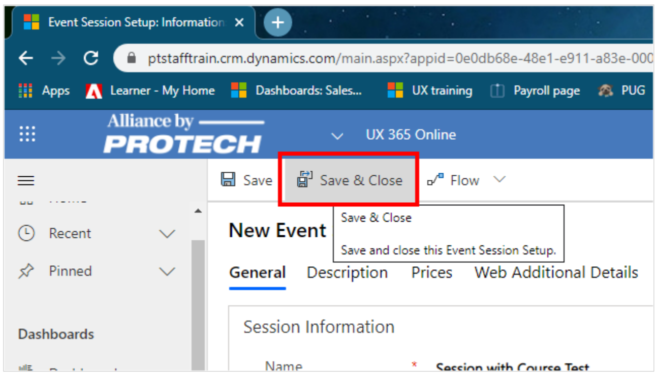
Select the Course you would like to add.



During registration, UX automatically checks the Education Item setup for eligibility dependencies, such as Members Only and Education Item prerequisites. If the registrant contact is eligible for the Education Item, UX completes the session registration, and creates an Education Activity record for the session course, using the meeting session transaction date as the Activity Date in the system created Education Activity record.

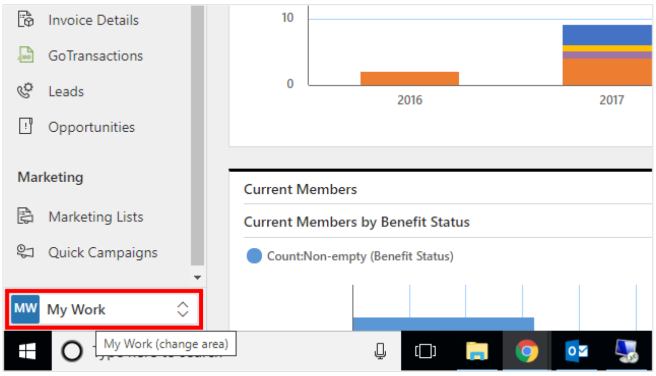
Note If the Education Item has a prerequisite Education Item, the registrant will not be allowed to register for the session unless they have a fulfilled Education Activity for the prerequisite Education Item. If the Education Item has a prerequisite Award, the registrant will not be allowed to register for the session unless they have achieved the prerequisite Award

Click on the menu item **Save & Close**

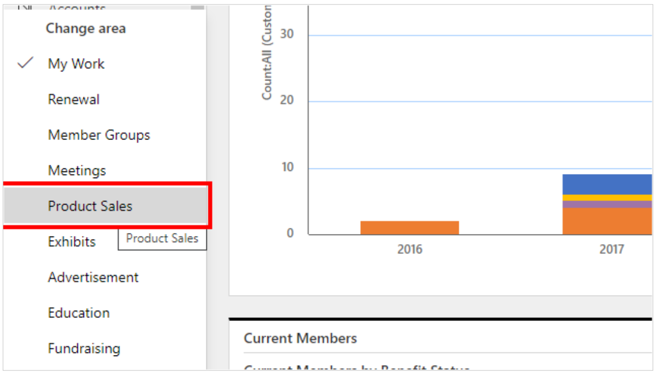


8.16. Setting Up Enrollment via Product Sales

Click on the button **My Work (change area)**

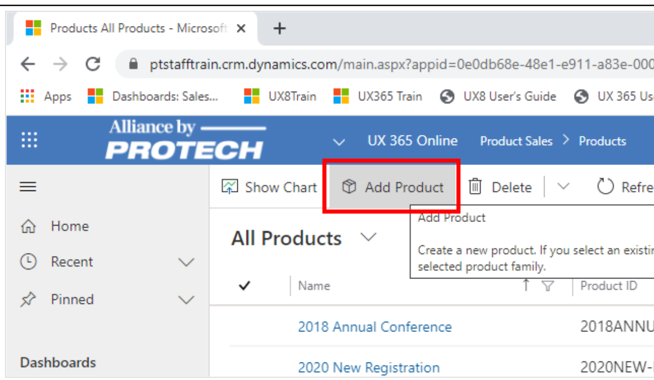


Click on the item **Product Sales**

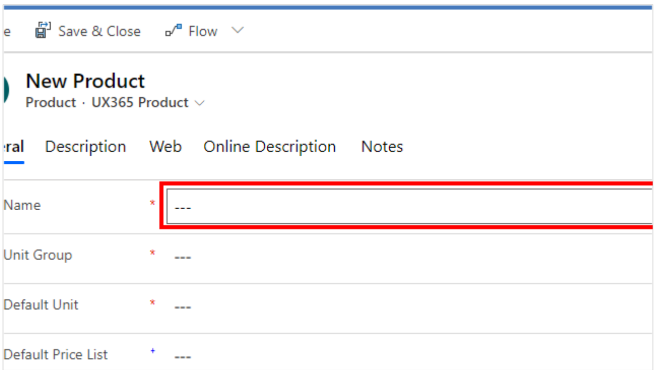


Click on the item **Products**

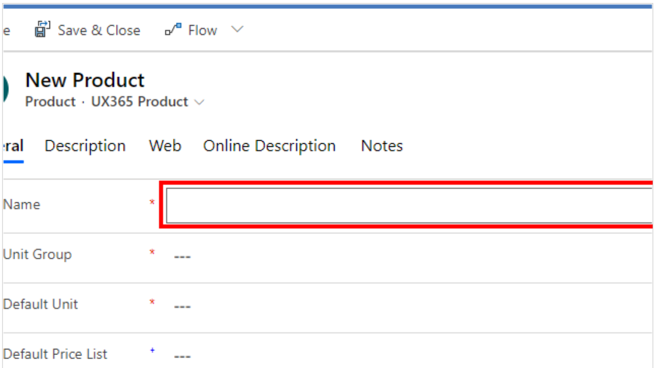
Click on the menu item **Add Product**



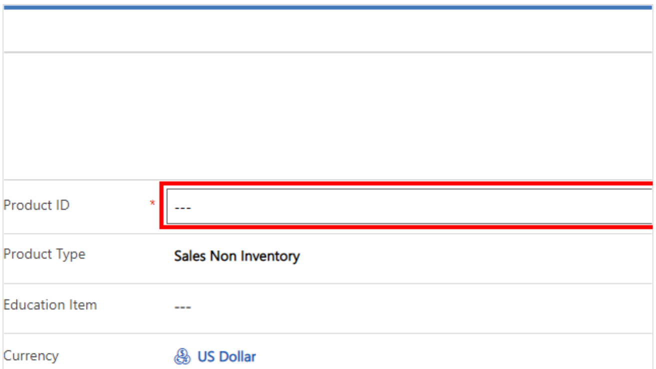
Click on the text field **Name**



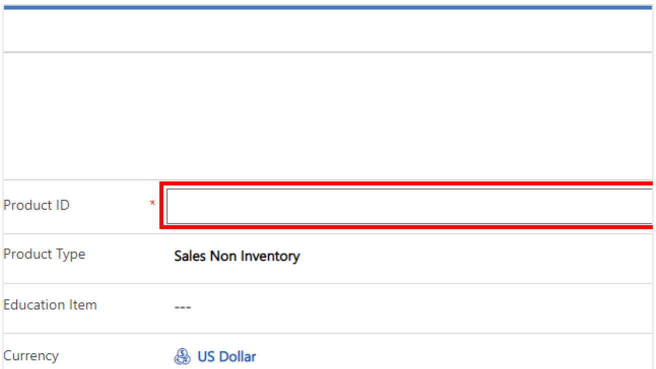
Enter the Enrollment Product Name



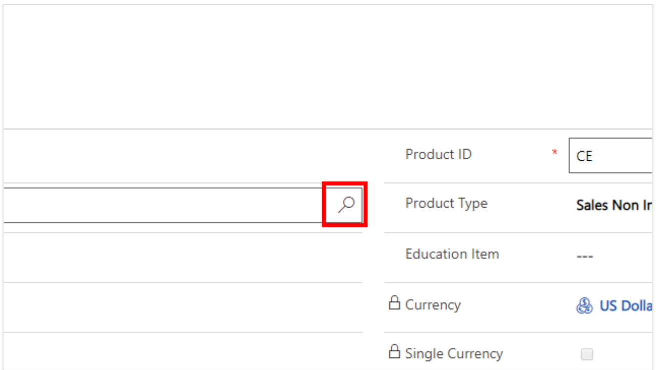
Click on the text field **Product ID**



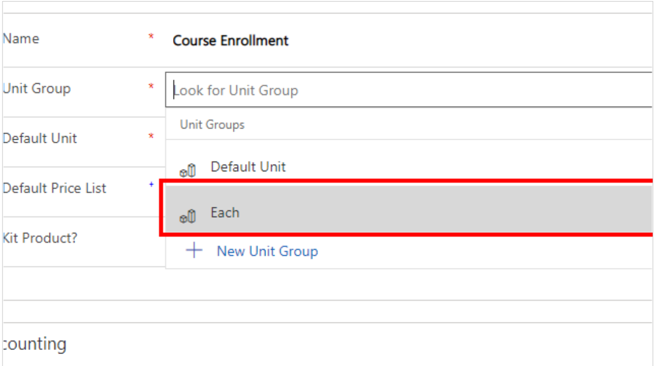
Enter **Enter the Product ID**.



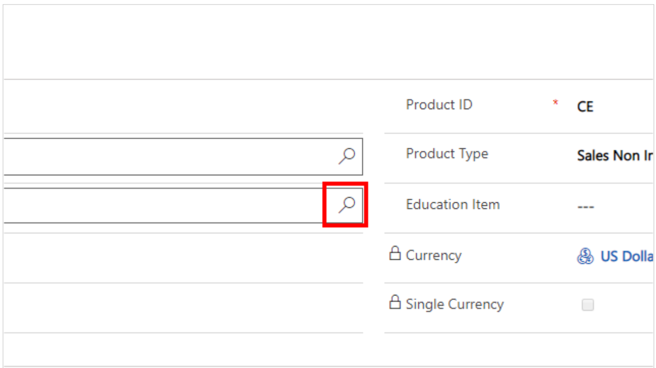
Click on the link **Unit Group**



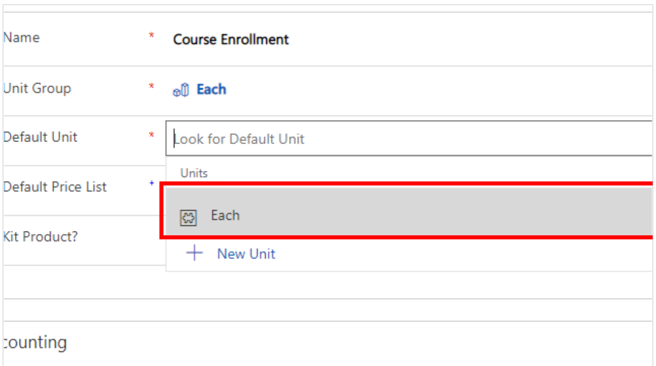
Click on the item **Each**



Click on the link **Default Unit**

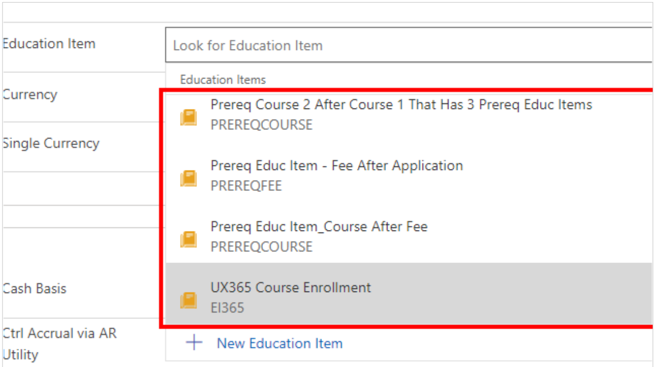


Click on the item **Each**

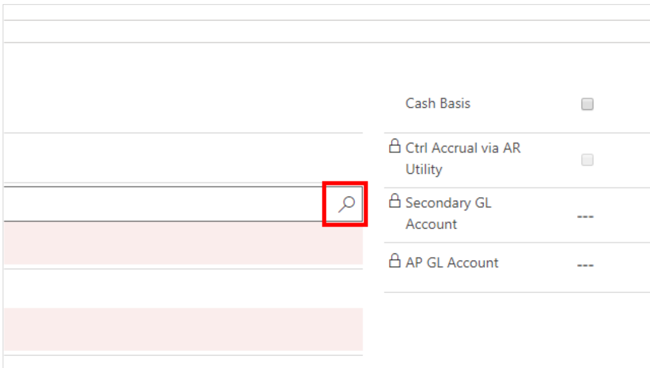


Click on Education Item Look Up

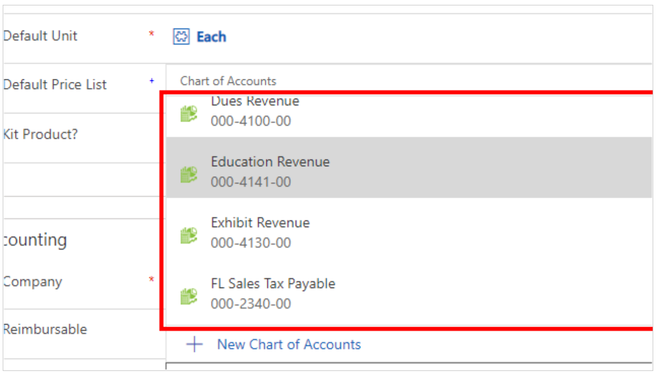
Select the Education Item



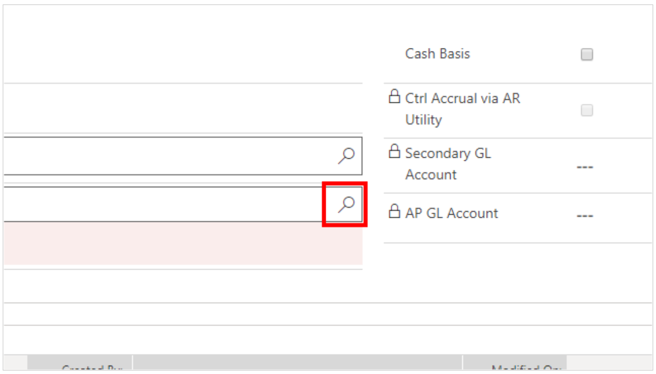
Click on the Primary GL Look Up



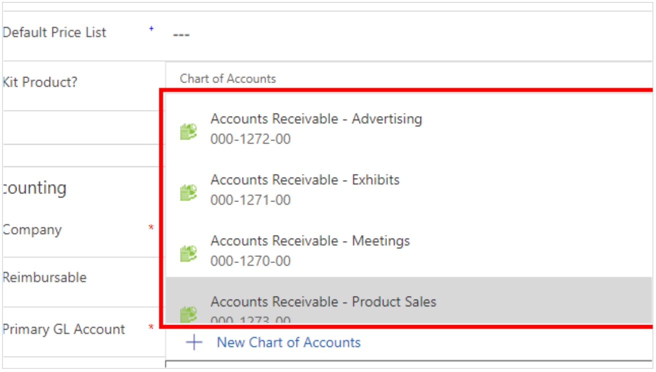
Select the Primary GL Account



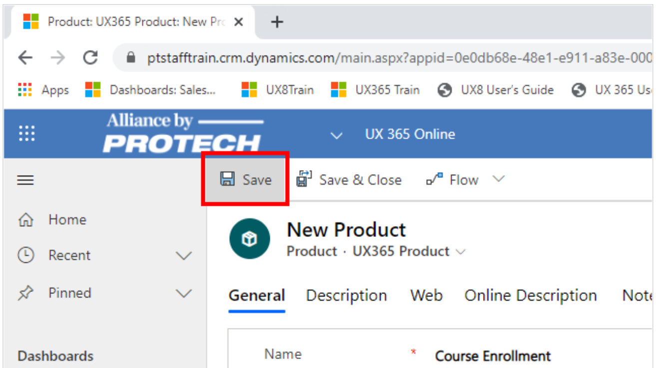
Click on the AR GL Account Look Up



Select the AR GL Account



Click on the menu item Save

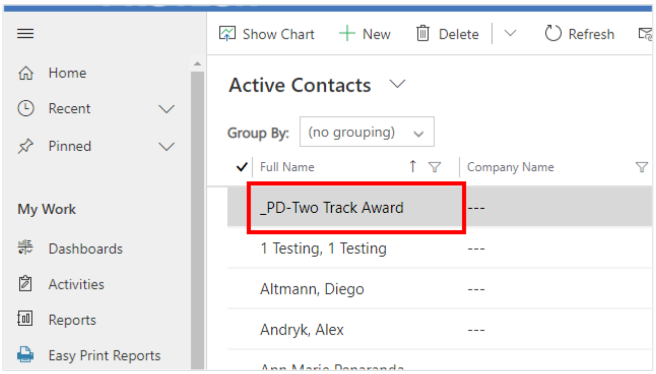


8.17. Terminating Awards

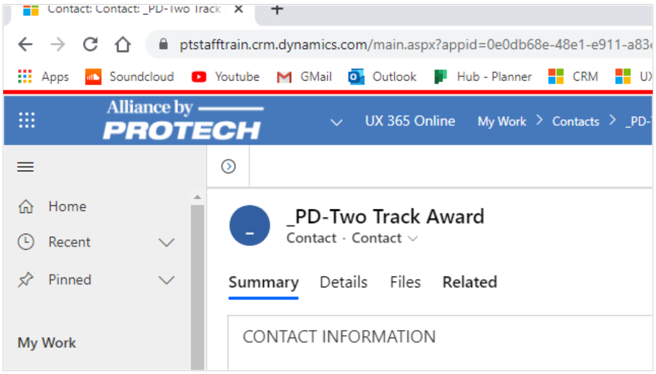
8.17.1. Terminating Awards Manually

Click on the item **Contacts**

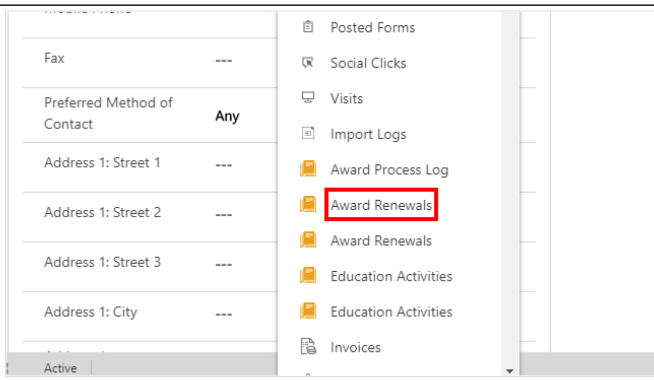
Double click on the cell **Full Name**



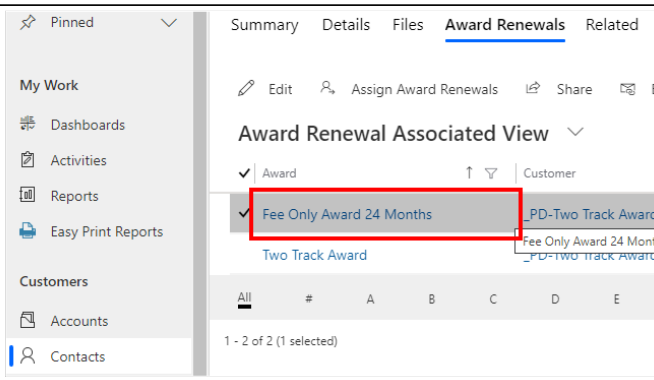
Click on the related tab



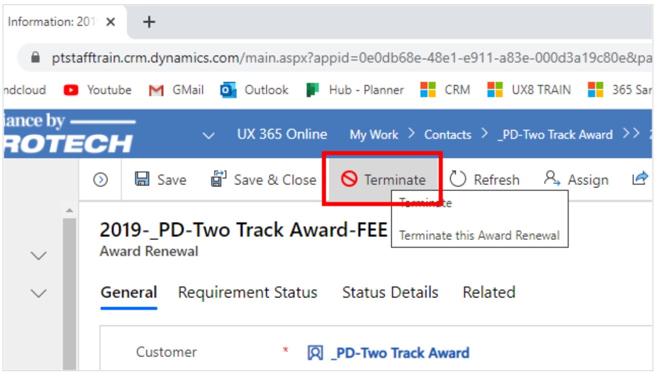
Click on the menu item **Award Renewals**



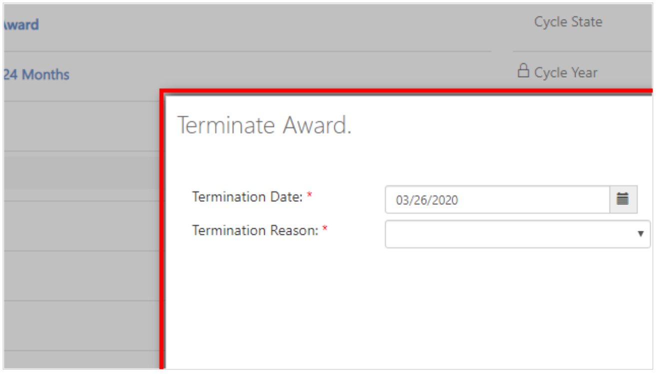
Double click on **Award**



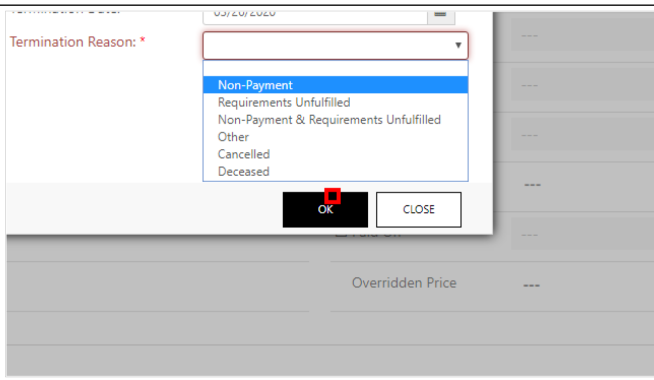
Click on the menu item **Terminate**



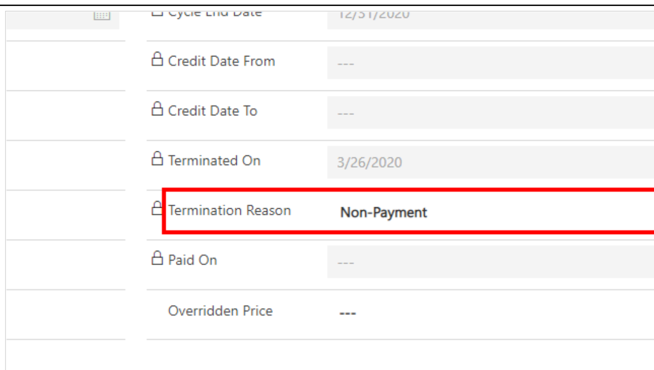
This is where you can add a reason and date of termination



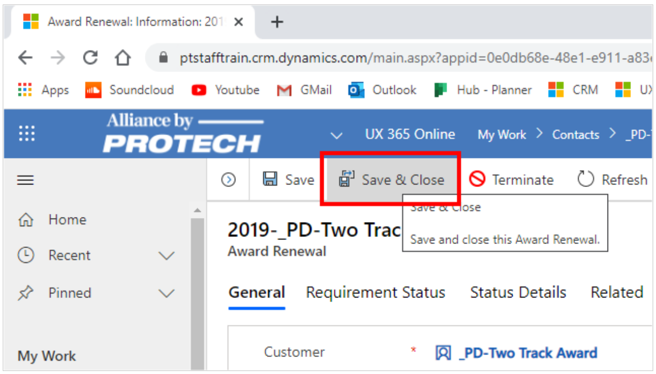
Click ok when you are ready to terminate



When you finish, you can see the termination reason populates

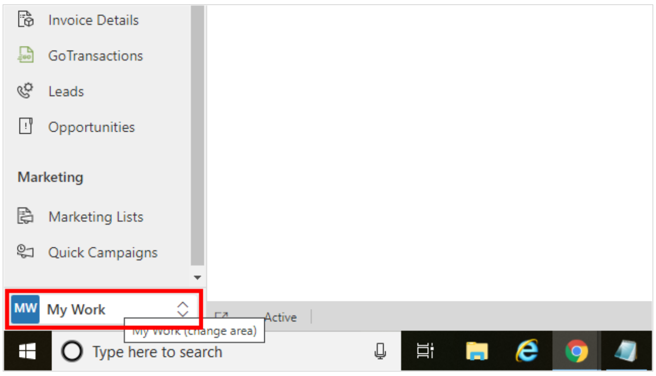


Click on Save and Close

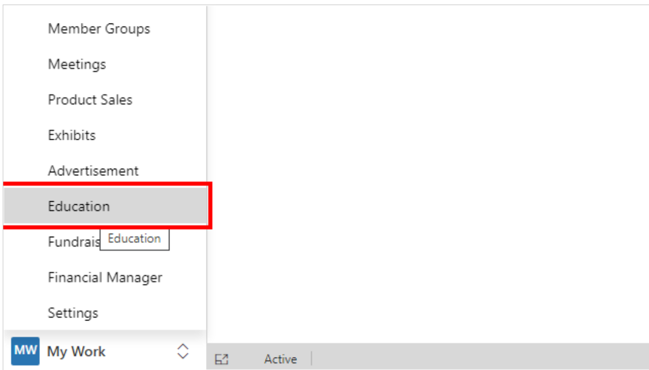


8.17.2. Terminating Awards Process

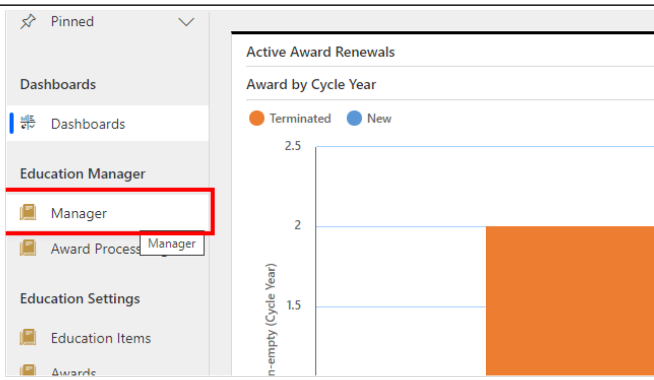
Click on the button **My Work (change area)**



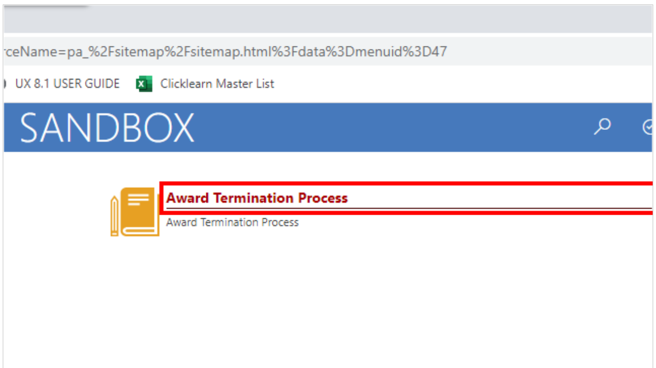
Click on the item **Education**



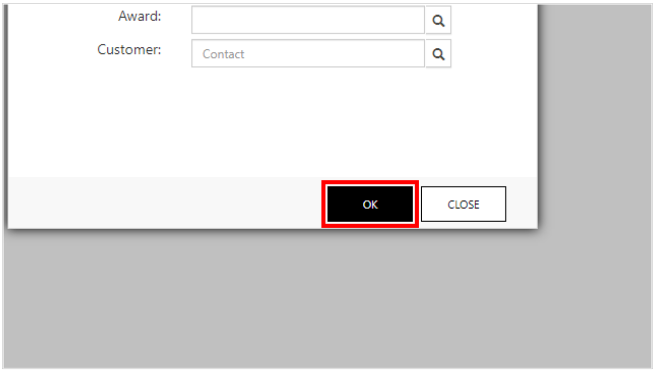
Click on the item **Manager**



Click on **Award Termination Process**



Click ok and follow the steps when ready to terminate

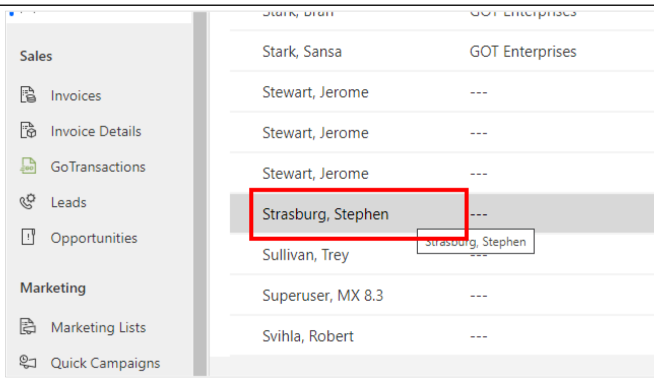


8.18. Track Header and Track Header Details

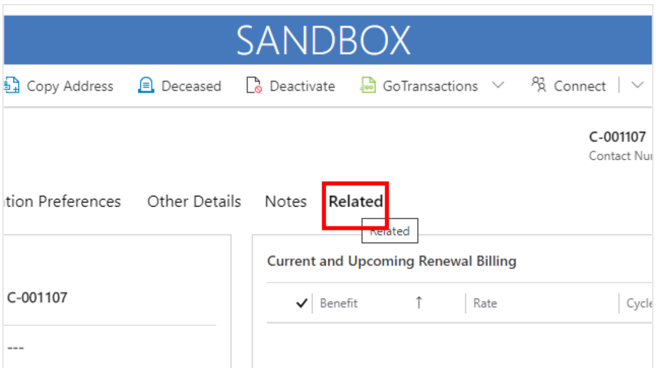
The Track Header and related Track Header Detail records are created when the UX Professional Development System Job updates the Status Updated = Yes for Education Items where Fulfilled = Yes. In other words, when the system job updates the Status Updated = Yes for a fulfilled Education Activity that is a Track Requirement for an Award, UX creates the Track Header and related Track Detail records that details on theTrack and Track Requirements. Use the Track Header and Track Details to drill down into the detail of the Track Requirement.

Click on the item **Contacts**

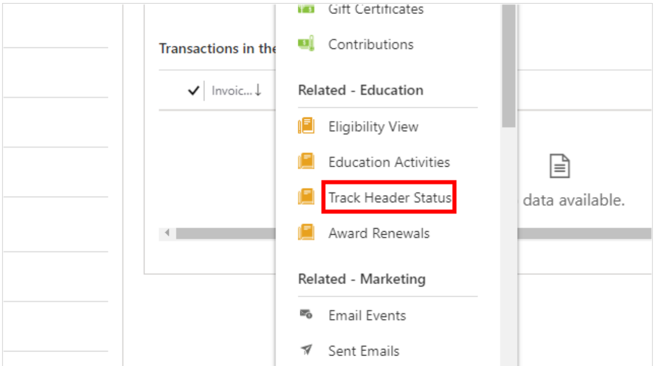
Double click on the cell **Full Name**



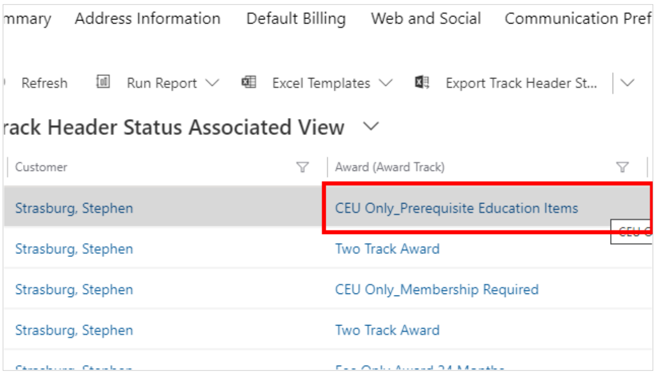
Click on the item **Related**



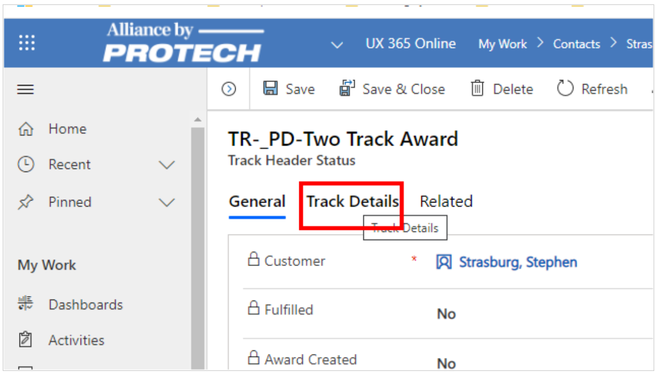
Click on the menu item **Track Header Status**
This opens the Track Header Status Associated View listing all Tracks with a Track Requirement where Education Item satisfied a Track Requirement.



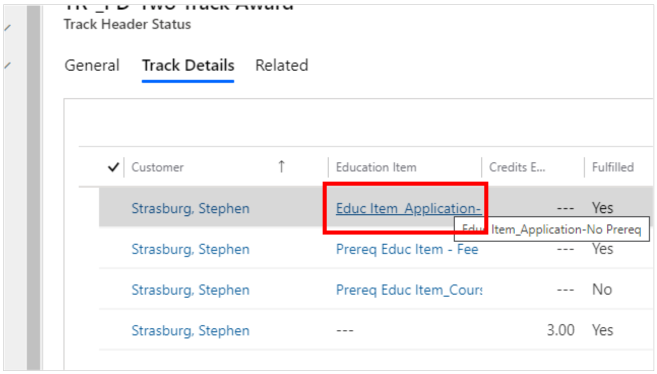
Select and click to open a Track Header record to drill down in to the details of the Track and Track Status.



Click on the item Track Details to view the Track Requirements satisfied by a fulfilled Education Item.



Select and click to open a Track Detail record for further information.



9. Subscriptions

9.1. Cancelling a Subscription

Canceling a subscription

In this situation, the customer wants to cancel their existing subscription, so you must cancel the current subscription using a full or partial cancellation.

This section describes how to cancel a current subscription and the system rules that apply based on batch status and payments within the invoice. When you cancel a subscription, invoice detail line items and charges are updated to reflect the cancellation. If the originating batch is closed, when you create GL detail for batch used to cancel the subscription, reversing GL detail will be created to reflect these changes. The subscription is no longer eligible for renewal or the galley utility.

> Important
>
> *If you have already generated renewals for the upcoming renewal year and are cancelling the subscription in the Current renewal invoice, you must also cancel the subscription in the Upcoming renewal invoice. Protech does not recommend cancelling a Past renewal invoice.*

There are two scenarios for canceling a renewal invoice:

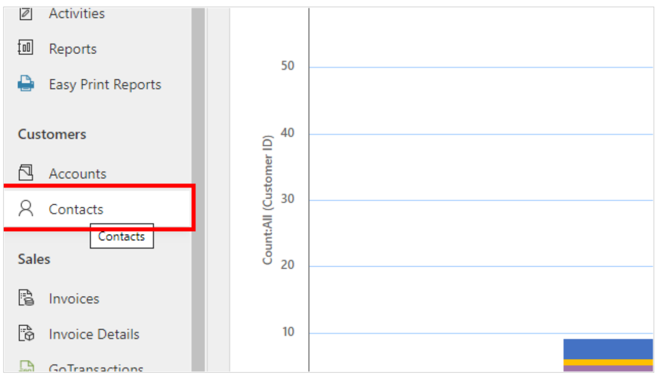
- **Full cancellation** – Fully canceling the subscription line item cancels/deletes the original invoice line item and creates a credit balance if there was a payment on the invoice.
- **Partial cancellation** – A partial cancellation cancels the original subscription line item and creates a new line item for a prorated portion of the full subscription charge. You can partially cancel single and multiple-installment anniversary subscriptions, and single-installment calendar subscriptions. In addition, you can partially cancel multiple-installment calendar subscriptions if they are not prorated.

> Note
>
> *You cannot partially cancel multiple-installment calendar subscriptions with proration because the invoice detail line item does not include start and end dates. If you attempt process a partial cancellation on a multiple-installment prorated calendar subscription line item, the system will process a full cancellation.*

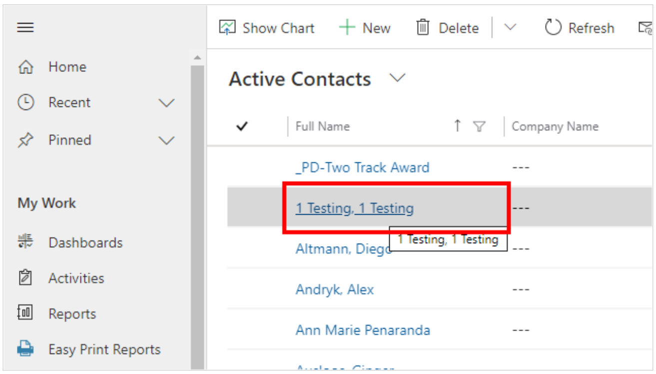
Canceling a subscription line item will have the following effects on the renewal billing record:

- **Current renewal invoice** – Fully or partially canceling a current renewal invoice does not affect Past or Upcoming renewal billing records. When cancelling a Current renewal invoice, if the associated renewal billing record has any benefit status other than **NULL**, the status will be changed to **Terminated**, and the **Termination Reason** field will say **Cancelled**. The related invoice will be removed from the renewal billing record. If the renewal billing record has a status of **NULL**, it will be deleted.
- **Prior renewal invoice** – *Not recommended.* Fully or partially canceling a prior renewal invoice does not affect the Current renewal billing record. When cancelling a Past renewal invoice, if the associated renewal billing record has any benefit status other than **NULL**, the status will be changed to **Terminated**, and the **Termination Reason** field will say **Cancelled**. The related invoice will be removed from the renewal billing record. If the renewal billing record has a status of **NULL**, it will be deleted.
- **Upcoming renewal invoice** – Fully or partially canceling an upcoming renewal invoice does not affect the Current or Past renewal billing records. When cancelling an Upcoming renewal invoice, if the associated renewal billing record has any benefit status other than **NULL**, the status will be changed to **Terminated**, and the **Termination Reason** field will say **Cancelled**. The related invoice will be removed from the renewal billing record. If the renewal billing record has a status of **NULL**, it will be deleted.

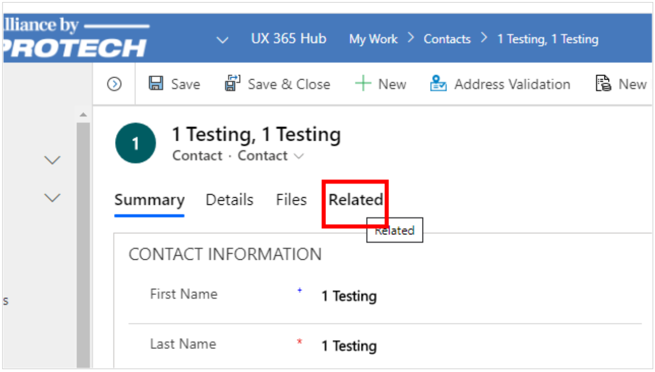
To cancel a subscription,first navigate to the contact's invoice that contains the subscription youd like to cancel.



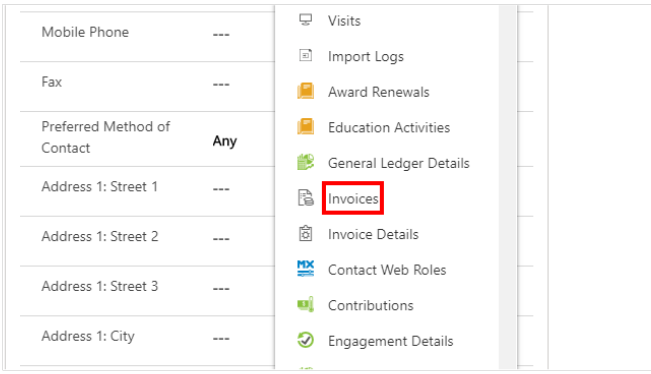
Click into the contact



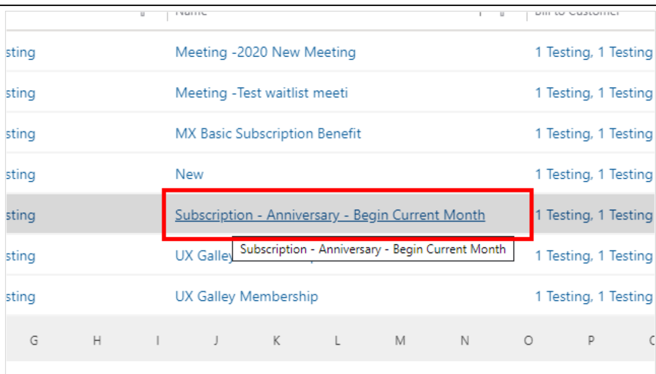
Click the related tab to display a dropdown of associated records.



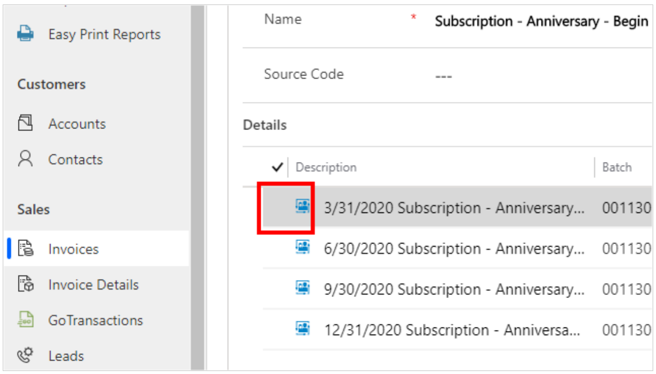
Click on the menu item **Invoices**



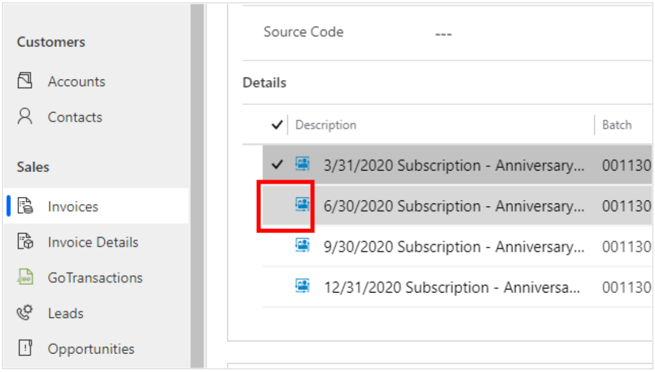
Click into the invoice that contains the subscription you wish to cancel



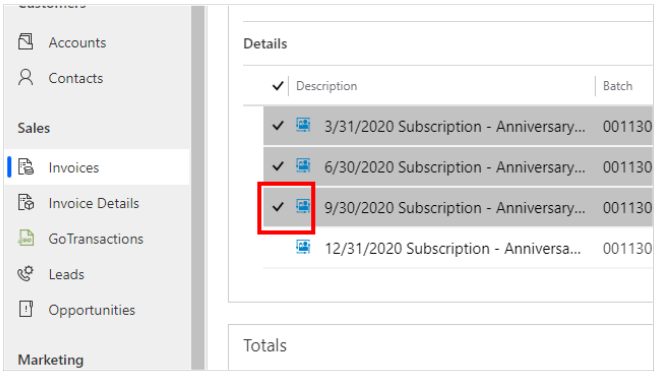
If the subscription contains more than one line item, you can select multiple



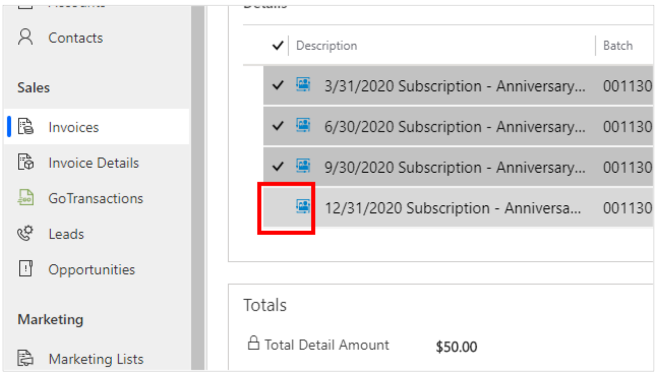
Click on the row selector where **Description = 6/30/2020 Subscription - Anniversary - Begin Current Month, A - Q - 1 Year Quarterly, Batch = 001130, Batch Date (Batch) = 12/13/2019**



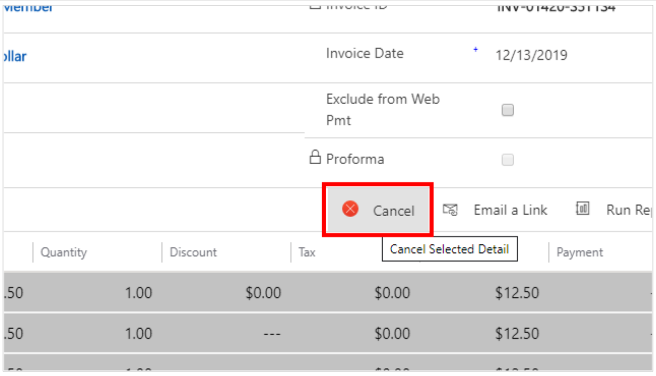
Click on the row selector where **Description = 9/30/2020 Subscription - Anniversary - Begin Current Month, A - Q - 1 Year Quarterly, Batch = 001130, Batch Date (Batch) = 12/13/2019**



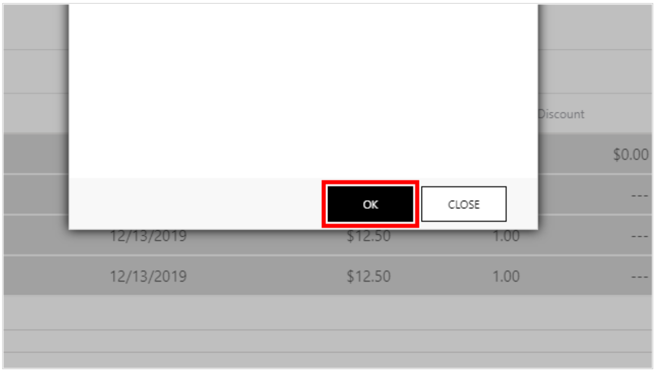
Click on the row selector where **Description = 12/31/2020 Subscription - Anniversary - Begin Current Month, A - Q - 1 Year Quarterly, Batch = 001130, Batch Date (Batch) = 12/13/2019**



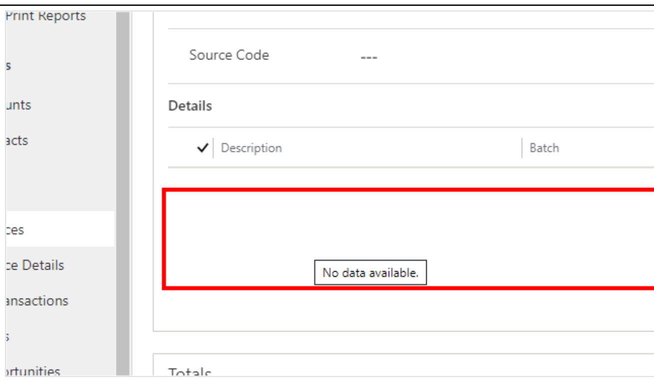
Once you have selected the line items, click the item 'cancel'



Click the button OK when you are sure you would like to cancel

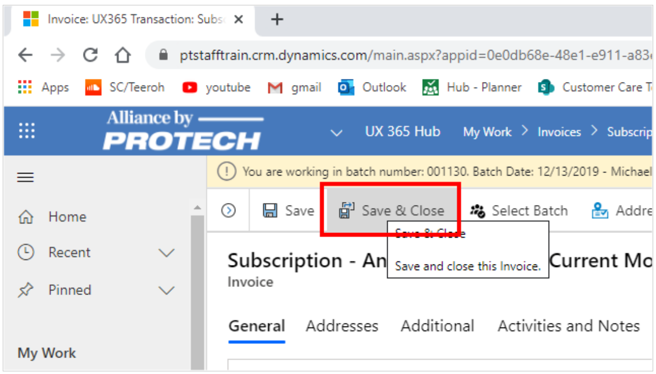


You can see the line items have been deleted.



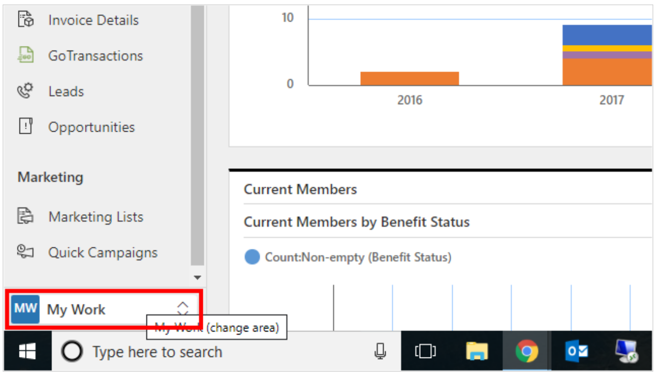
Depending the originating batch status (open or closed), the system will take the following actions: If the originating batch is closed, the system will cancel the original invoice detail line item, and if you selected a partial cancellation, will create a new line item for the prorated subscription amount. (If necessary, you can override the prorated subscription amount on this new line item.) If the originating batch is open, the system deletes the original invoice detail line for both a full or partial cancellation. You cannot process a partial cancellation when the originating batch is open.

When you are done in the invoice, be sure to click save & close.

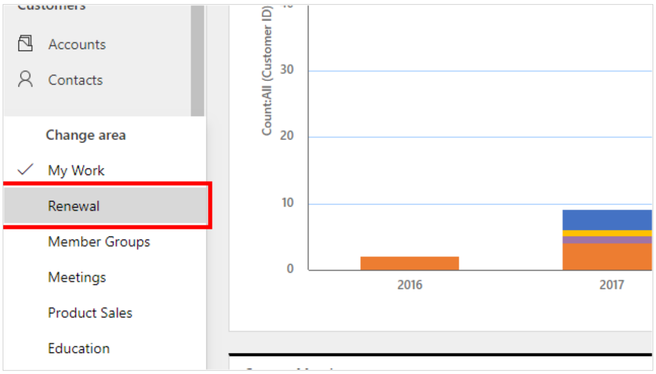


9.2. Creating a Subscription Benefit

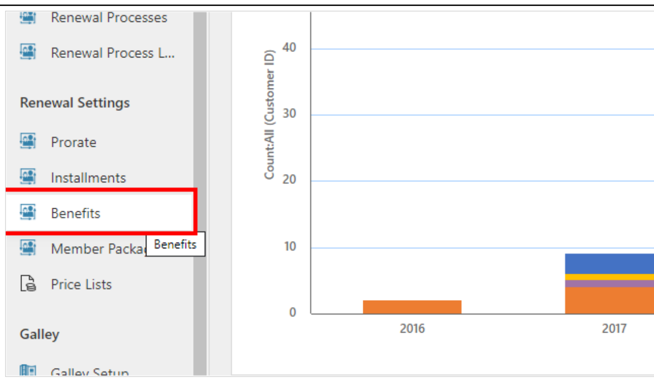
Click on the button **My Work (change area)**



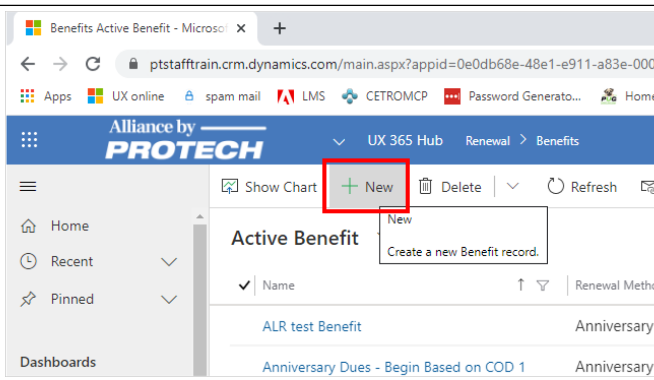
Click on the item **Renewal**



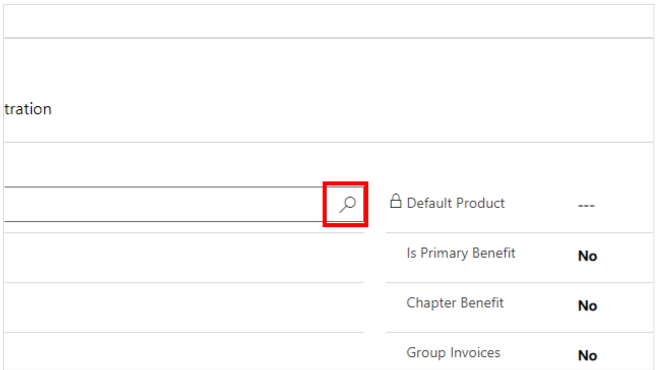
Click on the item **Benefits**



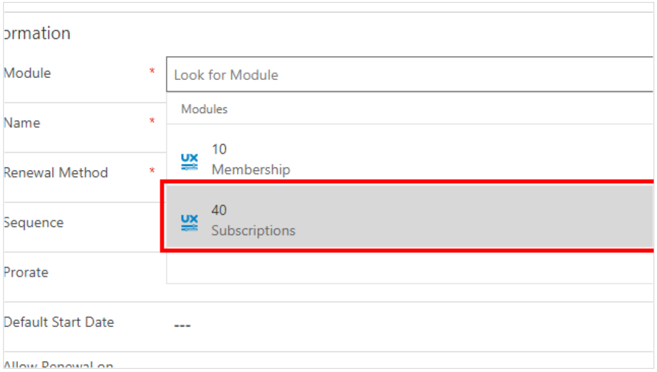
Click on the menu item **New**



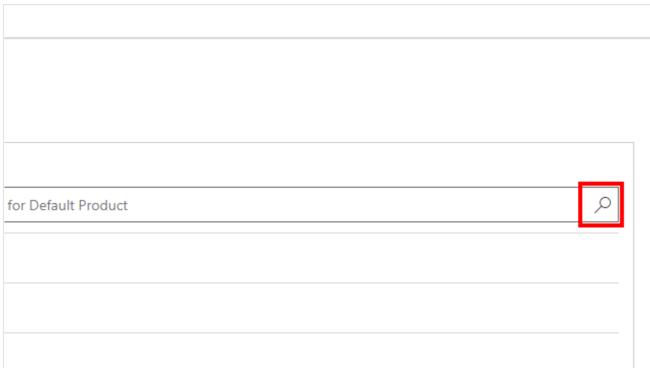
Click on the link **Module**



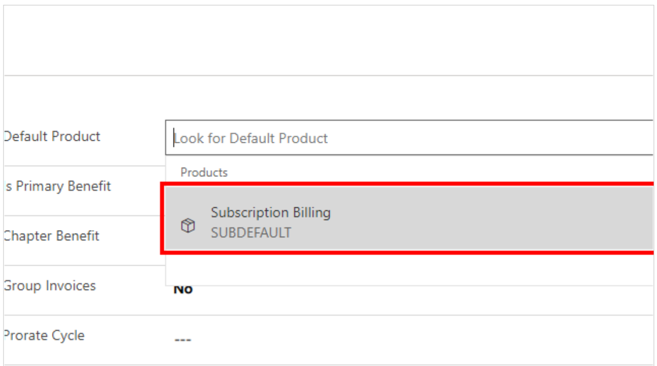
Click on the item **40 Subscriptions**



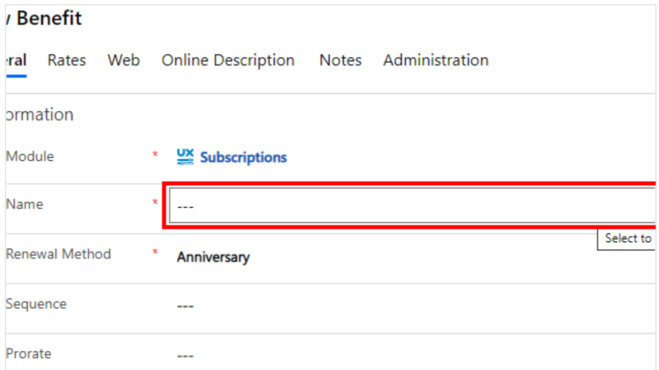
Click on the link **Default Product**



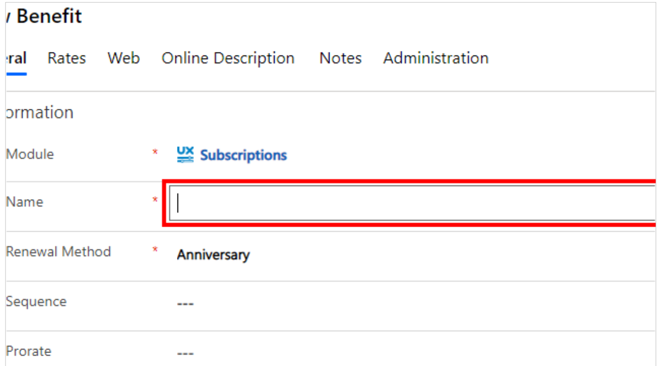
Select Subscription Billing



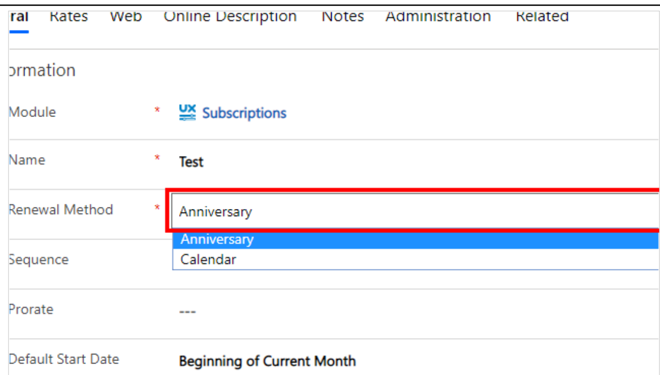
Click on the text field **Name**



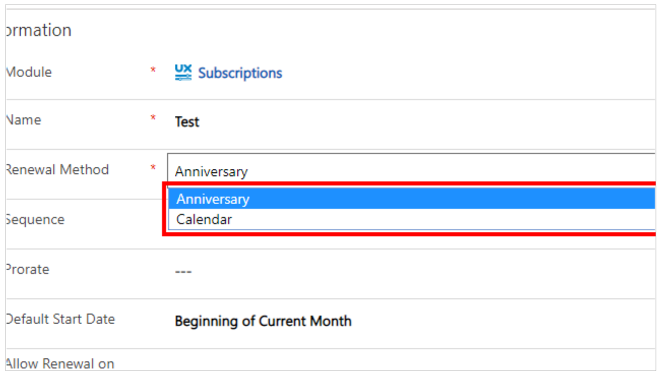
Enter the name of the subscription



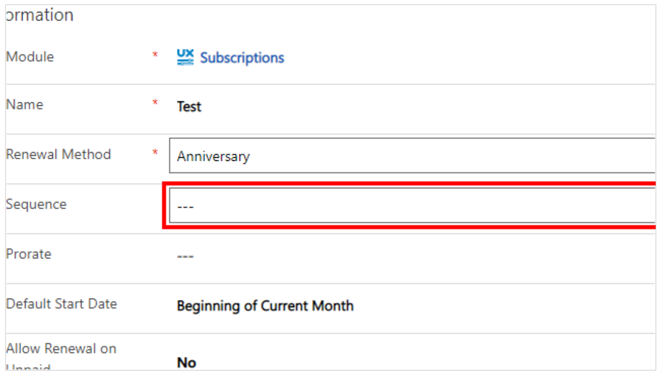
Click on the field **Renewal Method**



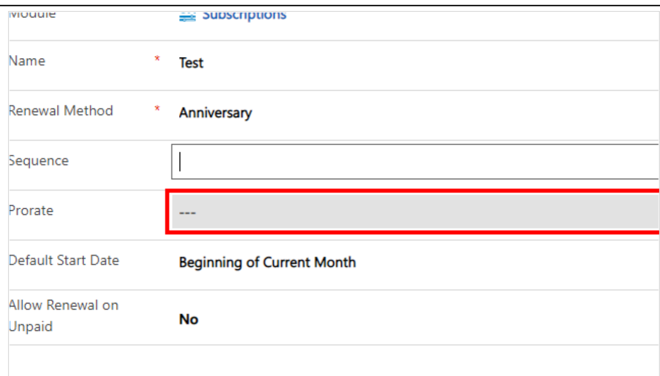
Click on an option from the list



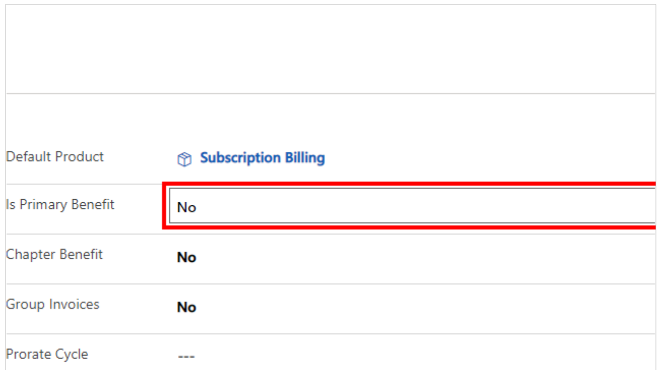
Click on the text field **Sequence**
Enter a sequence number to support reporting requirements, otherwise, leave blank



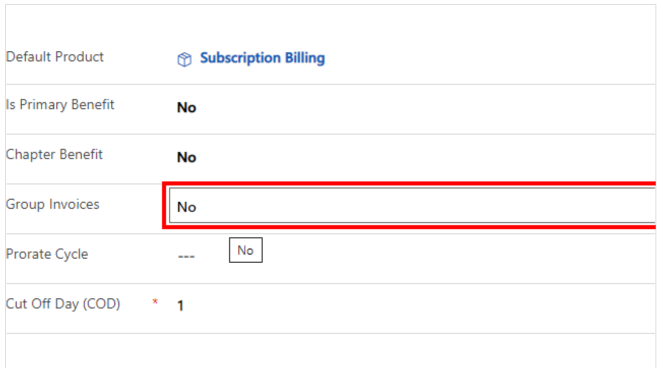
Click on the lookup field **Prorate**
Enter a Prorate only if you selected a Calendar Renewal Method in the previous step, otherwise, leave blank



Set Primary Benefit to no

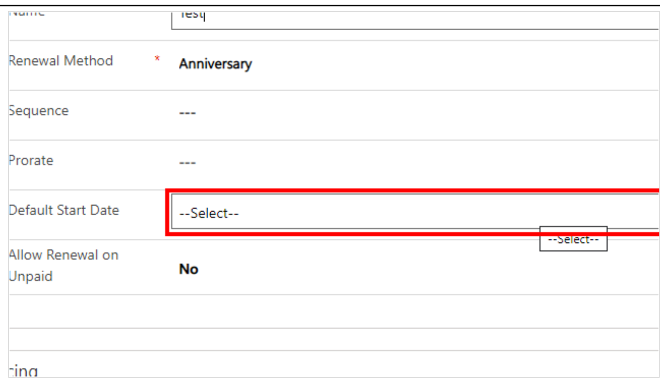


Click on **Group Invoices**
Set Group Invoices to Yes if you would like this benefit to be included on the same invoices of other benefits that share the same renewal cycle, otherwise, set to no

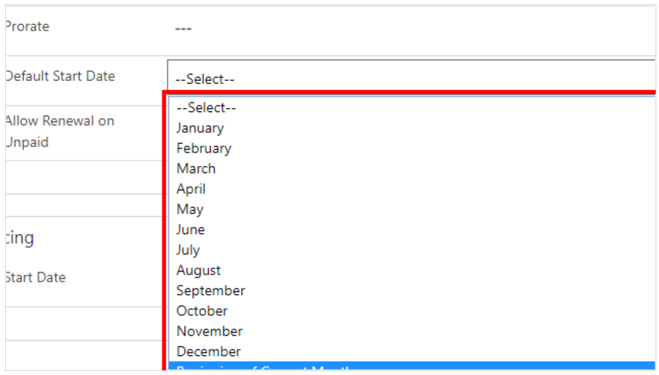


Click on the text field **Cut Off Day (COD)**
Enter a cutoff day to tell the system how you would like the Cycle Start date to be calculated when the Benefit is purchased.

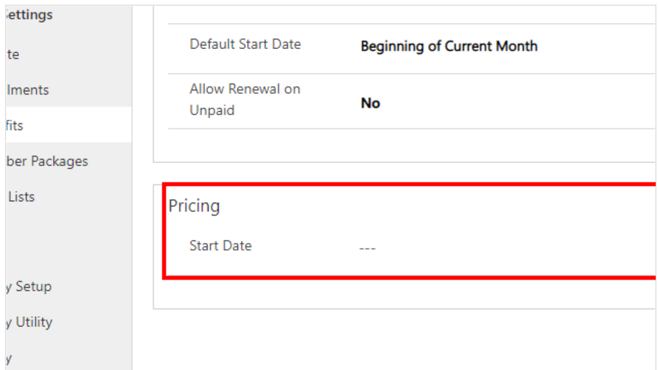
Click on the field **Default Start Date**



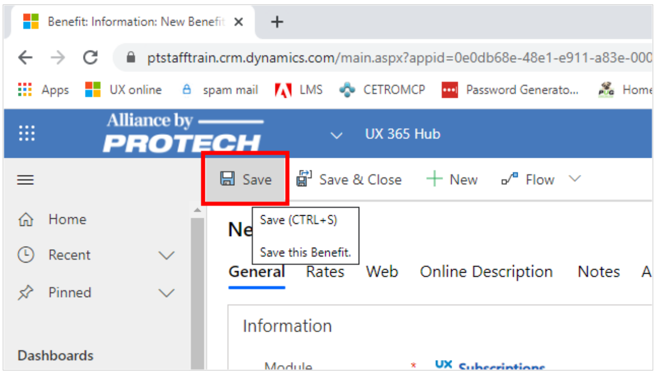
Select how you would like the subscription to begin



Enter a Price Start and End Date if there is a specific date range a particular pricing will be available, otherwise, leave blank.



Click on Save to complete the Subscription Benefit setup



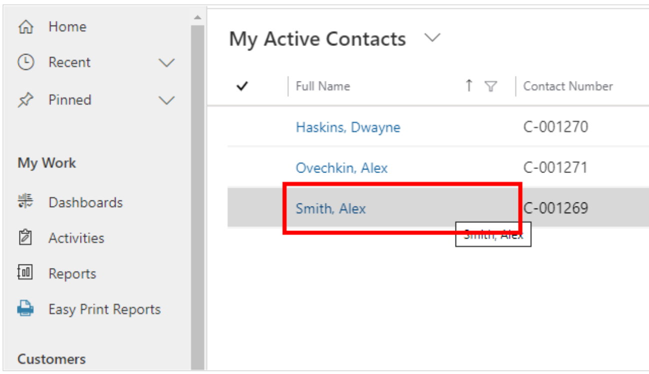
9.3. Creating a Subscription Invoice

This procedure describes how to create a new subscriber invoice for billing the initial subscription by selecting a subscription renewal benefit. You can create a new invoice from within an existing account or contact record or directly from Invoices in any of the UX work areas on the Navigation Tile Bar. By creating an invoice from an existing record, the system automatically fills many data entry fields in the invoice header by using data from the record. These fields include the Customer name, the Bill To and Ship To name and address, Price List and Currency. The following procedure shows how to begin the membership invoice process from the contact's record, but you can also begin from an account record or the Invoices list.

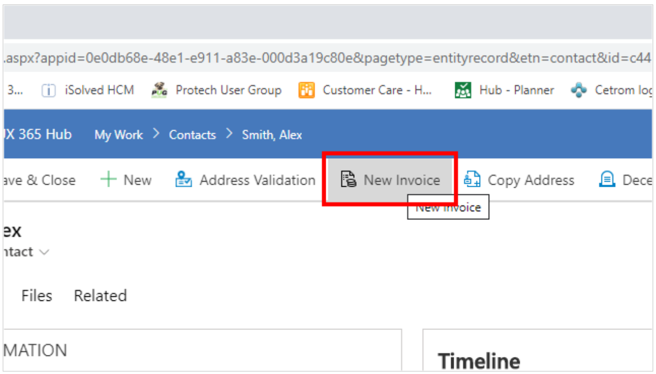
Creating a Subscription Invoice in UX 365

Click on the item **Contacts**

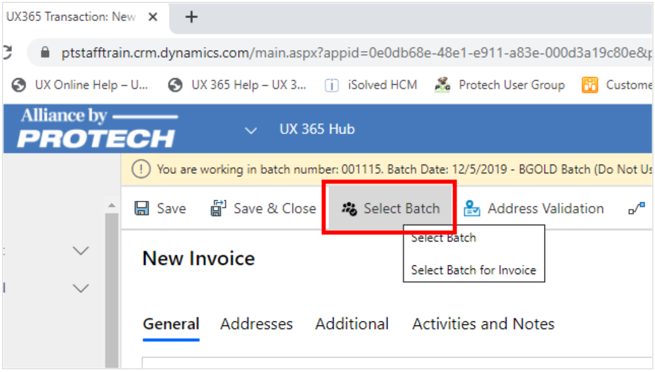
Double click on the cell **Full Name**



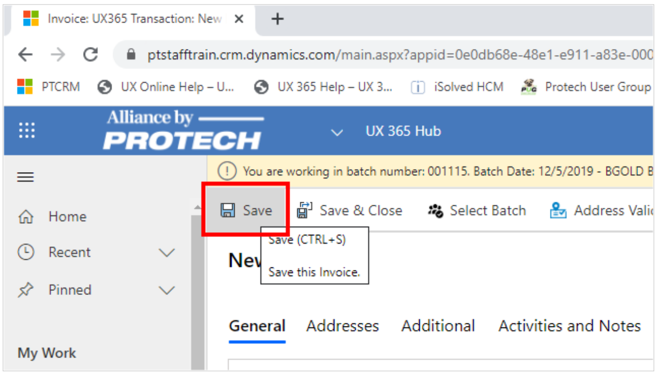
Click on the menu item **New Invoice**



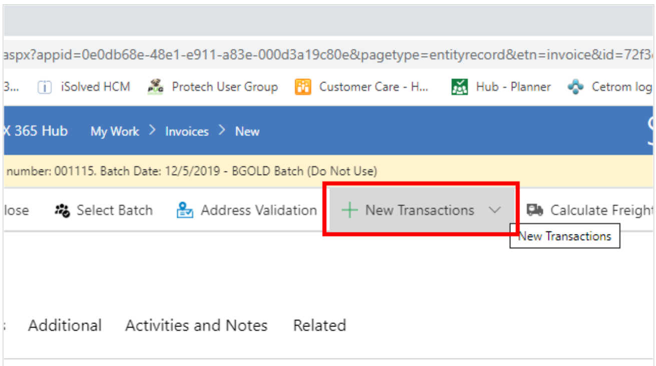
Click Select Batch to select the appropriate open batch based on your organization's business rules.
If the appropriate batch is already selected this step can be skipped.



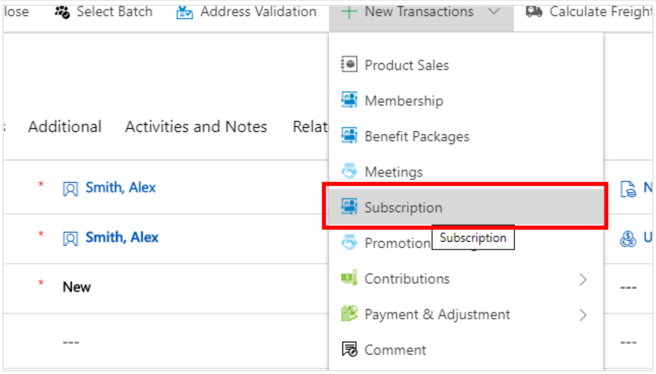
Click on the menu item Save



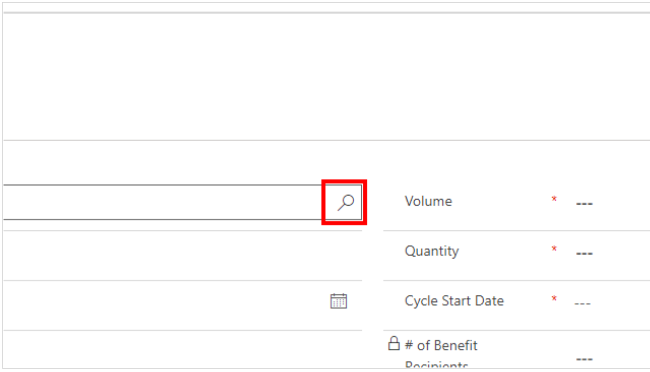
Click on the menu item **New Transactions**



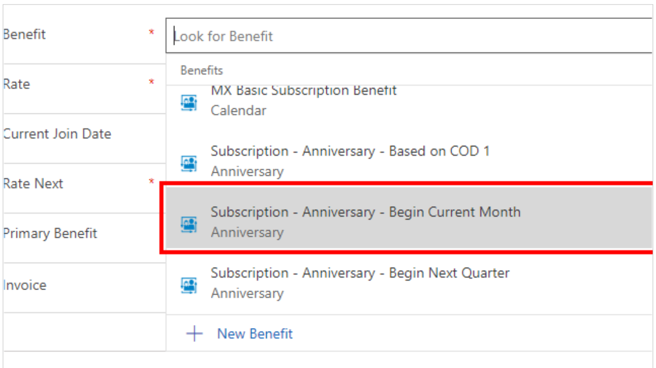
Click on the menu item **Subscription**



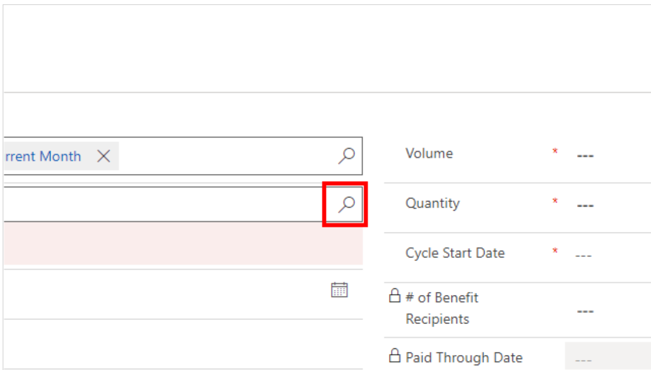
Click on the link **Benefit**



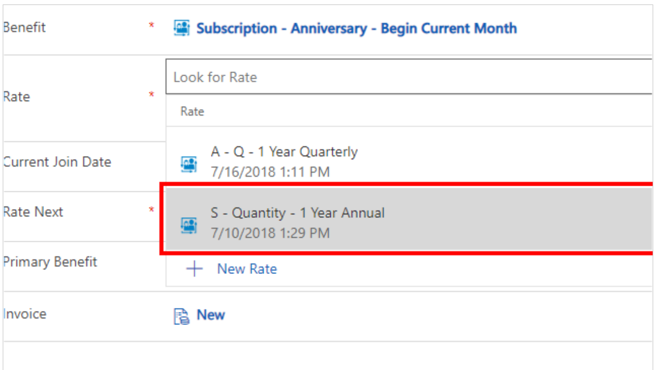
Select the subscription benefit that is being purchased.



Click on the link **Rate**

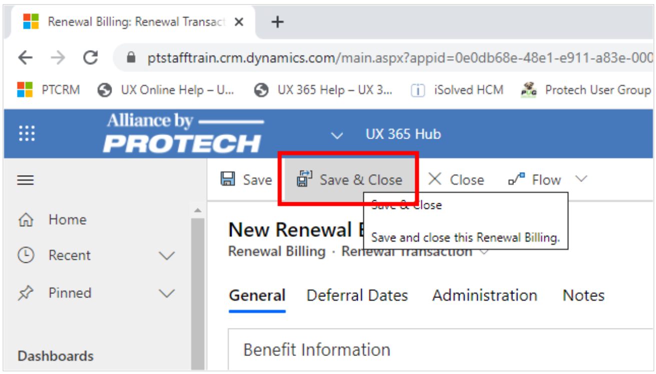


Select the appropriate rate. When you select the rate, the system automatically fills in several of the remaining fields on the benefit entry form.
If your organization uses calendar-based dues, you must follow the guidelines provided in Membership Renewal Setup regarding revenue recognition deferral start and end dates with multiple installment rates.

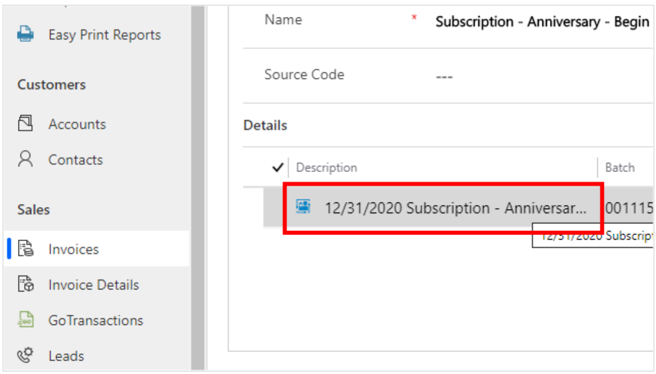


Quantity
If the customer is purchasing more than one subscription to this publication, change the Quantity field to reflect how many subscriptions to this publication they are purchasing. If purchasing more than 1, for rates where the rate type = Quantity, Microsoft Dynamics 365 will update the price based on the price per unit times quantity entered. Also, Microsoft Dynamics 365 will automatically create the requisite number of benefit recipient records based on the number allowed in the rate setup times the quantity entered in the transaction.

Click on the menu item **Save & Close**

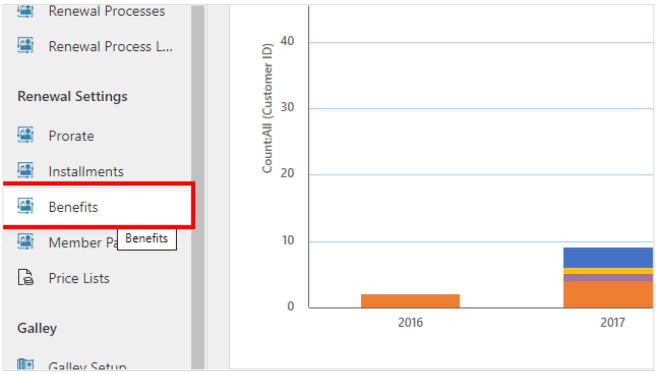


A line item is created and added to the invoice for the subscription that is being purchased.

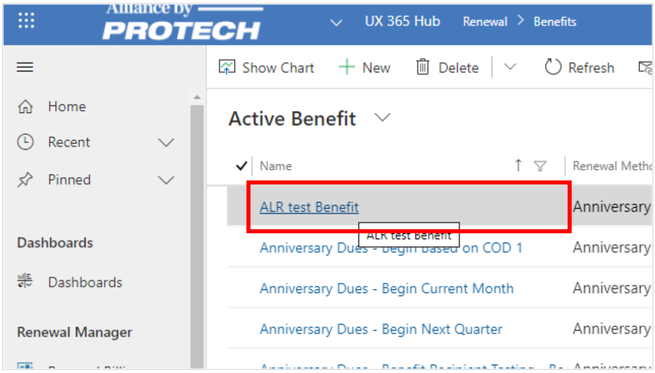


9.4. Creating Subcription Benefit Rates and Prices

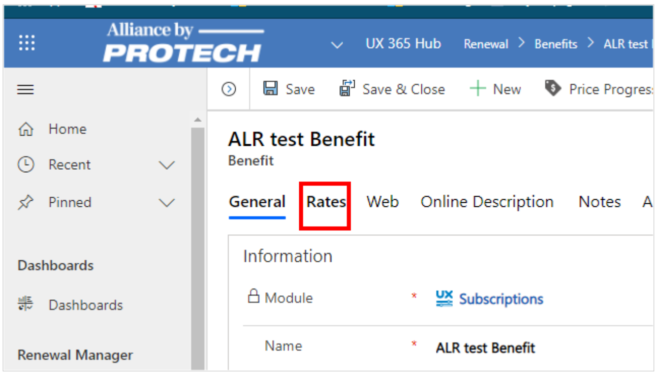
Go to the Work Area Renewal and click on the menu Benefits



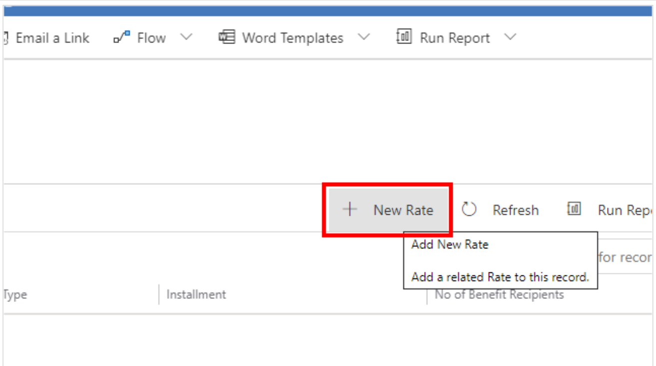
Click on the subscription benefit



In the Navigation Pane of the Benefit record, click Rate to open the Rate Associated View.

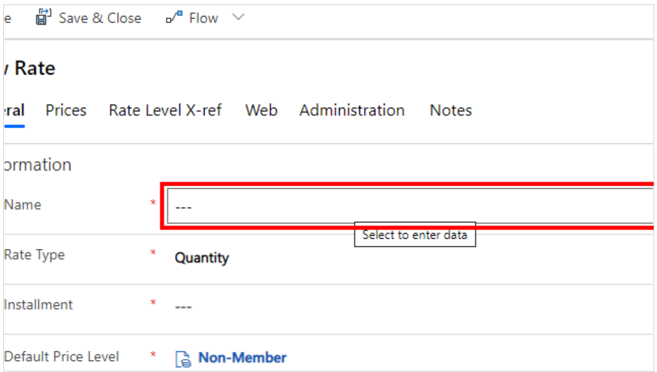


Click Add New Rate on the List View toolbar to create a new rate.

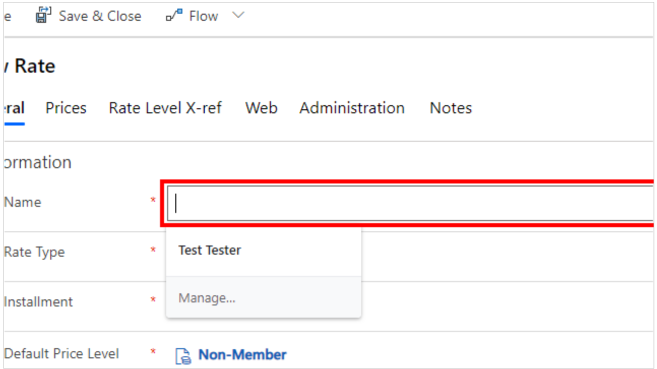


Enter a descriptive name for the rate. If a rate is going to have a specific installment option, we recommend that you include that in your name rate (for example, ‘One Year Domestic Subscription’).

Click on the text field **Name**

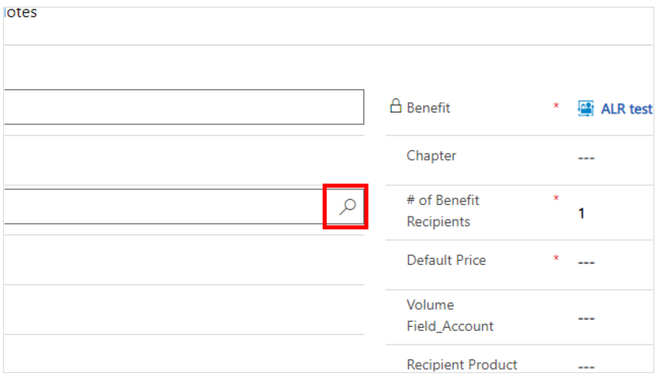


Enter **Name**.

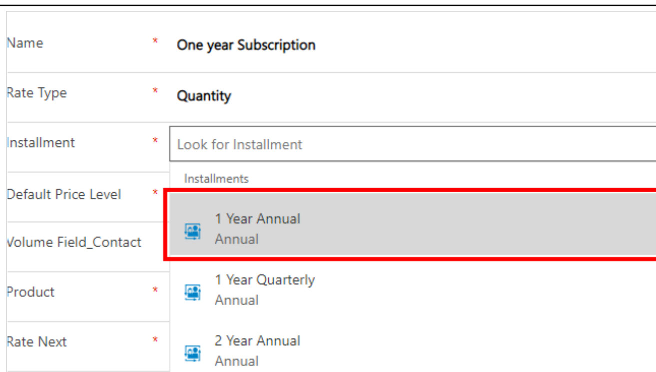


Installment – Click the Lookup button to select the installment schedule for this rate.

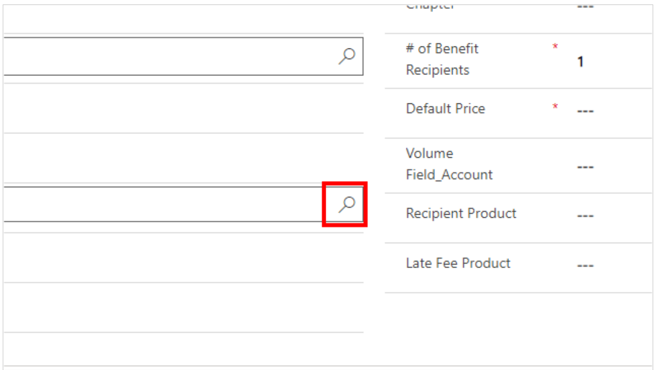
Click on the link **Installment**



Click on the desired installment rate.

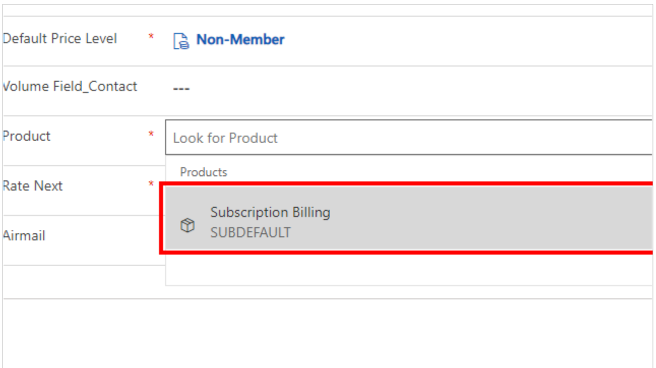


Click on the link **Product**



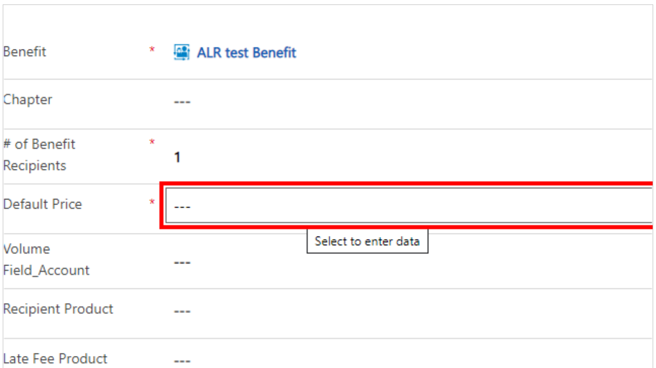
Product – Displays the default product entered on the benefit record. If this particular rate's revenue needs to be tracked in a GL account other than the one that was defined for the benefit, select the appropriate product.

Select the default product.

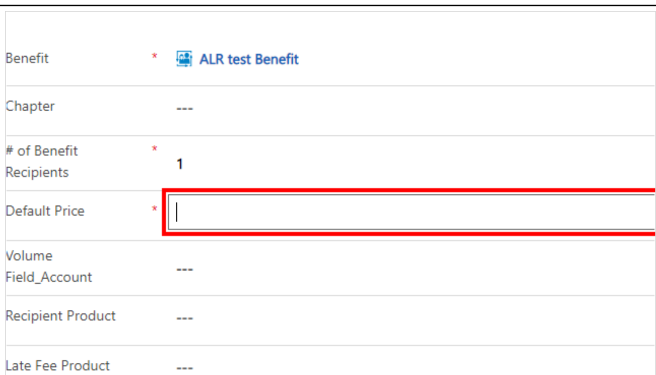


Default Price – Enter the default price for this rate. The system will use this entry to create a price for each price level that you have set up. You can modify these prices at any time, or you can create additional price records for this rate, if needed.

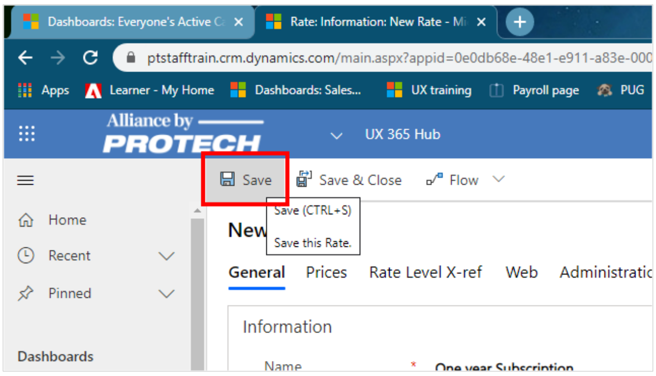
Click on the text field **Default Price**



Enter **Default Price**.

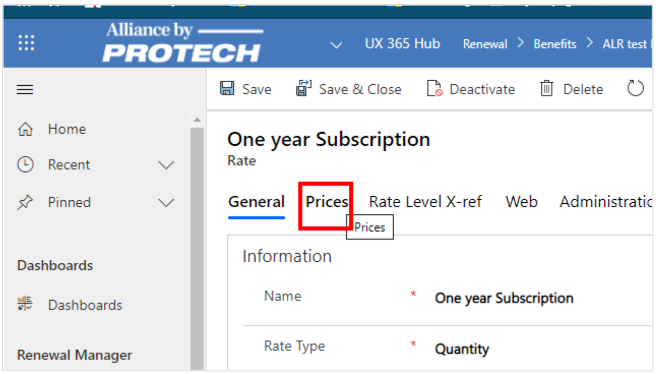


Click on the menu item **Save (CTRL+S)**



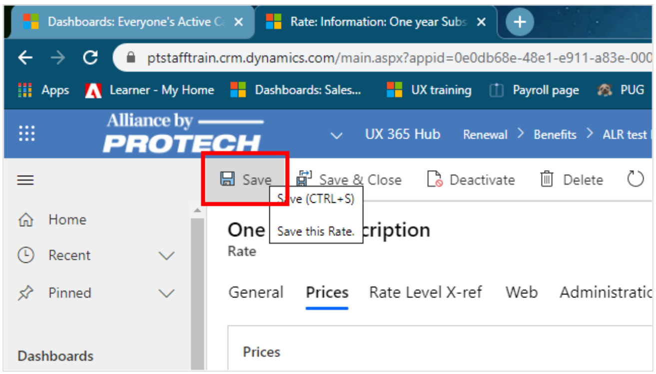
In the Navigation Pane of the rate record, click Prices to display the price records created by the system for each price list in your system setup.

Click on the item **Prices**



All system created prices records will use the default price in the rate, as well as the price start date and price end date that you defined for the benefit. You will need to review and revise these prices.

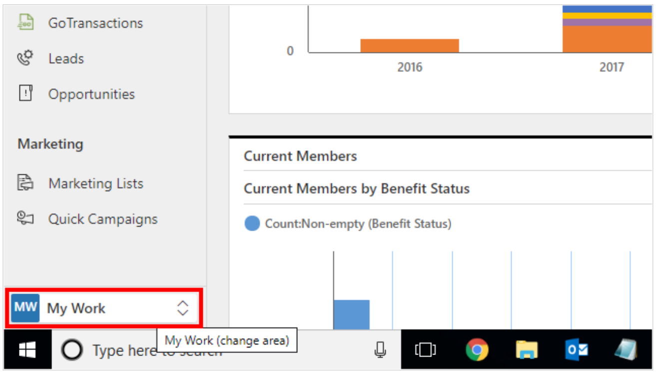
Click on the menu item **Save (CTRL+S)**



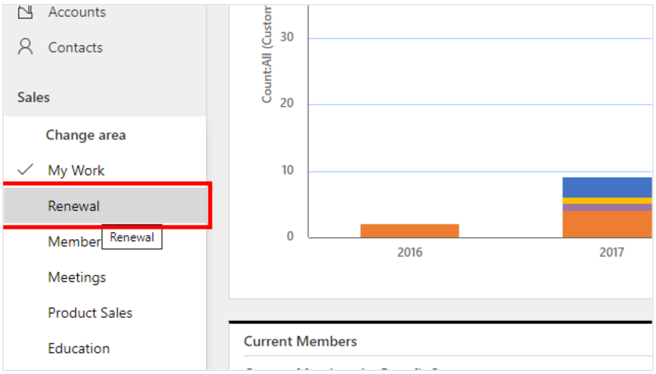
9.5. Setting Up Galleys and Galley Details

9.5.1. Setting Up Galleys and Galley Details

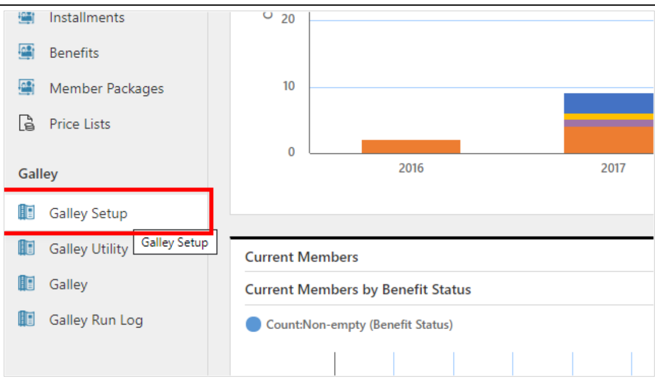
Click on the button My Work



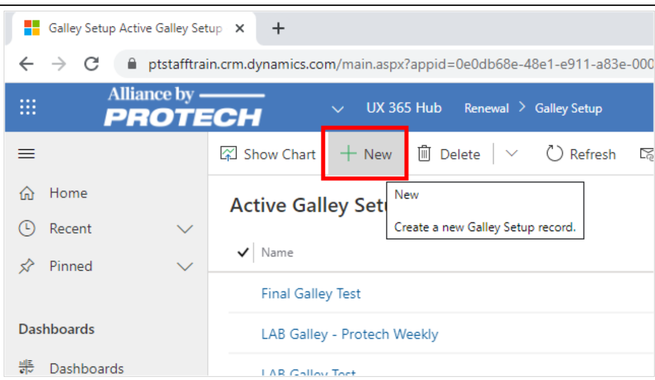
Click on the item **Renewal**



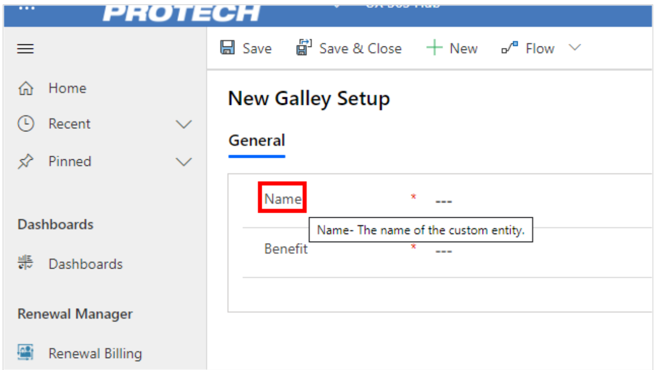
Click on the item **Galley Setup**



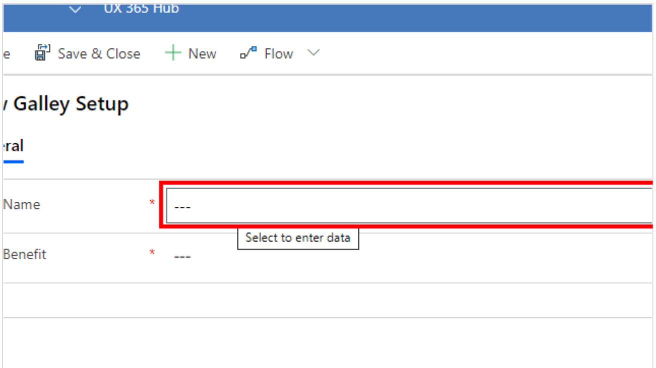
Click on the menu item **New**



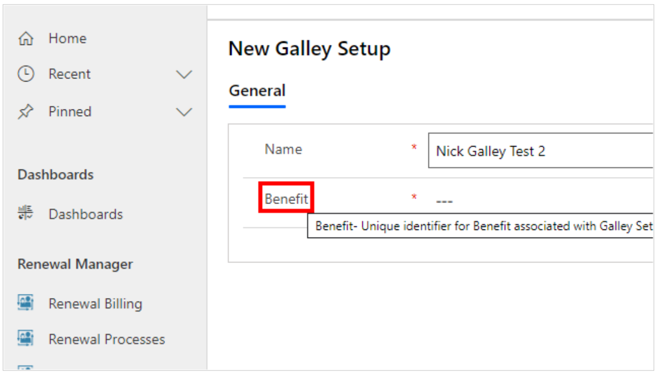
Enter the full publication name in the Name field.



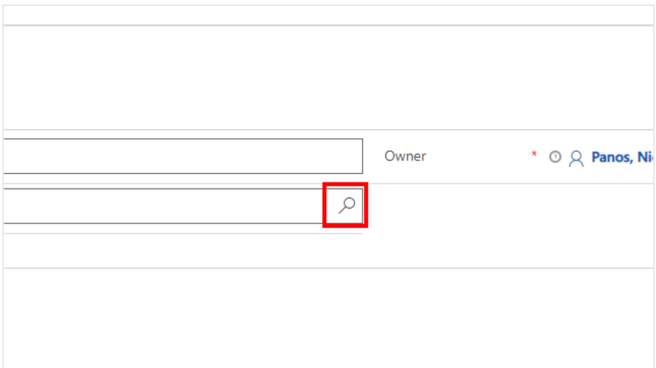
Text the name of the Galley



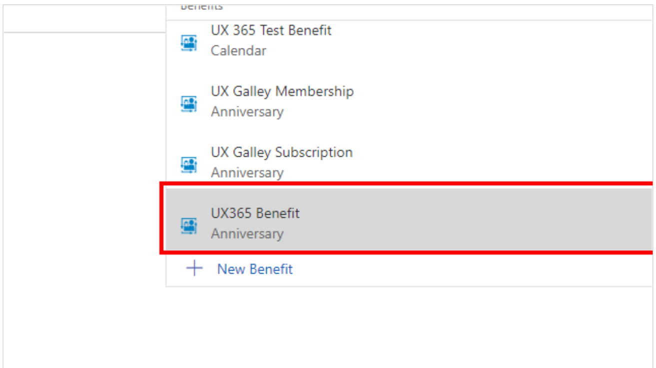
The Benefit field defaults from the parent subscription benefit.



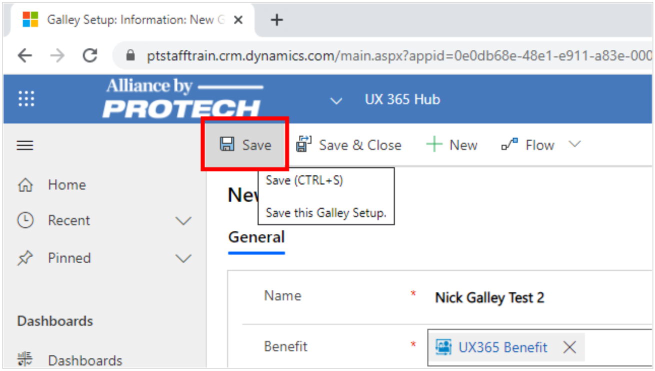
Click on the link **Benefit**



Select the benefit you would like to use

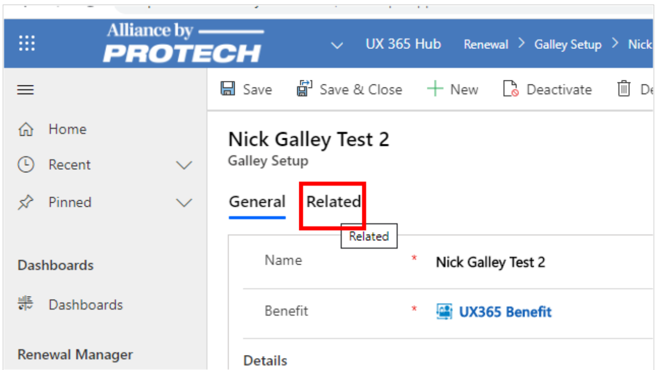


Click Save to save the Galley Setup record and activate setup options in the record including Galley Run Log, Galley Details, and Galley.

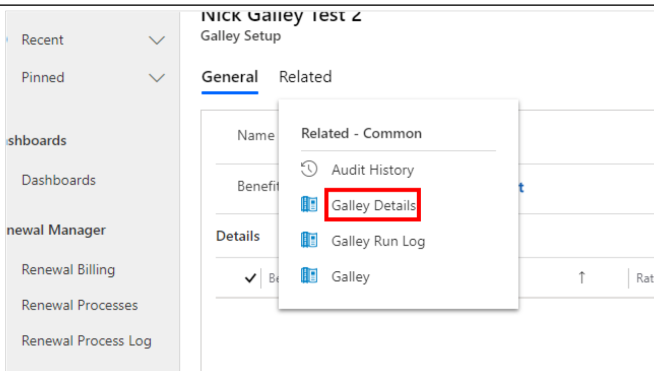


9.5.2. Galley Details for Paid Subscribers

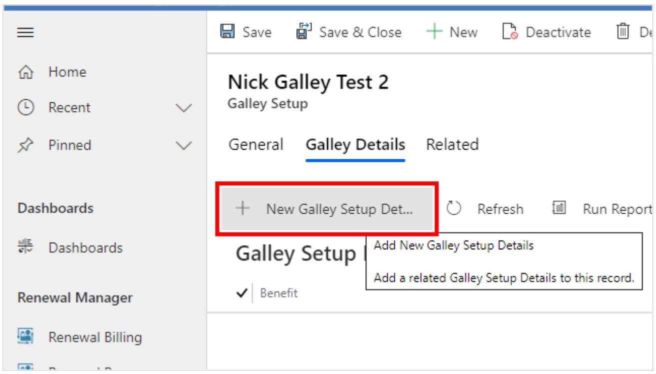
Click on the item Related



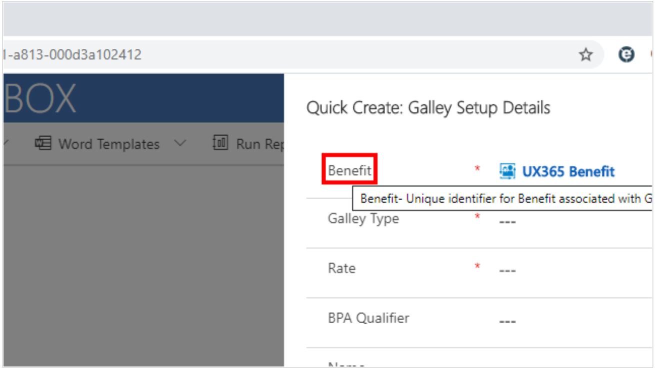
Click on the menu item **Galley Details**



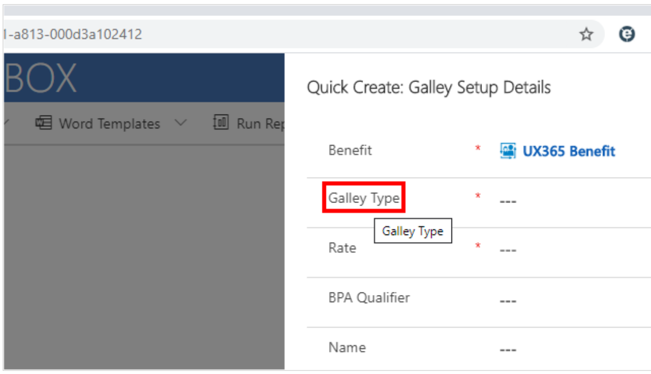
Click on the menu item **Add New Galley Setup Details**



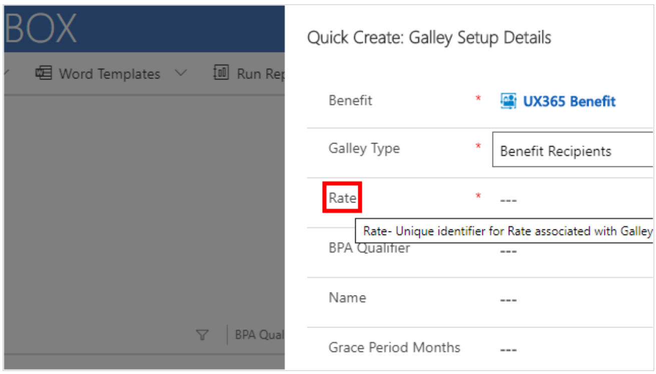
Benefit – Do not change this value. This defaults from the parent benefit for this galley.



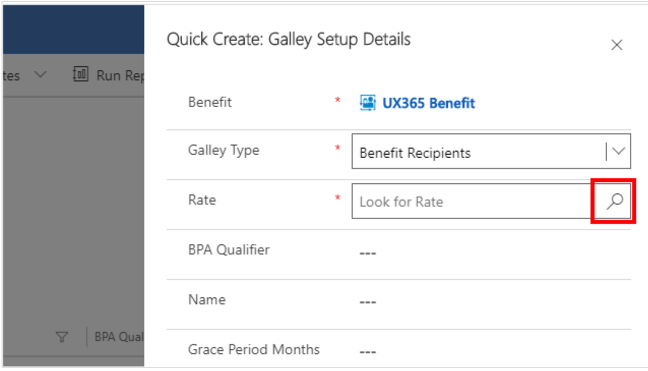
Galley Type – This defaults to Benefit Recipients. Do not change this setting.



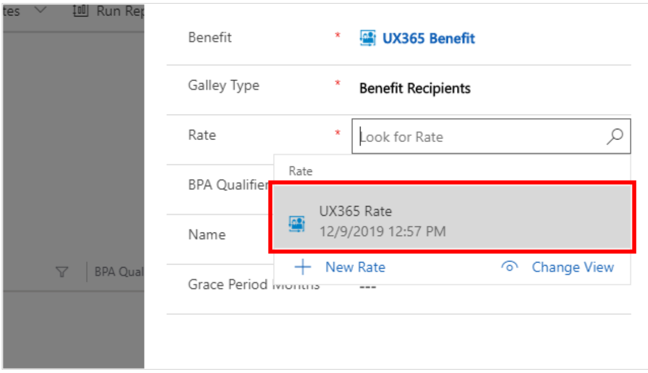
Rate – Click the Lookup button to select the first subscription rate that should be included in the galley for label printing.



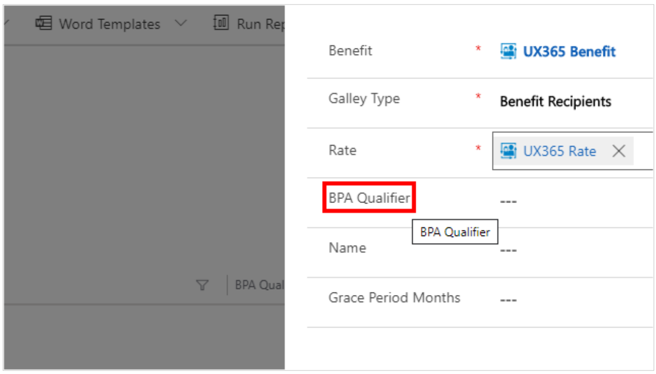
Search the rate you would like to select.



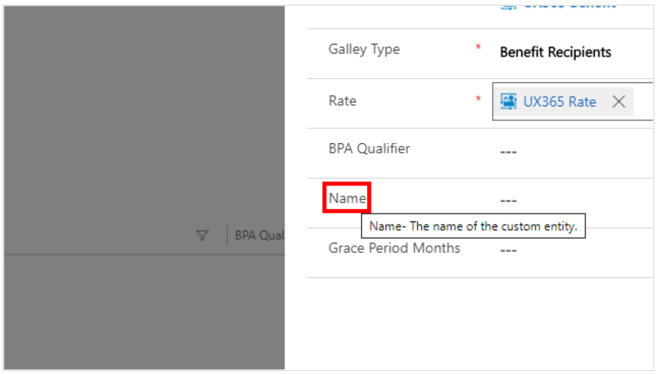
Click on the rate you would like to use.



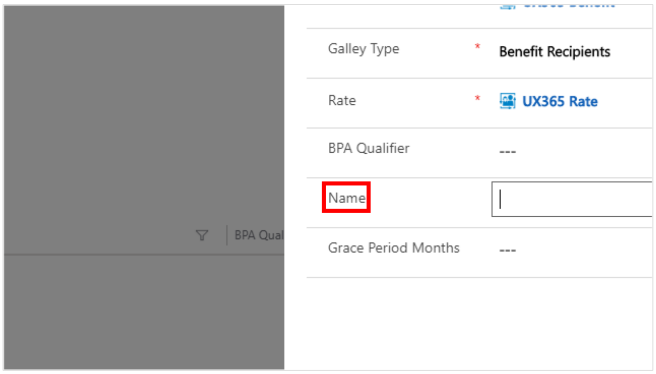
BPA Qualifier – If your organization produces BPA Audit reports required for advertising, you can select the type of qualifier this subscription rate represents. If your organization does not do BPA Audit reporting, skip this field.



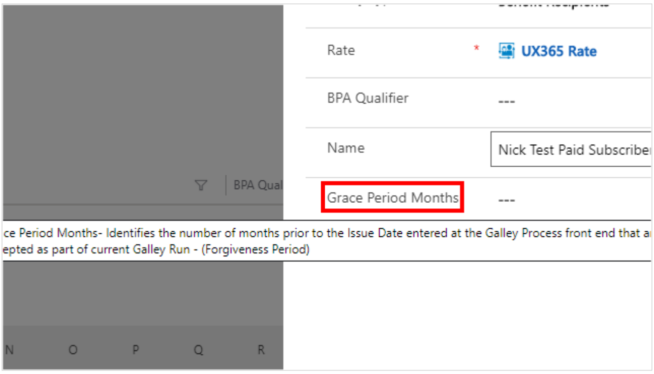
Enter the full publication name in the Name field.



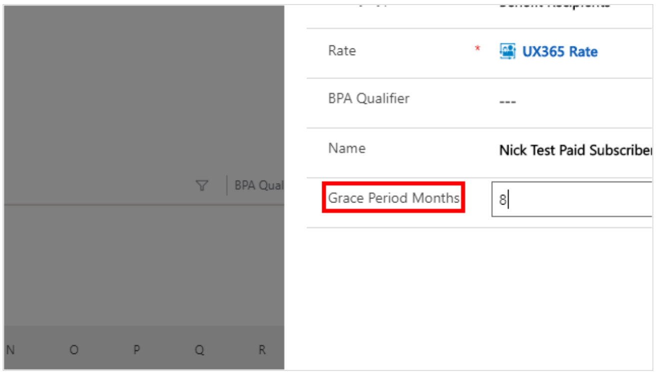
Enter **the Name in the text field**.



Grace Period Months – Enter the number of months beyond their expiration date that subscribers will continue to receive the publication.

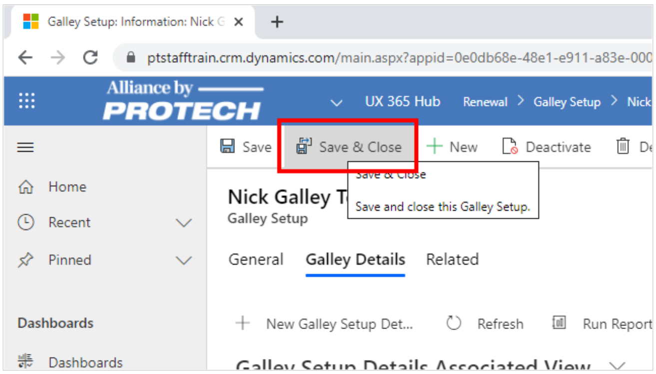


Enter **the Grace Period Months**.



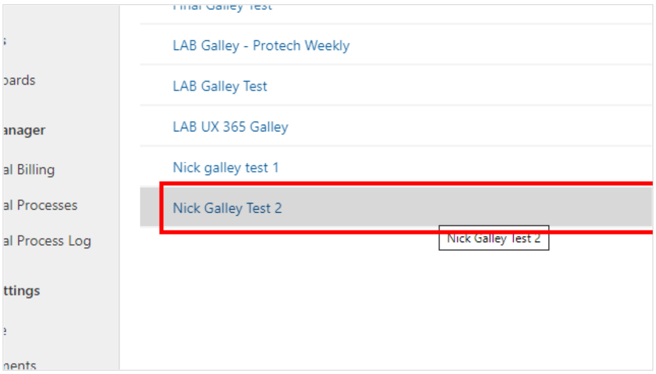
Click on the button **Save and Close**

Click on the menu item **Save & Close**

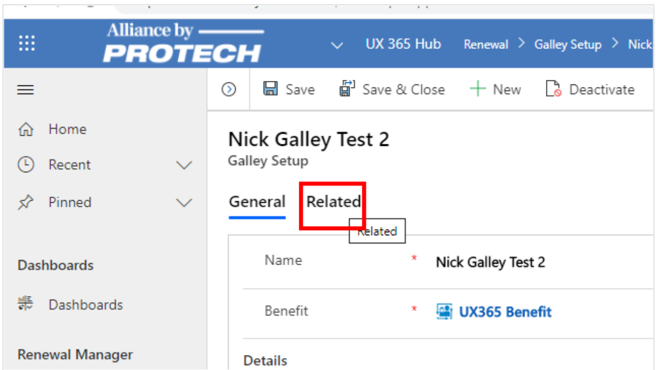


9.5.3. Galley Detail for Membership Benefit

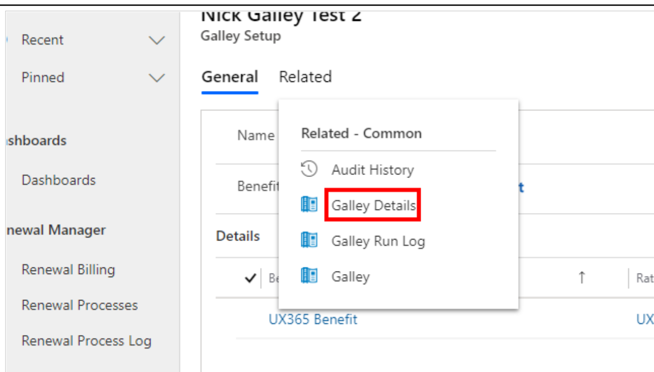
Double click on the Galley.



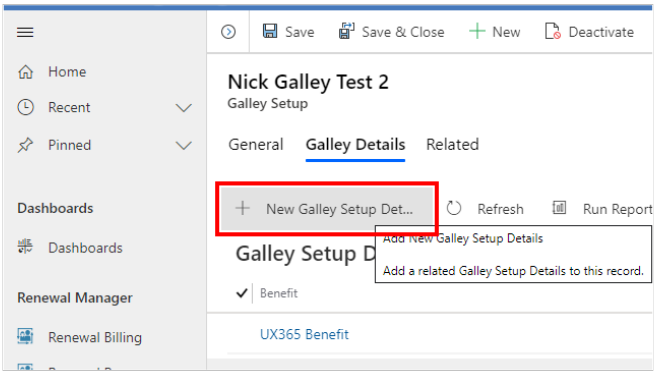
Click on the item **Related**



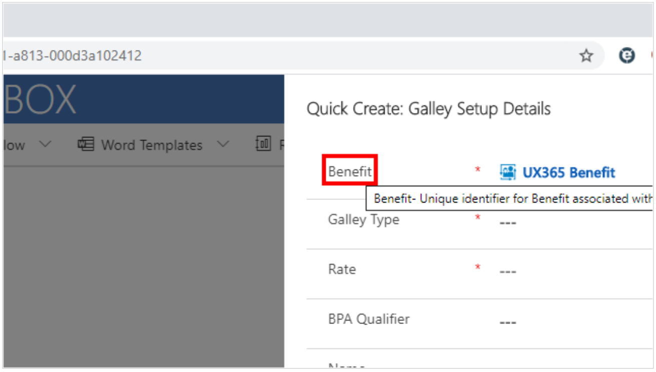
Click on the menu item **Galley Details**



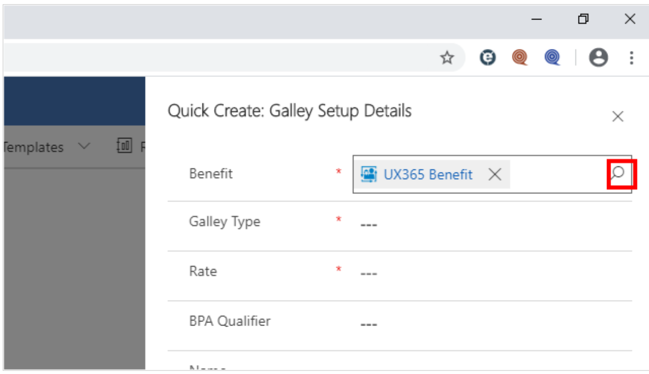
Click on the menu item **Add New Galley Setup Details**



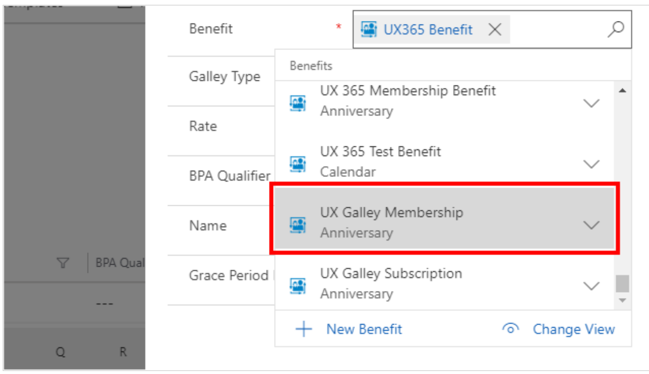
Benefit – Click the Lookup button to select the first dues membership benefit that receives this publication as part of its benefits.



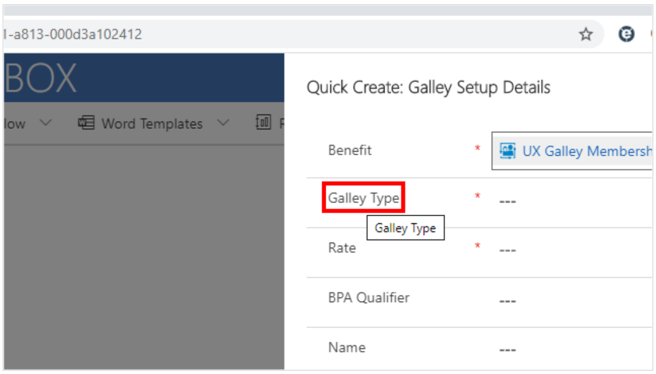
Click on the link **Benefit**



Select the benefit.

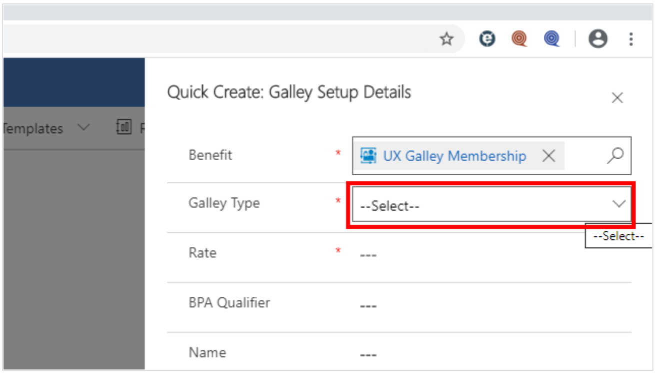


Select the Galley Type

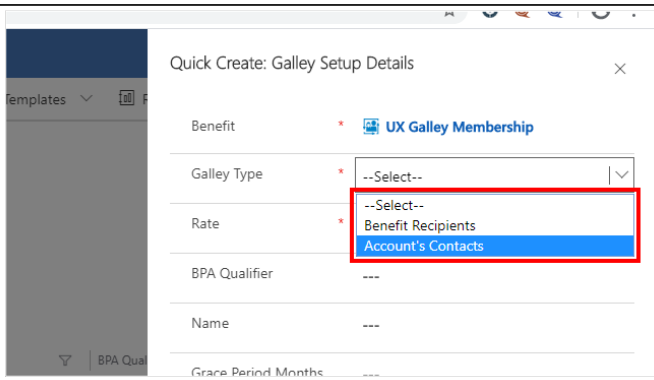


- If the membership benefit you are adding to the galley detail is a "company" member benefit where the contacts at the member company receive this publication, select the Account's Contacts option from this pull down. -If the membership benefit you are adding to the galley detail is for a contact, select the Benefit Recipients option from this pull down.

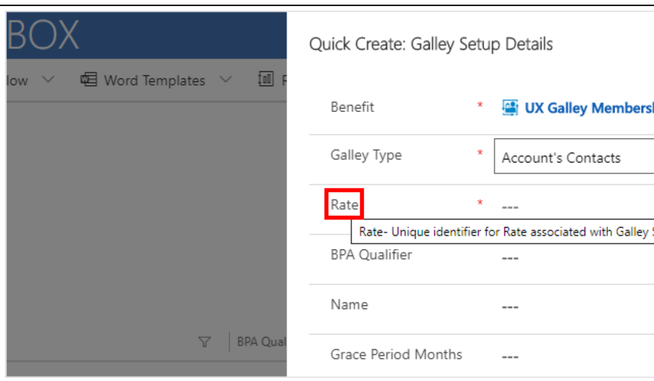
Click on the field **Galley Type**



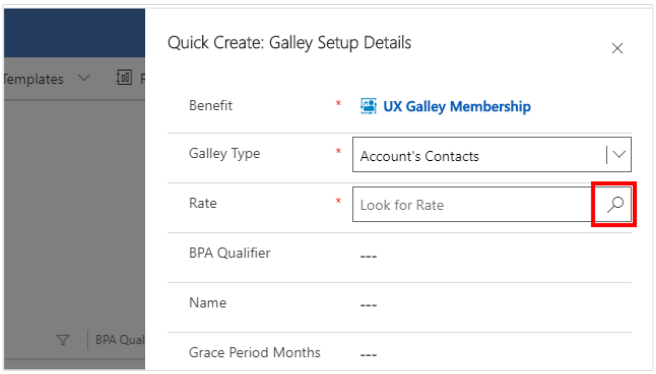
Click on the item **Account's Contacts** in the list



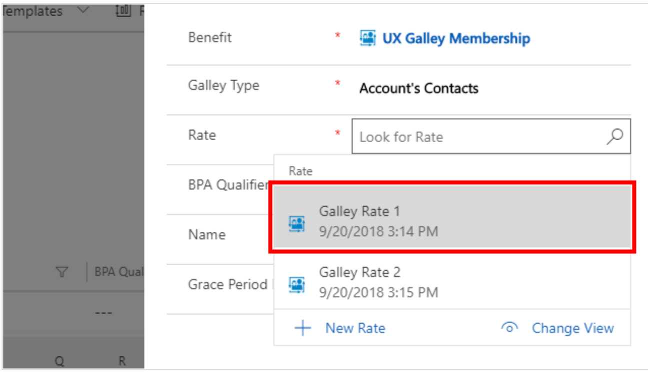
Click the Lookup button to select the first renewal benefit rate that should be included in the galley for label printing.



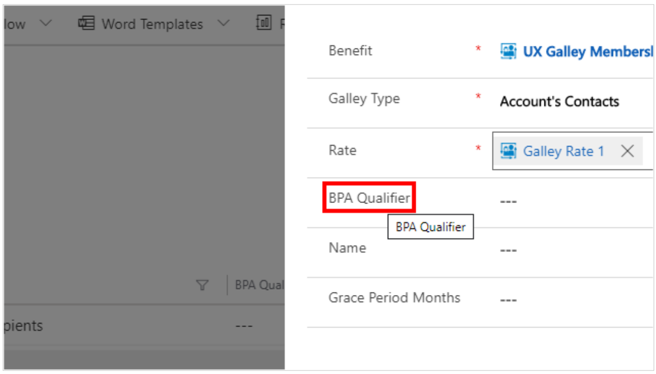
Click on the link **Rate**



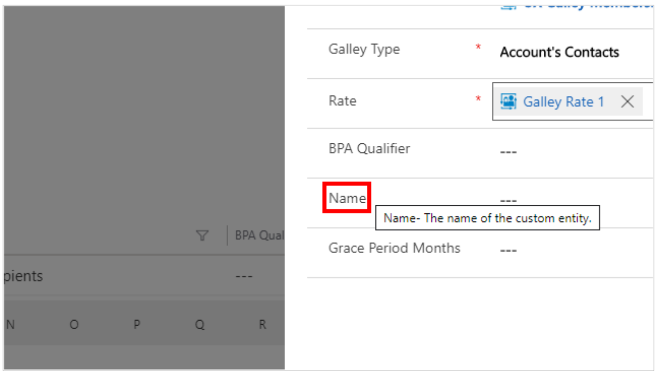
Select the Galley Rate



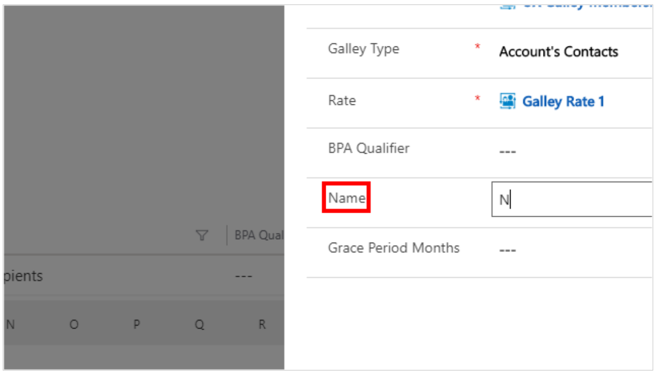
BPA Qualifier – If your organization produces BPA Audit reports required for advertising, you can select the type of qualifier this subscription rate represents. If your organization does not do BPA Audit reporting, skip this field.



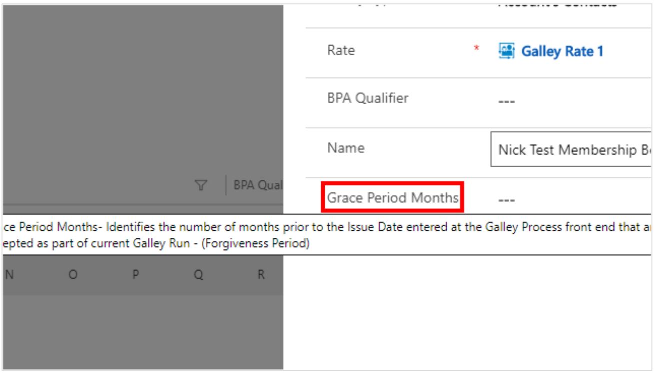
Enter the full publication name in the Name field.



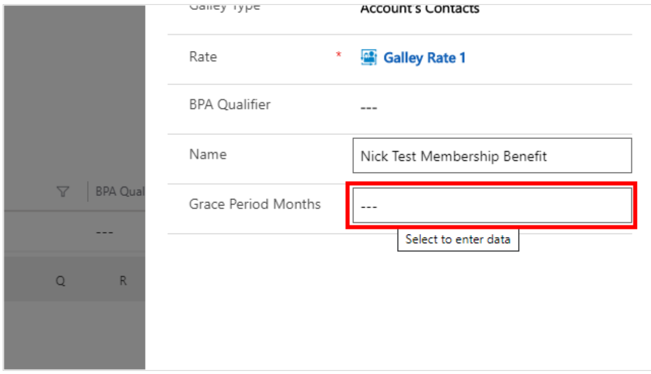
Enter **Name**.



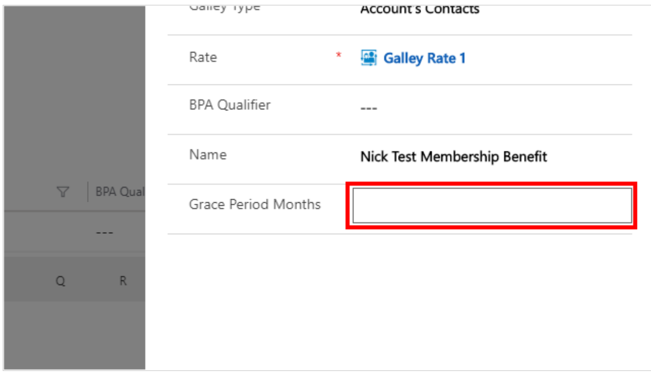
Grace Period Months – Enter the number of months beyond their expiration date that subscribers will continue to receive the publication.



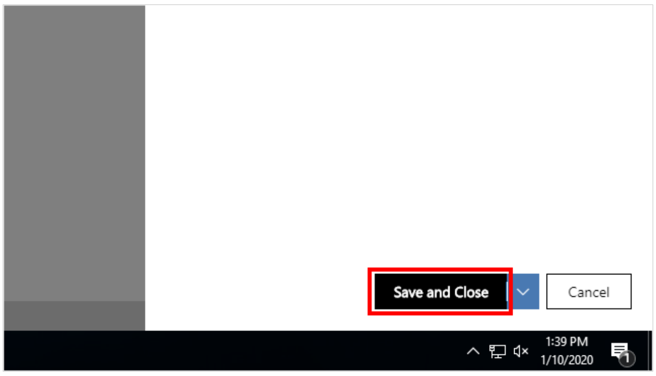
Enter the Grace Period Months



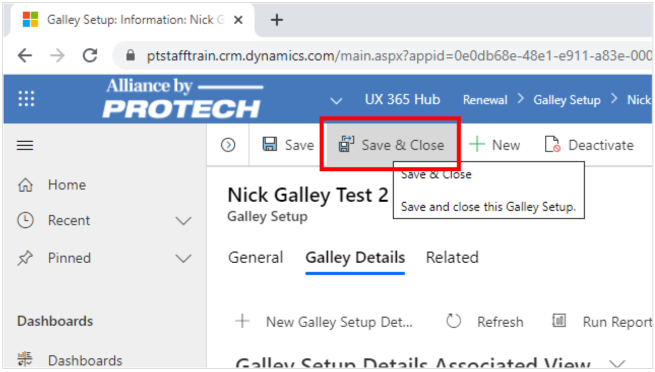
Enter **Grace Period Months**.



Click on the button **Save and Close**



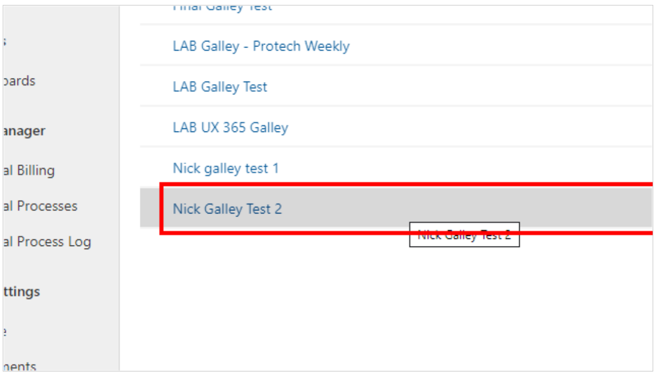
Click on the menu item **Save & Close**



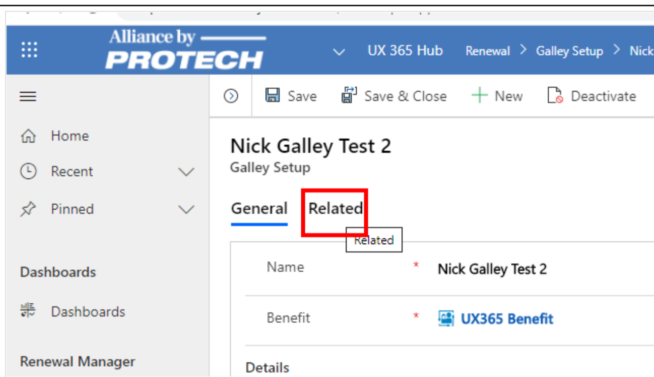
9.5.4. Galley Run Log

Each time the galley process is run for a publication, the date it is run and the subscription issue start date for which is was run is recorded in the Galley Run Log. At any time, you can view a galley's Galley Run Log to see when the last galley was run and for what issue start date.

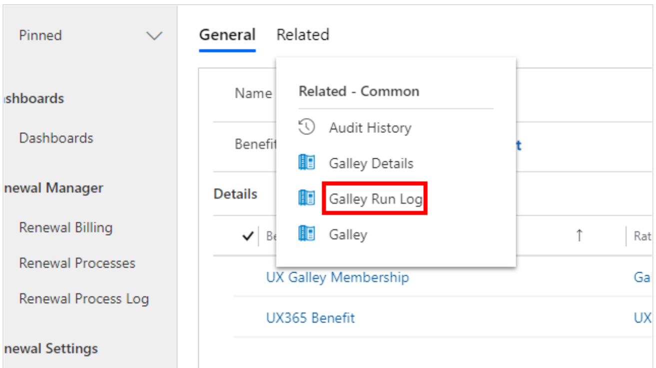
Click on the cell **Name**



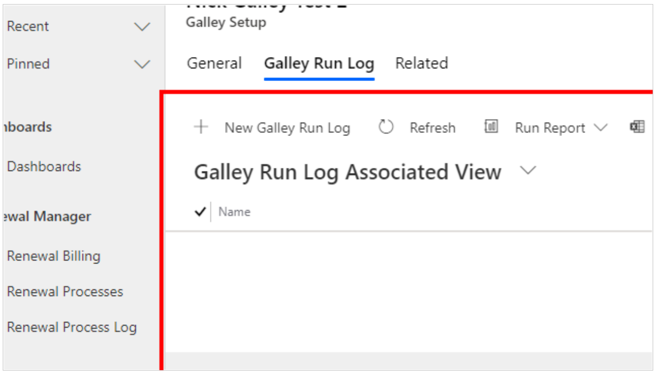
Click on the item **Related**



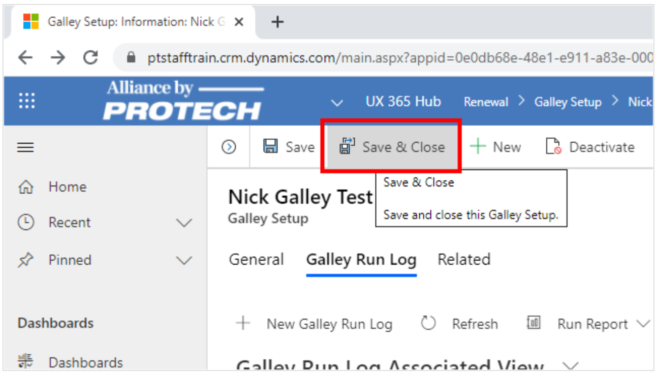
Click on the menu item **Galley Run Log**



At any time, you can view a galley's Galley Run Log to see when the last galley was run and for what issue start date.



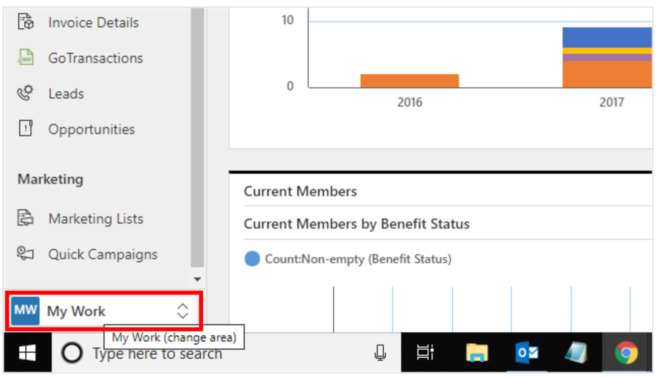
Click on the menu item **Save & Close**



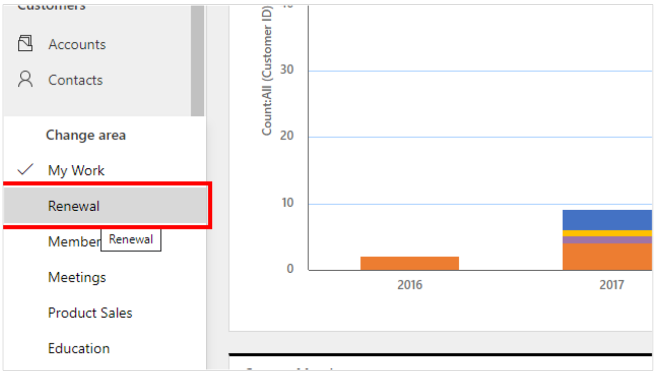
9.6. Subscription Rates

A single subscription benefit can have multiple rates, which define how a renewal benefit is calculated. For example, a journal subscription benefit can have rates for students, members, and non-members, as well as domestic and international rates, rates for regular and airmail delivery, and single or multiple year rates. Additionally, you can define the number of benefit recipients for each rate. As long as each rate shares the attributes of the benefit setup, you can create multiple billing rates under the same benefit. To set up multiple rates under a single benefit, repeat the following steps for each rate.

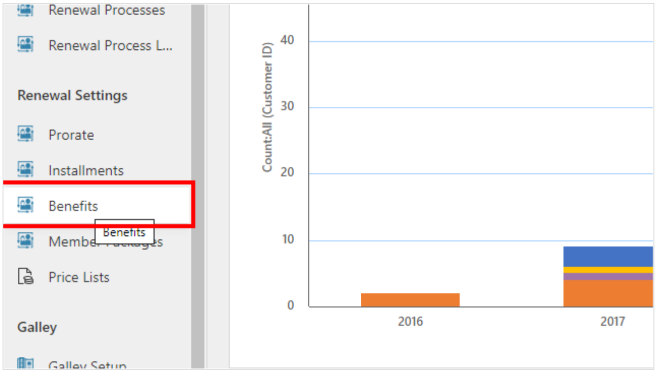
Click on the button **My Work (change area)**



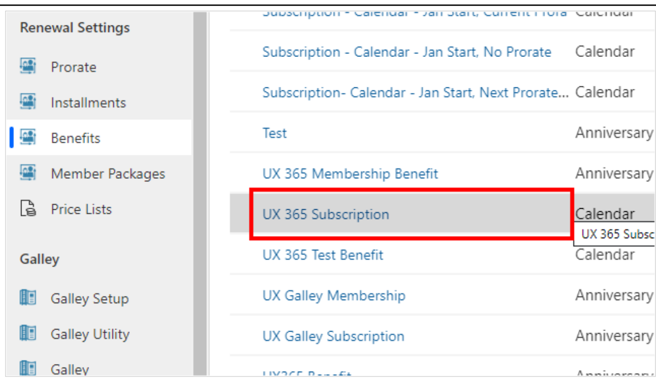
Click on the item **Renewal**



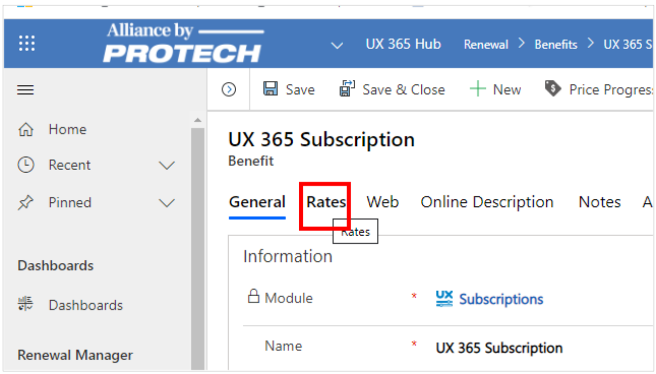
Click on the item **Benefits**



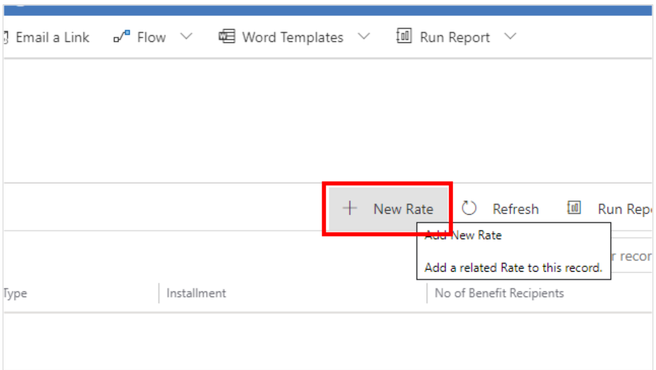
Double click on the cell **Name**



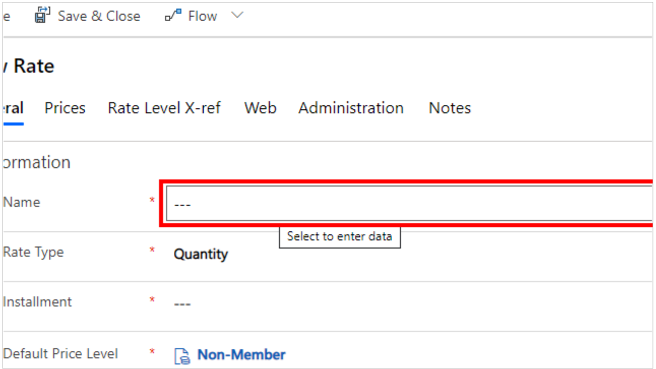
Click on the item **Rates**



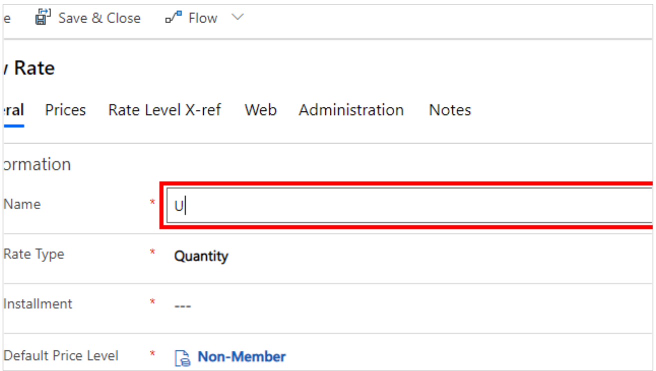
Click on the menu item **Add New Rate**



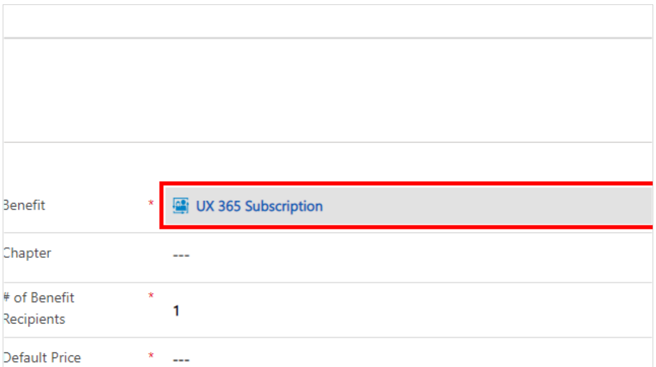
Click on the text field **Name**



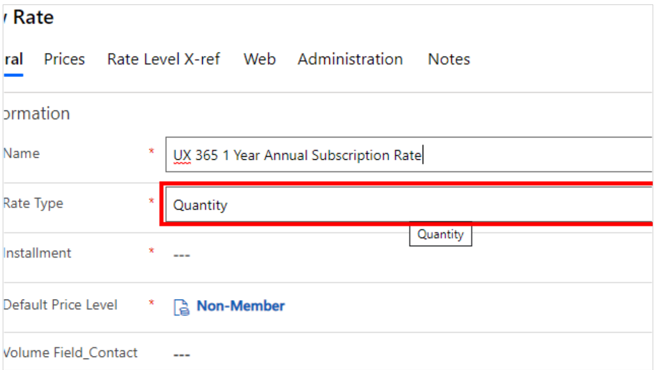
Enter **Name**.
Enter a descriptive name for the rate. If a rate is going to have a specific installment option, we recommend that you include that in your name rate (for example, 'One Year Domestic Subscription').



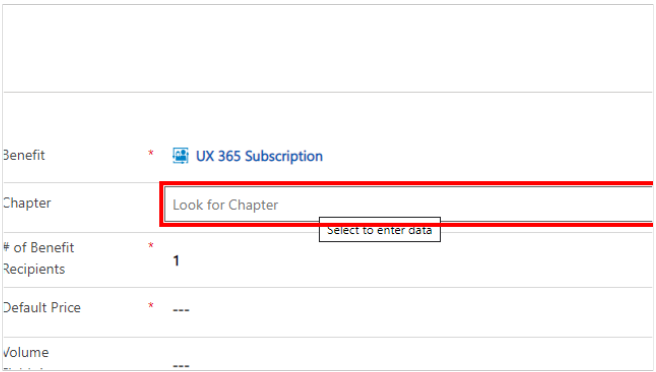
Benefit
This field displays the name of the parent benefit for this rate and is not available for edit.



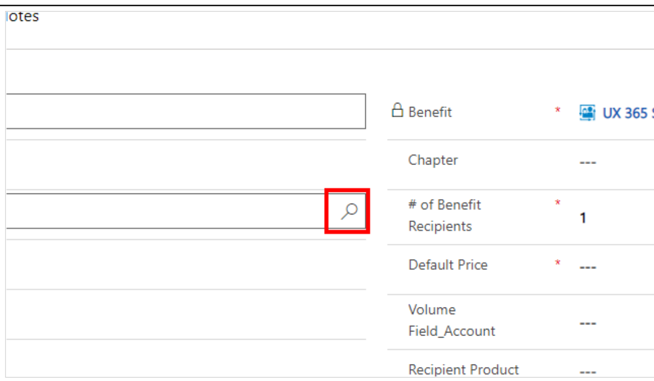
Rate Type
Select the calculation method for this rate: Select Quantity if the pricing is not calculated based on volume data in the account or contact record; instead, the price is based on a flat quantity (typically 1). This is the typical rate type for subscriptions. Select Volume if the pricing is calculated based on volume data in the account or contact record. For example, your organization can base its subscription price on a company’s sales revenue and you capture that sales revenue figure for purposes of calculating pricing. You could use Volume rates so that the system will calculate the pricing automatically for you based on the value ranges in your price setup for this rate. Select Factor if the pricing is calculated based on a factor calculation using volume data in the account or contact record. For example, your organization can base its subscription price based on a factor calculation of a company’s sales revenue. You could use Factor rates so that the system will calculate the price automatically for you based on the value ranges in your price setup for this rate.



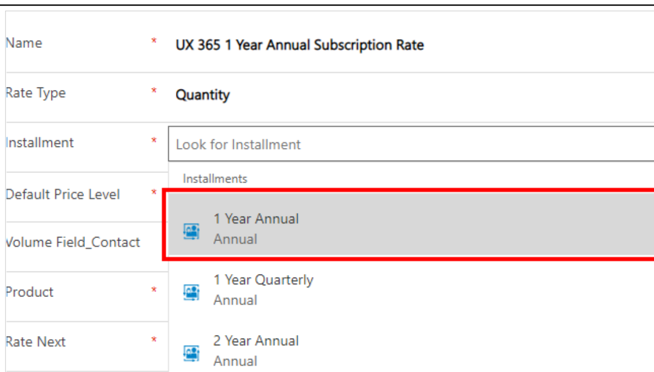
Chapter
Leave this field blank. It does not apply to subscription benefits.



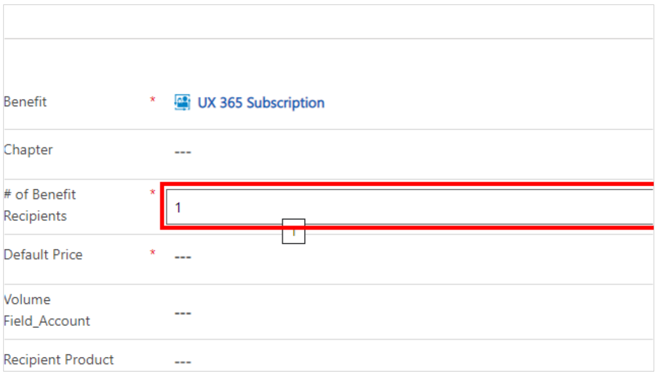
Click on the link **Installment**



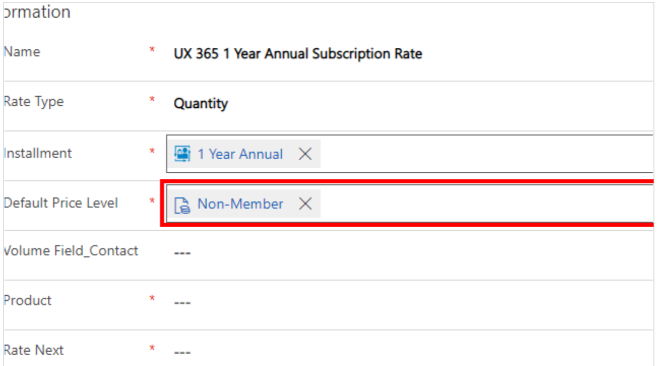
Click on the item 1 Year Annual



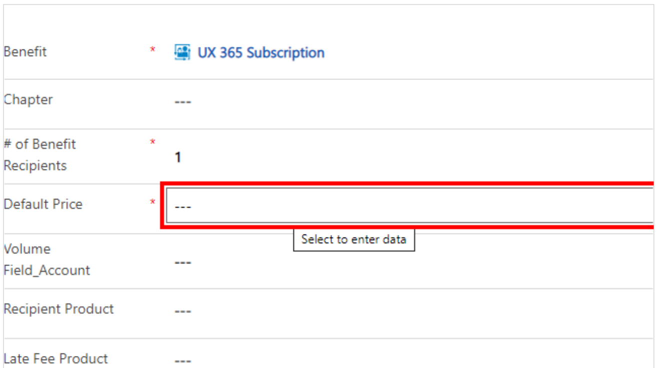
# of Benefit Recipients
You must enter at least 1, however, the number is based on your organizational needs. For example, if you are creating a rate that is specific to account records, enter the number of records that can benefit from the account's renewal billing record.



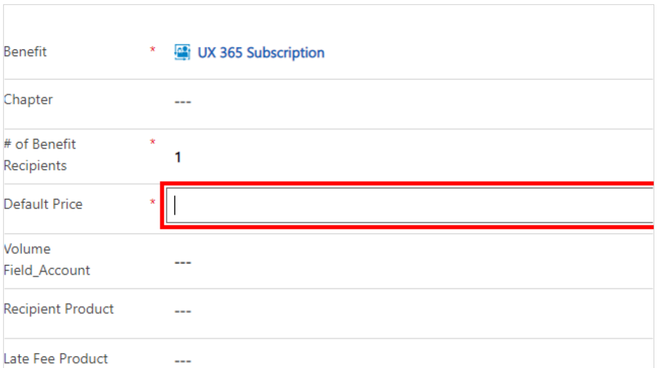
Default Price Level
Click the Lookup button to select the default price level for this rate. Price levels in CRM allow an organization to have multiple price lists. Typically, organizations have two price levels to differentiate pricing for members from pricing for non-members (although some have more intricate pricing structures). Every account and contact record in CRM has a field that indicates the price list that applies to that record. Each product also has a field relating that product to a particular price level. If an account or contact record does not have a default price level, the system uses the default price level indicated for the product itself. For subscriptions, the default price level will typically be Non-Member.



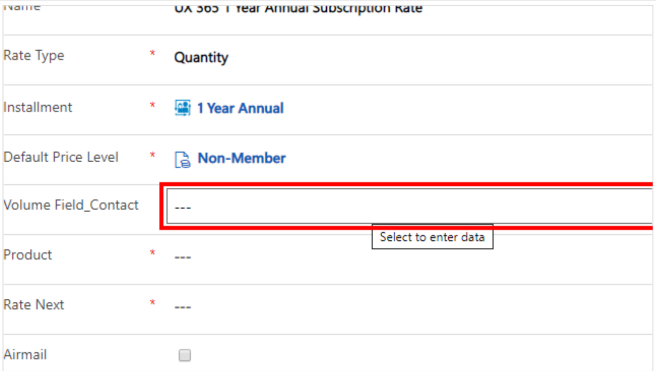
Click on the text field **Default Price**



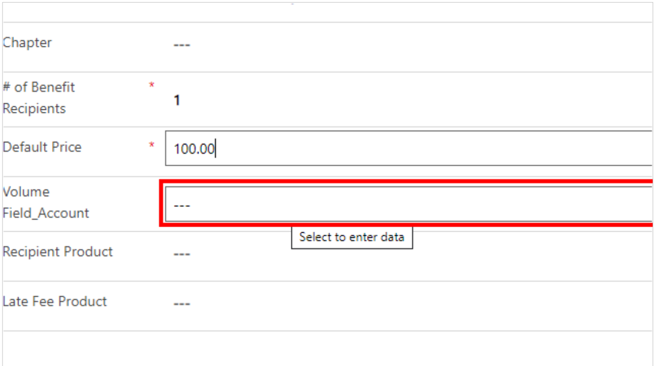
Enter **Default Price**.



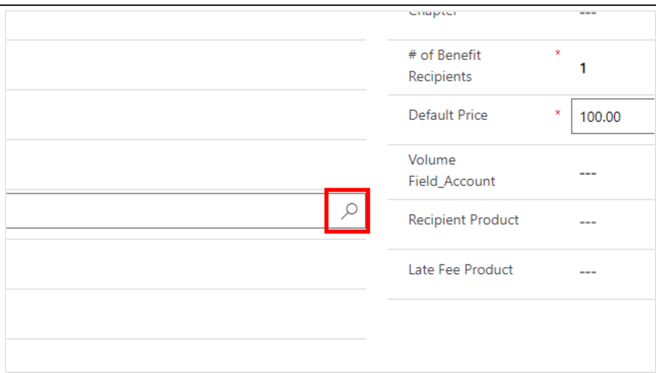
Volume Field_Contact
If you selected Volume or Factor as the Rate Type, enter the attribute name for the contact field used to maintain volume data for purposes of calculating price. The typical contact attribute is pa_volume. If the Rate Type selected is Quantity, leave this field blank.



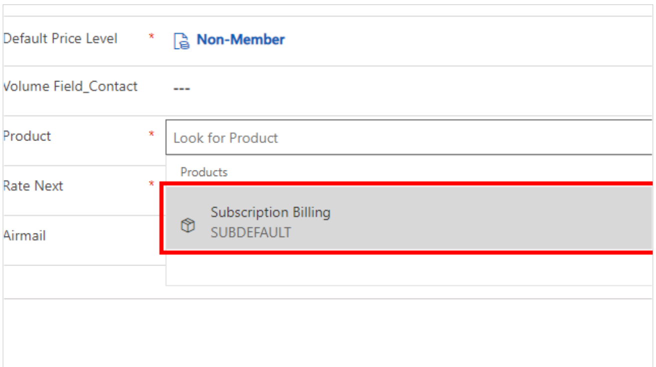
Volume Field_Account
If you selected Volume or Factor as the Rate Type, enter the attribute name for the account field used to maintain volume data for purposes of calculating price. The typical account attribute is pa_volume. If the Rate Type selected is Quantity, leave this field blank.



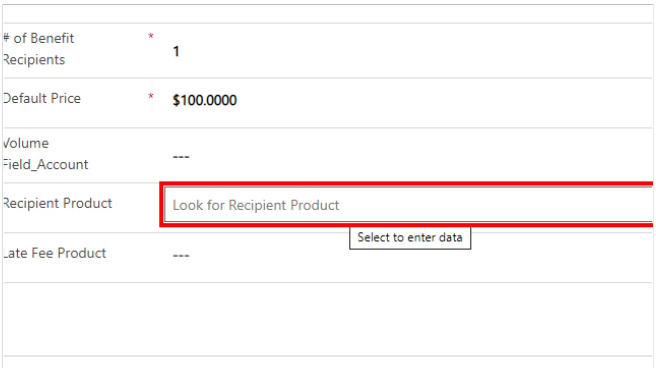
Click on the link **Product**
Displays the default product entered on the benefit record. If this particular rate’s revenue needs to be tracked in a GL account other than the one that was defined for the benefit, select the appropriate product.



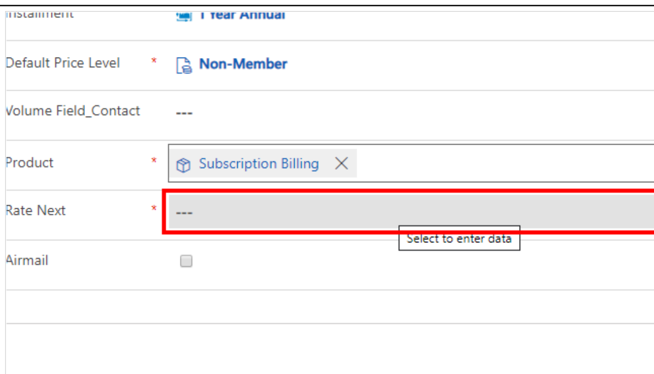
Click on the item Subscription Billing



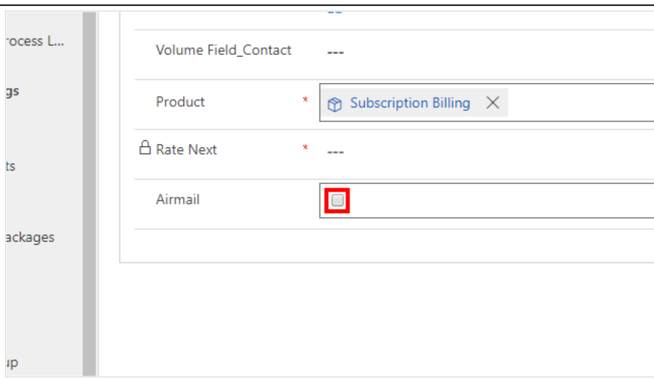
Recipient Product
If this rate supports a specific number of “free” benefit recipients (as defined in the Number of Benefit Recipients field), and your organization charges for any additional recipients above this number, you will need to assign a product for this. This product is used to calculate additional charges on the renewal invoice if the renewal billing benefit recipients count exceeds the number defined for this rate.



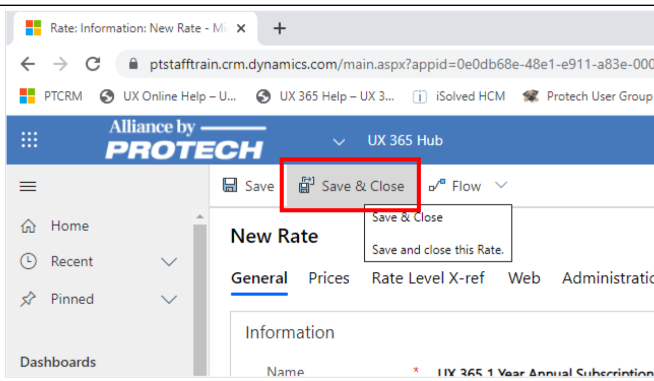
Rate Next
This field is not enabled until you save the rate, when the system automatically populates this field with this rate. If this rate is part of a progressive rate structure, click the Lookup button to select the rate to be used after this rate.



Airmail
Click the Yes option if subscriptions using this rate should be mailed via airmail. You can use this field to separate galley records that should be sent via airmail.



Click on the menu item **Save & Close**

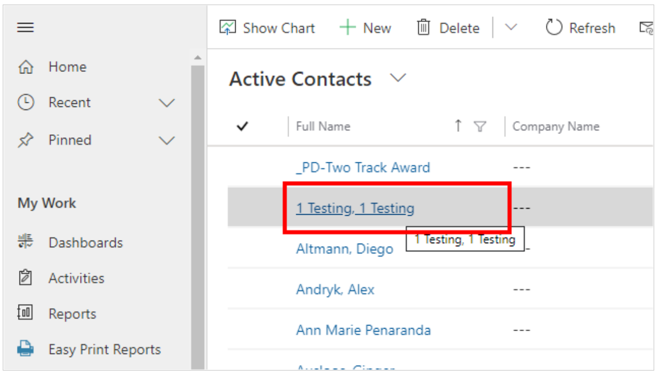


9.7. Terminating a Single Subscription

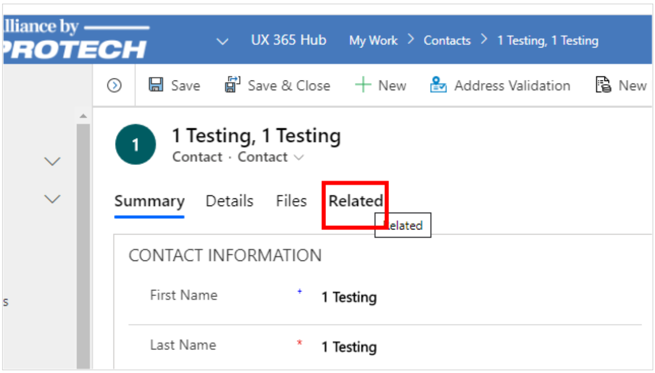
In this situation, you want to manually terminate the customer’s current subscription without changing the invoice detail line charges. This section describes how to terminate a subscription and the system rules that apply based on batch status and payments within the invoice. When you terminate a subscription, there are no changes to the invoice detail line item charges. The subscription is no longer eligible for renewal processing or the galley utility. These instructions terminate the current subscription from within the invoice detail. You may also terminate from the list view of renewal billing records by selecting the checkbox next to the current renewal billing record and clicking Terminate on the List View toolbar of the list of renewal billing records.

Click on the item **Contacts**

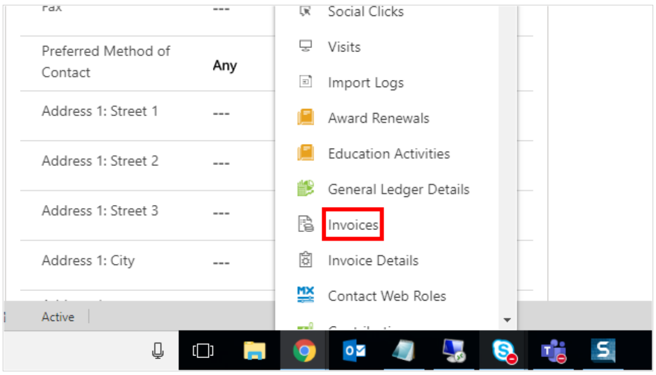
Search for the contact who's subscription you would like to terminate.



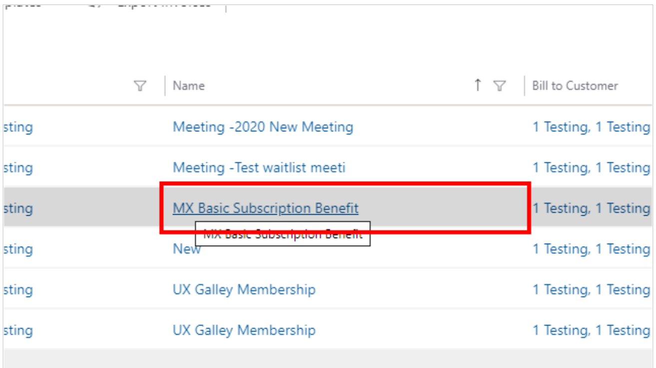
Click on the item **Related**



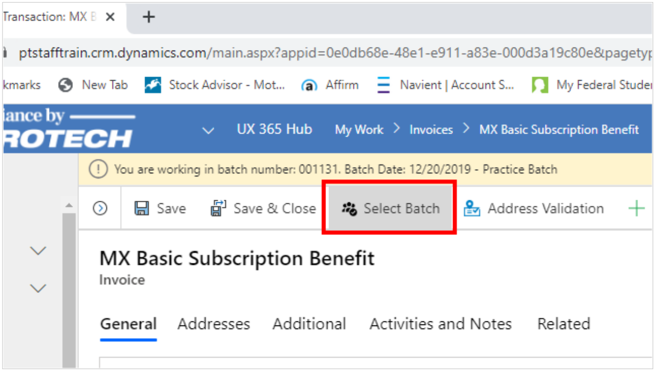
Click on the menu item **Invoices**



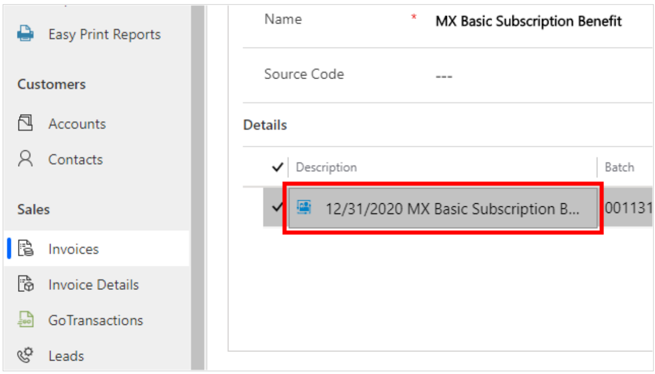
Open the invoice that contains the subscription.



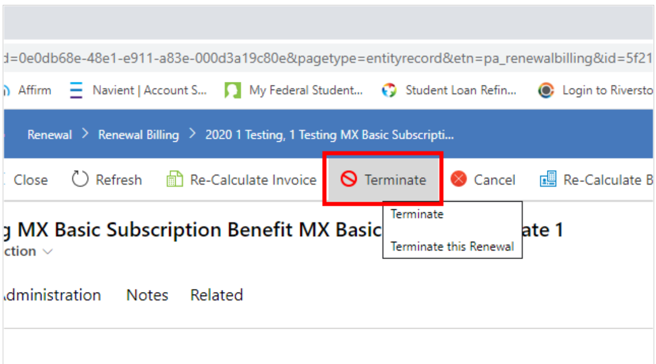
Select the appropriate batch based on your Organization's business rules.



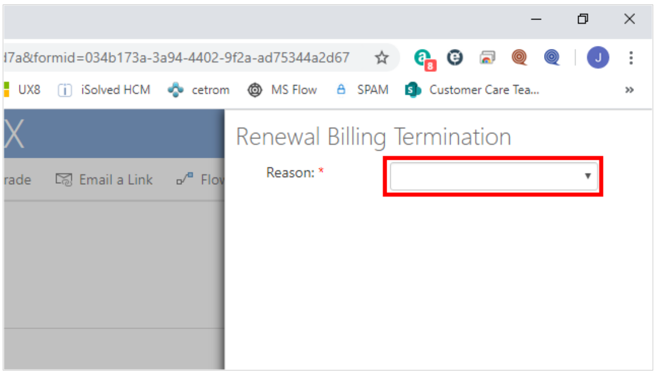
Double click on the subscription product detail record to open the form.



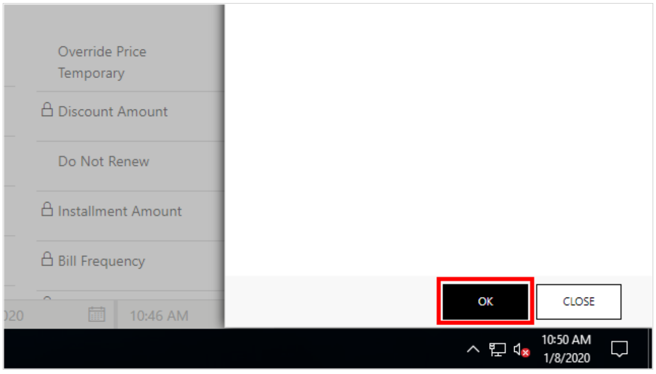
Click on the menu item **Terminate**



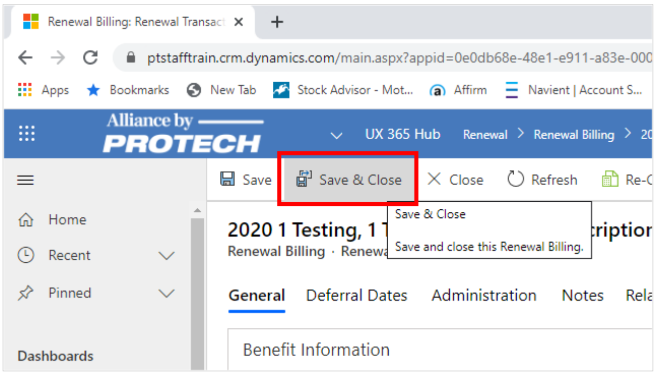
Enter the reason for termination from the drop down menu.



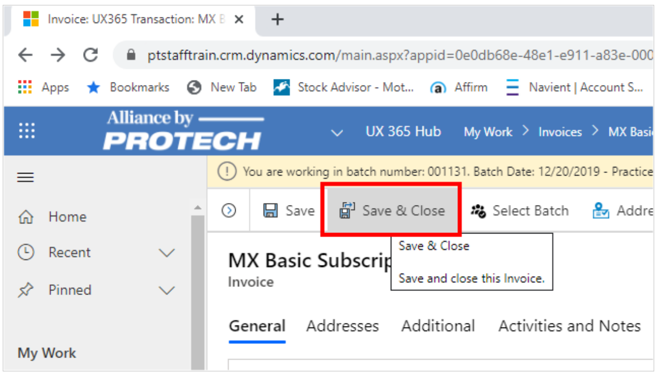
Click on the button **OK**



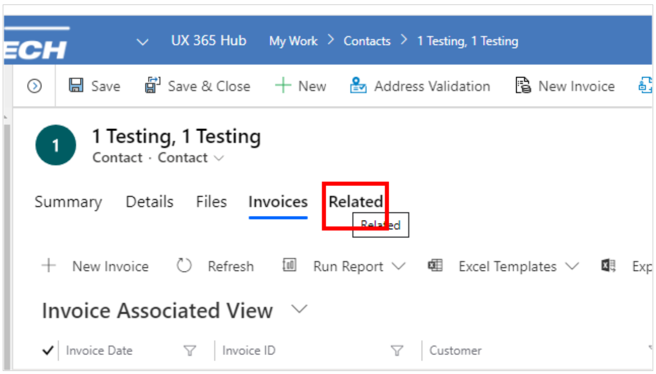
Click on the menu item save and close to close the form.



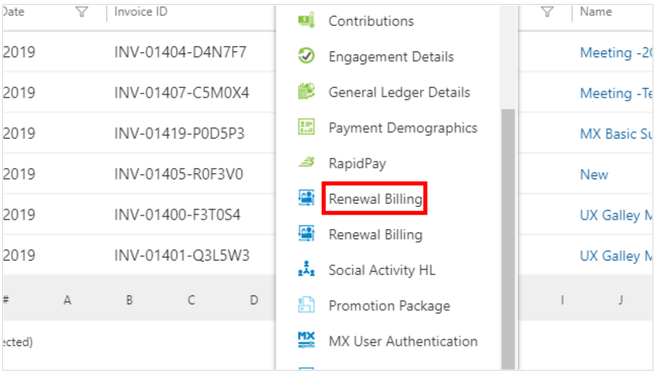
Click on the menu item save and close to return to the contact record.



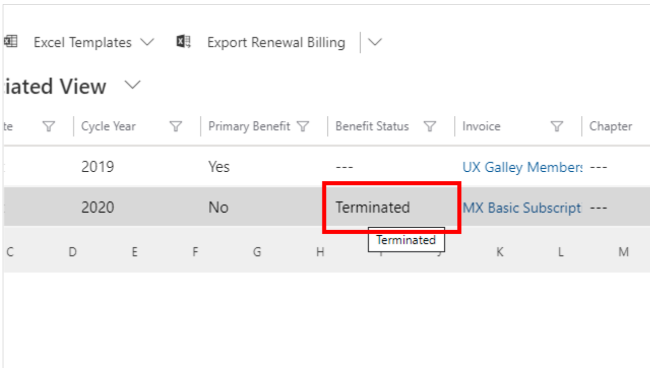
Click on the item **Related**



Click on the menu item **Renewal Billing**



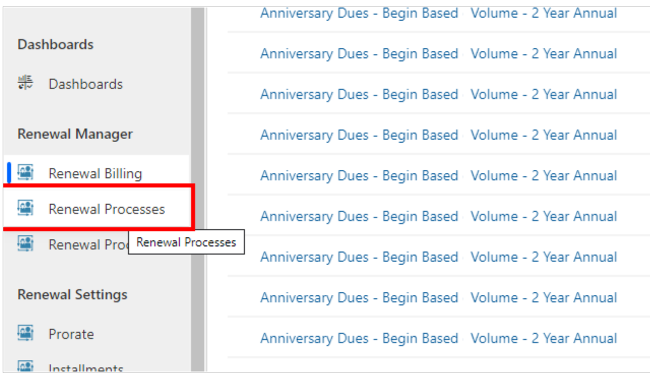
Here you can see the renewal billing record for the subscription has been terminated.



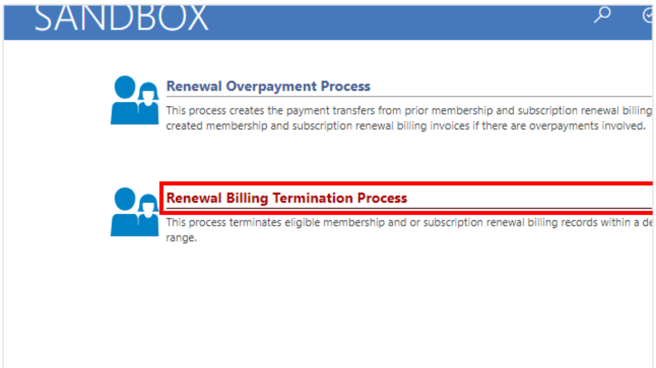
9.8. Terminating Expired Subscriptions

When you terminate subscriptions, you will select the subscription renewal benefit you are terminating, and enter the subscription paid-through date you want to include in the process. The timing for performing this process will depend on your organization's policy for when you need to terminate subscriptions.

Click on the item **Renewal Processes**

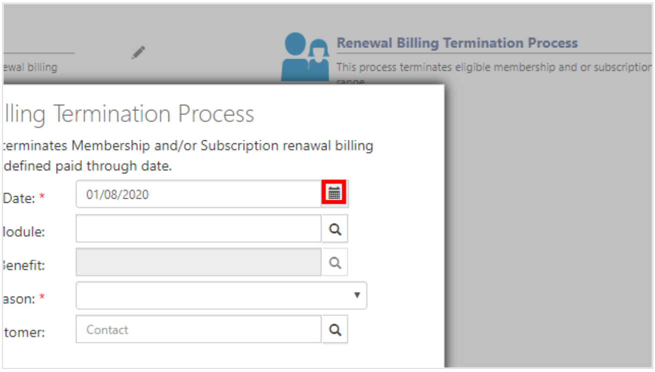


Click on **Renewal Billing Termination Process**

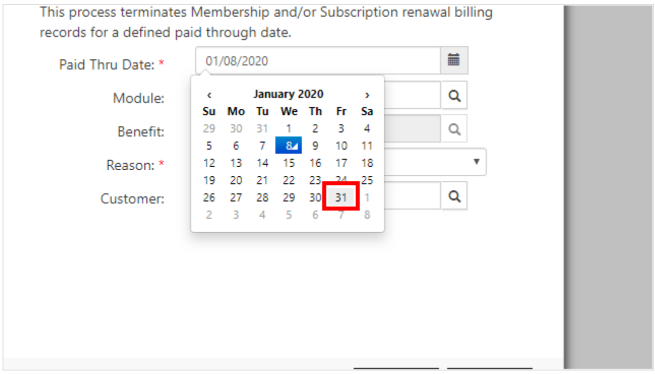


Paid Thru Date – Click the Calendar button and select the expiration date of the subscriptions you want to terminate. This date will always be the last day of the month you are running this for.

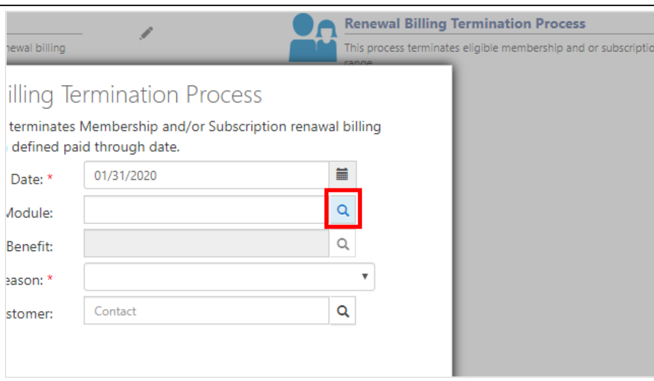
Click on Calendar Look Up

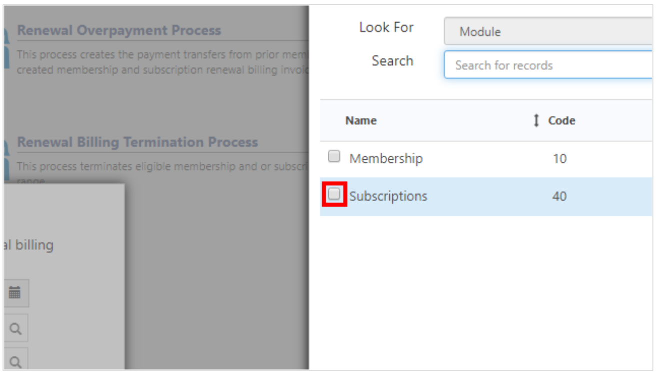
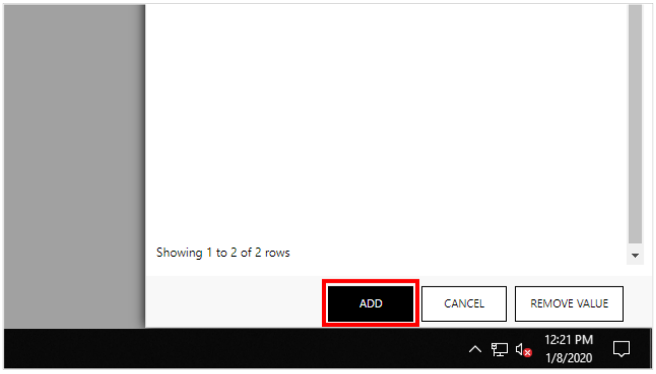
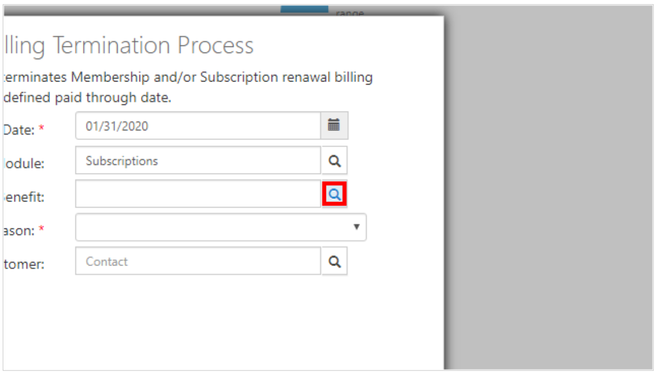
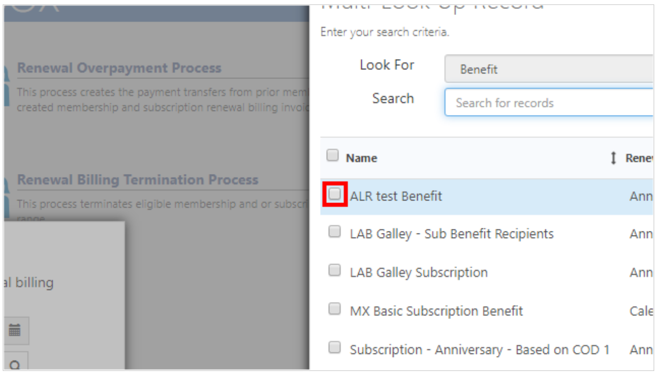


Select the desired paid thru date.

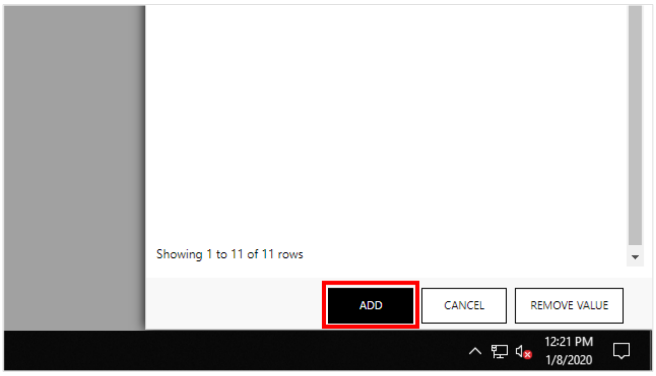


Module – Click the Lookup button and select Subscriptions.

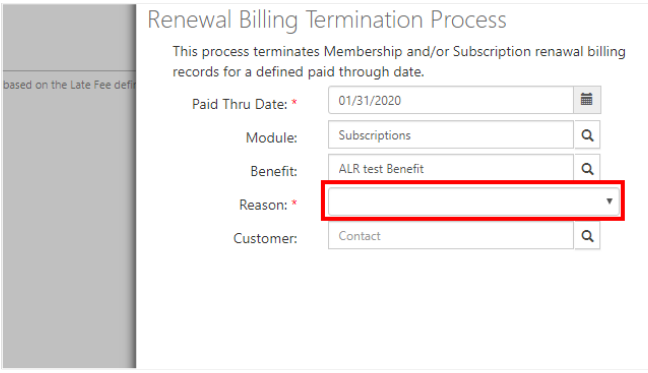


Click on Subscriptions.	
Click on the button **ADD**	
Benefit – Click the Lookup button to select the publication you are running this termination process for.	
Click on the checkbox **on**	

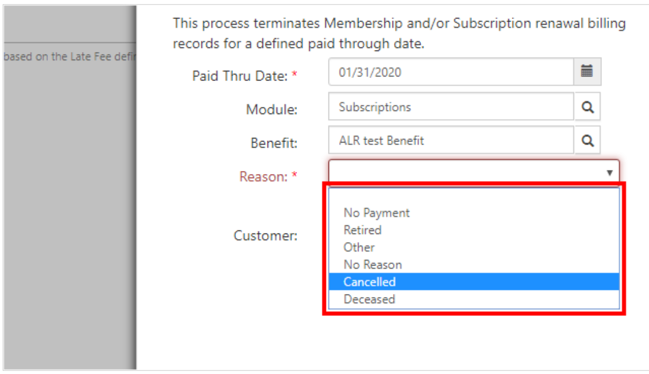
Click on the button **ADD**



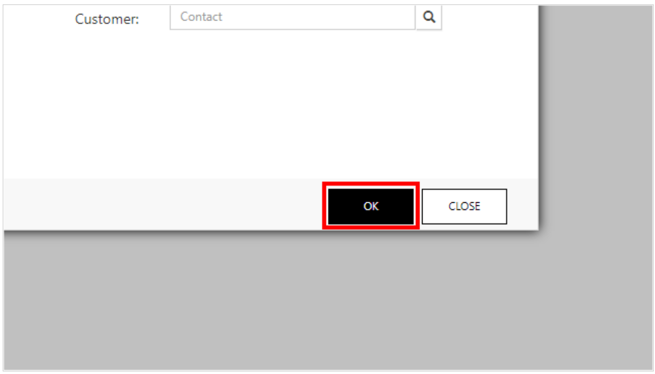
Reason – Select a termination reason from the menu. This reason will be recorded on each subscribers detail invoice record



Select the termination reason.



Click on the button **OK**

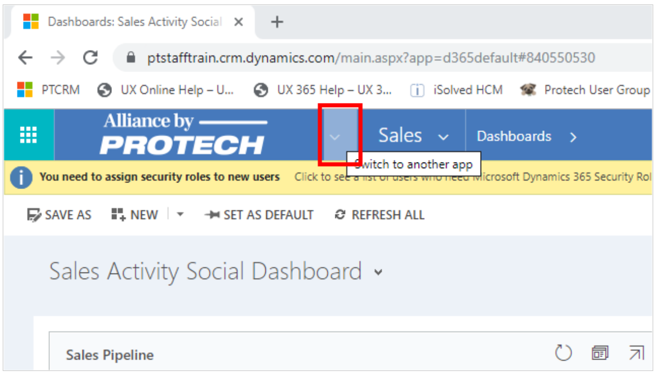


10. Whats New in UX 365

10.1. Accessing UX 365 in the Unified Client Interface

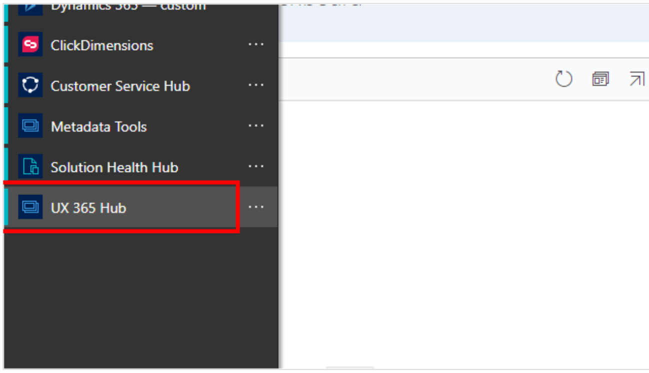
Before you can access UX 365, you must first sign in to Microsoft Dynamics® 365 with your Microsoft user account credentials. Once you sign in, open the Dynamics 365 App Selector by clicking the carat icon to the right of Alliance by Protech.

Click on the navigation button **Switch to another app**



To access UX 365, select UX 365 Hub from the App Selector.

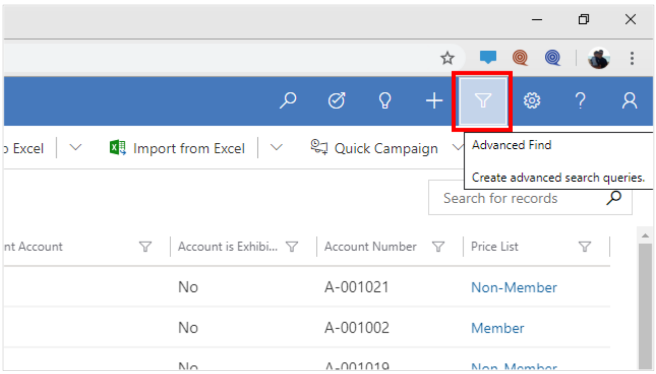
Click on the button **UX 365 Hub**



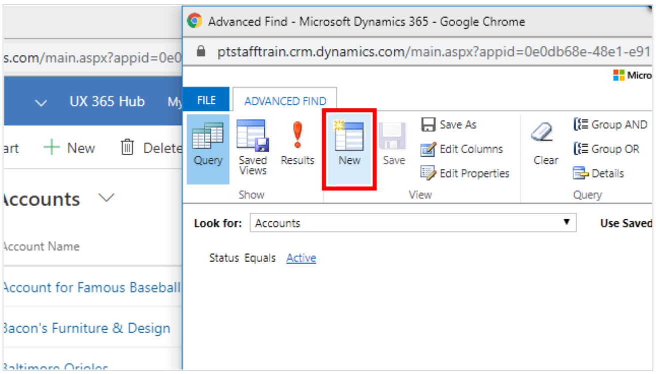
10.2. Advanced Find and Saved Views

Find the records you want in UX 365 by using the Advanced Find command. You can also use Advanced Find to prepare data for export to Office Excel so that you analyze, summarize, or aggregate data, or create PivotTables to view your data from different perspectives. What's New? Now you can use the advanced find option to build a “Not In” query records using Does not contain data option

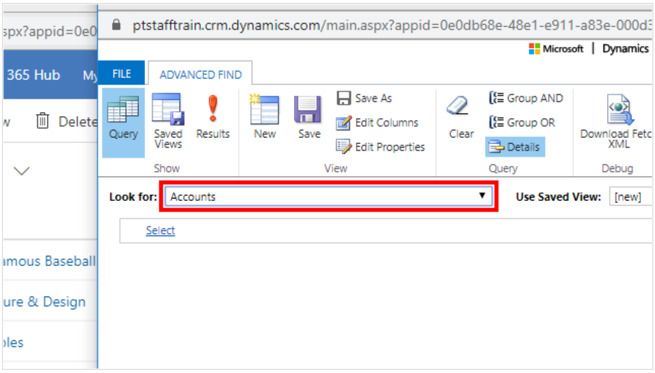
Click on the menu item **Advanced Find**



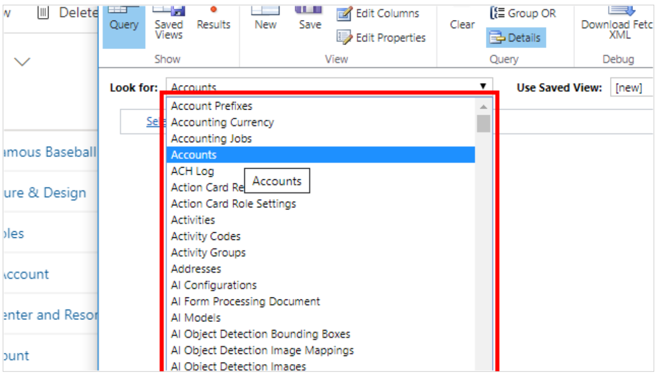
Click on the ribbon item **New**



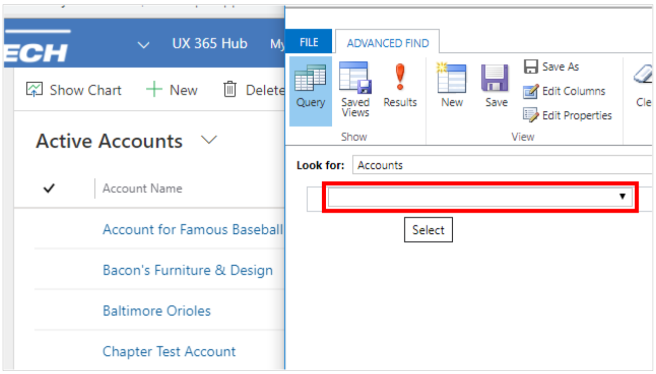
In the Look for list, select a record type



Select Accounts

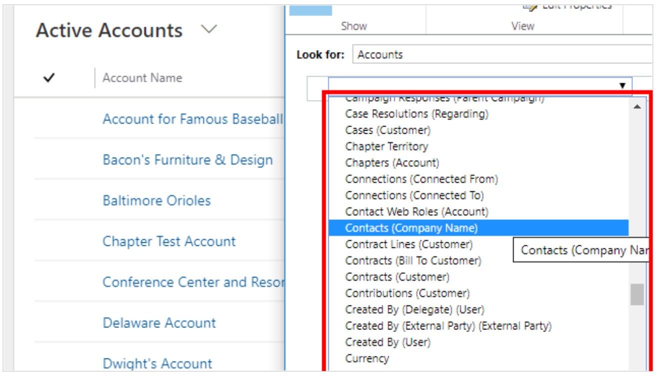


Define search criteria

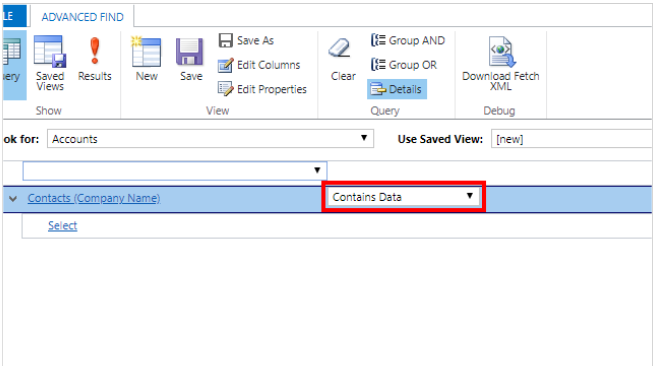


For example, find Accounts without any related Contact records

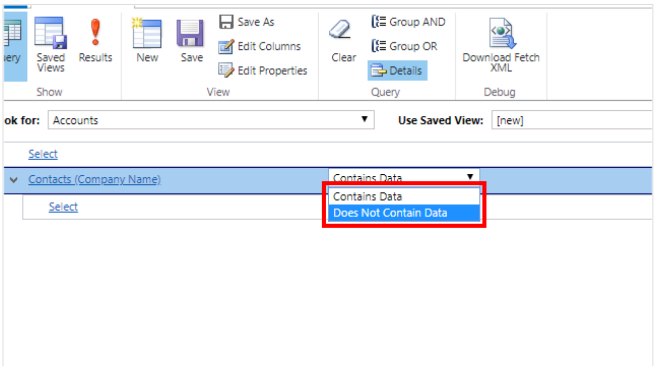
Click on the regarding entity, Contacts



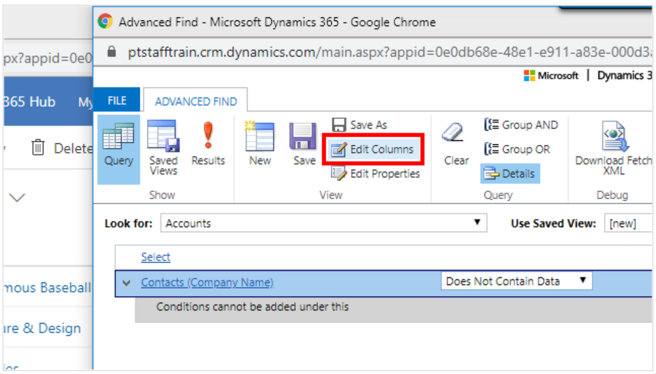
Open the selection criteria



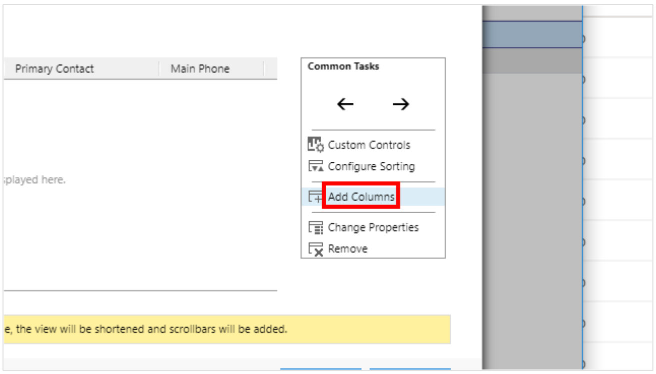
Choose, Does Not Contain Data. This will return all Accounts that do not have any related Contact records



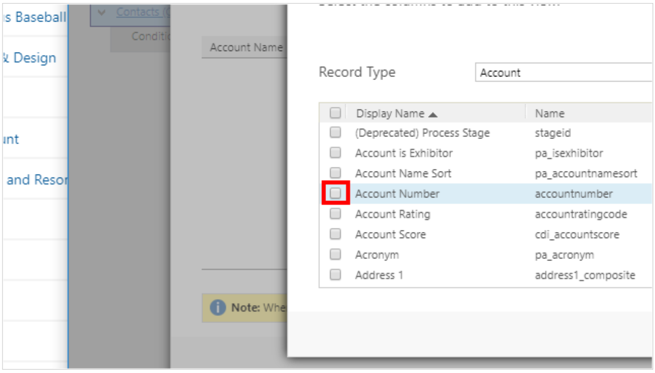
Specify the columns to include in the search results. Click on the button, Edit Columns



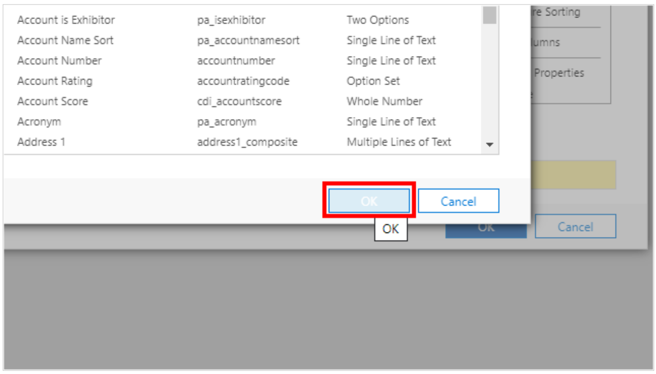
Click on the link **Add Columns**



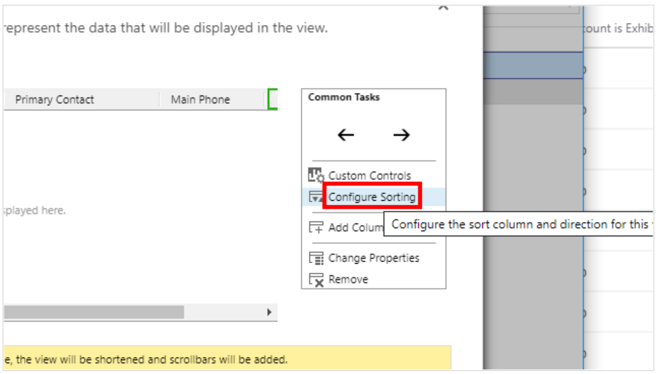
Check mark the fields you would like included in the search results



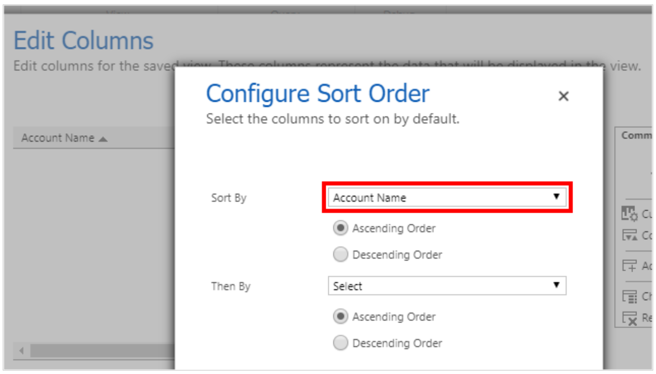
Click on the button **OK**



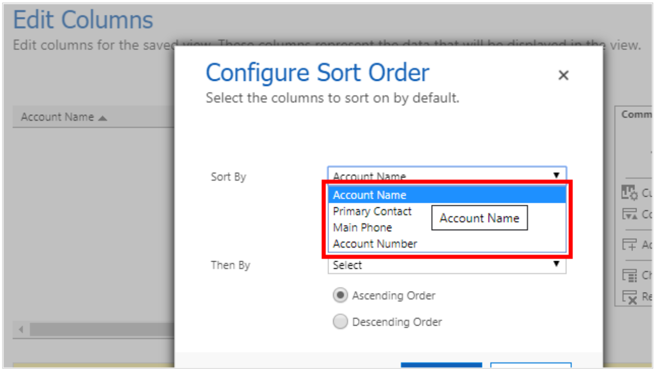
Configure sorting



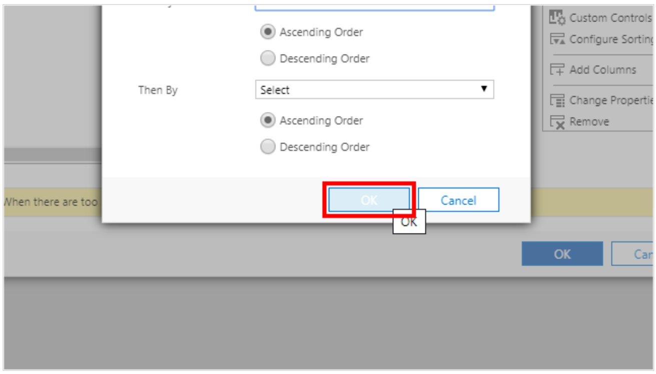
Configure Sort By



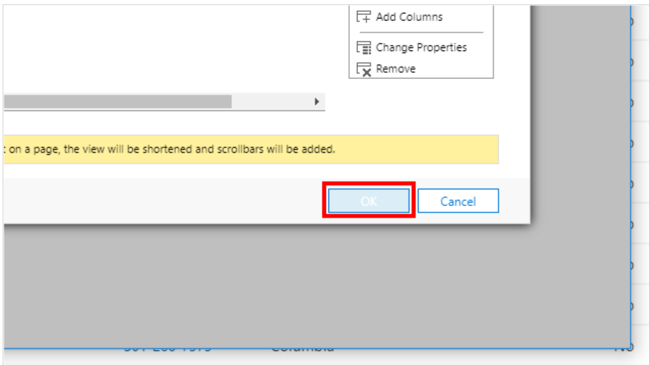
Click on the item **in the list**



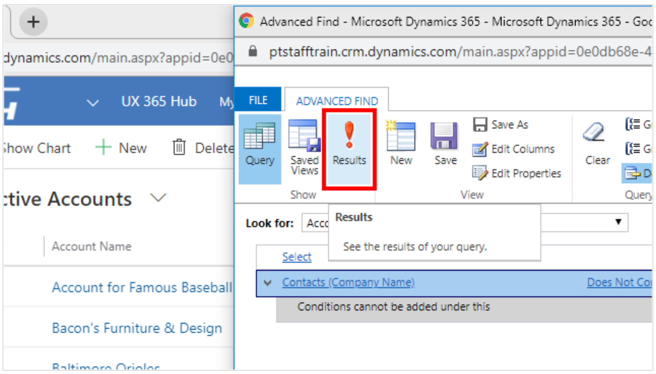
Click on the button **OK**



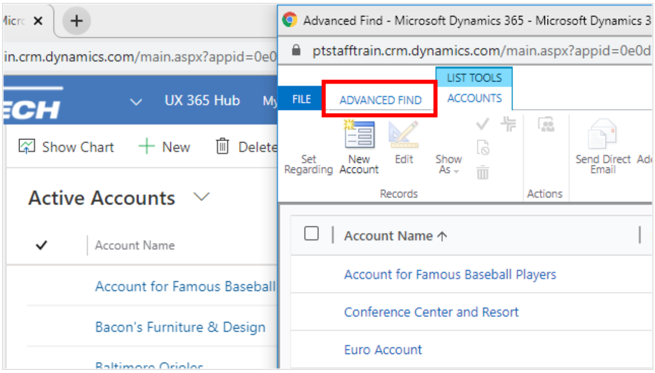
Click on the button **OK**



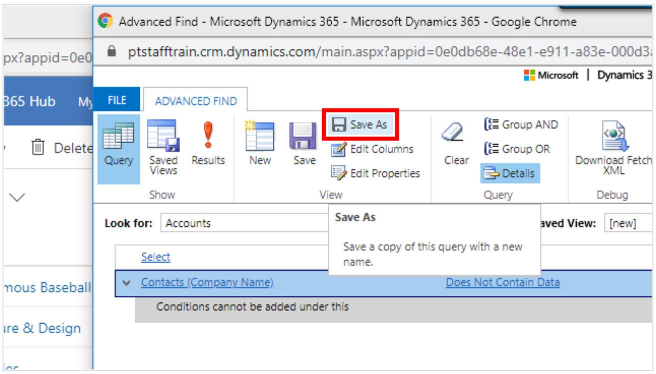
Click on the ribbon item Results to execute the query



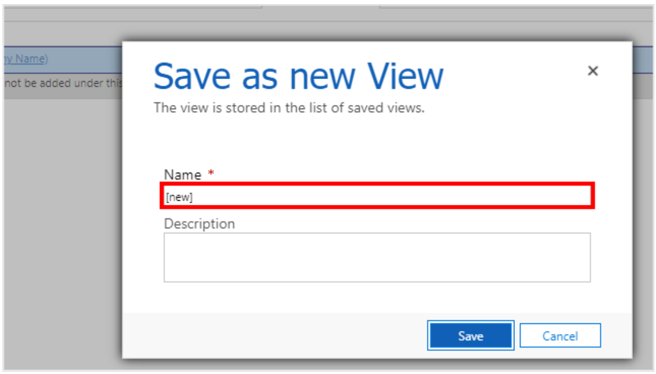
Review results and return to the Advanced Find query builder



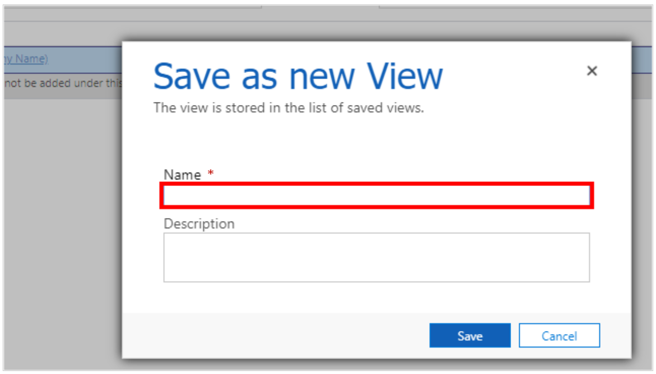
Click on the link **Save As**



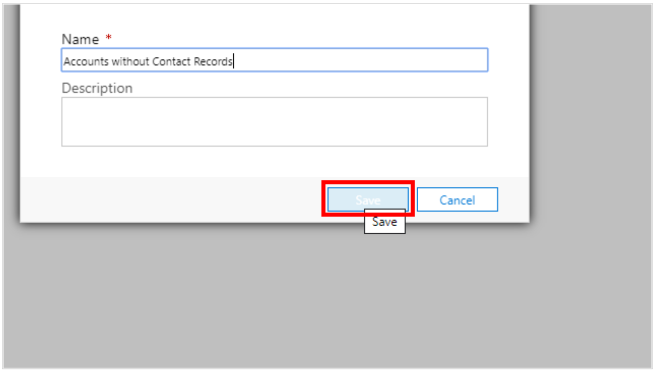
Give your query a name



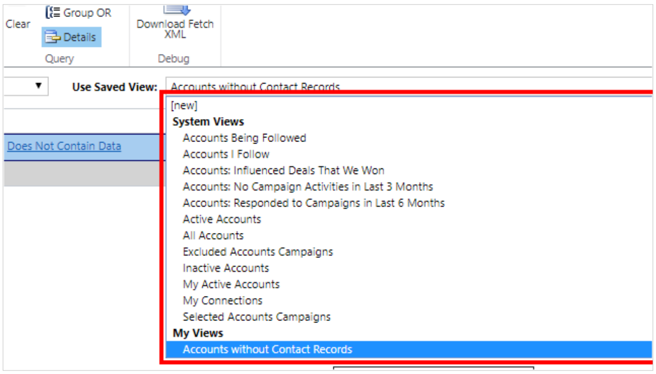
For example, enter the text Accounts without Contact Records



Click on the button **Save**



Your new query is now accessible from, My Views

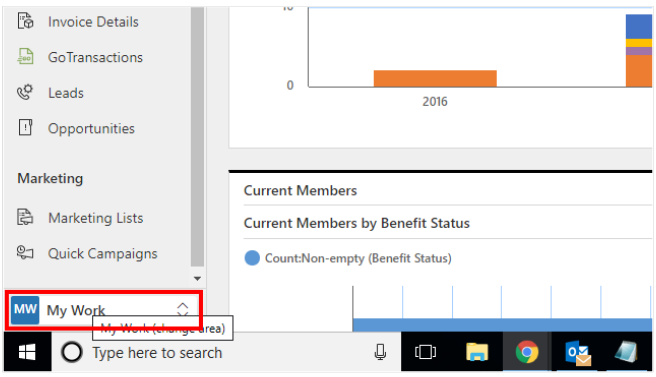


10.3. Editable Grids

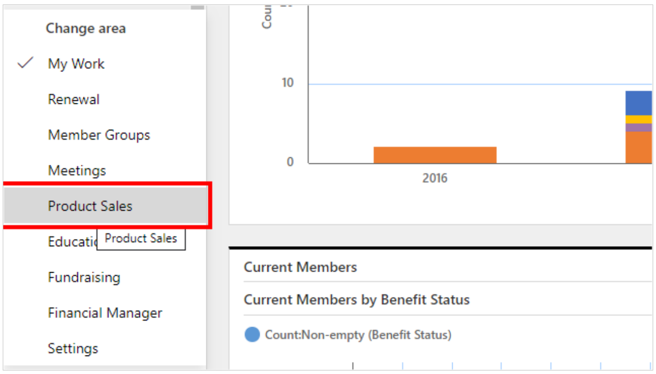
10.3.1.1. Prices

Selected fields in the Prices grid are now editable directly in the grid.

Click on the button **My Work (change area)**

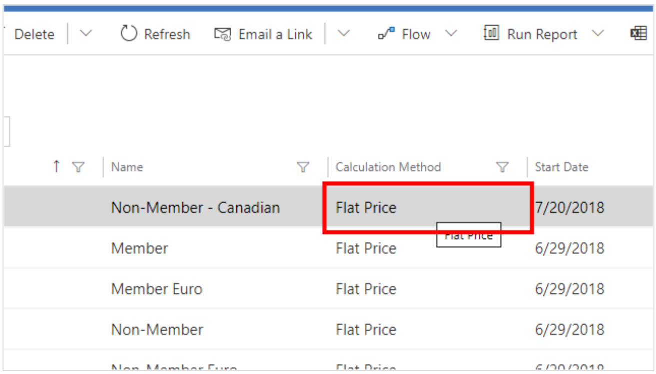


Click on the item **Product Sales**

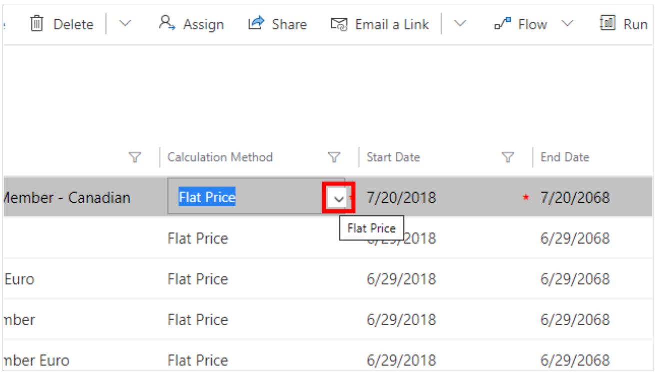


Click on the item **Prices**

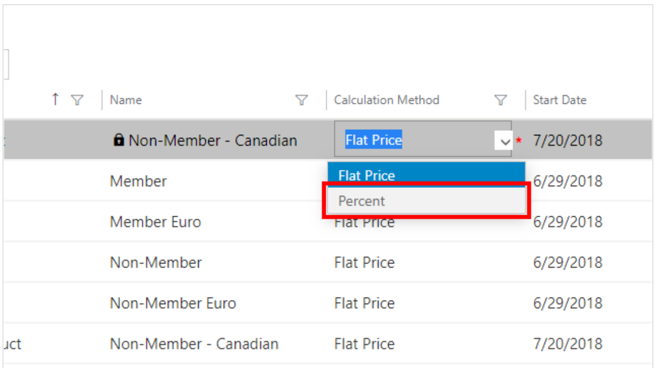
In this grid view, users can edit all fields displayed except Product and Name directly in the grid. For example, Calculation Method:



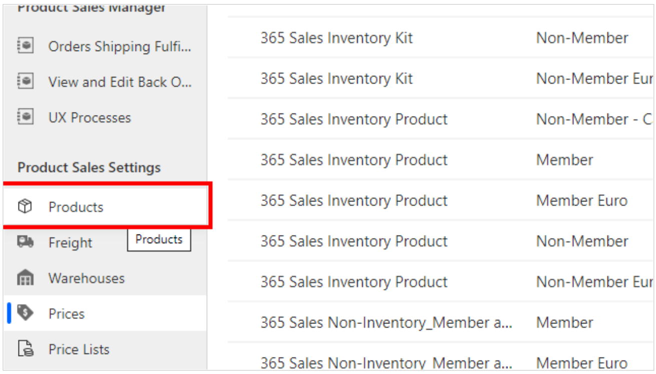
Click on the Toggle Dropdown button



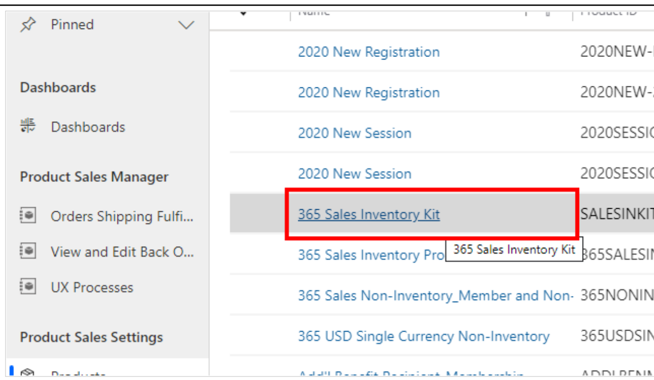
Click on **Percent**



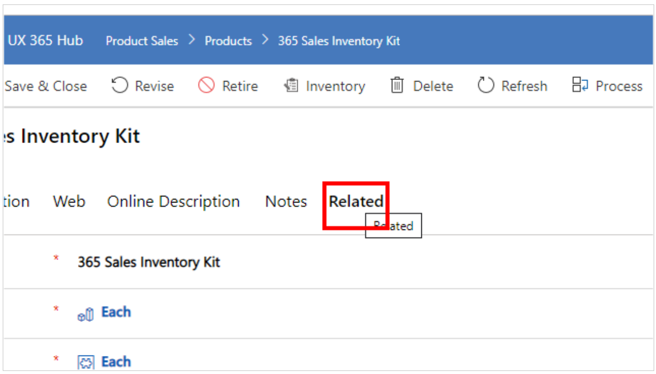
Users can access Prices records in UX setups, by navigating from the setup record to Related > Prices to open the Prices Associated View for that record. For example, from a product sales non-inventory product, select Related > Prices. Users can edit all fields directly in the related grid except Price Level and Currency.
Click on the item **Products**



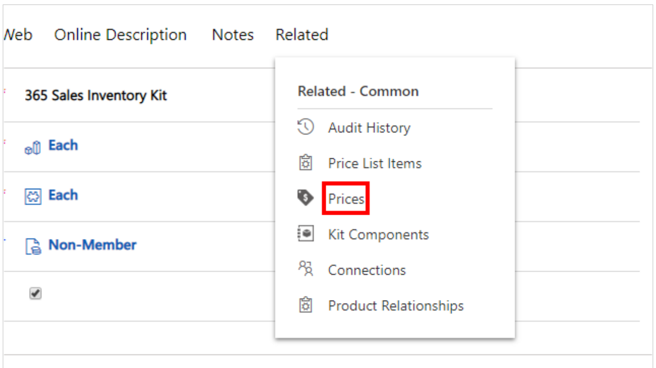
Click on the product you would like to edit.



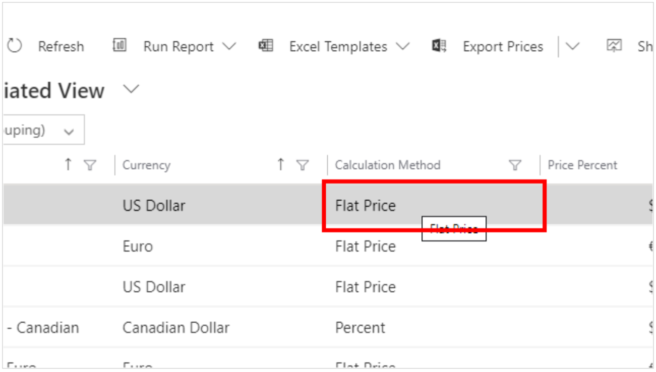
Click on the item **Related**



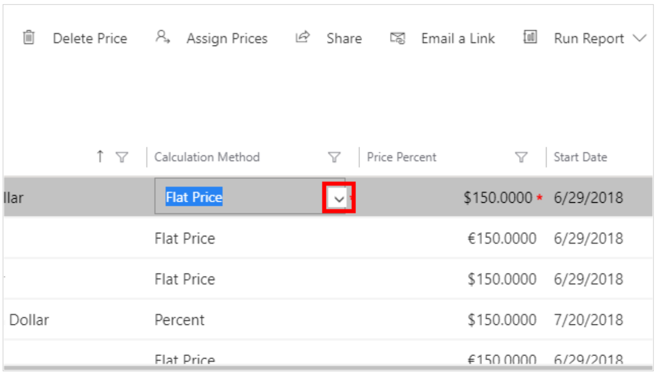
Click on the menu item **Prices**



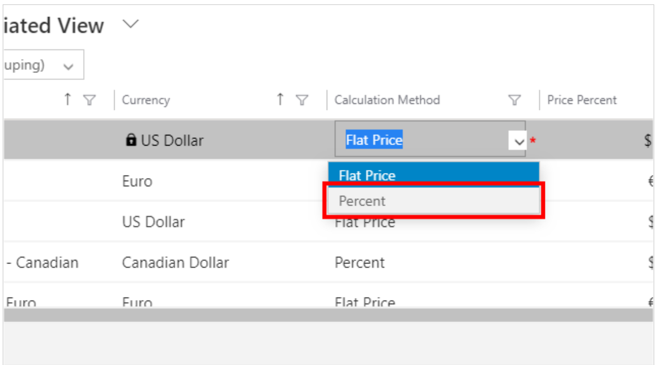
Click on the field you would like to edit.



Click on the Toggle Dropdown button

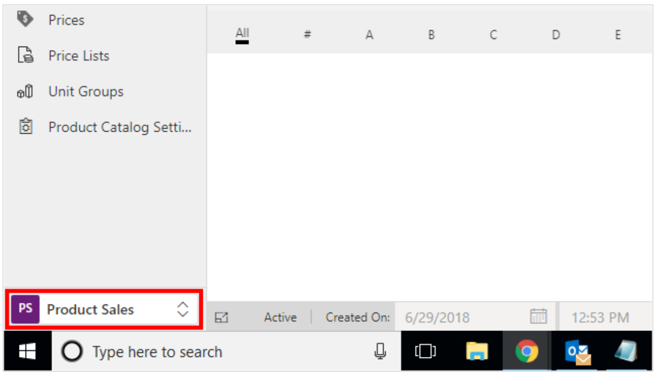


Click on **Percent**

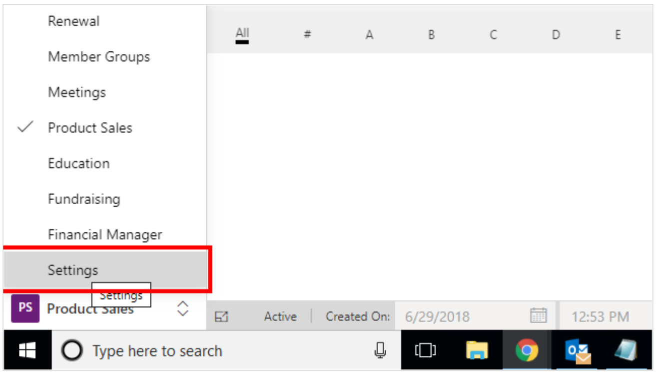


10.3.1.2. Application Parameters

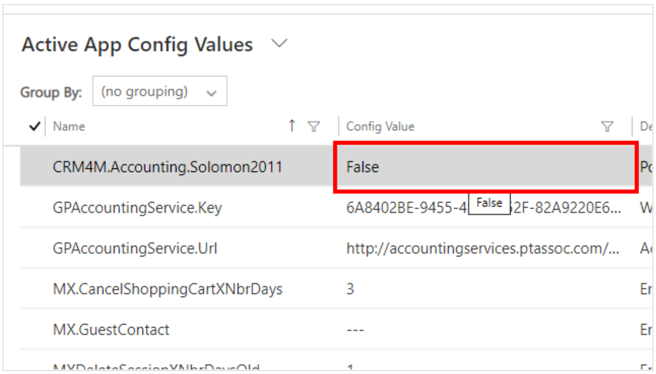
The Application Parameters List View is now an editable grid. Users can modify the Config Value directly in the grid. Changes are saved dynamically as you move from the field. Click on the button **Product Sales (change area)**



Click on the item **Settings**



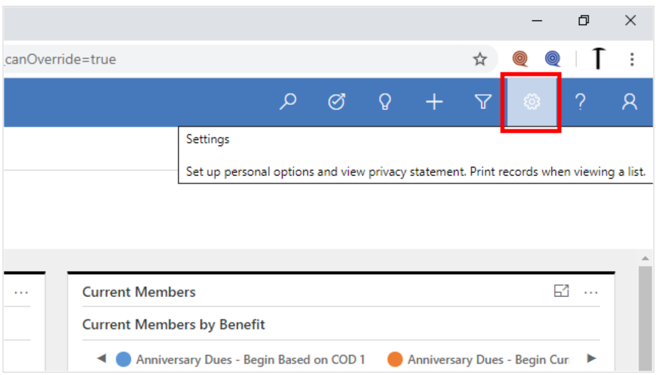
Click directly on the field you would like to edit.



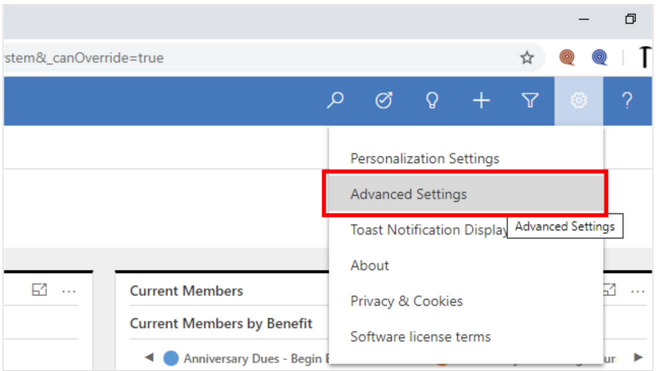
10.4. Forms Customization

In UX Online 365, all base forms are locked and cannot be customized in the Alliance by Protech managed solution. If a client requires a change to a base form, they must add the entity and specific form to their own solution and customize in their solution. There are no exceptions.

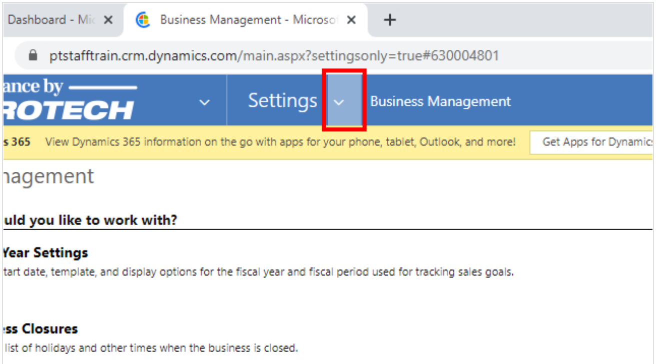
To navigate to Solutions, first click the cog wheel for settings in the top right



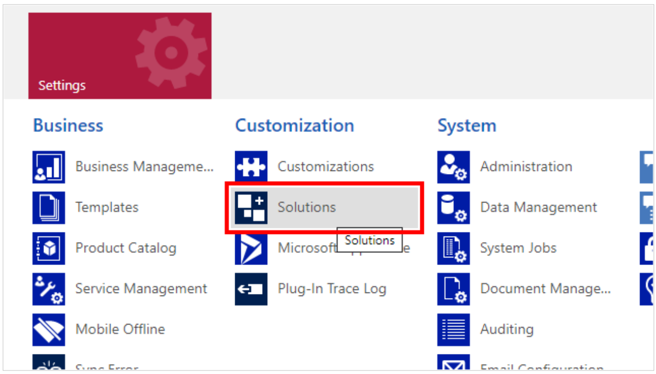
When a dropdown appears, click 'advanced settings'



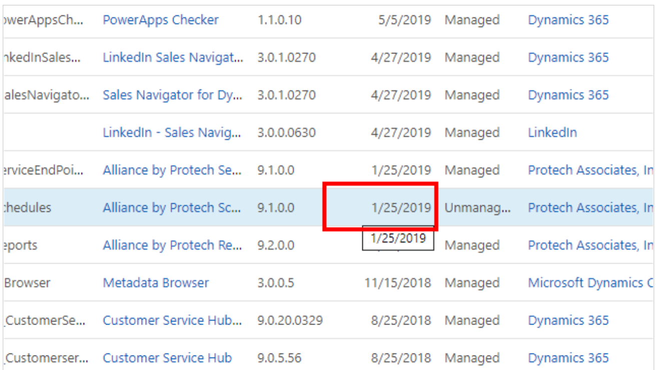
At the top of the page, click the dropdown button on the right of 'Settings'



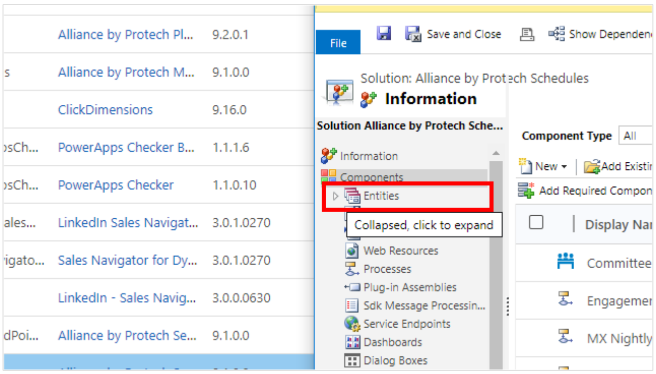
When a dropdown appears, click the 'Solutions' button.



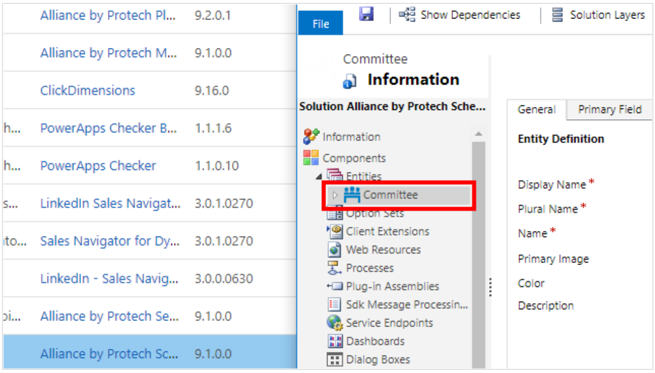
Find your unmanaged solution and click into it.



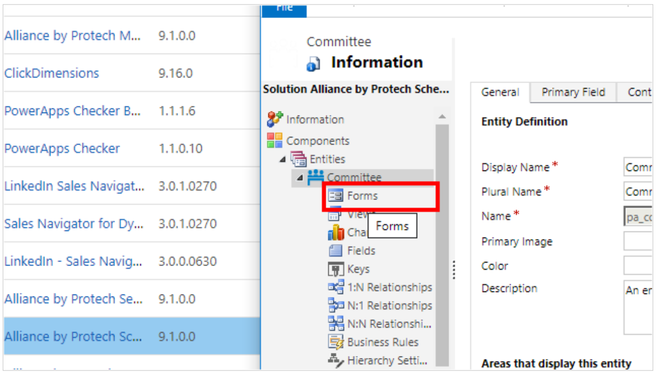
Click on the arrow button next to 'entities'
If you do not have any here, then you will need to add some entities in order to create a form.



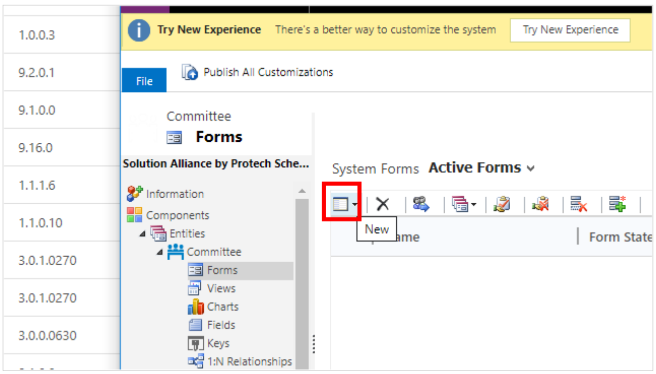
Click on the arrow button next to an entity.



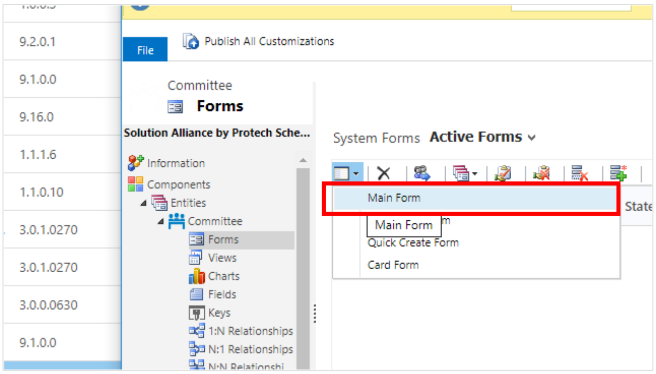
To create a new form for your entity, click 'Forms'



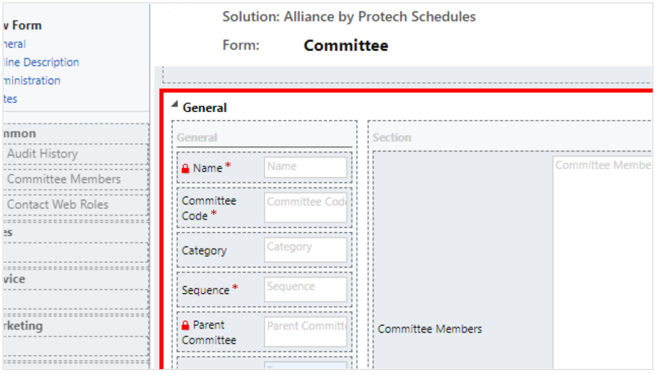
Click on the left button on the toolbar to create a new form.



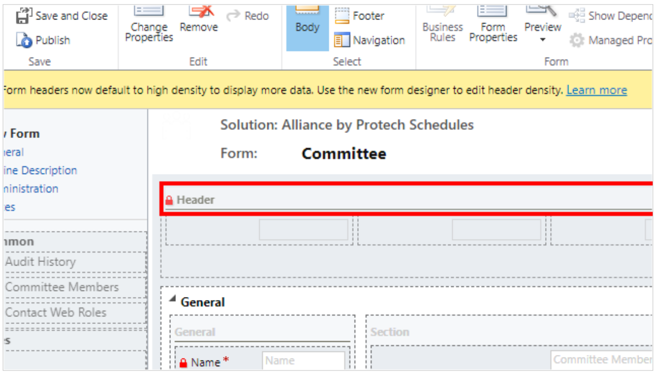
Select the type of form you wish to create



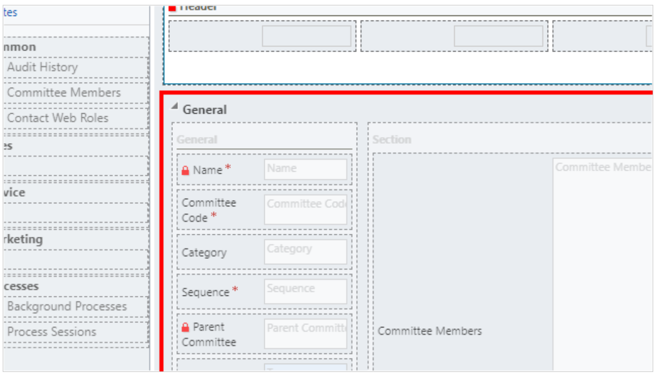
When the window pops up, you will see the form editor. this is where you can edit field information and field security.



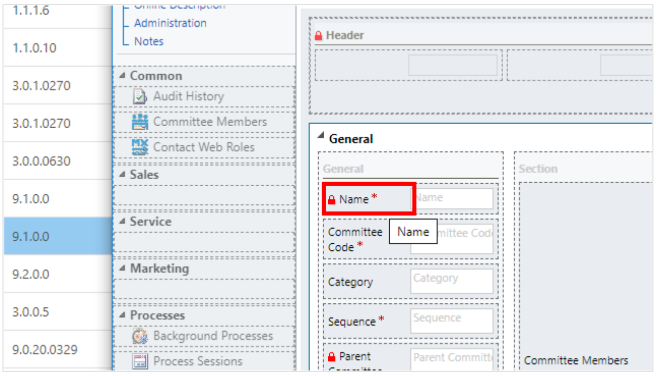
double click on a header to start working in that specific area.



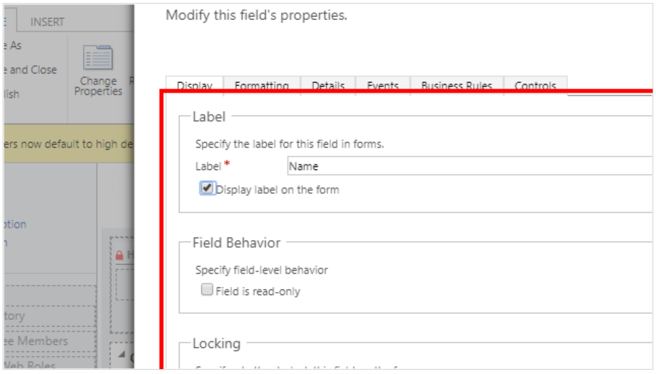
-



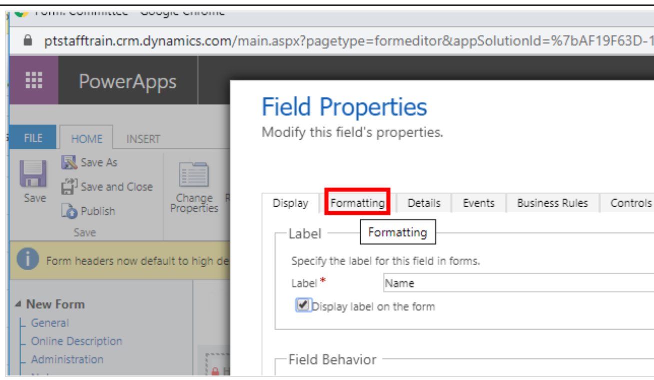
double click into a field to modify the field's properties.



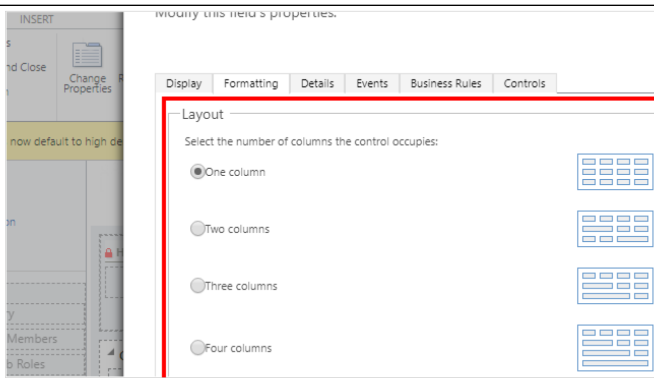
The display information is where you can change display options for fields, such as making a field locked.



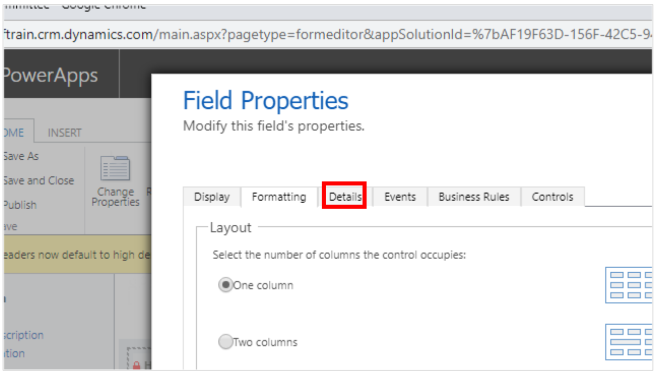
Click on the link **Formatting**



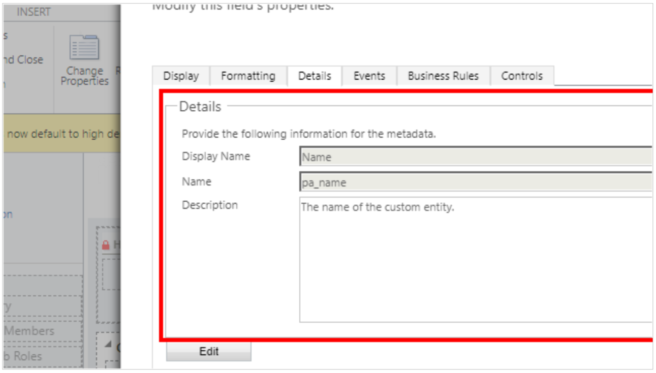
This is where you can change the number of columns the control occupies.



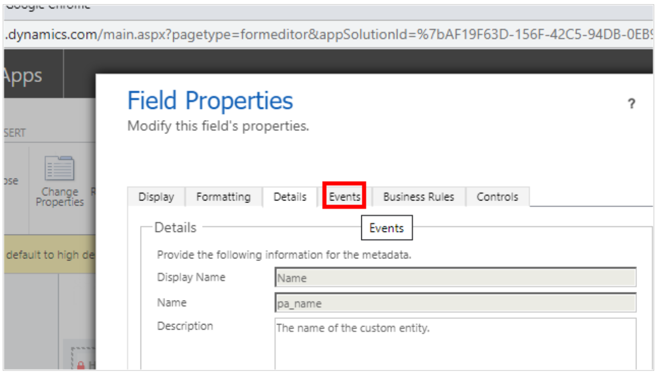
Click on the link **Details**



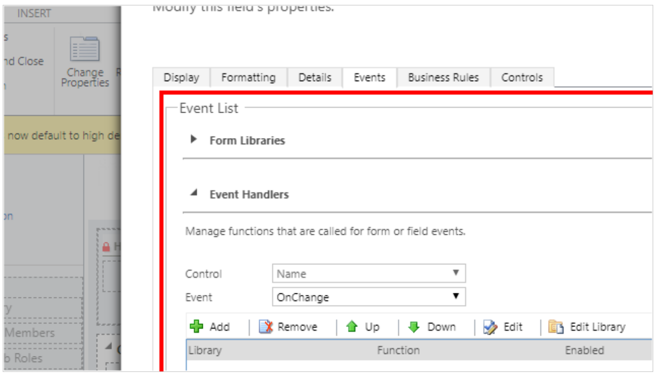
This is where you provide the metadata for your field.



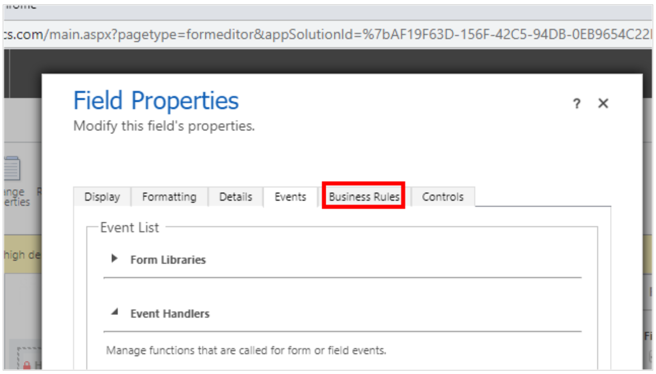
Click on the link **Events**



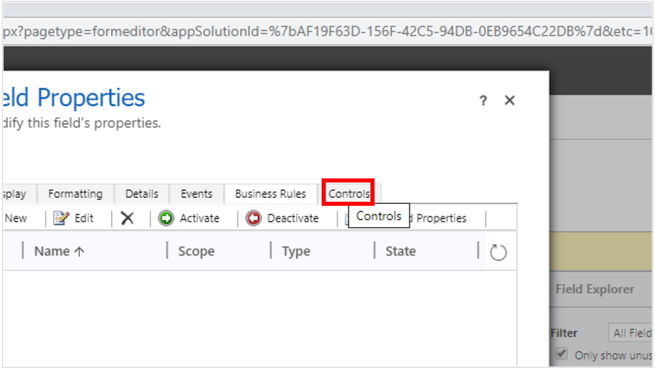
This section is where the event list is located.



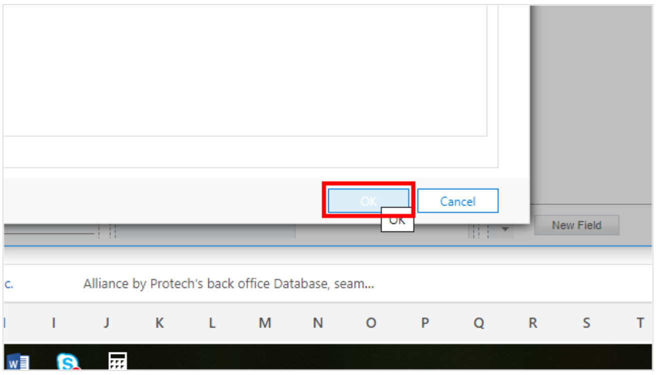
click on Business rules to show processes.



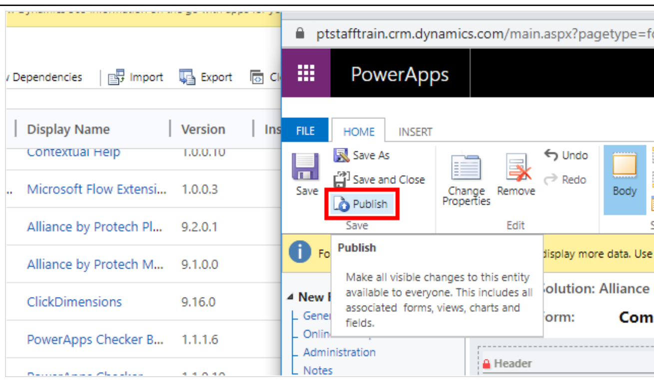
Click controls to add controls



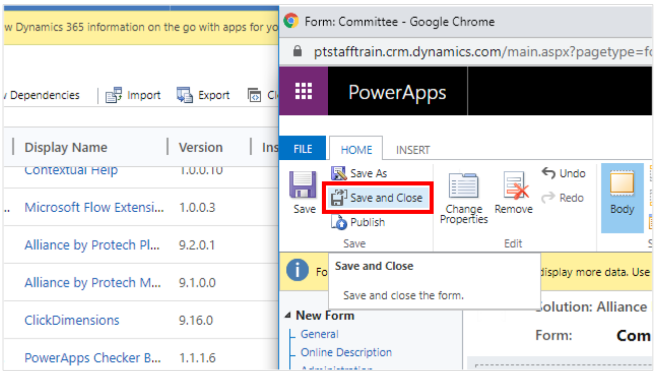
When you are done editing field properties, press OK in the bottom right



When you are done customizing the form, be sure to publish you work.



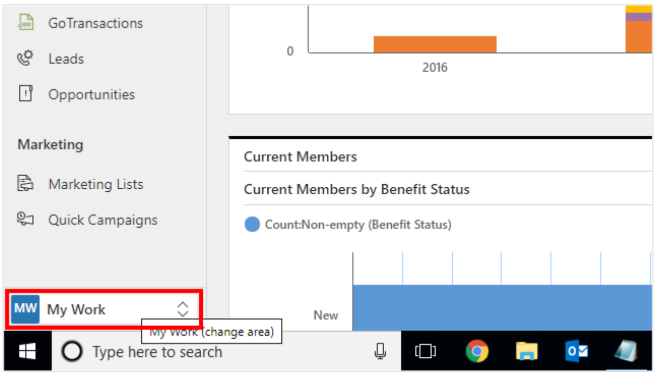
When you are done with forms customization, click save and close.



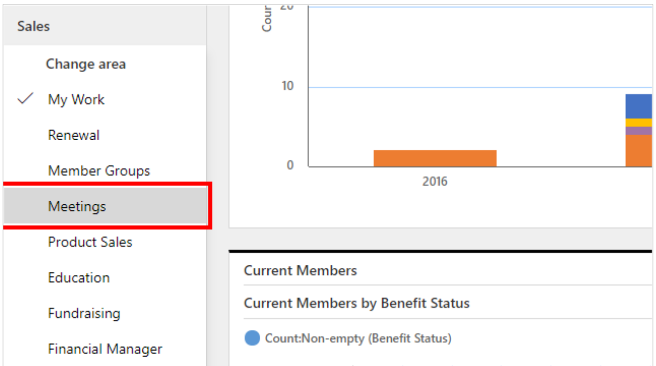
10.5. Is Cancellation Fee

10.5.1. Is Cancellation Fee in UX 365

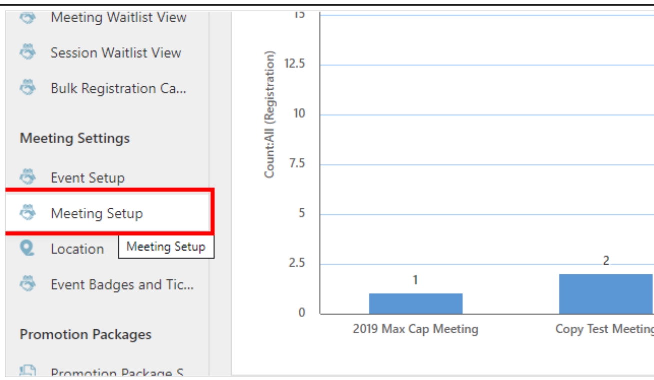
Click on the button My Work



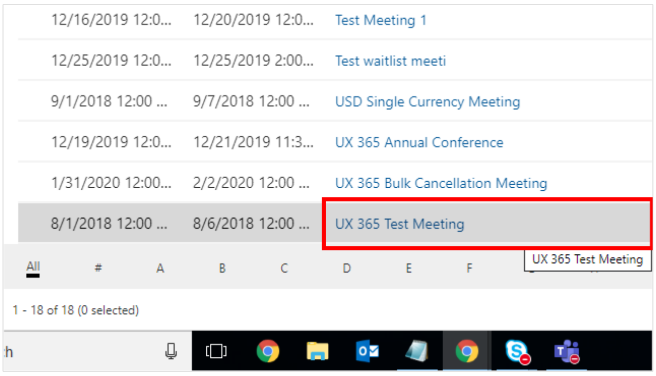
Click on the item **Meetings**



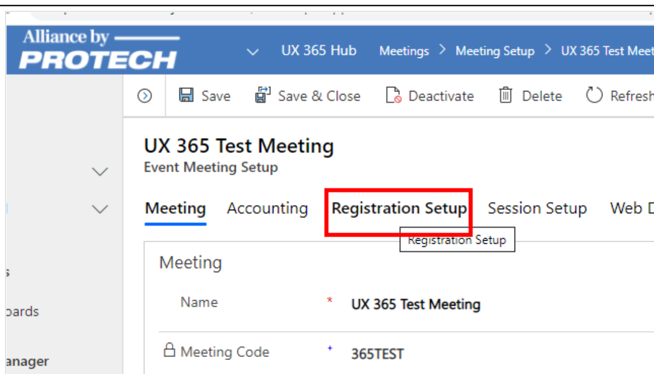
Click on the item **Meeting Setup**



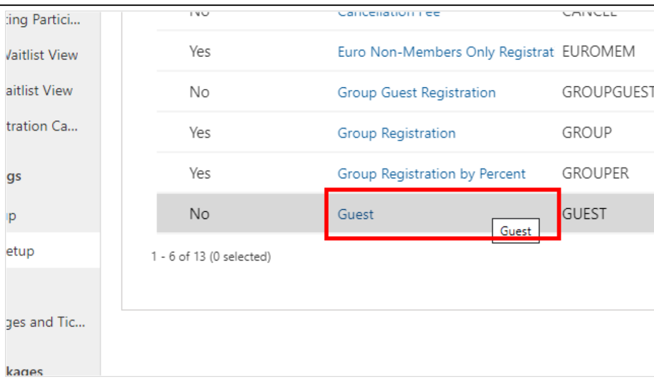
Click on the Meeting you would like to select



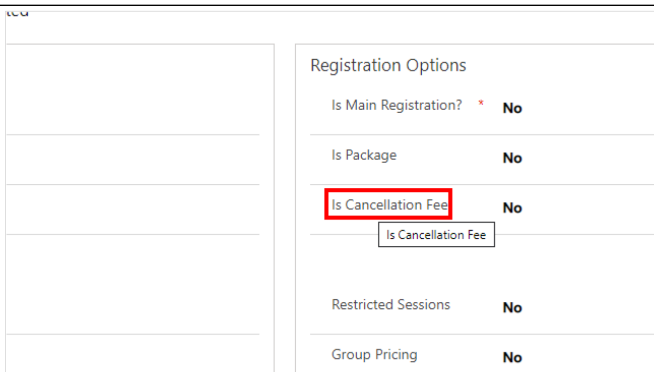
Click on the item **Registration Setup**



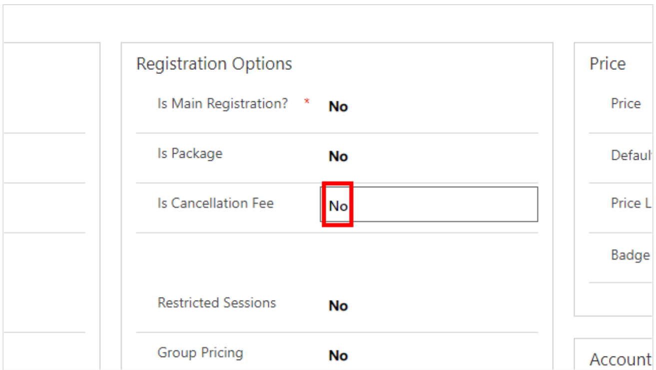
Select the correct Registration you would like to edit



This is where the 'Is Cancellation Fee' field is located in UX 365 in the Event Registration Setup form.

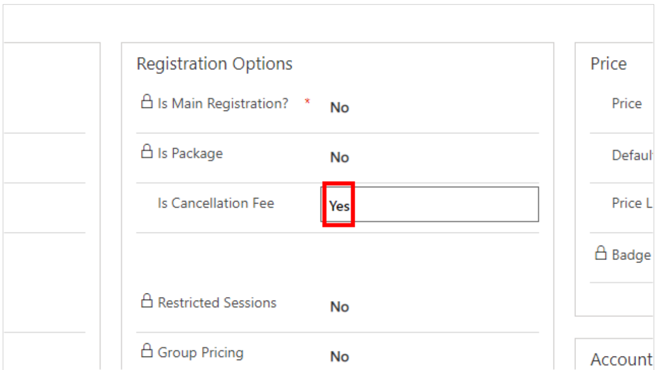


If a user changes the value to No, UX unlocks the other registration options.



Registration option fields include: -Is Main Registration -Is Package -Restricted Sessions -Group Pricing -Members Only

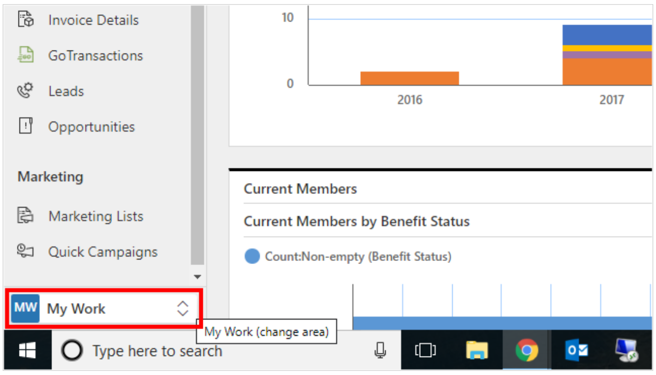
If Yes, then other Registration options = No and are locked.



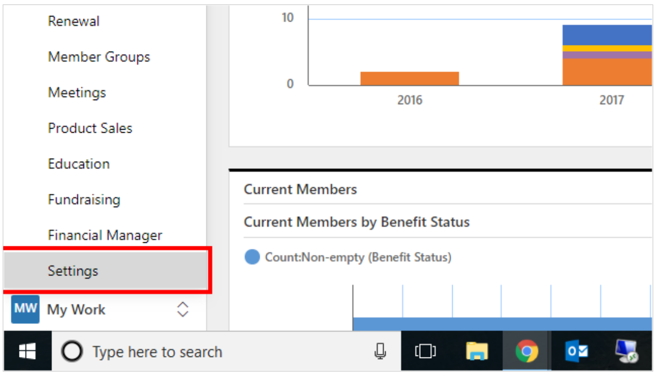
10.6. Manually Running a UX Recurring System Job

At times, users may want to manually run a recurring UX System Job rather than waiting for the scheduled time. To trigger a UX System Job manually in UX 365, you will need to create a new UX System Job record. This is different from in previous versions of UX Online, where deleting a UX System Job record would manually trigger a recurring UX System Job to run. From the list of UX System Jobs, select the New button from the view's toolbar to open a new UX System Job record. In the 'Job Type' dropdown field, select the "manual" option for the system job that you want to run. For example, to run the Nightly Process, select the "Manual Nightly Trigger" option. Save and Close.

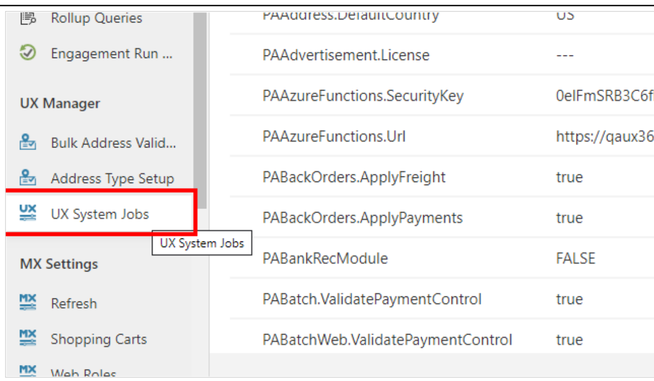
Click on the button **My Work (change area)**



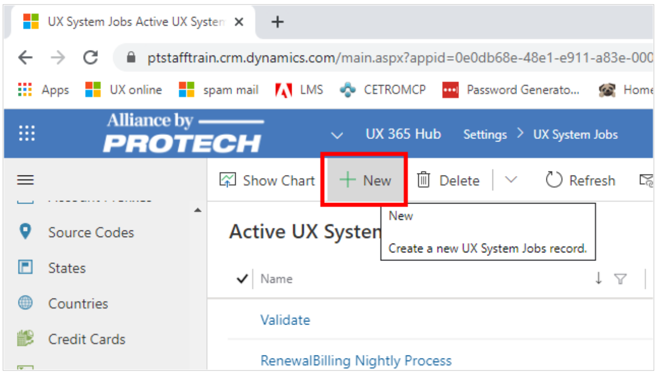
Click on the item **Settings**



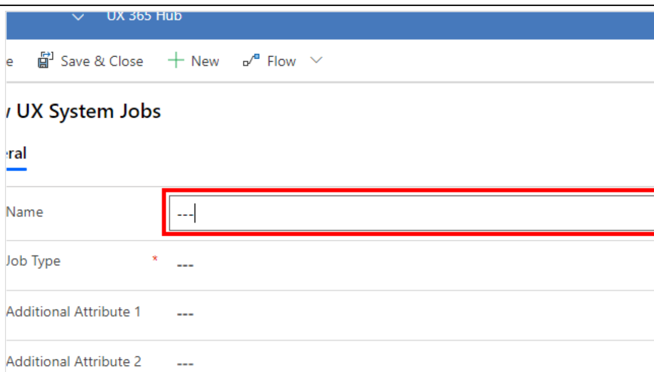
Click on the item **UX System Jobs**



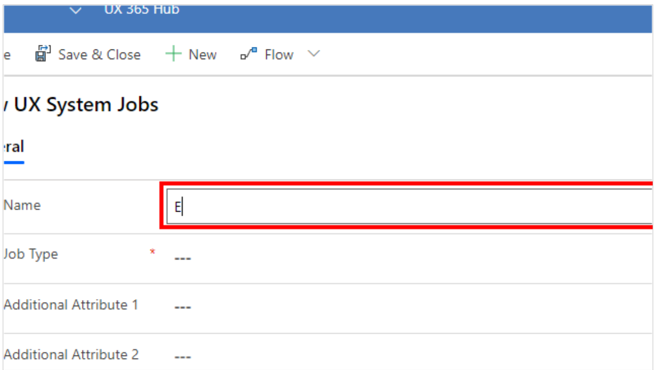
Click on the menu item **New**



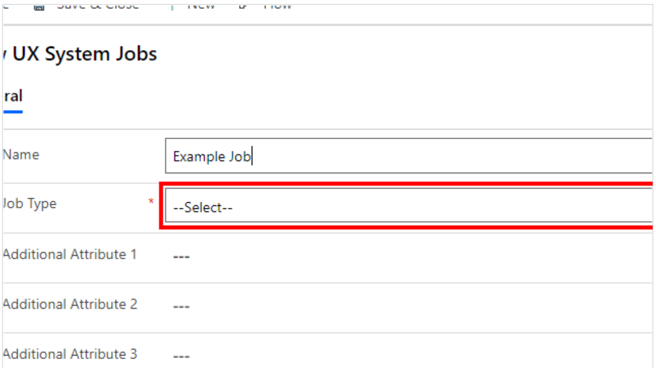
Click on the text field **Name**



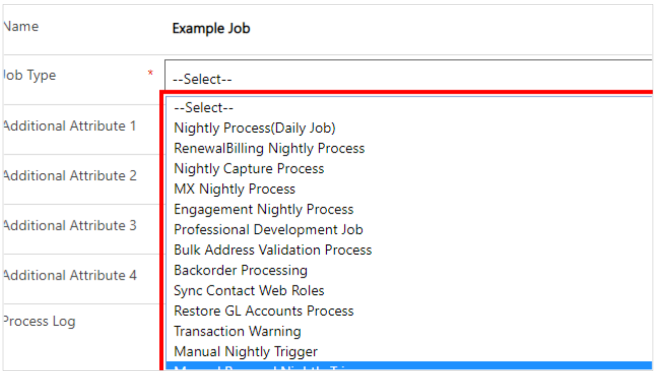
Enter **Name of manually run job** .



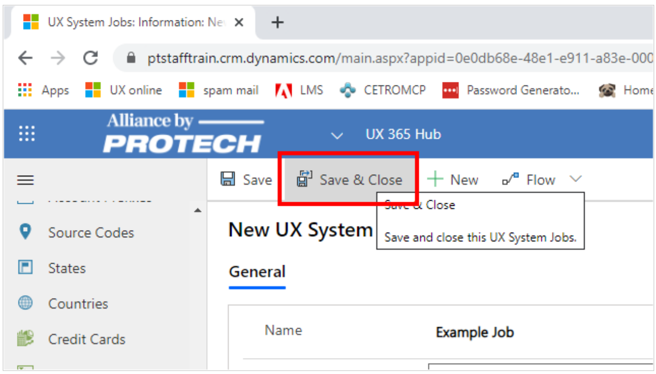
Click on the field **Job Type**



In the 'Job Type' dropdown field, select the "manual" option for the system job that you want to run



Click on the menu item **Save & Close**



Job Type Cross Reference

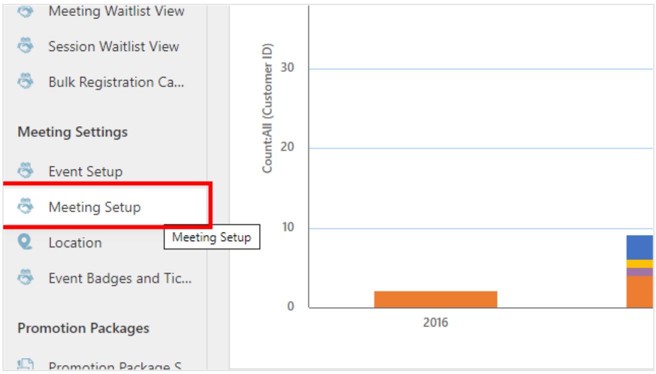
The following table is a cross-reference of the Job Type that should be selected in order to run each recurring UX System Job manually.

Job Name	Job Type for UX generated UX System Job records	Job Type for manually created UX System Job records
Engagement Nightly Process	Engagement Nightly Process	[not available]
MX Nightly Process	MX Nightly Process	[not available]
Nightly Process	Nightly Process (Daily Job)	Manual Nightly Trigger
Nightly Capture Process	Nightly Capture Process	[not available]
Renewal Billing Nightly Process	Renewal Billing Nightly Process	Manual Renewal Nightly Trigger
Professional Development Job	Professional Development Job	Manual Professional Development Trigger

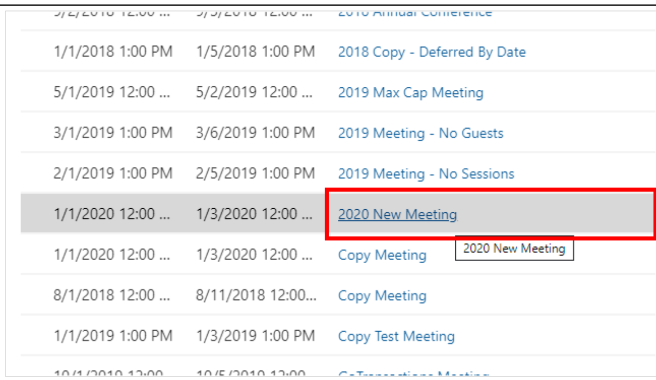
10.7. Meeting Code for Multiple Meetings per Event

UX 365 includes a new Meeting Code attribute in the Event Meeting Setup to support setting up multiple meetings for a single Event.

Click on the item **Meeting Setup**

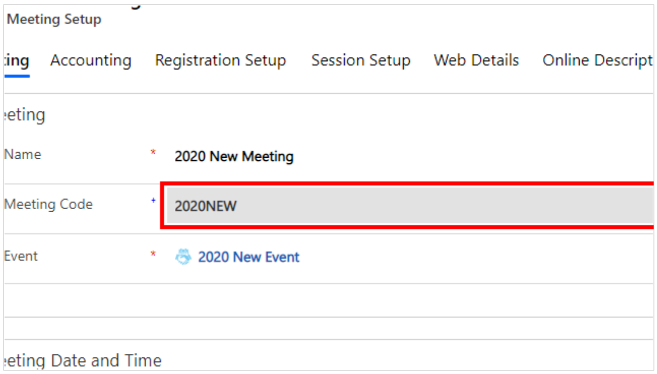


Click on the Meeting



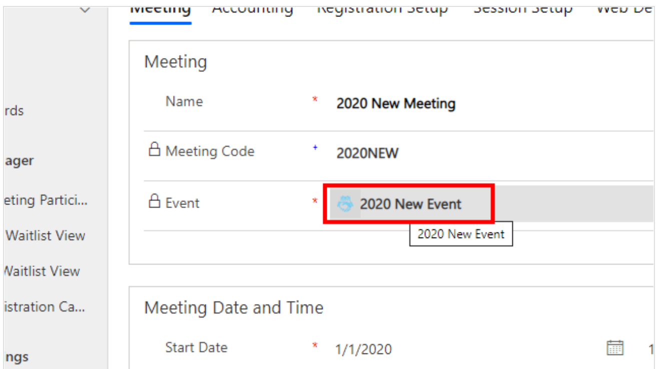
While the Meeting Code is optional, it must be unique across all meeting setups. The code should be short and can include a space, a hyphen, or an underscore. Avoid other special characters – they are not supported.

Move the mouse to the text field **Meeting Code**



UX 365, users can start with the meeting setup and use the Event lookup to select an existing Event, or create a new Event from the Look Up Records dialog. While you can still start with the Event and create a related meeting, this change is a more efficient approach and is particularly useful when creating multiple meetings per Event.

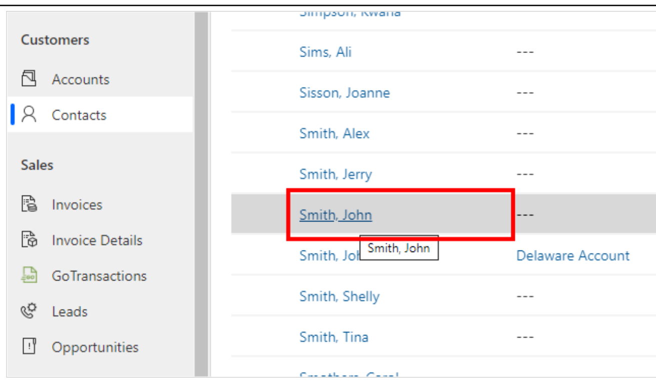
Move the mouse to the link **Event**



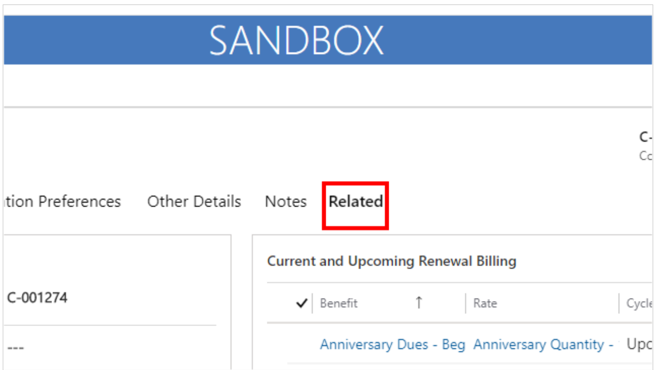
10.8. Member Engagement

Click on the item **Contacts**

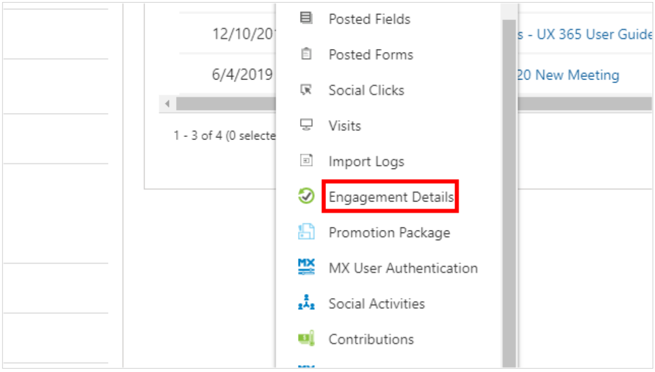
Select the desired Contact



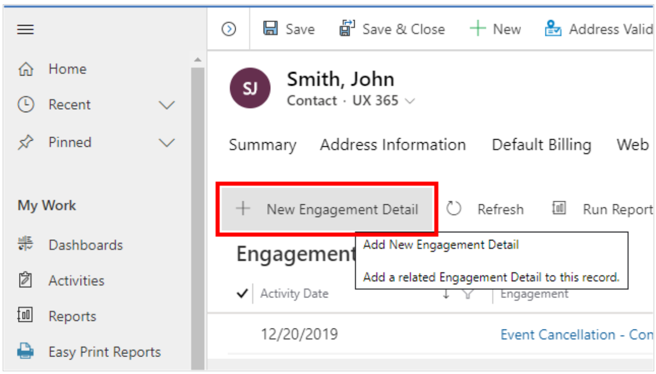
Click on the item **Related**



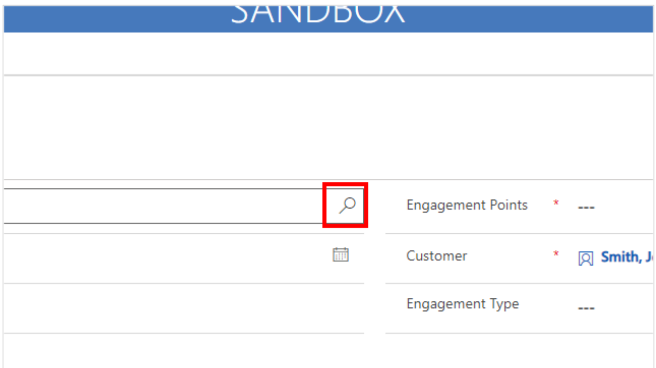
Click on the menu item **Engagement Details**



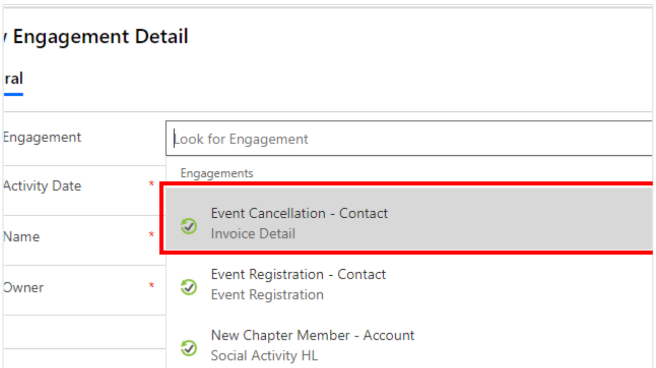
Click on the menu item **Add New Engagement Detail**



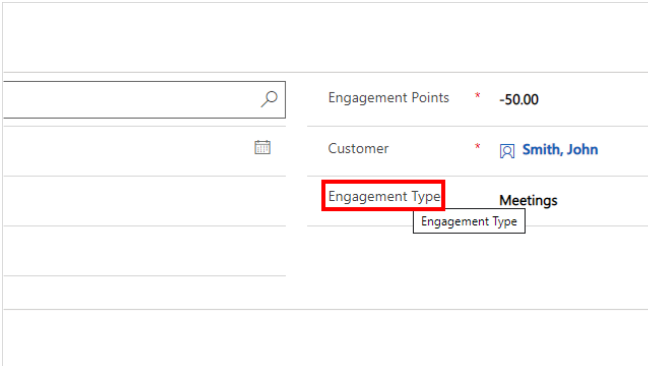
Click on the search icon to select Engagement product



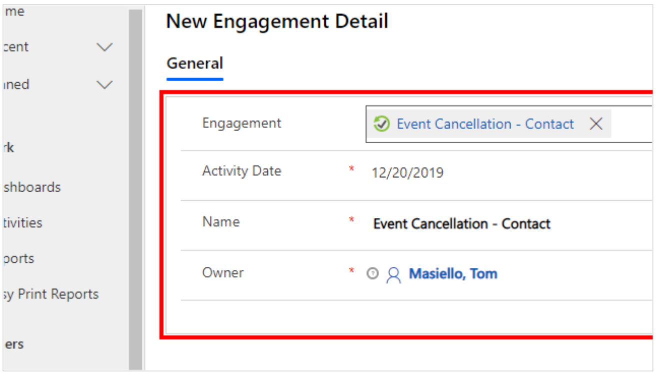
Click on the item **Engagement product**



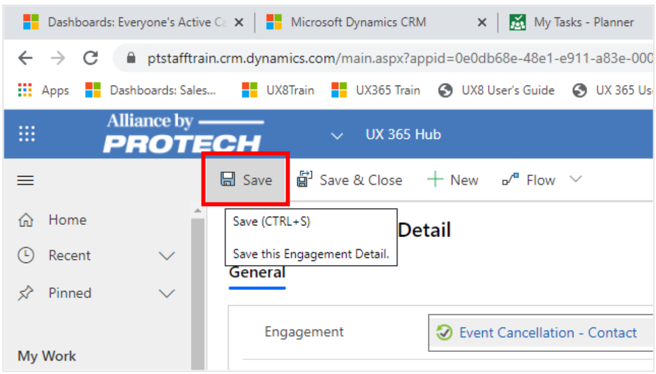
The Engagement Type field is a new field on the Engagement record that defines the module of the activity. This value flows down to the Engagement Detail record.



UX 365 allows the Engagement Points value for the Account or Contact to be a negative value. In UX 8, the minimum value was 0. This is useful for deducting points if, for example, a meeting registrant who earned points for registering and then cancels the registration.

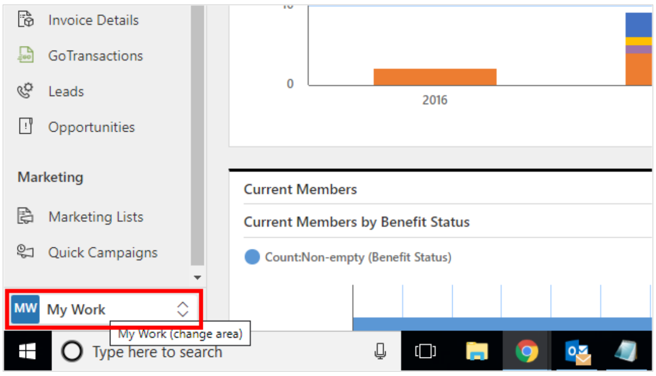


Click on the menu item Save

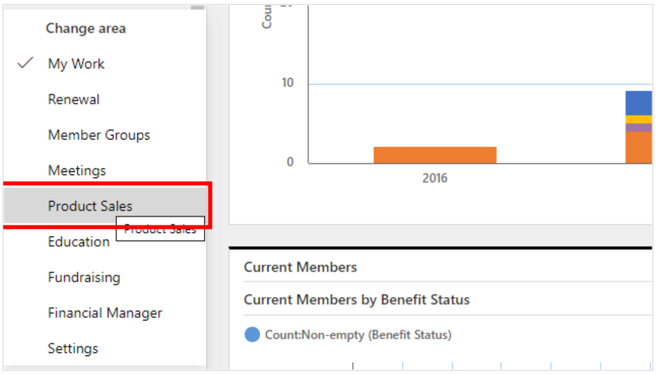


10.9. Payments Adjustments Product Setup Payment Type Option Set

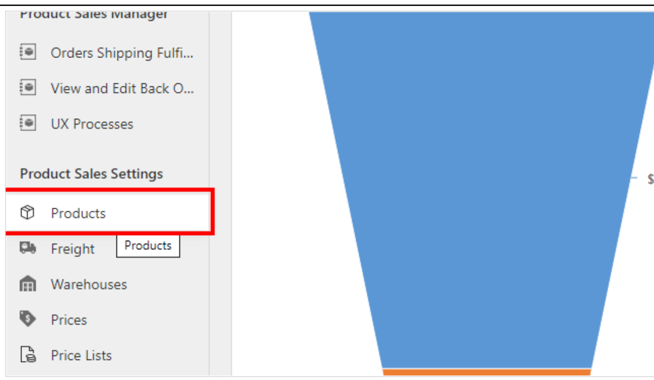
The checkboxes on the product setup form for a Payments & Adjustments product that was in earlier versions of UX have been replaced by a single option set for Payment Type in UX 365.
Click on the button **My Work (change area)**



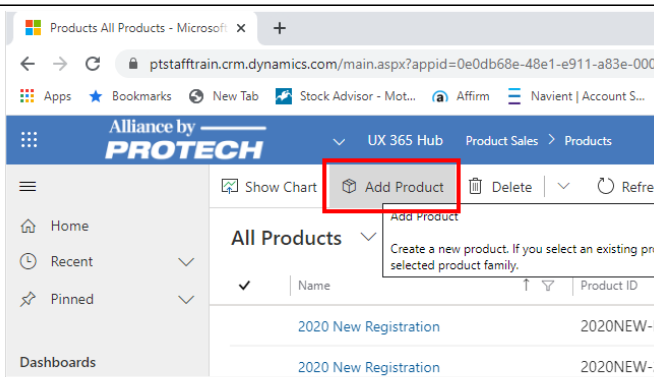
Click on the item **Product Sales**



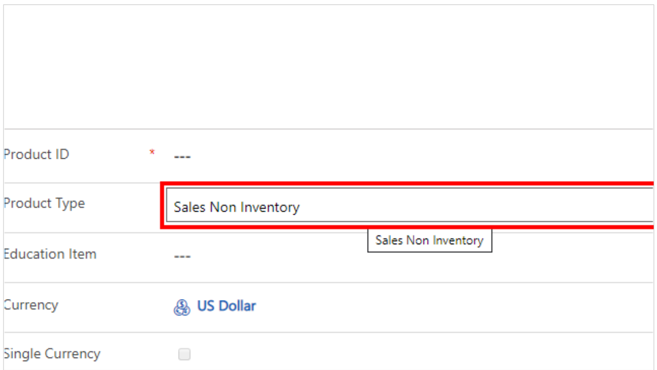
Click on the item **Products**



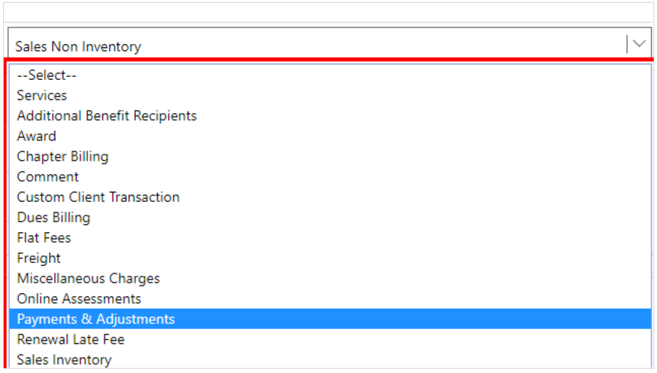
Click on the menu item **Add Product**



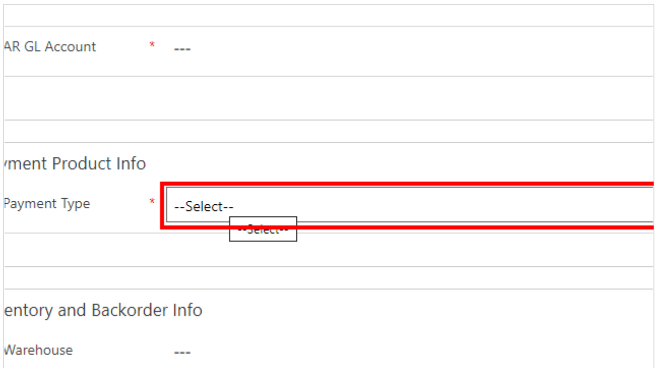
Click on the field **Product Type**



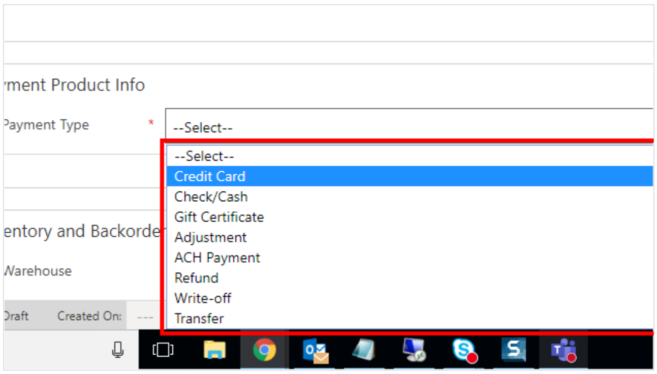
Click on the item **Payments & Adjustments** in the list
When Product Type = Payments & Adjustments, the UX 365 PRODUCT form displays a section named, Payment Product Info, containing a Payment Type and the Checkbook ID field. If the Payment Type = Credit Card, the UX 365 PRODUCT form also displays the additional fields for credit card type and live verification bit field in this section.



Click on the field **Payment Type**
When creating a new payment product, use the Payment Type drop down to select from the following values: Credit Card Check/Cash Gift Certificate Adjustment ACH Payment Refund Write-off Transfer



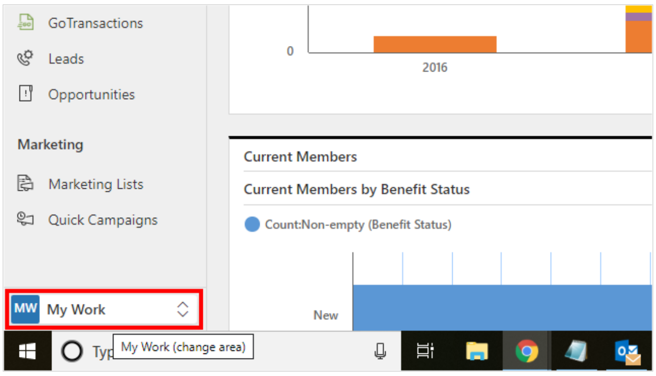
Select the payment type for this Payments & Adjustments Product.



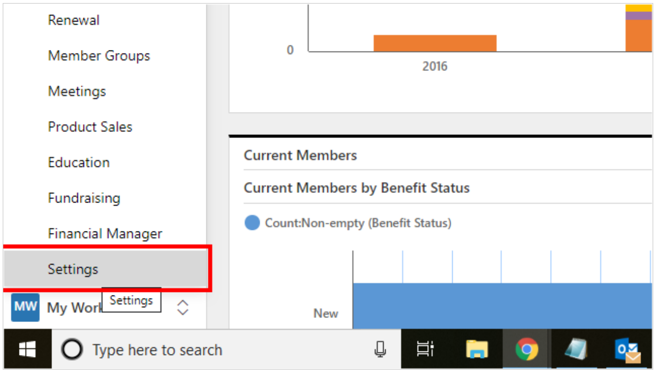
10.10. Price Level Controlled Promotion Discounts

UX 365 offers a new option to limit promotion discounts by Price Level. By defining a Price List in the Promotion record, you can restrict discounts to eligible invoice detail where the invoice Price List matches the Price List in the Promotion record.

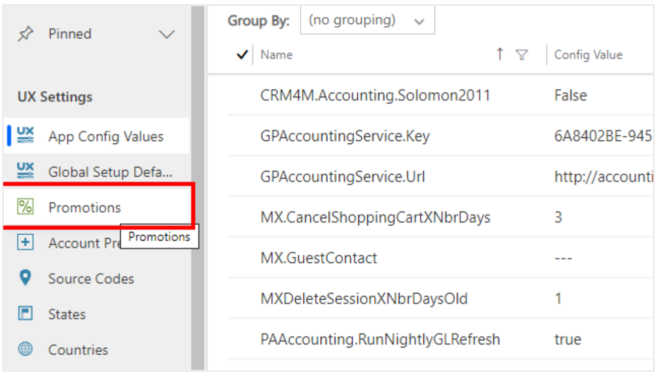
to navigate to promotions, first click on the buttom 'My Work' to change areas



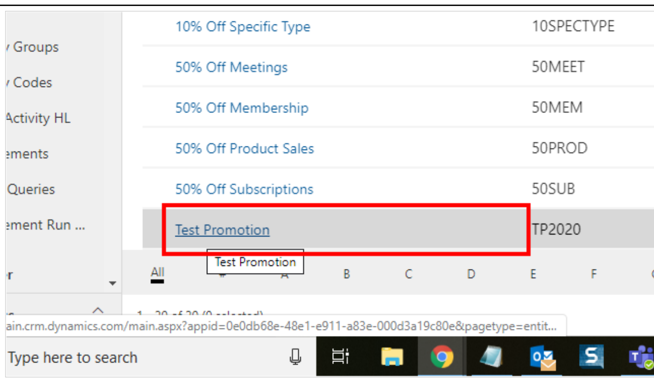
Click on the item **Settings**



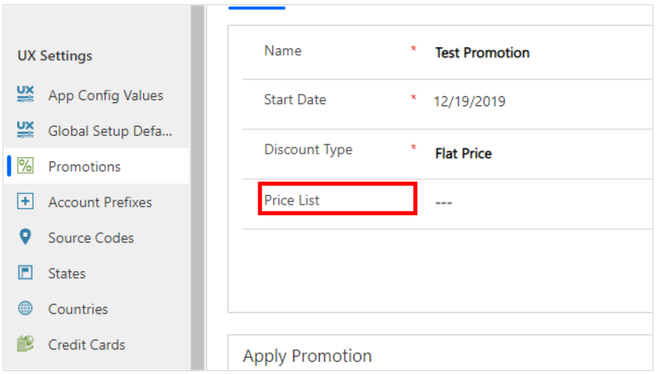
Click on the item **Promotions**



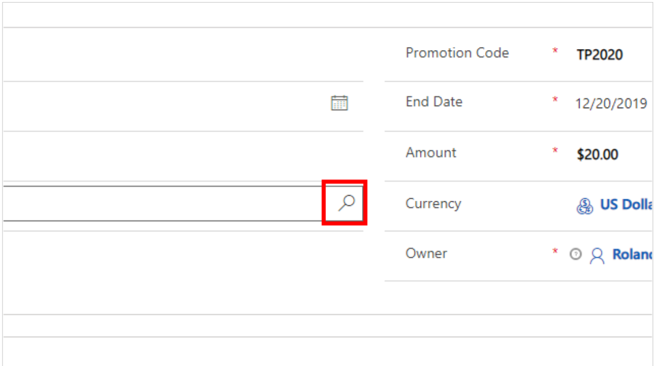
Locate and click into the desired promotion setup record



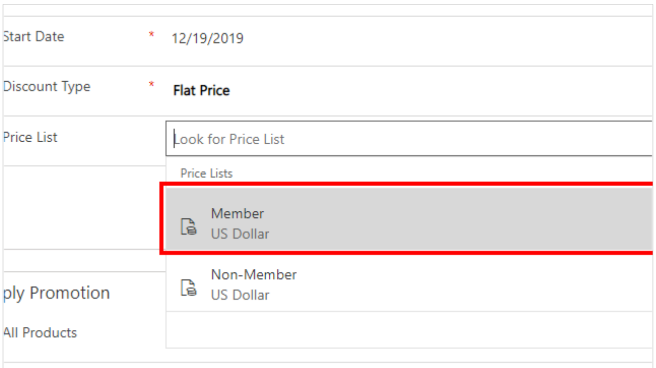
Price List limits the promotion discounts by price level.



click on the lookup icon on the right of 'Price List'

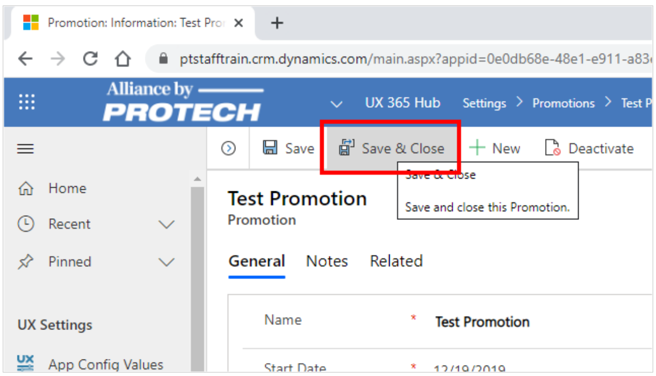


Select desired price level.



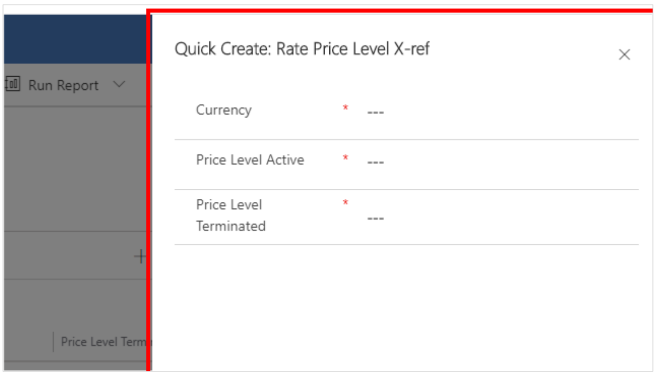
Price Level control can be used in conjunction with any promotion setup (All Products, Specific Type, and Module)

Click on the menu item **Save & Close**



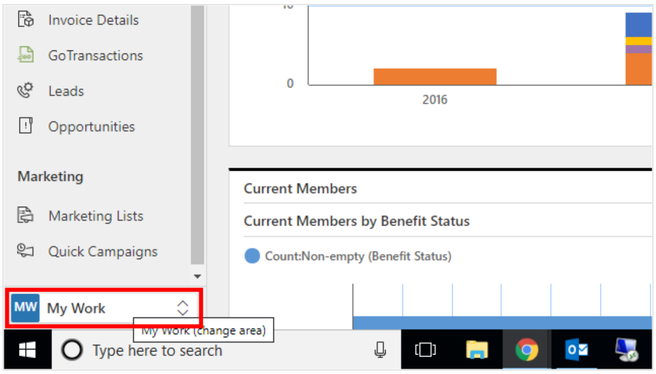
10.11. Quick Create

UX 365 includes Quick Create from Subgrids and Associated Views for the following entities: Prices, Rate Price Level X-Ref, Prorate Detail, Member Package Detail, and Education Item Credits.

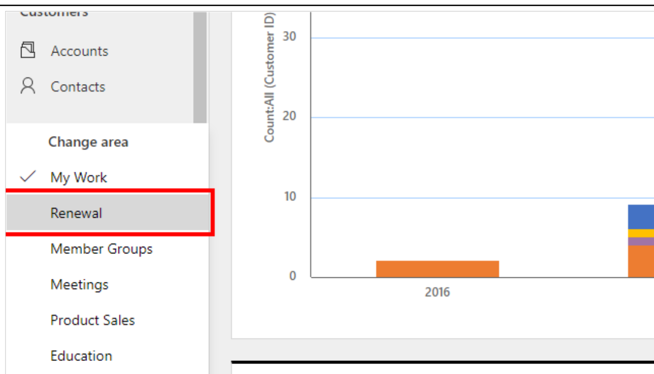


The following is an example using Quick Create to make a new Rate Price Level X-Ref

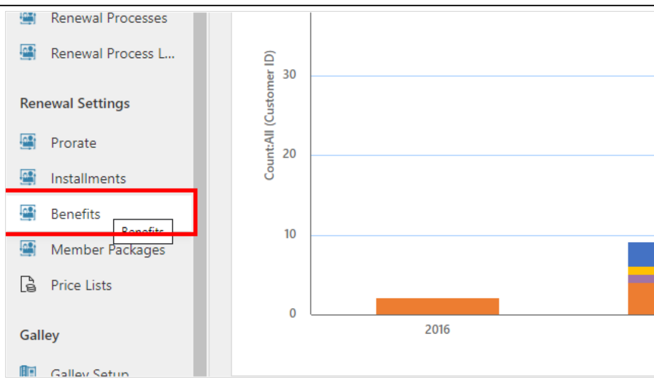
Click on the button **My Work**

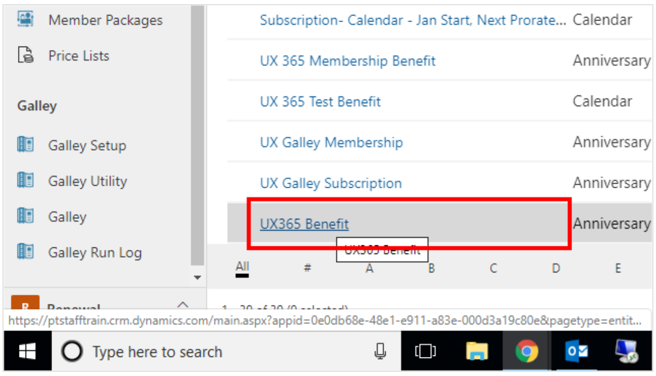
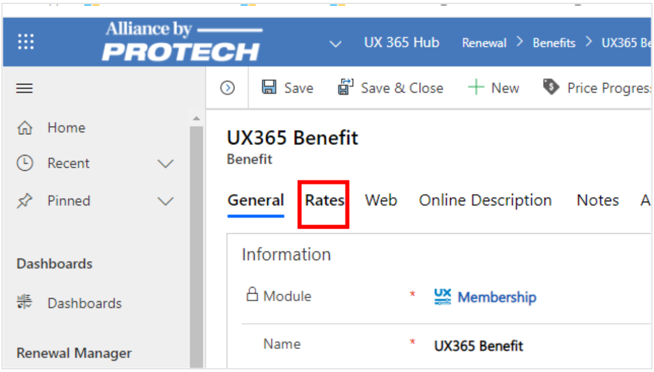
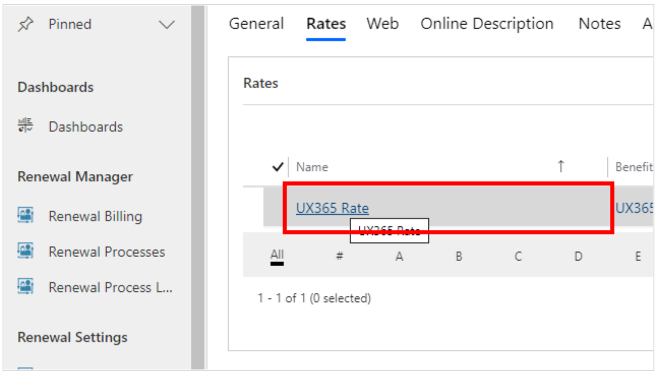
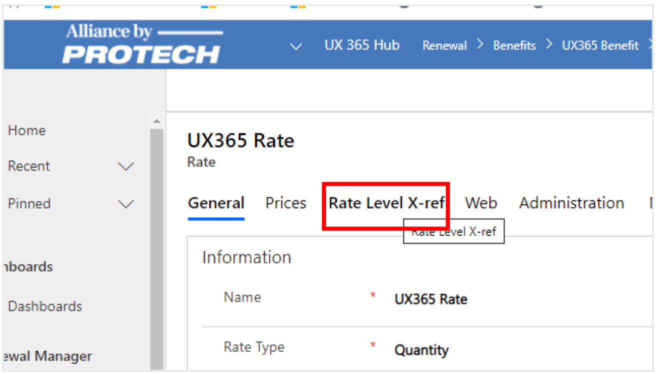


Click on the item **Renewal**

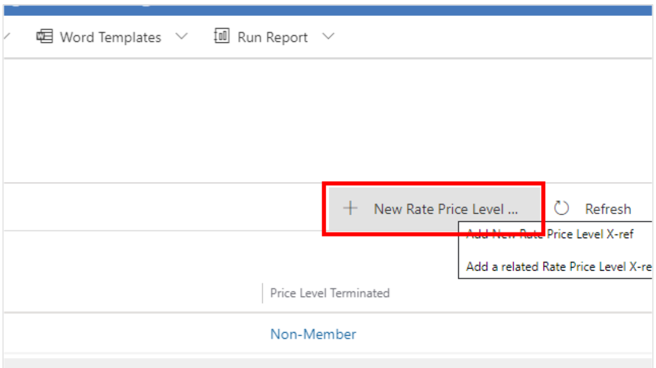


Click on the item **Benefits**

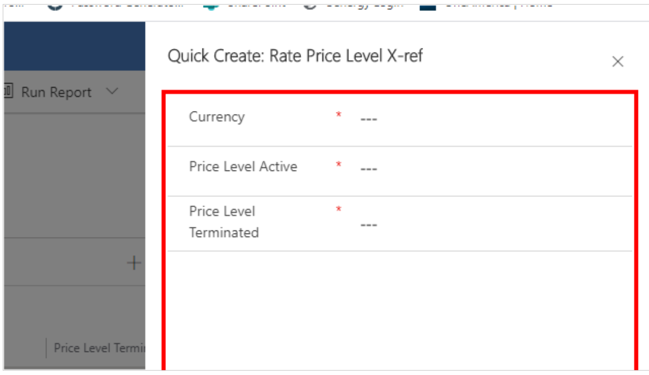


Select your desired Benefit	
Click on the item **Rates**	
Select your desired Rate	
Click on the item **Rate Level X-ref**	

Click on the menu item **Add New Rate Price Level X-ref**



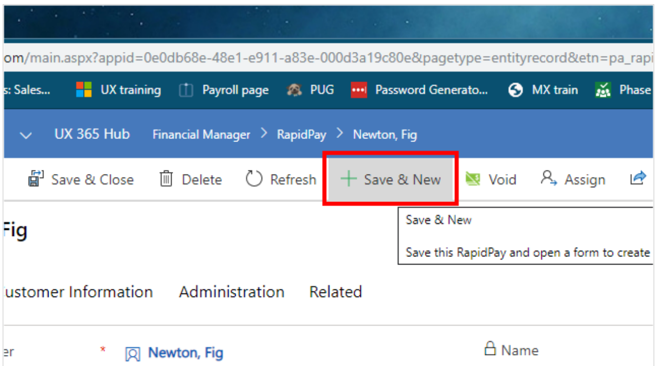
The Quick Create dialog opens on the right side of the window.



10.12. Rapid Pay Save and New

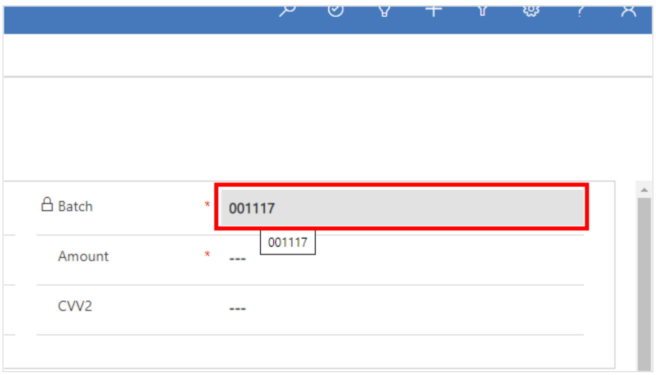
When selecting the 'Save & New' in the RapidPay payment record, UX now automatically populates the new record with the selected Batch, Currency, and Payment Source selected in the previous RapidPay payment record.

Click on the menu item **Save & New**

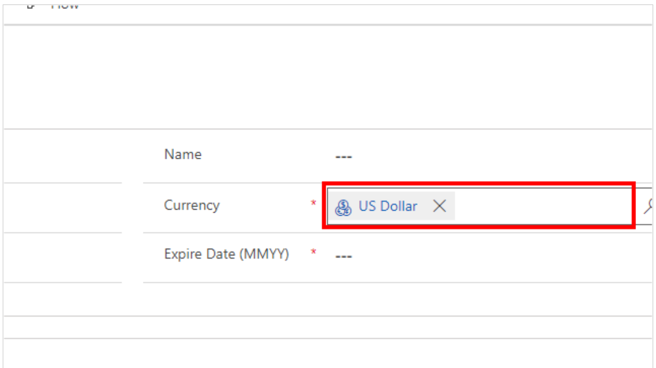


Save and New function allows for quicker RapidPay entry when working in the same batch for creating RapidPay payments with the same currency and payment type.

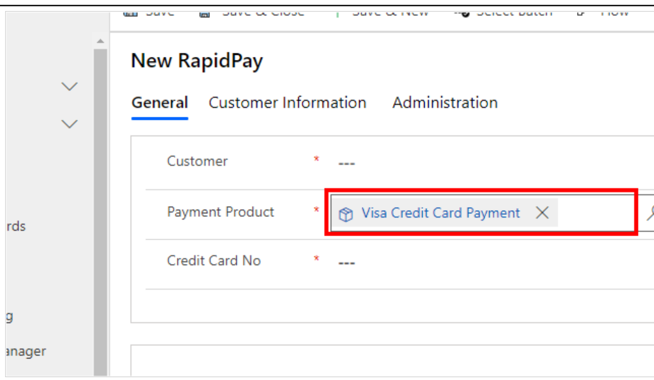
The batch number is populated with the same information.



The currency type remains the same.

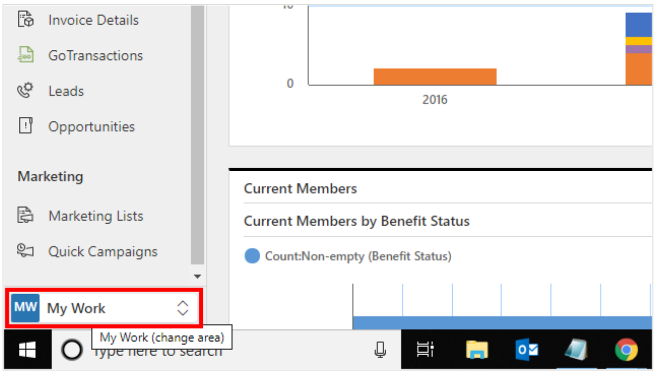


The payment source also populates with the same information.

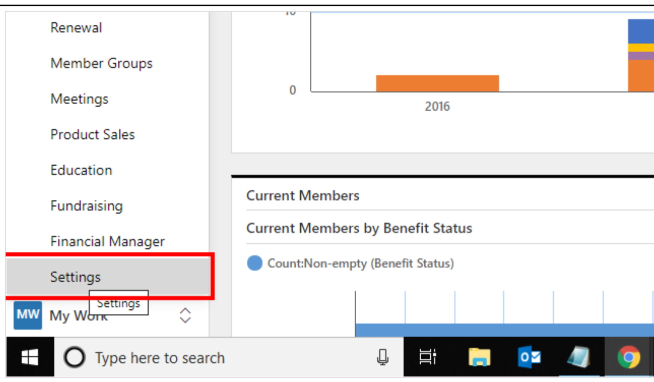


10.13. Refresh Cache and Refresh Metadata

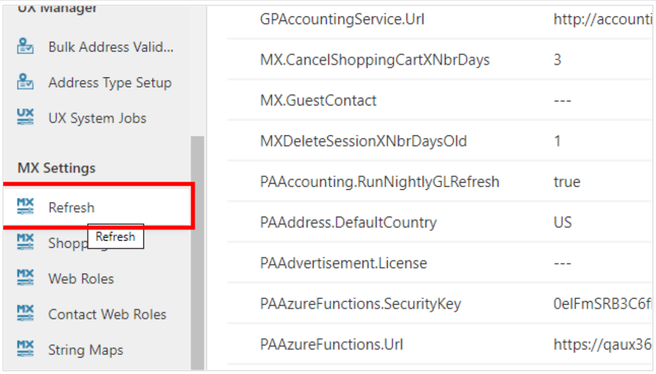
Click on the button **My Work (change area)**



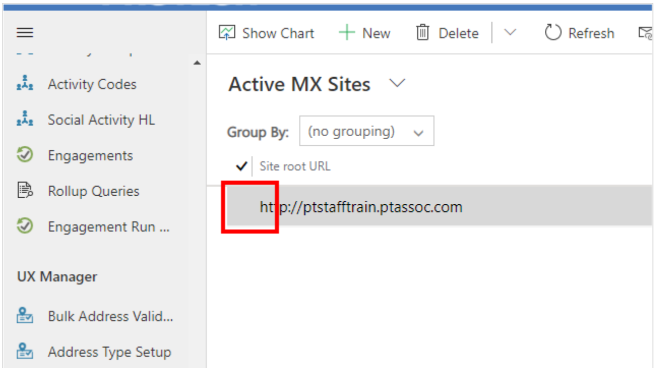
Click on the item **Settings**



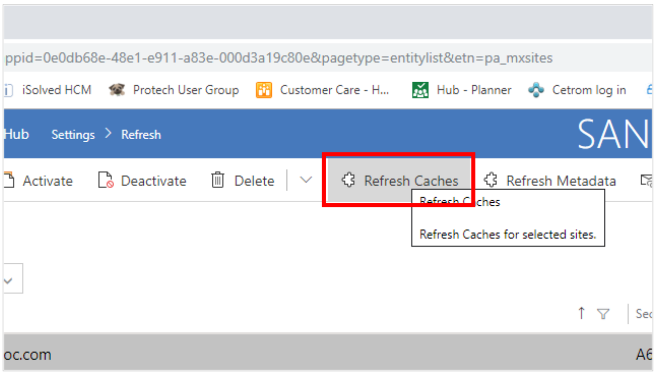
Click on the item **Refresh**



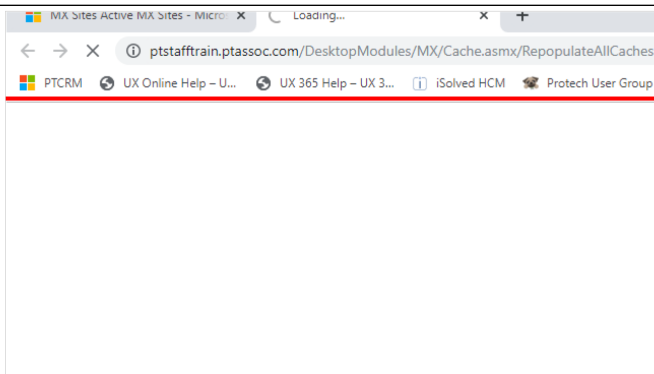
To run either the Refresh Caches or the Refresh Metadata utility, start by selecting a single MX Site record. Once a record is selected The Refresh Caches and Refresh Metadata buttons become available on the list view toolbar.



Click on the menu item **Refresh Caches**

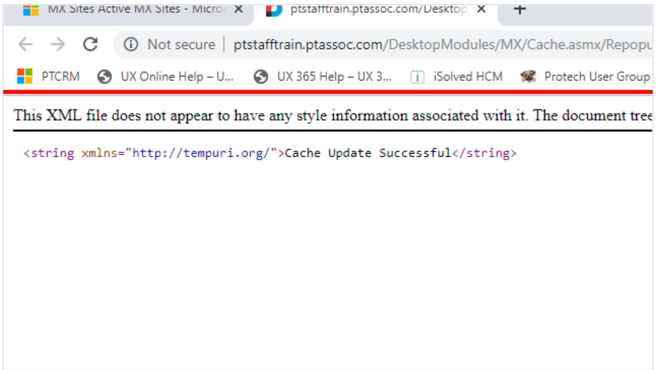


UX will display a blank dialog while it waits to connect to the selected site and runs the utility. Do not close this dialog, or you risk interrupting the utility. When the process is complete, UX will automatically close the blank dialog and display a new dialog with the results.

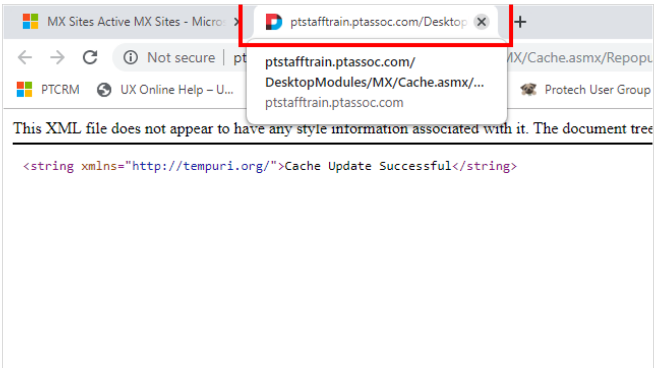


This process should be run after modifying any Advanced Find or setup data that is exposed to MX Online.

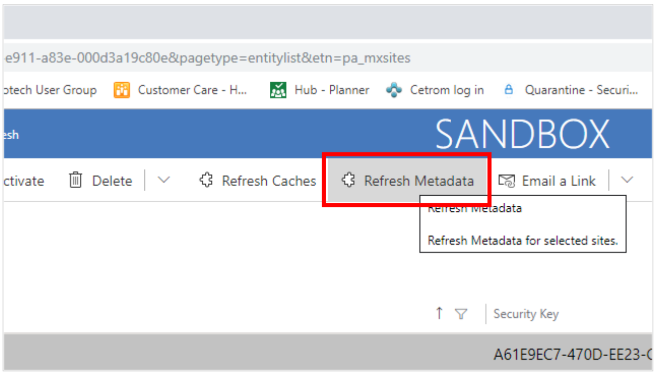
Once MX Cache has been refreshed a message of Cache Update Successful will show.



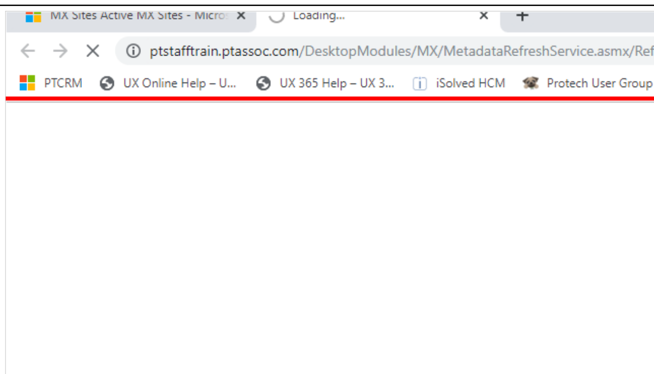
Once successful, close the tab.



Click on the menu item **Refresh Metadata**

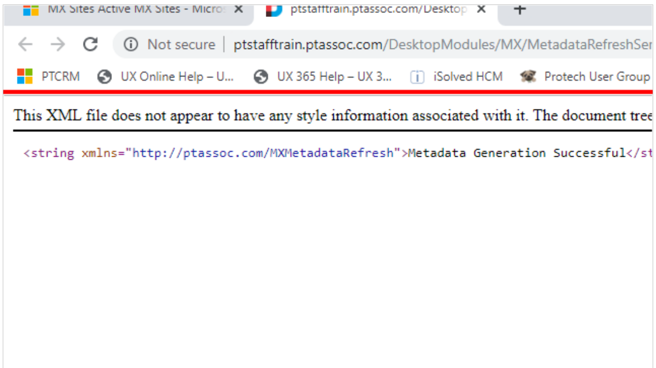


UX will display a blank dialog while it waits to connect to the selected site and runs the utility. Do not close this dialog, or you risk interrupting the utility. When the process is complete, UX will automatically close the blank dialog and display a new dialog with the results.

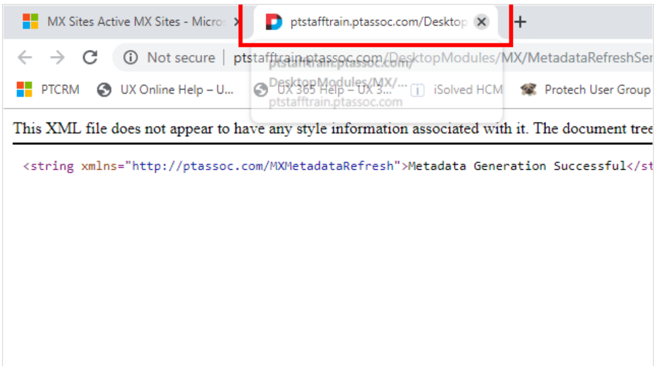


This process should be run after publishing any customizations that are exposed to MX Online.

Once Metadata has been refreshed a message of Metadata Generation Successful will show.



Once successful, close the tab.

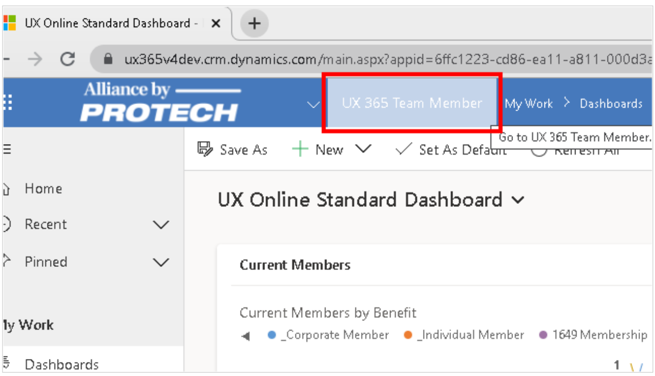


If you want to run both utilities while the same record is selected, you will have to wait to close the confirmation dialog box from the first utility before clicking the button to start the second utility. Each utility runs on one MX site record at a time. Therefore, if multiple MX Site records are selected, the utility will not run.

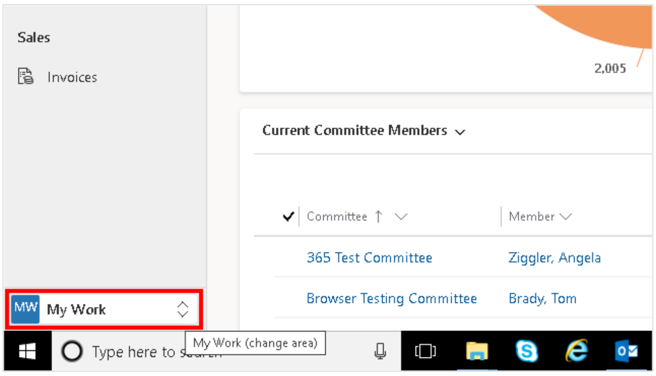
10.14. UX 365 Team Member App

UX 365 Team Member App Protech will be deploying the UX 365 Team Member App with streamlined navigation that focuses on the areas of the system that are most relevant to users with the UX 365 Lite Subscriber License. The following is a preview of what to expect logged on as a UX 365 Team Member.

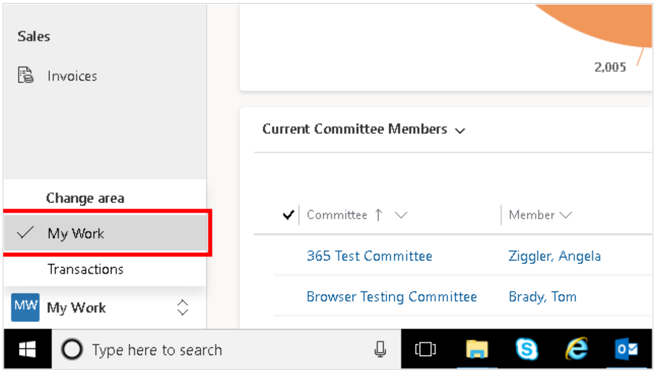
You will know that you are logged into the system as a Team Member when you see the UX 365 Team Member home button at the top navigation.



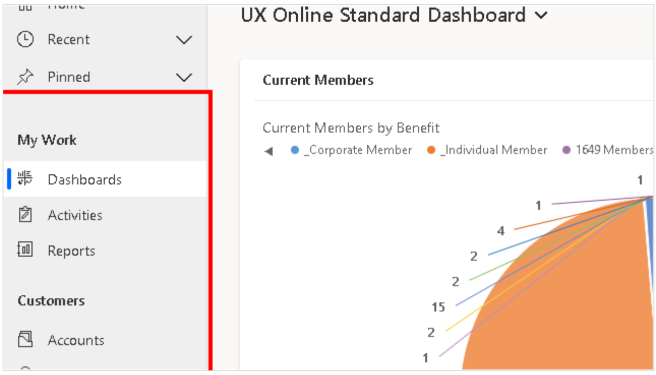
The UX 365 Team Member App features a more streamlined sitemap for navigation, including two different work areas in the sitemap. My Work and Transactions



Click on My Work

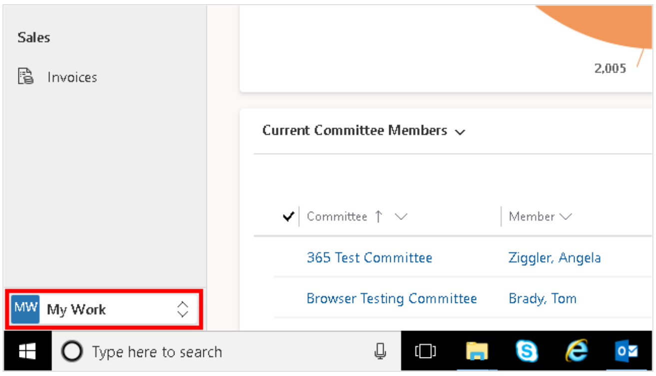


Entities available within My Work

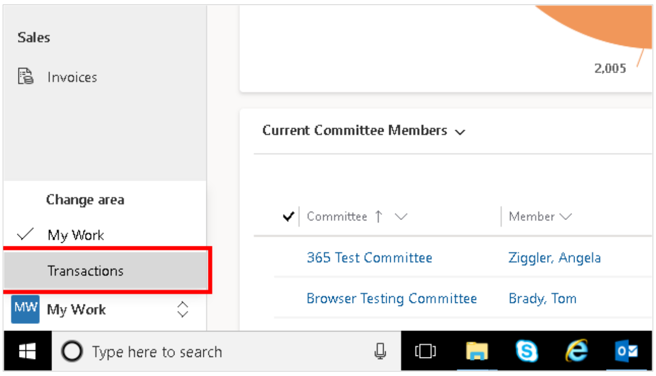


Access Rights to Contacts, Committee Members, Chapter Officers, Roster Members, Speaker Profile , Views, Dashboards, Activity Records, Notes, Reports will include create, read, update and delete.   All other entities will be Read Only

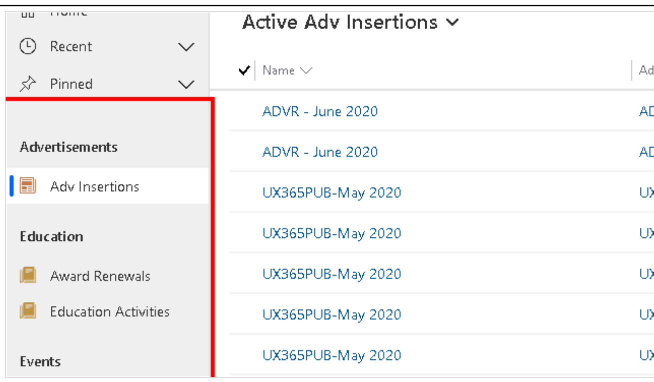
Click on the button **My Work (change area)**



Click on Transactions



Entities available within Transactions

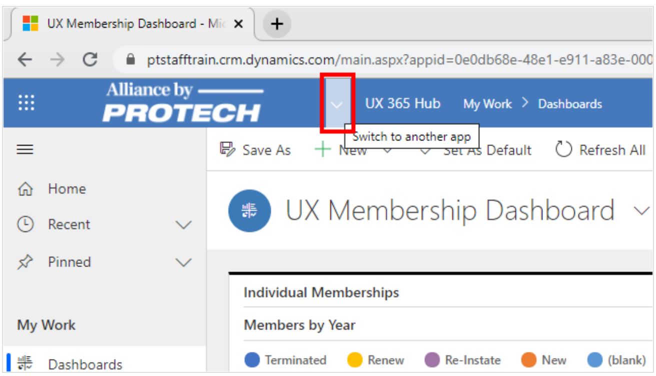


When will this happen? Protech will roll out this new app as Microsoft's technical enforcement of the Dynamics 365 Team Member license for partners is applied to U.S. Dynamics 365 customer tenants. This is expected to take place during the week of June 21, 2020.

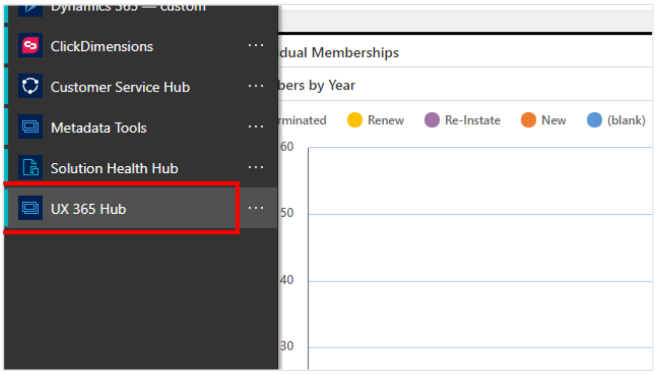
10.15. UX 365 Unified Client Interface Basics

Navigation and views have gone through a transformation in the new Unified Interface. The navigation to work areas has moved from tiles on a horizontal bar across the top of the screen to a new navigation panel on the left-hand side of the screen.

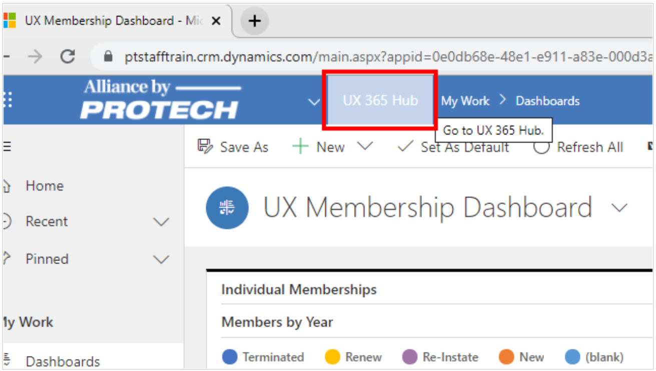
Click on the switch app button to change applications



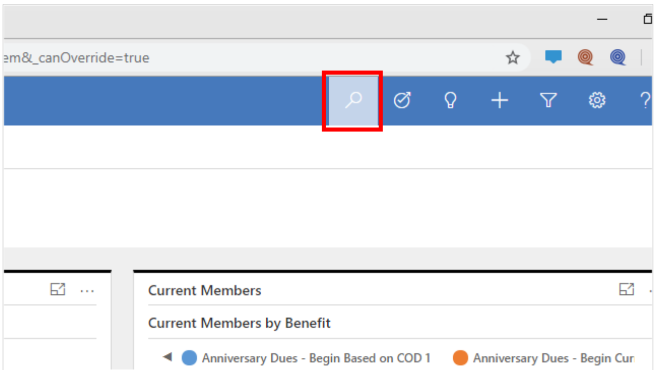
UX 365 Hub



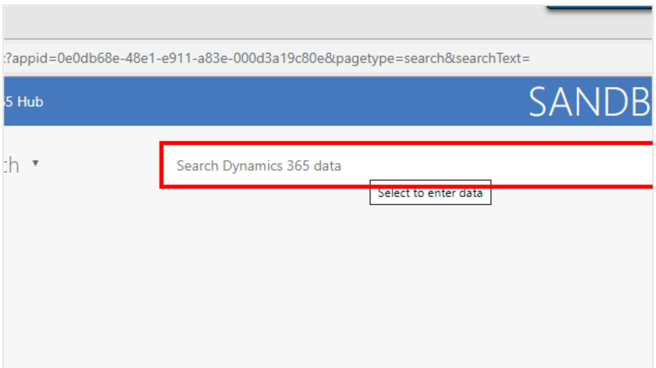
On the top command bar, you will find the navigational bread crumbs that allow you to quickly see where you are in the system



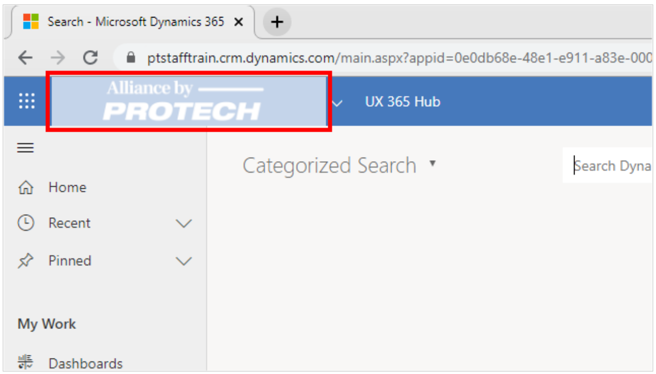
Search for records



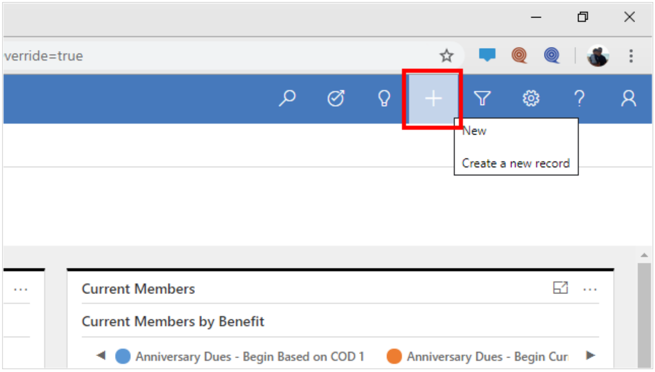
Enter search text here



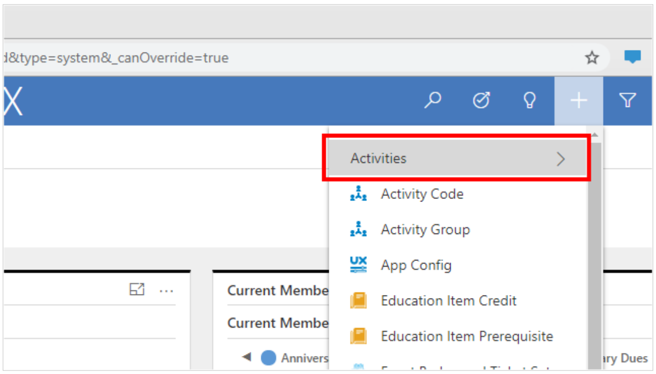
Click on the **home** button



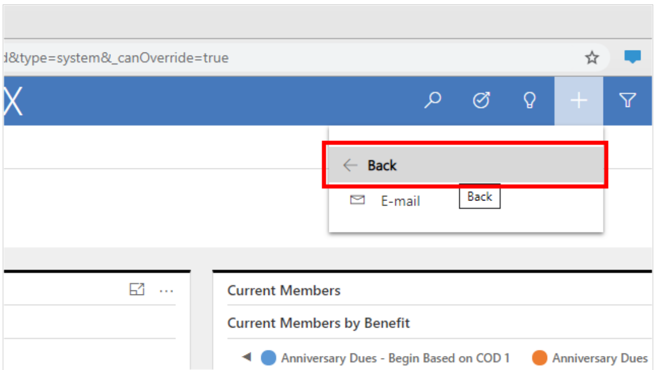
Quickly create a new record



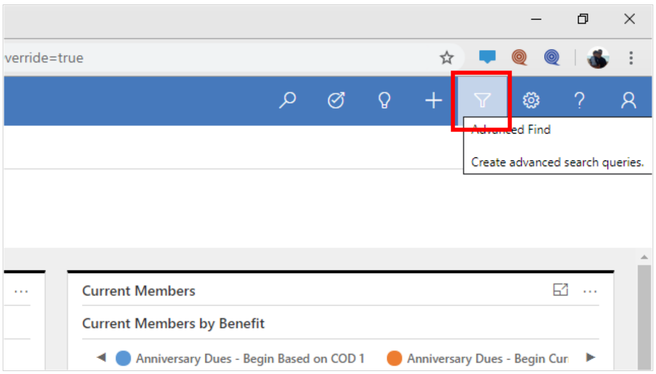
Click on the menu item **Activities**



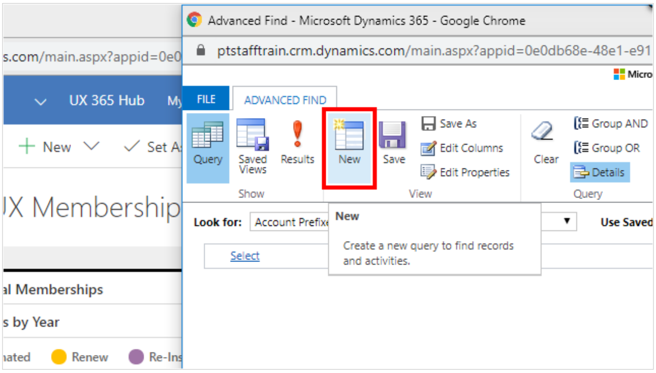
Click on the item **Back**



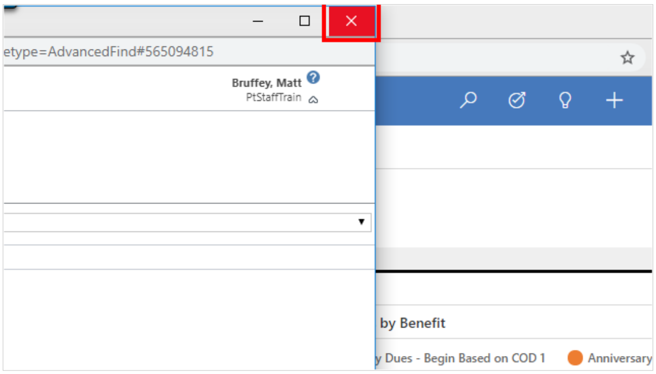
Click on the menu item **Advanced Find**



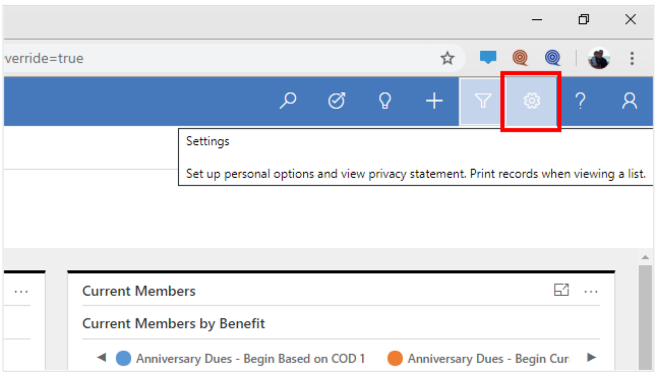
click here to create a new query



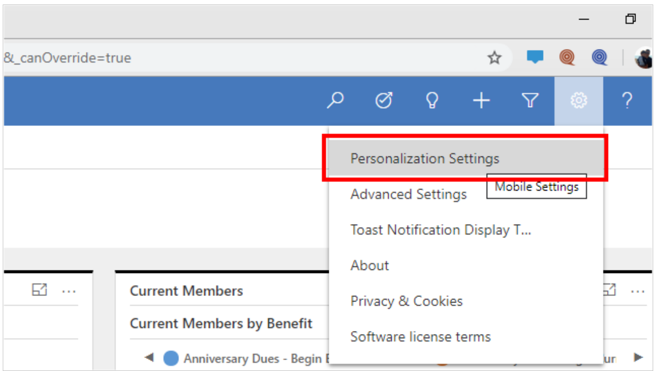
Click on the button **Close**.



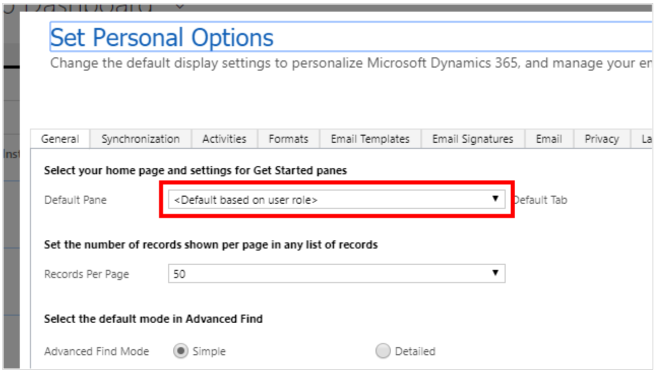
Click on the menu item **Settings**



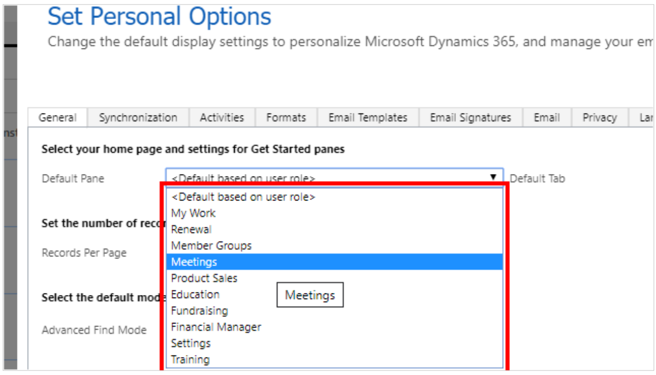
Click on the menu item **Personalization Settings**



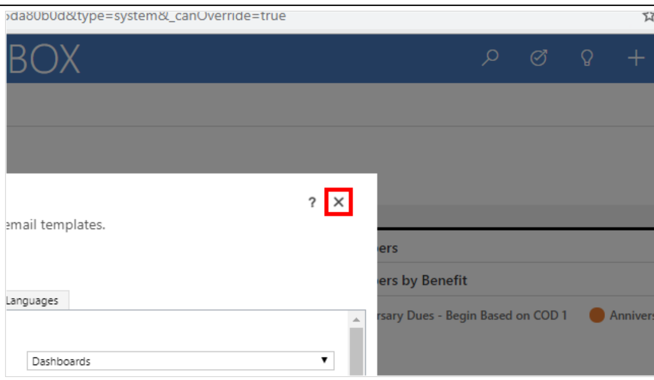
Configure your default home page



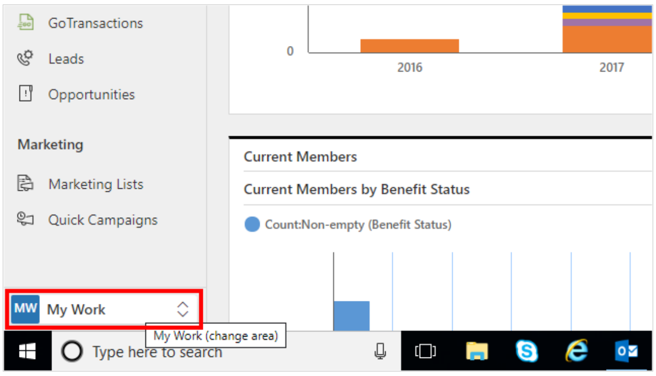
Click on an option from the list



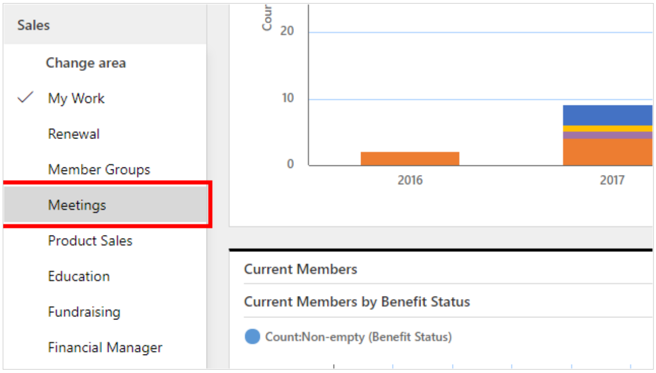
Click on the link **Cancel**



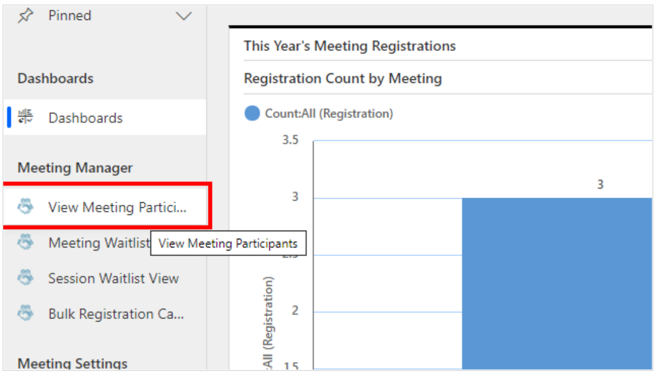
Click on the button **My Work (change area)**



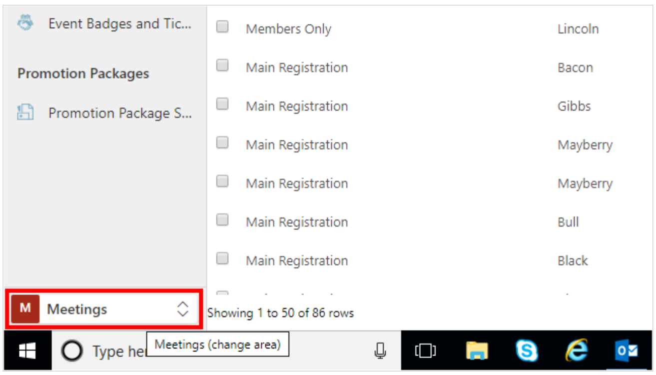
Click on the item **Meetings**



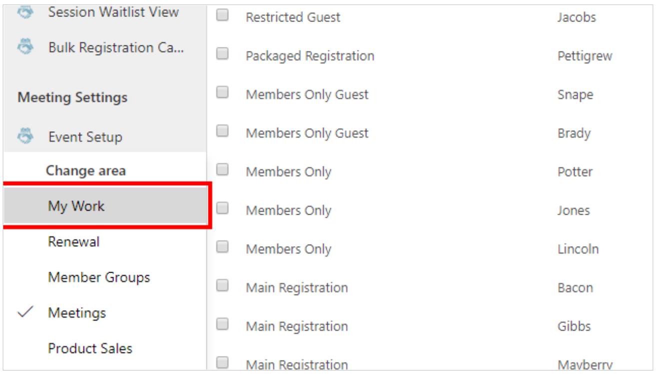
Click on the item **View Meeting Participants**



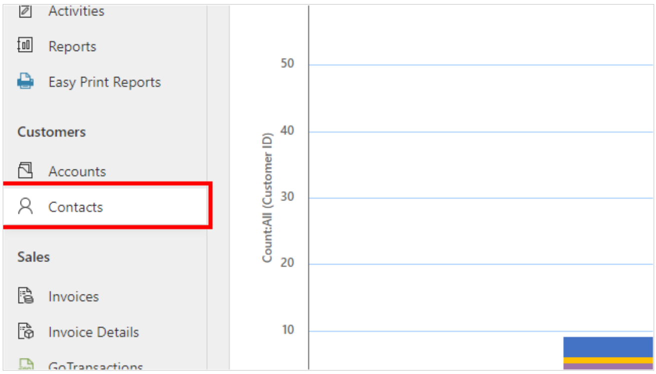
Click on the button **Meetings (change area)**



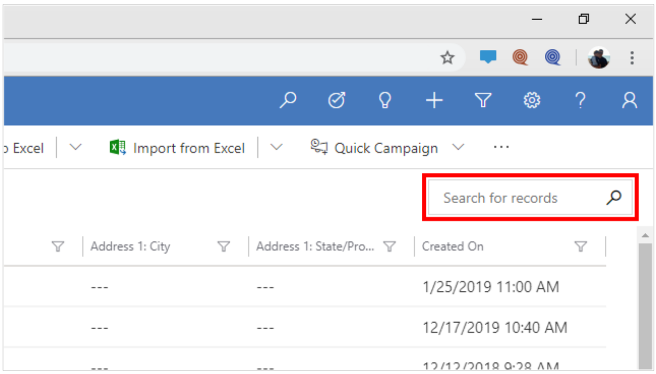
Click on the item **My Work**



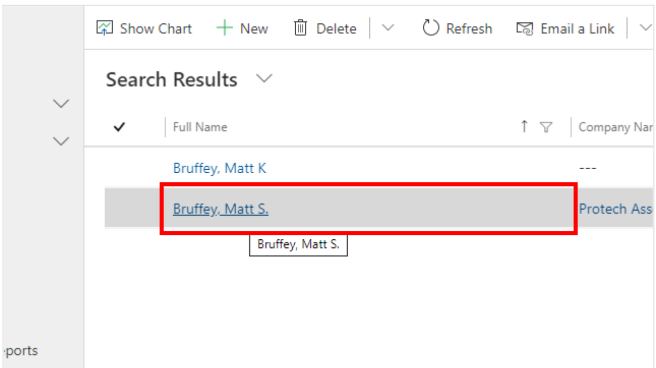
Click on the item **Contacts**



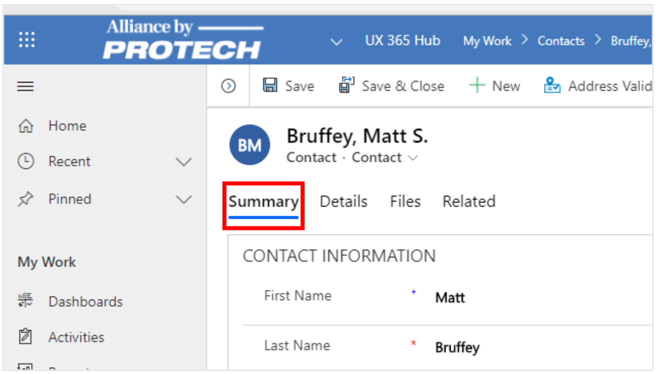
Search for a Contact



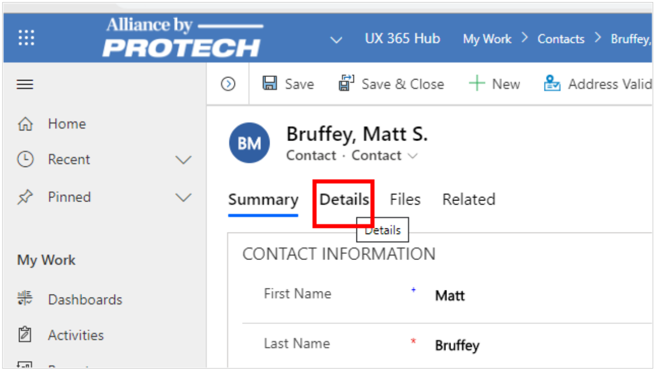
Open Contact record



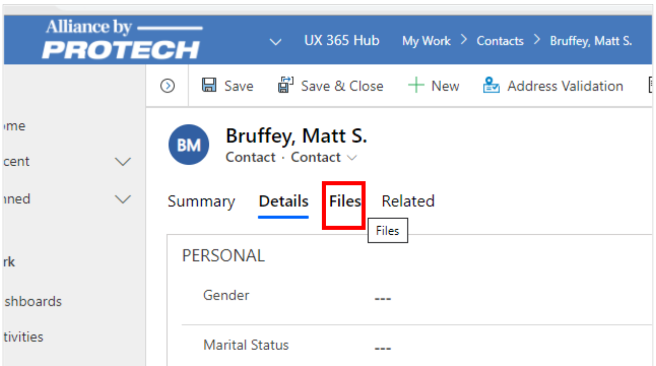
Click on the item **Summary**



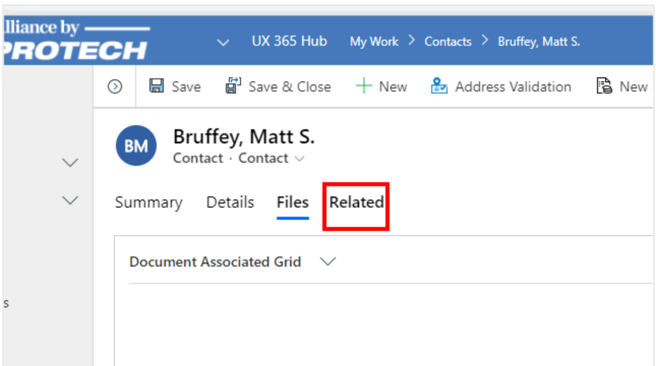
Click on the item **Details**



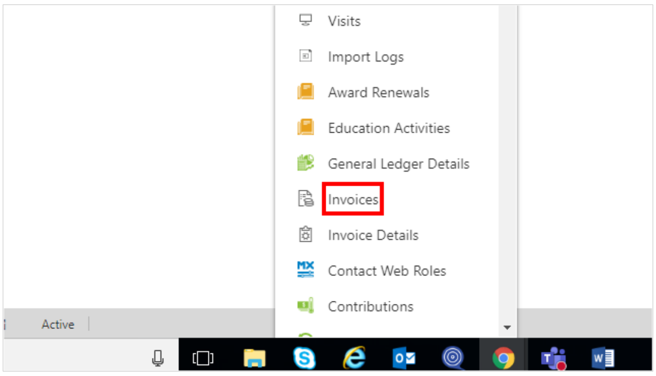
Click on the item **Files**



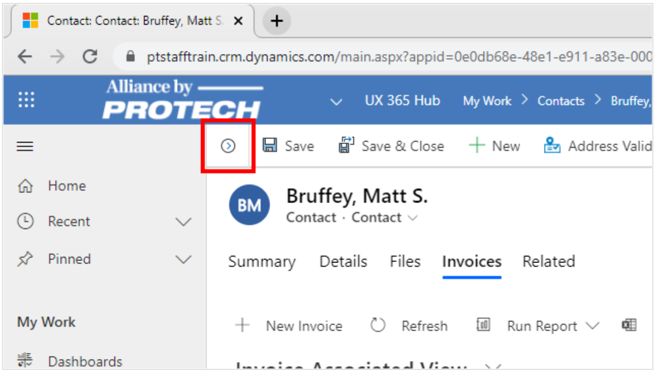
Click on the item **Related**



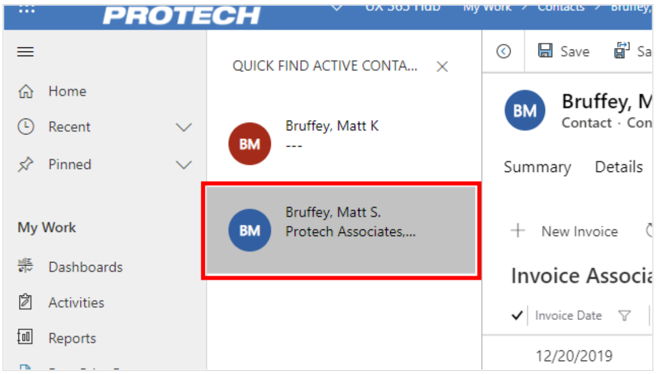
Click on the menu item **Invoices**



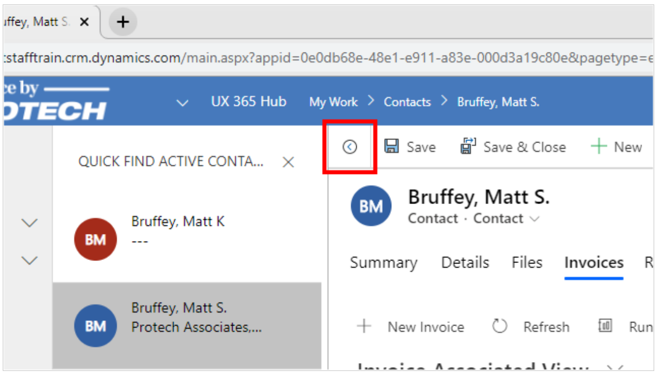
Click on the link Record set navigator that allows you to quickly access other Contact records



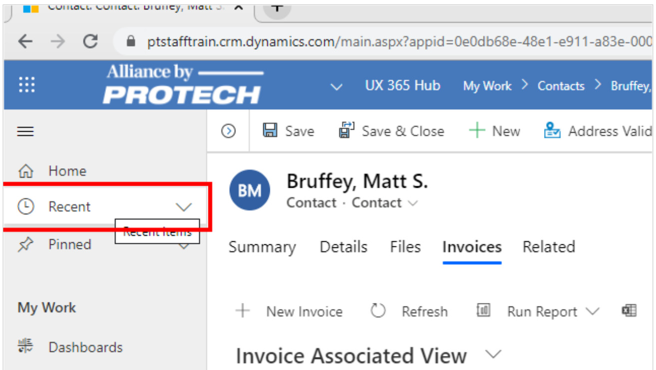
Click on a Contact



Close navigator

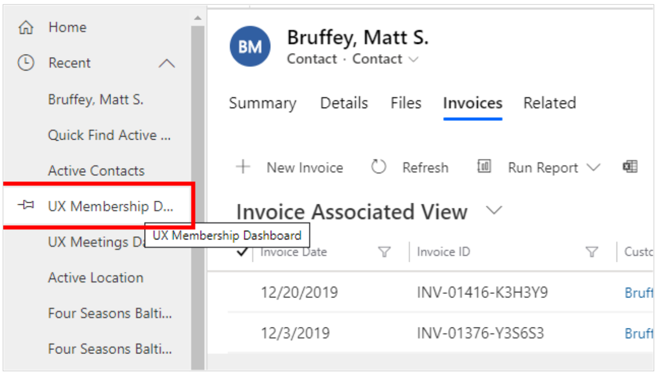


Click on the item **Recent items**

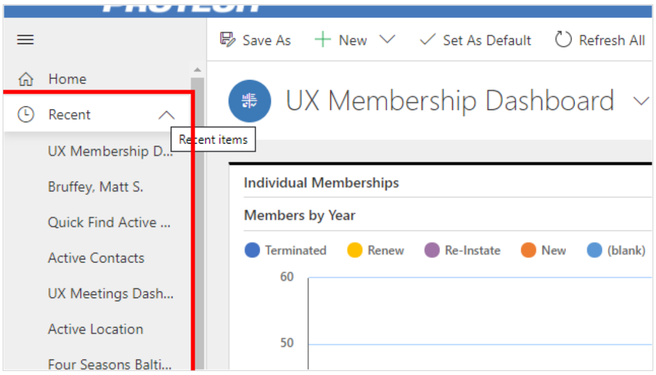


Recent items allows you to quickly access areas of the system you previously navigated to

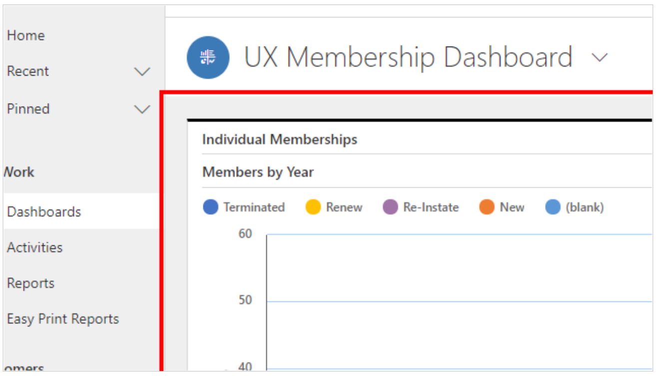
Click on a recent item



Close recent items panel



This concludes the navigational tour of the UX 365 Unified Interface. Enjoy



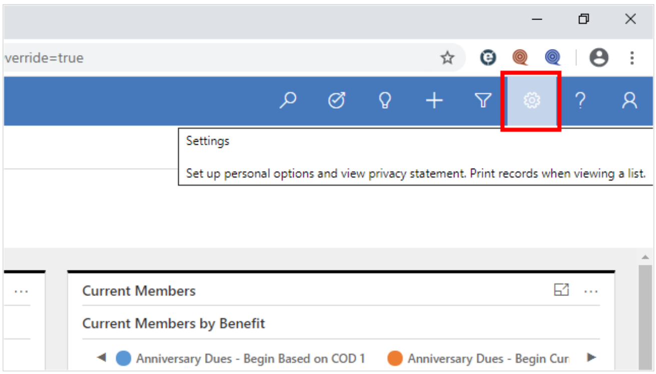
10.16. UX Securtity Roles

10.16.1. UX Security Roles

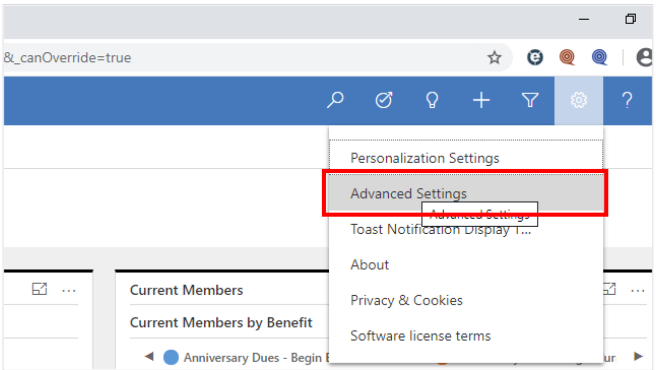
Security roles simplify assigning the privileges and access levels to users

UX 365 includes the following UX-specific security roles: □ UX Core (assign to all users) □ UX Administrator □ UX Accounting Manager □ UX Advertising Manager □ UX Advertising User □ UX Chapter Manager □ UX Committee Manager □ UX Exhibits Manager □ UX Exhibits User □ UX Fundraising Manager □ UX Fundraising User □ UX Meeting Manager □ UX Meeting User □ UX Membership Manager □ UX Membership User □ UX Payment User □ UX Product Sales Manager □ UX Product Sales User □ UX Professional Development Manager □ UX Promotion Package User □ UX Roster Manager □ UX Subscription Manager □ UX Subscription User □ MX User (assign to all users) □ MX Shopping Cart User

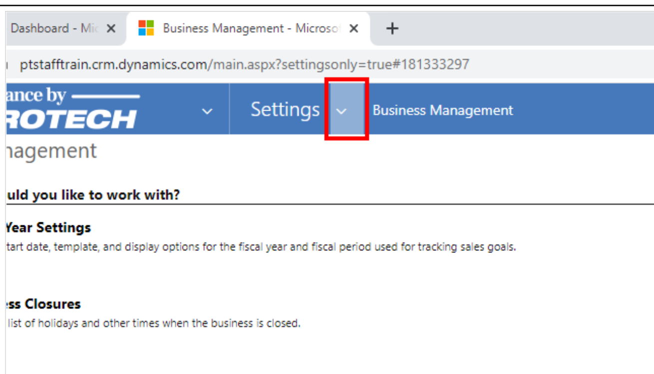
Click on the menu item **Settings**



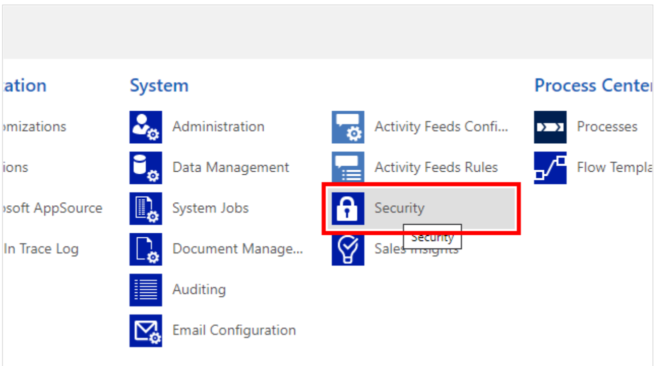
Click on the menu item **Advanced Settings**



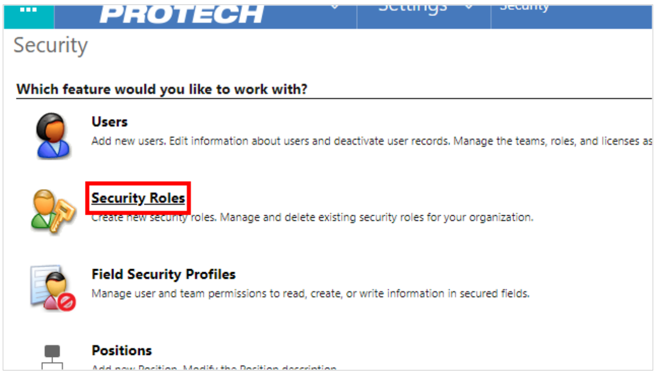
Click on the navigation button **Settings**



Click on the link **Security**

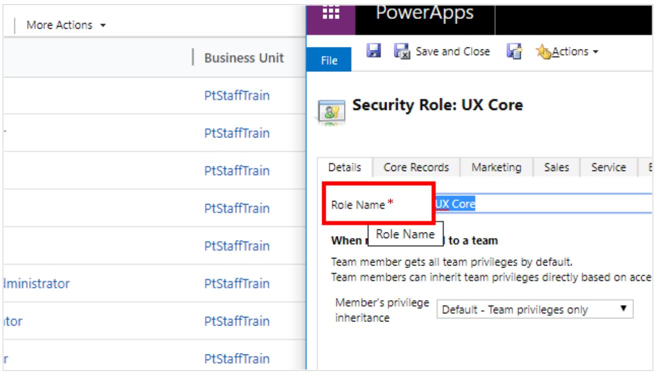


Click on the link **Security Roles**

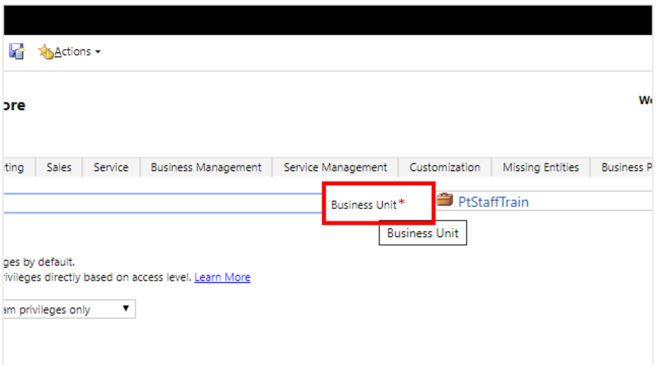


Select a Security Role you would like to view

Role Name is the name of the Security Role

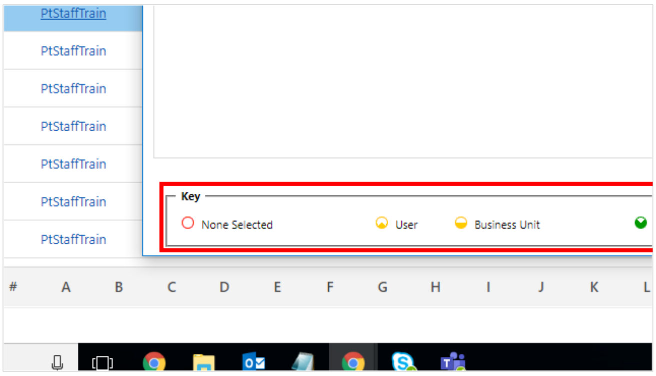


This is the Business Unit



Business Unit is any user who is in the same business unit as a record’s owner can perform the action on that record.

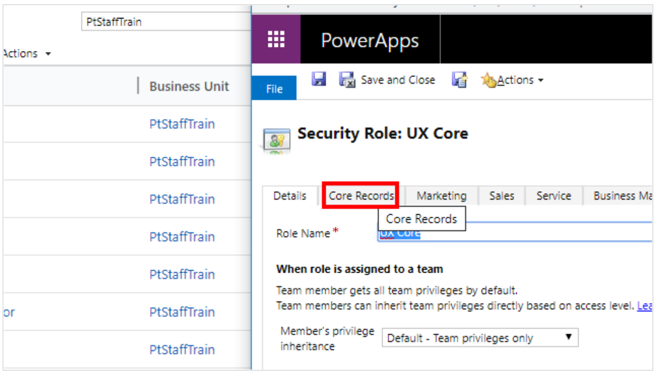
This the key which shows that different access levels for each Security Role



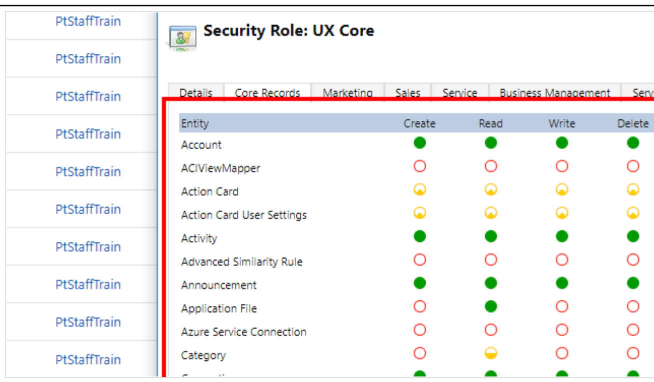
Access levels control the level of the organization where a privilege applies. Dynamics CRM allows you to set up a security model based on your association's structure. The hierarchy of the structure includes the organization at the top level (that is, the company that owns the deployment), with business units (that is, a logical grouping of business operations) below it

The different access levels are: User – Only the user who owns a record can perform the action on that record, unless the owner has shared the record with a team or with other users. Business Unit – Any user who is in the same business unit as a record's owner can perform the action on that record. Parent Child Business Unit – Any user who is in the parent business unit of a record's owner can perform the action on that record. Organization – Any user in the organization can perform the action on records in the entity, regardless of the owner.

Click on Core Records



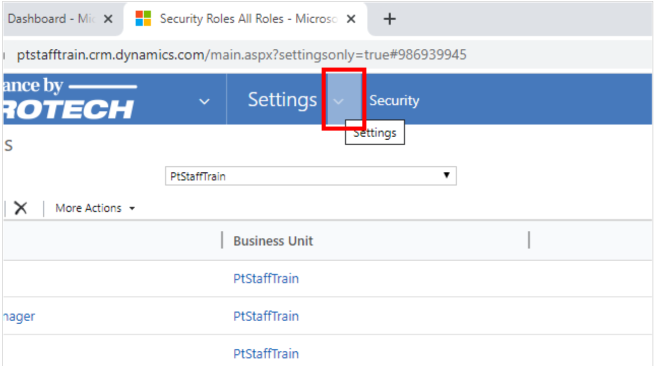
This table shows the the entity and its Privileges, each privilege has its own access level.



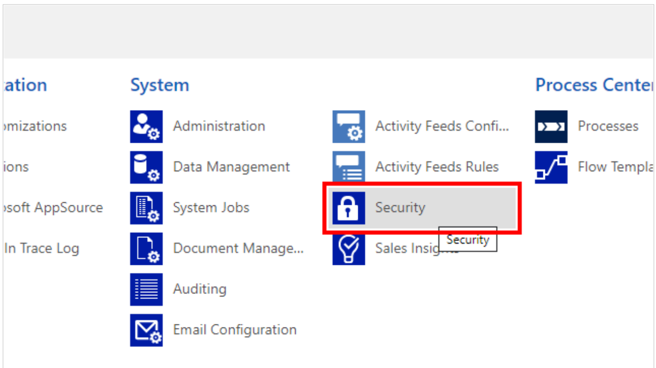
Privileges include the following actions: Create – Add a new record. Read – View a record. (Some UX processes use this privilege.) Write – Edit an existing record. (Some UX processes use this privilege.) Delete – Delete a record. (Some UX processes use this privilege.) Append – Attach another entity or associate another entity with the record. This works in conjunction with 'Append To'. Append To – Attach another entity or associate another entity with the record. This works in conjunction with 'Append'. Assign – Change a record's owner to a different user. Share – Share a record with another user or team. Enable/Disable – Activate or deactivate records. This privilege appears only on the Business Management tab of the "Business Unit" and "User" entities.

10.16.2. UX Security Roles- Assigning Security Roles to a User

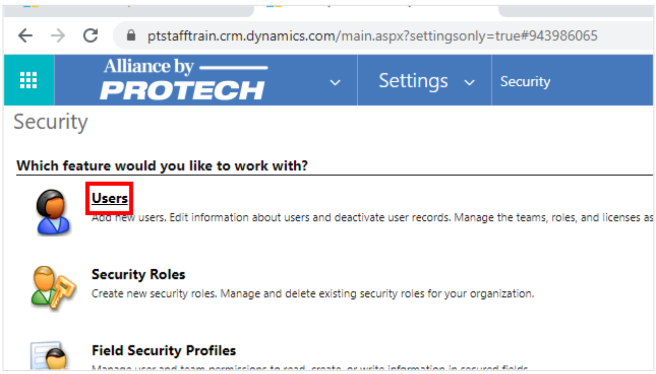
Click on the navigation button **Settings**



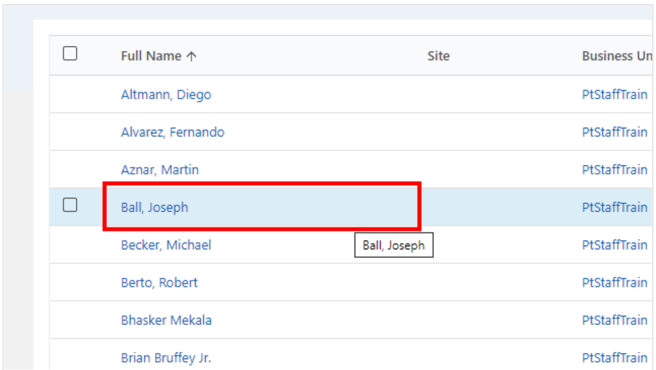
Click on the link **Security**



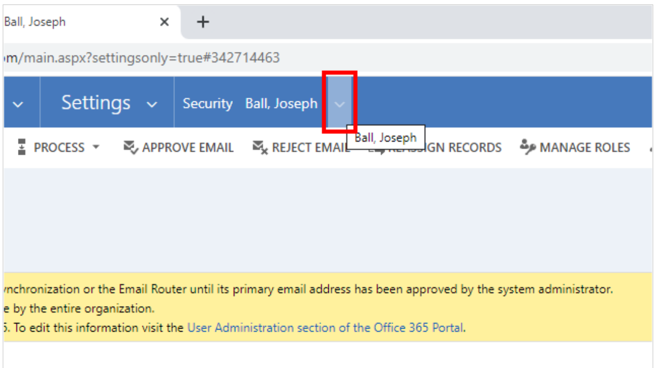
Click on the link **Users**



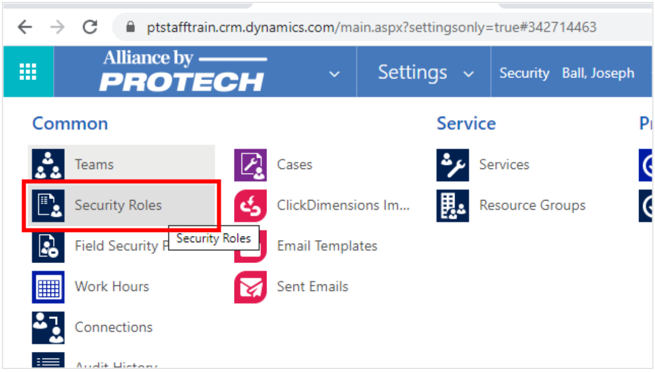
Double click on the User you would like to select



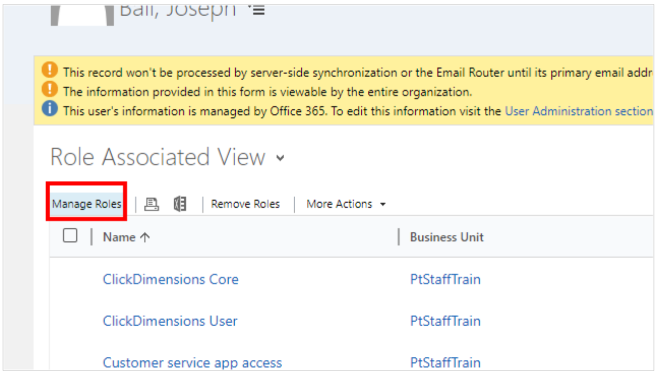
Click on the navigation button for the user



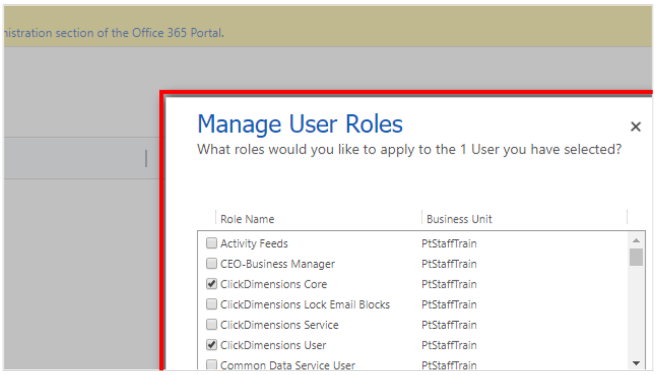
Click on the link **Security Roles**



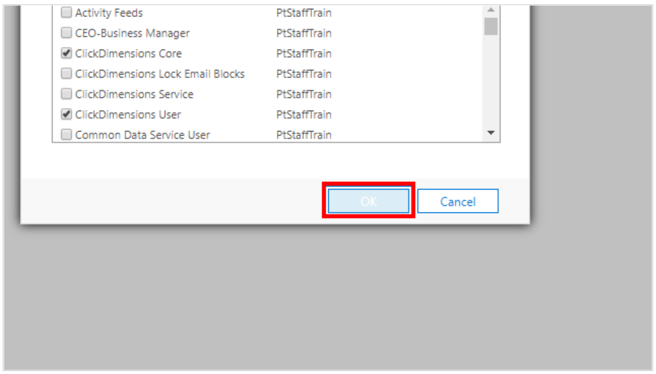
Click on Manage Roles to assign Security roles to the user



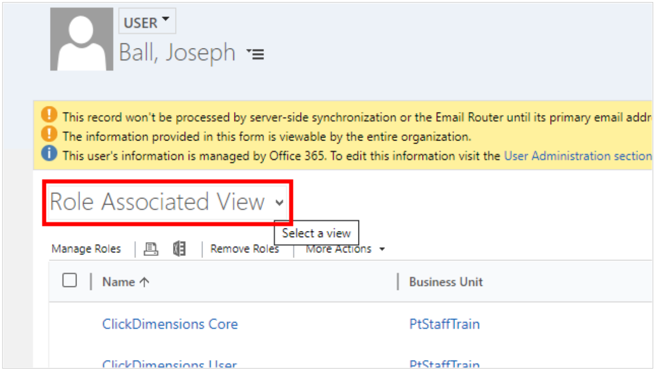
Check the box next to the Security Role to sign to the User



Click on the button OK to confirm these changes

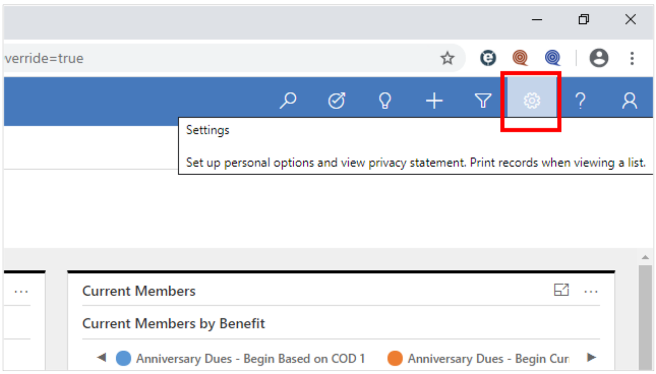


This shows the System Views for this User

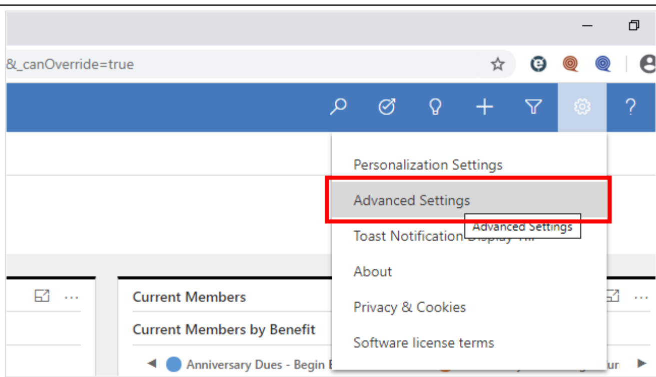


10.16.3. UX Security Roles-Copy a New Security Role

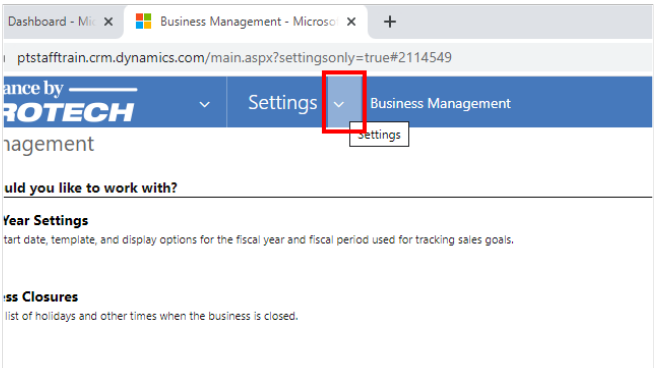
Click on the menu item **Settings**



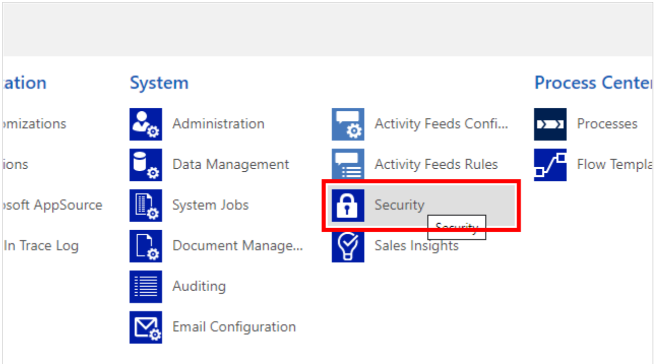
Click on the menu item **Advanced Settings**



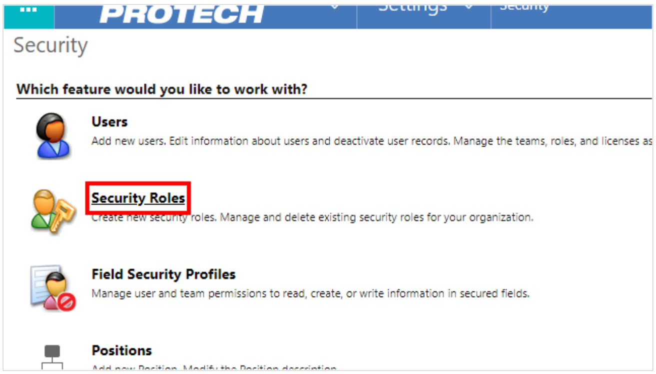
Click on the navigation button **Settings**



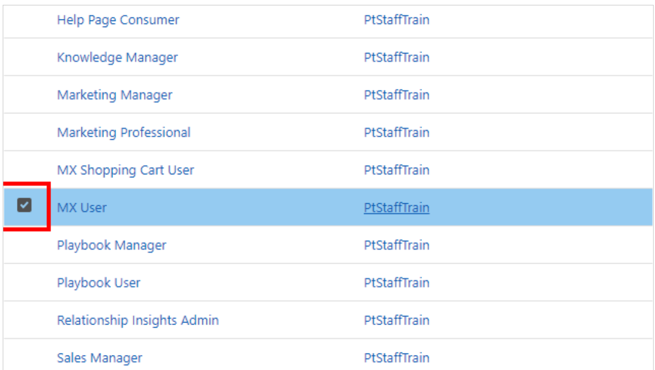
Click on the link **Security**



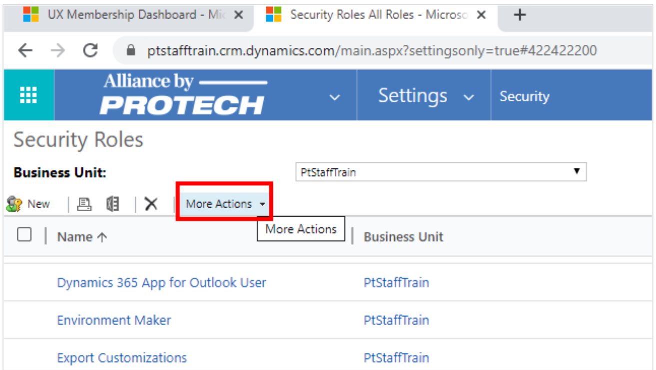
Click on the link **Security Roles**



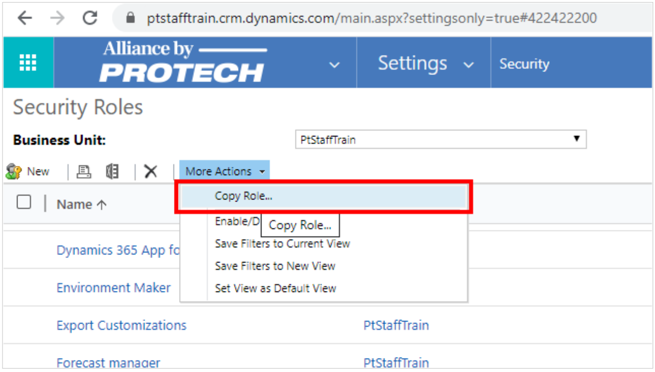
Select the Role you would like to copy



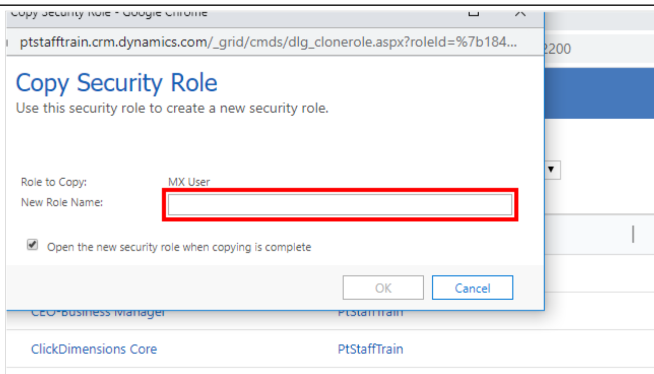
Click on the link More Actions



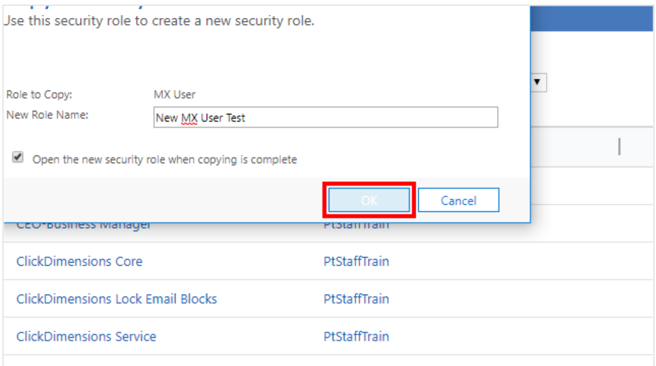
Click on the item **Copy Role...**



Create a name for the new Security Role

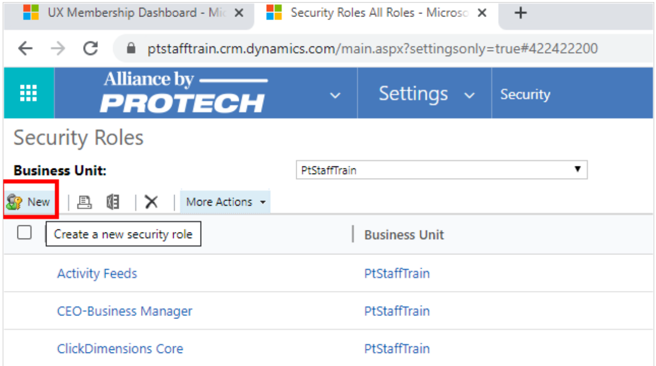


Click OK to create the new Security Role

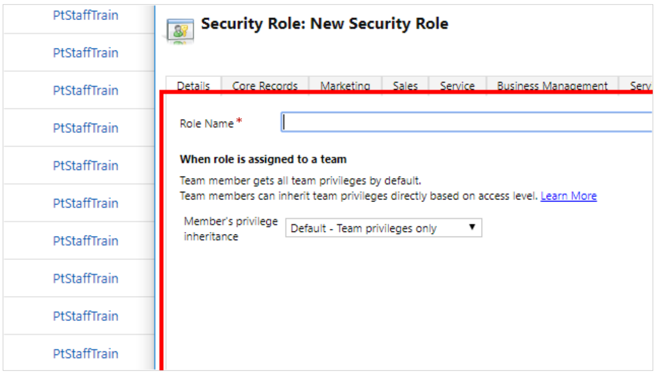


10.16.4. UX Security Roles- Create a New Security Role

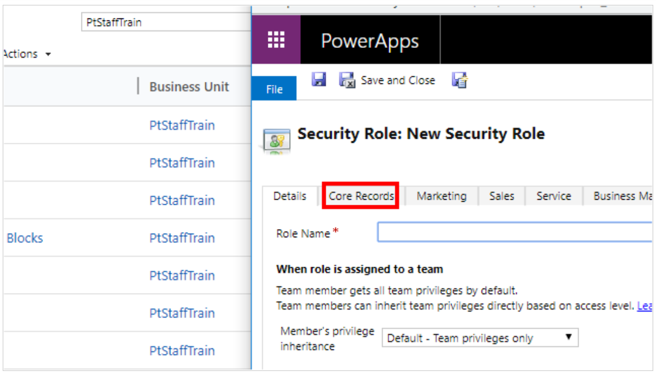
Click on the link **New**



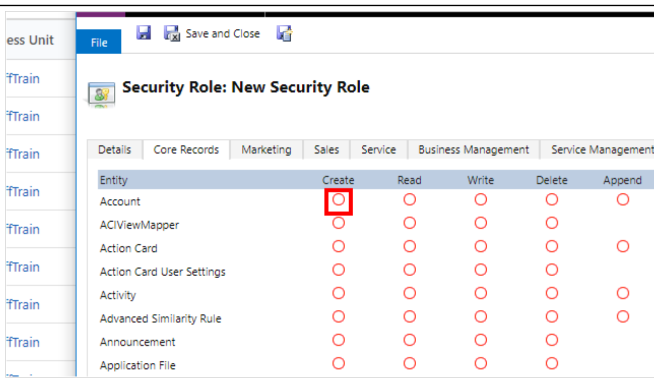
Create as name for the New Security Role



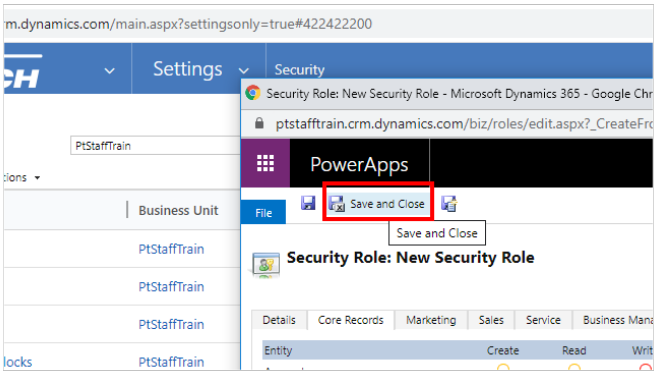
Click on a tab to edit the New Security Role



Click each enitity to change the access for each Privilege



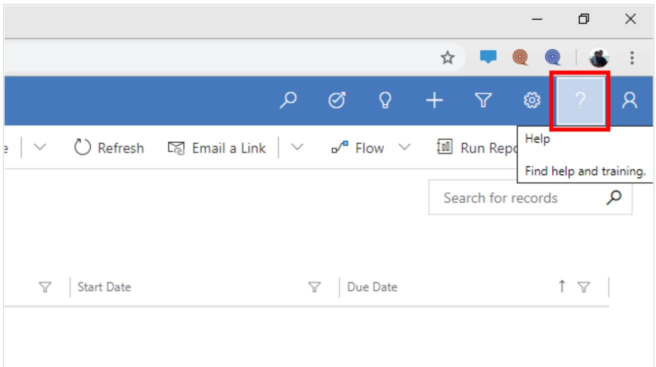
Move the mouse to the link **Save and Close**



10.17. What's New in UX 365 Help

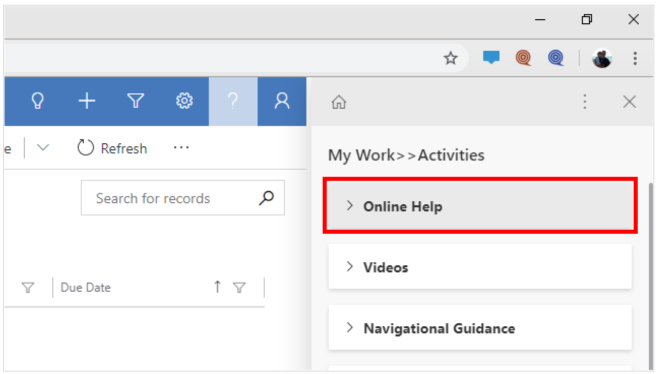
UX 365 help now combines HTML, Videos, PDF's and Dynamic Learning to assist our users in learning the feature rich set of tools available in UX 365. All of this is just one click away.

Click on the menu item **Help**

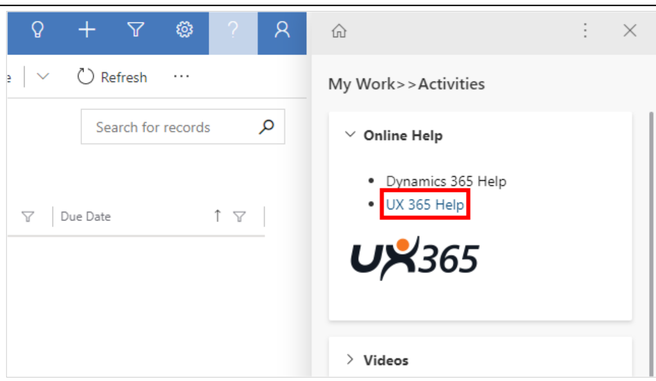


Here you will find several drop down menus containing a variety of learning materials

Select the drop down, Online Help



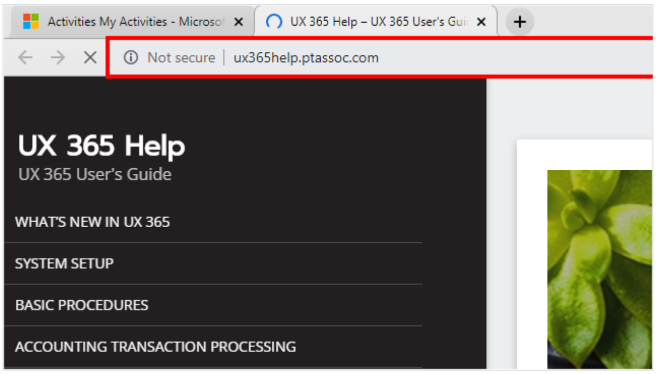
Click on the link **UX 365 Help**



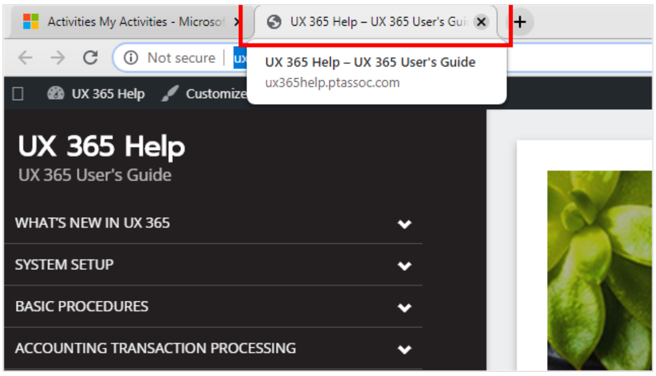
UX 365 Help contains all the documentation for the UX specific modules and features. For example, functionality regarding

Membership, Accounting, Meetings and Product Sales. As well as much more

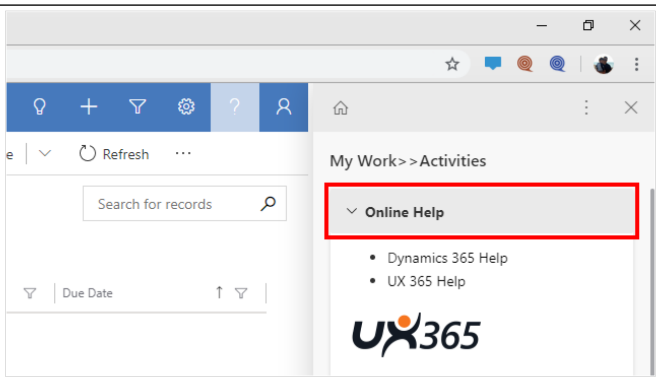
The URL is as follows:
ux365help.ptassoc.com



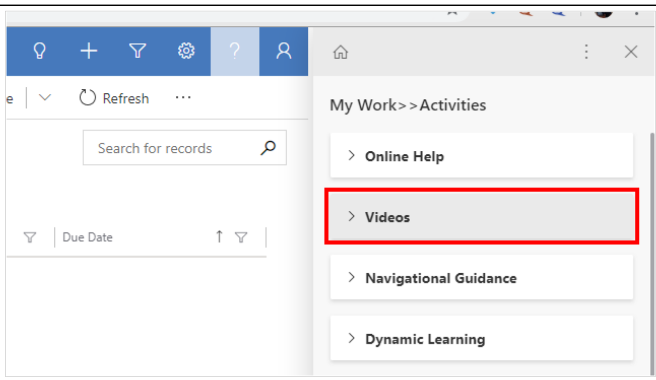
Close out of UX 365 Help



Close the Online Help section

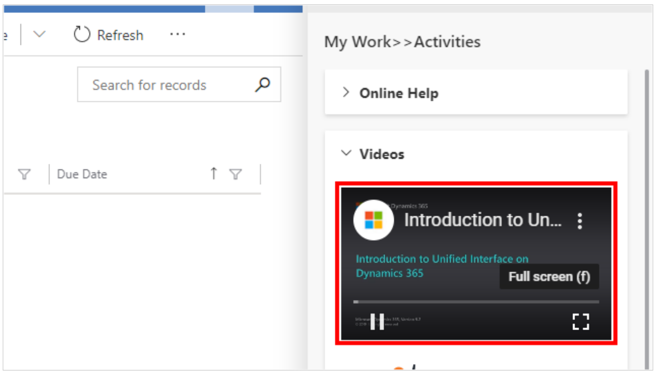


Select the drop down, Videos

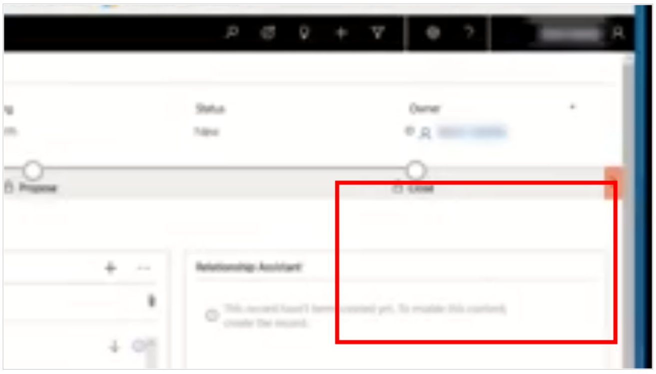


Here you will find any relevant videos based on where you are in the system

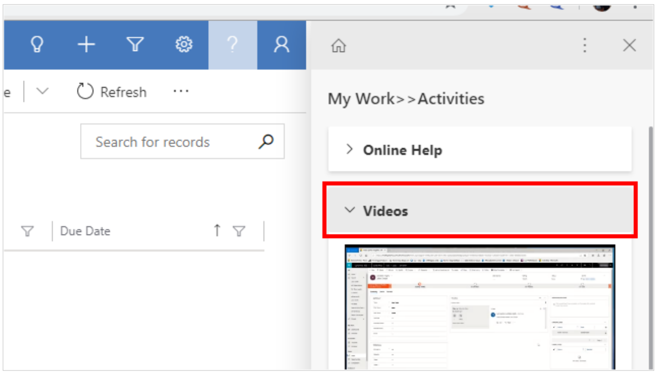
You can play the video within the panel or you can expand the video for a better picture



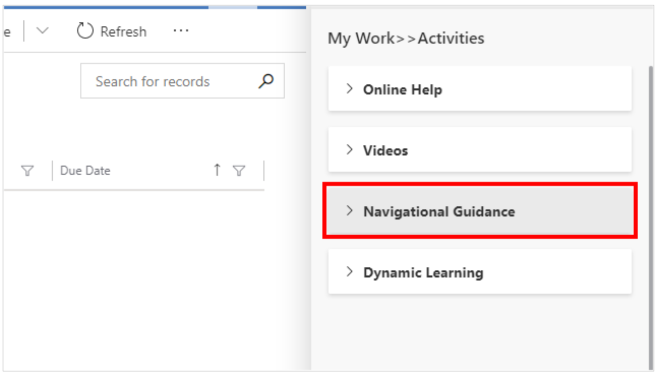
To Exit the video, press the Esc key



Close the video section

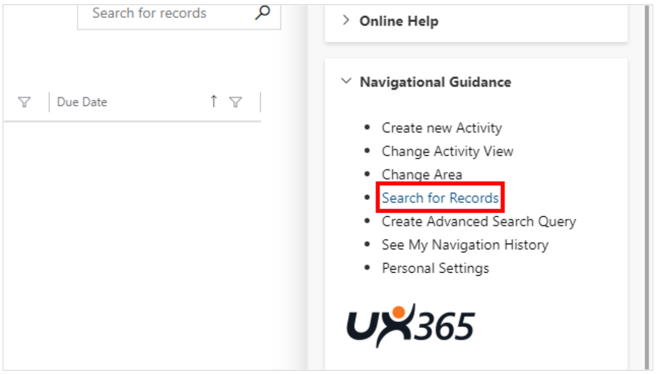


Select the menu, Navigational Guidance

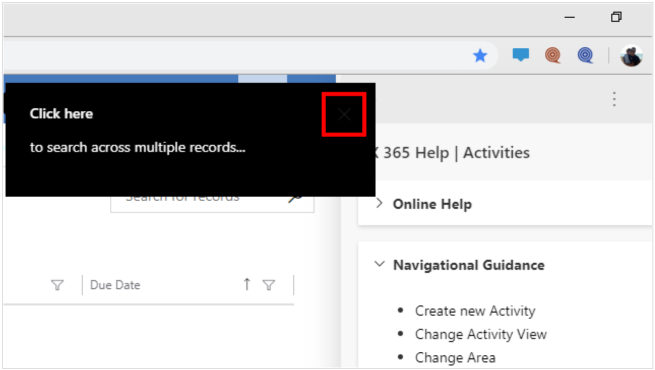


The options found here will quickly direct you to the area of the system you need access to. Once you click a menu item, the system will display a directional button telling you where to go

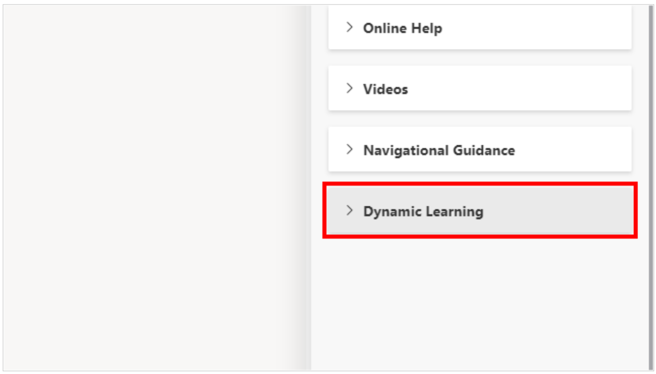
Click on the link **Search for Records**



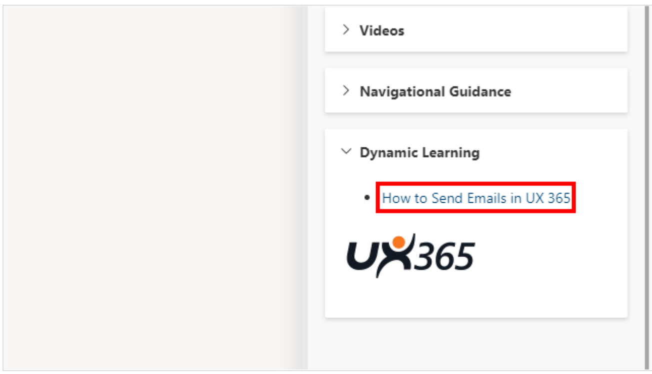
Close prompt
Notice the black and white message prompt that directs the user to the Search



Select the menu, Dynamic Learning

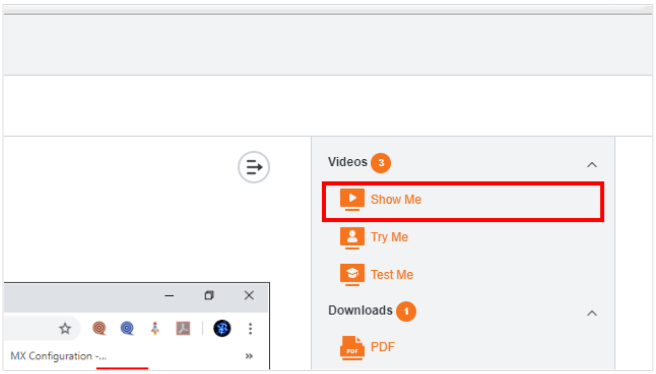


Click on the link **How to Send Emails in UX 365**



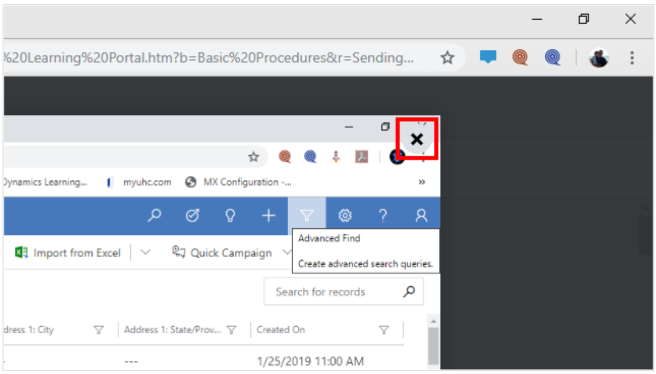
Your are now in the Protech Learning Portal. This consist of all of Protech's dynamic learning content. These learning materials allow you to learn the specific subjects your interested in via HTML, Video and downloadable PDF's. Look to the right hand side for all your options OR simply scroll the HTML to view the information you need

Click on the link **Show Me**

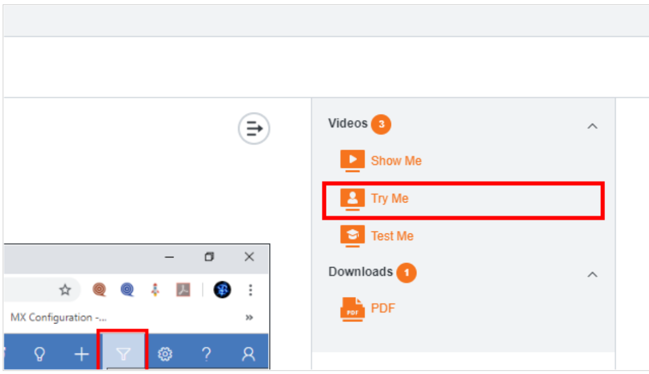


Show me will trigger a video which will take you through the subject material step by step

Close Video

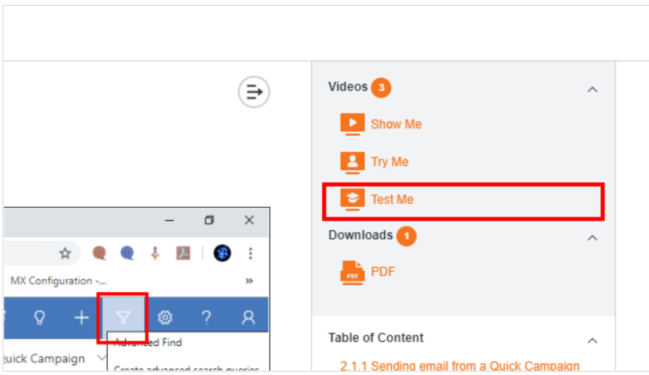


Click on the link **Try Me**



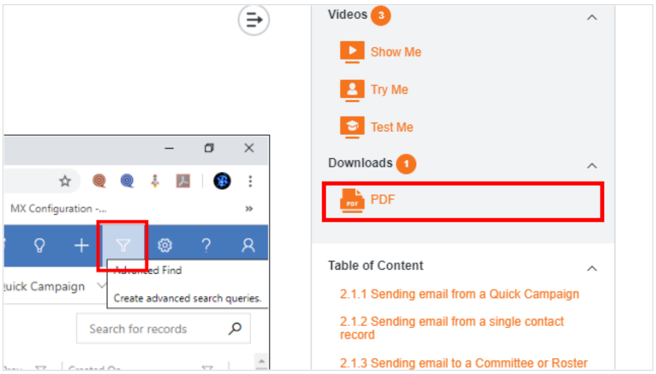
Try Me will trigger a video as well. However, this time the video will direct you where to click within the video step by step to encourage greater learning retention

Click on the link **Test Me**



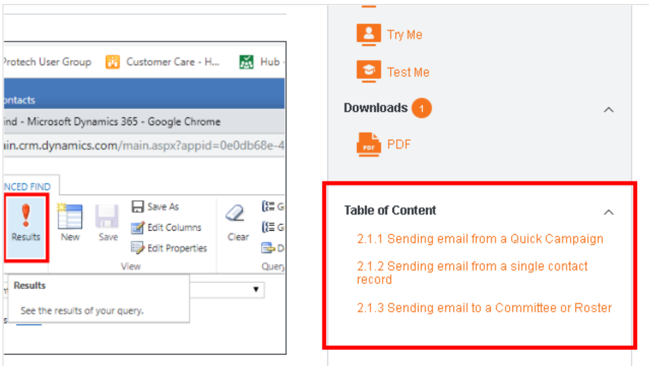
Test me takes it one step further and ask the user to click through the steps with little help. This is a great tool for onboarding and learning new processes.

Click on the link **PDF**



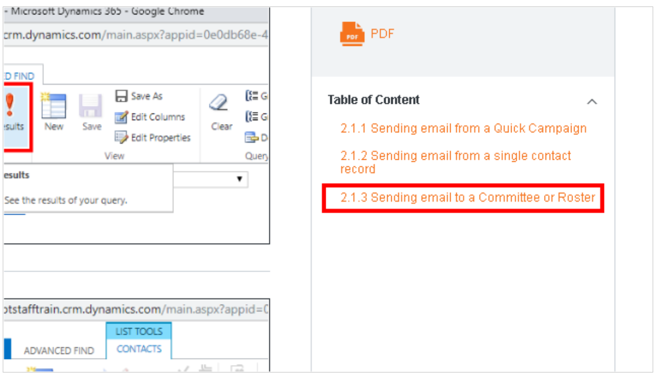
Selecting the PDF option allows users to download and save the learning material to their workstations or wherever device they are working with

Table of Contents

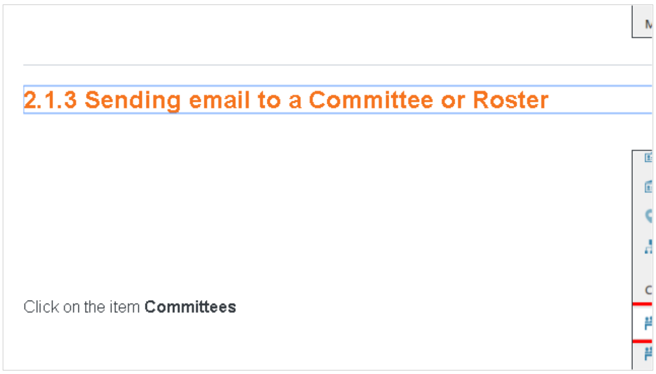


Here you can quickly jump through the HTML page to get the information you need quickly

Click on a link

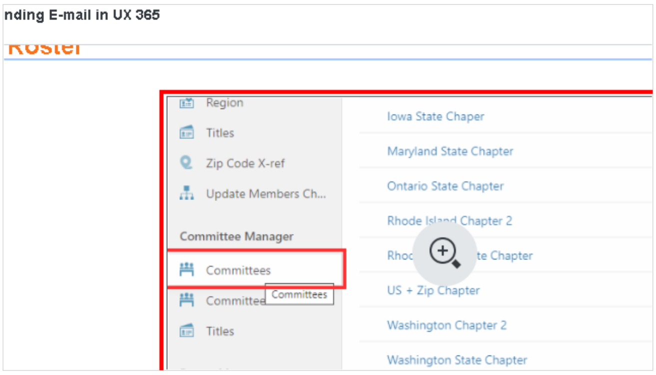


The hyperlink jumps to the section you clicked on



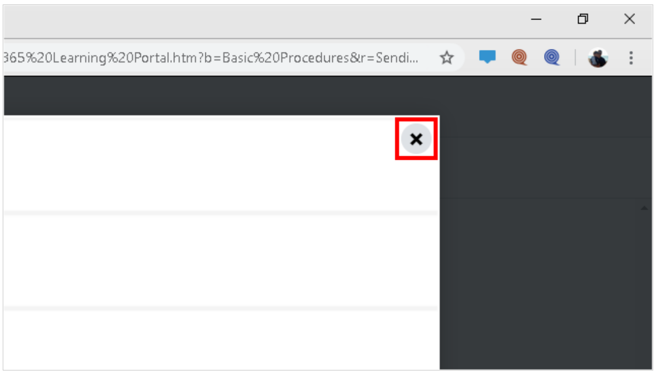
You can get a closer look at any of the images by clicking on the magnifying glass in the center of the image

Click on the image

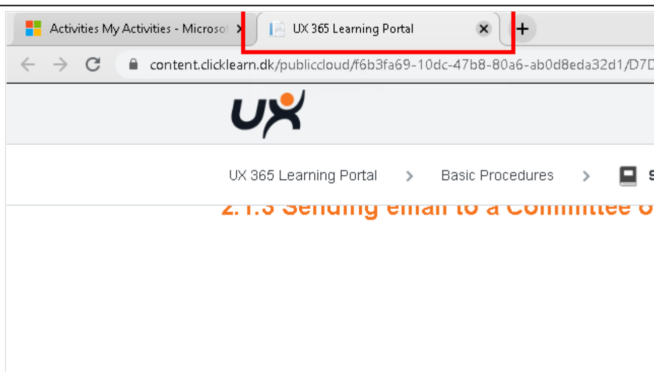


The image becomes much larger and easier to read

Close window



Close window



Close UX 365 Help
This concludes the review of the UX 365 Help learning tools.
Enjoy and happy Learning!