

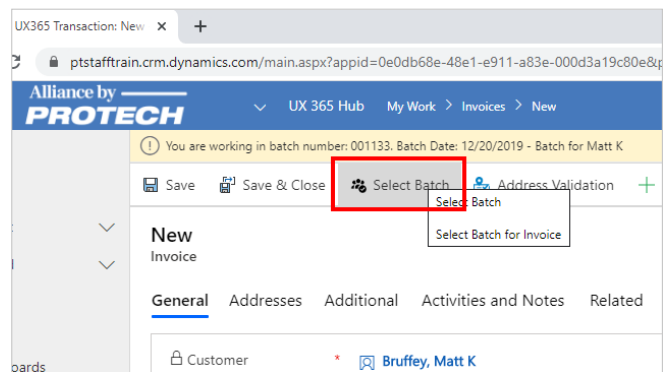
UX 365 Learning Portal

1.Accounting

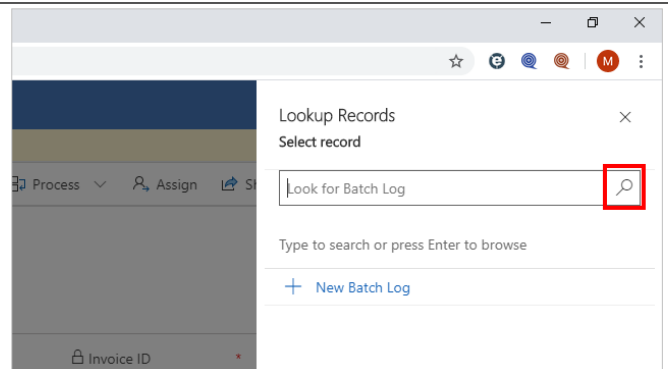
1.1. Applying a Cash or Check Payment

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

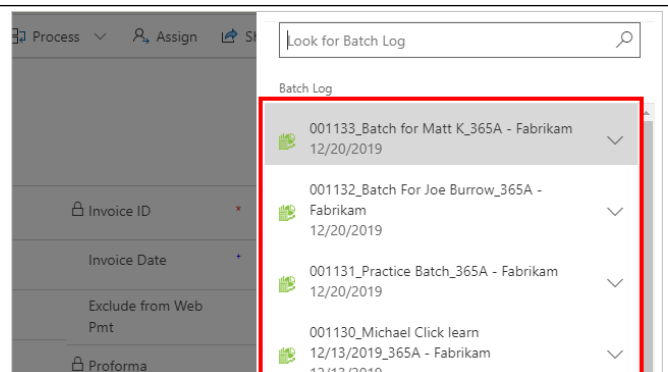
Click on the menu item **Select Batch**



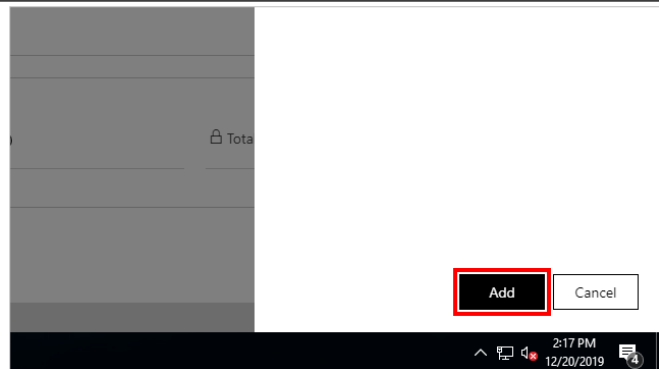
Click on, Batch Log look up



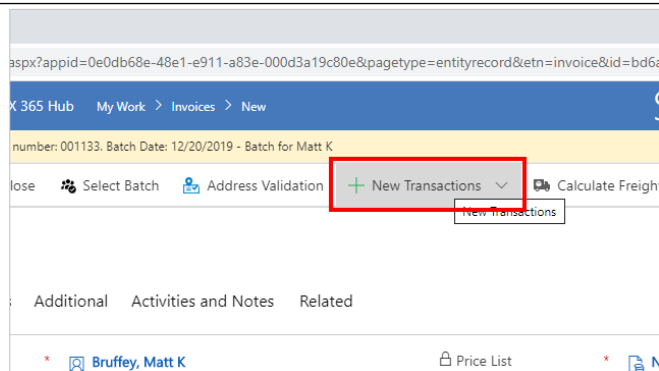
Click on an option from the list



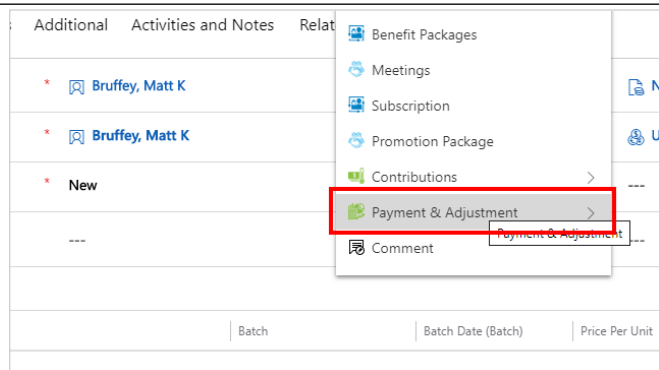
Click on the button **Add**



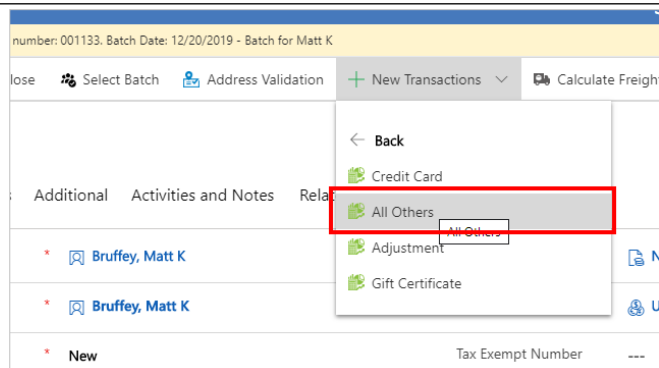
Click on the menu item **New Transactions**



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



Click on the menu item **All Others**



Click on the lookup field **Product**

Invoice Detail	
Invoice Detail · Payment Transaction ▾	
General	
Invoice Detail	
Product *	Look for Product
Reference *	---
Batch	100570
Customer +	Matt Bruffey

Select check payment

Invoice Detail	
Invoice Detail · Payment Transaction ▾	
General	
Invoice Detail	
Product *	Look for Product
Reference *	Products
Batch	<div> Check_Fabrikam USD CK_FABRIKAM_USD </div>
Customer +	<div> Refund_Fabrikam USD RF_Fabrikam USD </div>
	<div> Write-Off_Fabrikam USD WO_Fabrikam USD </div>

Click on the text field **Reference**

Invoice Detail · Payment Transaction ▾	
General	
Invoice Detail	
Product *	Check_Fabrikam USD ×
Reference *	---
Batch	100570
Customer +	Matt Bruffey

Enter check number

Invoice Detail · Payment Transaction ▾	
General	
Invoice Detail	
Product *	Check_Fabrikam USD
Reference *	
Batch	100570
Customer +	Matt Bruffey

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)**

The screenshot shows the Protech UX interface. On the left sidebar, under the 'Marketing' section, the 'My Work (change area)' button is highlighted with a red box. The main content area shows a list of items with columns for 'All', '#', 'A', 'B', and 'C'. The status '1 - 1 of 1 (0 selected)' is displayed. The user's name 'Bruffey Jr, Brian' is visible in the top right corner.

Click on the item **Financial Manager**

The screenshot shows the Protech UX interface. On the left sidebar, under the 'Financial Manager' section, the 'Financial Manager' item is highlighted with a red box. The main content area shows a list of items with columns for 'All', '#', 'A', 'B', and 'C'. The status '1 - 1 of 1 (0 selected)' is displayed. The user's name 'Bruffey Jr, Brian' is visible in the top right corner.

Click on the item **AutoPay**


The screenshot shows the Protech UX interface. On the left sidebar, under the 'Accounting Manager' section, the 'AutoPay' item is highlighted with a red box. The main content area shows a list of items with columns for 'All', '#', 'A', 'B', and 'C'. The status '1 - 1 of 1 (0 selected)' is displayed. The user's name 'Bruffey Jr, Brian' is visible in the top right corner.


Click on **Recurring Gift Installments AutoPay Process**

The screenshot shows the Protech UX interface. On the left sidebar, under the 'Accounting Manager' section, the 'Recurring Gift Installments AutoPay Process' item is highlighted with a red box. The main content area shows a list of items with columns for 'All', '#', 'A', 'B', and 'C'. The status '1 - 1 of 1 (0 selected)' is displayed. The user's name 'Bruffey Jr, Brian' is visible in the top right corner.

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

Installments AutoPay Process

Batch Number: * 

Date: * 

Select a batch to process the payment.

Look Up Records

Enter your search criteria.

Look For:

Search:

Batch Nu...	Batch Date	Name
<input checked="" type="checkbox"/> 001143	10/16/2020	Daily Batch
<input type="checkbox"/> 001142	10/15/2020	Daily Batch
<input type="checkbox"/> 001130	10/5/2020	BBruf Demo ...
<input type="checkbox"/> 001124	9/24/2020	Web Batch
<input type="checkbox"/> 001123	9/24/2020	Daily Activity


Add the batch.


Showing 1 to 6 of 6 rows

16:06 10/15/2020

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

Installments AutoPay Process

Batch Number: * 

Date: * 

Enter the due date.

Click on the button **OK**

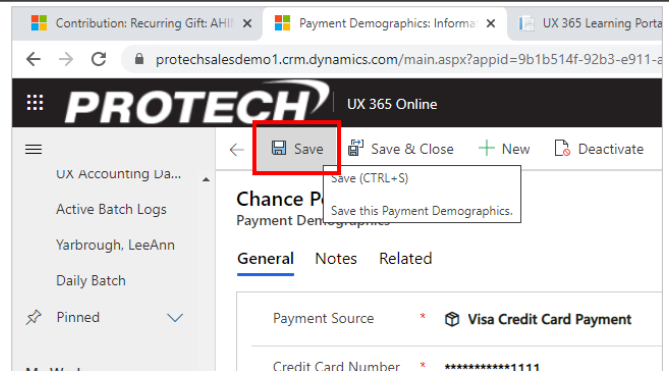
The next screen will show the number of payments applied. Select OK to finalize the autopay process.

1.3. Autopay renewal invoices

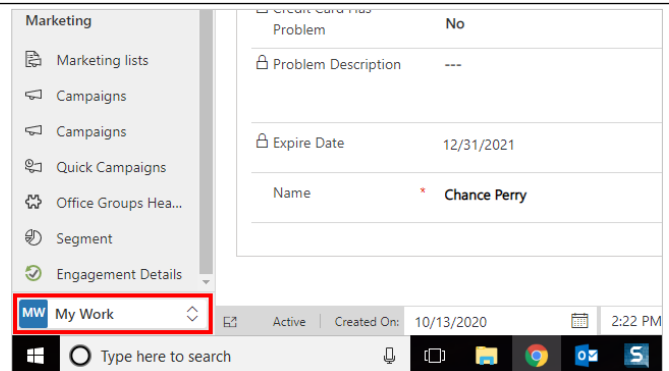
To process payments using AutoPay, the contact must have a payment demographics record. This is an authorized credit card saved to their contact record in the AMS. Members can allow or restrict payments by module. For membership, simply change membership to Allow. Members can also manage these preferences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

Address 1	5950 Fairview Rd Ste 305
State	NC
Modules	
Membership	Do not allow
Meetings	Allow
Certification	Allow

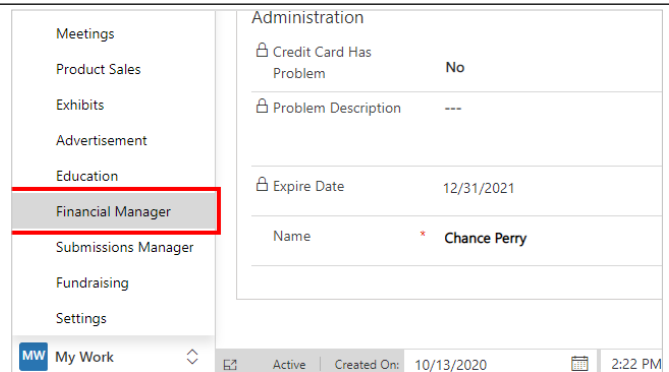
When you are done modifying the payment demographics record. Select save to finalize the changes.



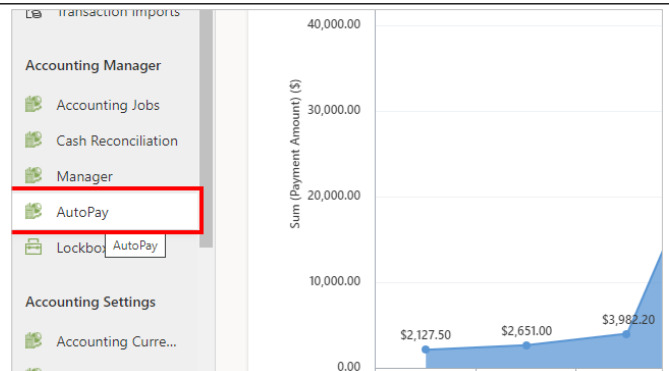
Click on the button **My Work (change area)**



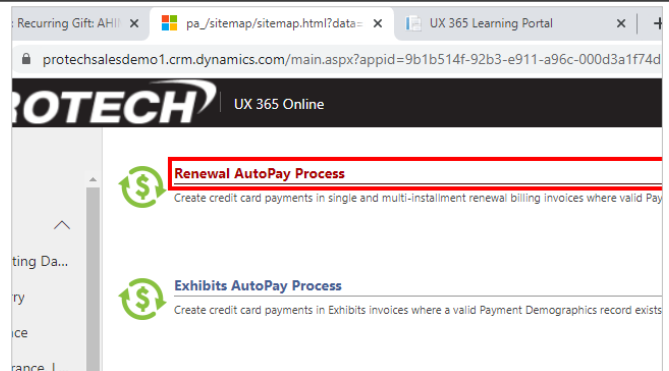
Click on the item **Financial Manager**



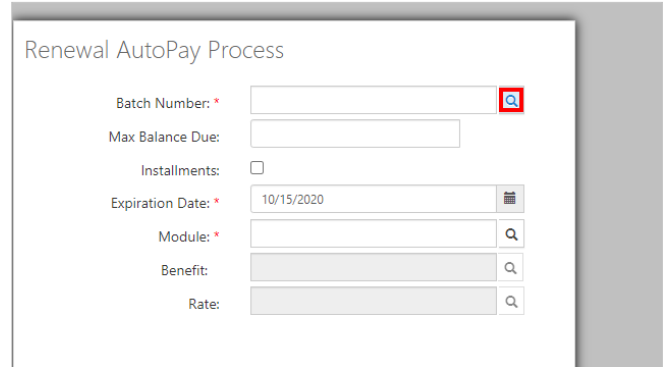
Click on the item **AutoPay**



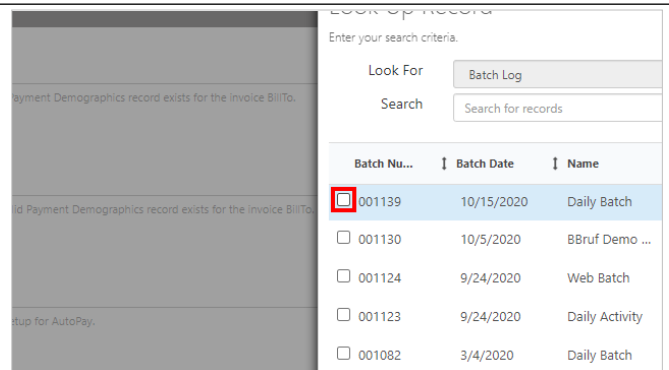
Click on **Renewal AutoPay Process**



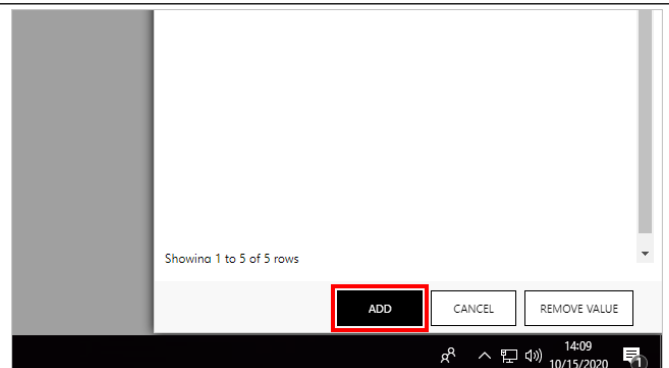
When the autopay process is open. Select the lookup to select a batch.



Select a batch to process the payment.



Add the batch.



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

Pay Process

Number: * 001139

Due Date:

Installments: ☐

Expiration Date: * 10/15/2020

Module: *

Benefit:

Rate:

Enter the expiration date.

Installments: ☐

Expiration Date: * 08/31/2021

Module: *

Benefit:

Rate:

OK CLOSE

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

Renewal AutoPay Process

Batch Number: * 001139

Max Balance Due:

Installments: ☐

Expiration Date: * 08/31/2021

Module: *

Benefit:

Rate:

Select Membership

Look Up Records

Enter your search criteria.

Look For: Module

Search: Search for records

Name	Code
<input checked="" type="checkbox"/> Membership	10
<input type="checkbox"/> Subscriptions	40

Select Add

Showing 1 to 2 of 2 rows

ADD CANCEL REMOVE VALUE

14:09 10/15/2020

Select OK to run the AutoPay process.

Expiration Date:

Module: * Membership

Benefit:

Rate:

OK CLOSE

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

Search found 1 Renewal invoice(s).

This action will create payment for the renewal invoice(s).

This action may take several minutes to complete and cannot be undone.

Would you like to continue?

OK CLOSE

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

The screenshot shows the 'New Transactions' dropdown menu. The menu is open, and the 'New Transactions' option is highlighted with a red box. The background shows the invoice details for 'Baseball Jersey 1, Product Sales - Baseball Jersey'.

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

The screenshot shows the 'Payment & Adjustment' dropdown menu. The menu is open, and the 'Payment & Adjustment' option is highlighted with a red box. The background shows the invoice details for 'Baseball Jersey 1, Product Sales - Baseball Jersey'.

Click on the menu item **All Others**

The screenshot shows the 'All Others' dropdown menu. The menu is open, and the 'All Others' option is highlighted with a red box. The background shows the invoice details for 'Baseball Jersey 1, Product Sales - Baseball Jersey'.

Click on the Product field look up

The screenshot shows the Product field look up search bar. The search bar is highlighted with a red box. The background shows the invoice details for 'Baseball Jersey 1, Product Sales - Baseball Jersey'.

Click on the item Check Payment

ral	
oice Detail	
Product *	Look for Product
Reference *	Products
Batch	Check Payment CK
Customer *	Refund RF

Click on the text field **Reference**

e Detail · Payment Transaction ▾	
ral	
oice Detail	
Product *	Check Payment X
Reference *	---
Batch	001121
Customer *	deGrom, Jacob

Enter reference number used on the original check payment

e Detail · Payment Transaction ▾	
ral	
oice Detail	
Product *	Check Payment
Reference *	1
Batch	001121
Customer *	deGrom, Jacob

Click on the text field **Payment**

Description *	
Check Payment	
Payment *	\$0.00
Transaction Date *	12/6/2019

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

Enter the negative amount

Description	* Check Payment
Payment	* -1
Transaction Date	* 12/6/2019

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

Payments	\$0.00	balance Due	\$55.00
Invoice ID	* INV-01373-N6R4M6		

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

Save	Save & Close	Close	Flow
New Invoice Invoice Detail · Pay Save and close this Invoice Detail.			
General Invoice Detail Product * Check Payment			

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

Invoice Associated View			
Invoice Date	Invoice ID	Customer	
12/6/2019	INV-01373-N6R4M6	deGrom, Jacob	
12/6/2019	INV-01380-D0F0H2	deGrom, Jacob	
12/6/2019	INV-01374-X9N6N3	deGrom, Jacob	
12/6/2019	INV-01377-Q7	deGrom, Jacob	

Click on the Credit Card payment detail record

Source Code		---
Details		
Description	Batch	
Baseball Jersey	001121	
Visa Credit Card Payment - Authorized	001121	

Click on the menu option, Void Payment

UX 365 Hub My Work > Invoice Details > Visa Credit Card Payment

Save & Close Close Refresh Void Payment Edit Properties

Credit Card Payment

Detail - Credit Card

ral Credit Card Log Administration Related

oice Detail

Product * Visa Credit Card Payment

Click on the button OK to process the voided payment

Are you sure you want to Void this transaction?

12/6/2019

OK Cancel

City New York

ZIP/Postal Code 123456

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

A screenshot of a web application interface for an invoice. At the top, there is a navigation bar with icons for search, add, filter, settings, and help. Below this is a toolbar with buttons for 'Process', 'Assign', 'Share', 'Email a Link', and 'Flow'. The main content area shows a summary of the invoice with two fields: 'Payments' with a value of '\$0.00' and 'Balance Due' with a value of '\$45.00'. The 'Balance Due' field is highlighted with a red box. Below the summary, there is a section for 'Invoice ID' with the value 'INV-01374-X9N6N3'.

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**

A screenshot of a web application interface for an invoice. The top navigation bar includes the 'Alliance by PROTECH' logo and a dropdown menu for 'UX 365 Hub'. The main content area shows a summary of the invoice with a 'Save & Close' button highlighted by a red box. Below the summary, there is a section for 'Customer' with the value 'deGrom, Jacob'.

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

INVOICE ASSOCIATED VIEW			
	Invoice Date	Invoice ID	Customer
	12/6/2019	INV-01373-N6R4M6	deGrom, Jacob
	12/6/2019	INV-01380-D0F0H2	deGrom, Jacob
	12/6/2019	INV-01374-X9N6N3	deGrom, Jacob
	12/6/2019	INV-01377-Q7Q8Y2	deGrom, Jacob
All # A B C D E F			
1 - 4 of 4 (0 selected)			

Click on the Credit Card payment line item

The screenshot shows the CRM interface. On the left, the 'Invoices' menu is selected. On the right, a table lists invoice items. The item 'Visa Credit Card Payment - Authorize...' is highlighted with a red box. The table has columns for 'Description' and 'Batch'.

Description	Batch
Baseball Jersey	001121
Visa Credit Card Payment - Authorize...	001123

Click on the menu option, Credit Payment

The screenshot shows the CRM interface. The 'Credit Payment' menu option is highlighted with a red box. The interface includes a navigation bar with 'UX 365 Hub' and 'My Work' tabs. The main content area shows 'Credit Card Payment' details.

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

The screenshot shows the 'Credit Payment Process' dialog box. The 'Credit Amount' field is set to 65.00. The 'OK' button is highlighted with a red box. The dialog box includes a 'CLOSE' button and a message: 'Click OK to process Credit Payment'.

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

The screenshot shows the CRM interface. The 'Save & Close' menu item is highlighted with a red box. The interface includes a navigation bar with 'UX 365 Hub' and 'My Work' tabs. The main content area shows 'Visa Credit Card' details.

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

The screenshot shows the UX365 interface with a form containing the following fields:

- Payments:** \$0.00
- Balance Due:** \$65.00 (highlighted with a red box)
- Invoice ID:** INV-01377-Q7Q8Y2

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

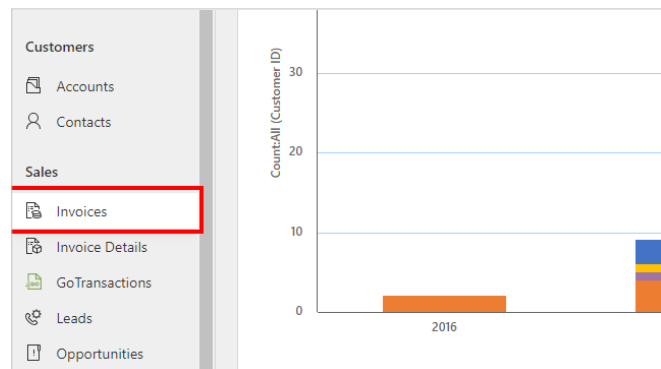
The screenshot shows the UX365 interface with the 'Save & Close' button highlighted by a red box. The interface includes a sidebar with navigation options (Home, Recent, Pinned, My Work, Dashboards) and a main content area displaying the 'Product Sales 3 - Invoice' form. The 'Save & Close' button is located in the top right corner of the form.

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.

SANDBOX			
Link ▾ Flow ▾ Run Report ▾ Excel Templates ▾ Export to Excel			
▾	Name	▾	Bill to Customer
les	Product Sales - 365 Sales Inventory Kit		Baltimore Orioles
les	Product Sales - Black Pa	Product Sales - 365 Sales Inventory Kit	Baltimore Orioles

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

Click on the transfer payment transaction.

Source Code	---	Promotion	
Details			
✓	Description	Batch	Batch Date (Batch
	365 Sales Inventory Kit	001118	12/6/2019
	Component 1	001118	12/6/2019
	Component 2	001118	12/6/2019
	Visa Credit Card Payment - Authorized	001118	12/6/2019
	Transfer Payment To: INV-01378-W3...	001118	12/6/2019
Transfer Payment To: INV-01378-W3V2J9 (TR OUT)			

Click on the menu item **Cancel**

Pmt				
Proforma				
<div> <div>✖ Cancel</div> <div>✎ Edit Properties</div> <div>💡 Suggestions</div> <div>✉ Email a Link</div> <div>⋮</div> </div>				
Cancel Selected Detail				
Tax		Payment	Line No	↑
\$0.00	\$7.50	\$157.50	---	1
---	\$0.00	\$0.00	---	2
---	\$0.00	\$0.00	---	3
---	\$0.00	\$0.00	\$157.50	4
---	\$0.00	\$0.00	(\$20.00)	5

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**

Transaction Items Cancel Confirmation

You have selected 1 records for cancellation.

OK

CLOSE

Confirm the transfer payment transaction has been removed.

Product Sales - 365 Sales Inventory Kit		Tax Lot(s)	
Source Code		Promotion	
Details			
<input checked="" type="checkbox"/>	Description	Batch	Batch Date (Batch Date)
<input type="checkbox"/>	365 Sales Inventory Kit	001118	12/6/2019
<input type="checkbox"/>	Component 1	001118	12/6/2019
<input type="checkbox"/>	Component 2	001118	12/6/2019
<input checked="" type="checkbox"/>	Visa Credit Card Payment - Authorized	001118	12/6/2019

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

You are working in batch number: 001118. Batch Date: 12/6/2019 - test

Save Save & Close Select Batch Address Validation + New Transaction

Product Sales - 365
Invoice

Save & Close
Save and close this Invoice.

General Addresses Additional Activities and Notes Related

Customer * Baltimore Orioles Price

Bill to Customer * Baltimore Orioles Current

Name * Product Sales - 365 Sales Inventory Kit Tax Ex

1.6. Closing a Batch

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

Invoice Details Go Transactions Leads Opportunities

Marketing Marketing Lists Quick Campaigns

MW My Work

My Work (change area)

Type here to search

2016

Current Members

Current Members by Benefit Status

Count:Non-empty (Benefit Status)

Click on the item **Financial Manager**

Renewal Member Groups Meetings Product Sales Education Fundraising

Financial Manager

Settings Financial Manager

MW My Work

Type here to search

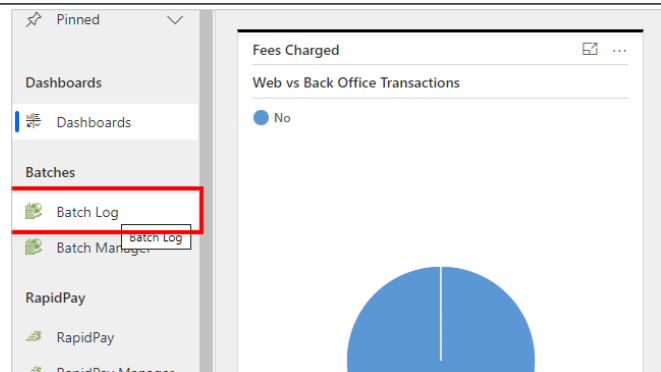
2016

Current Members

Current Members by Benefit Status

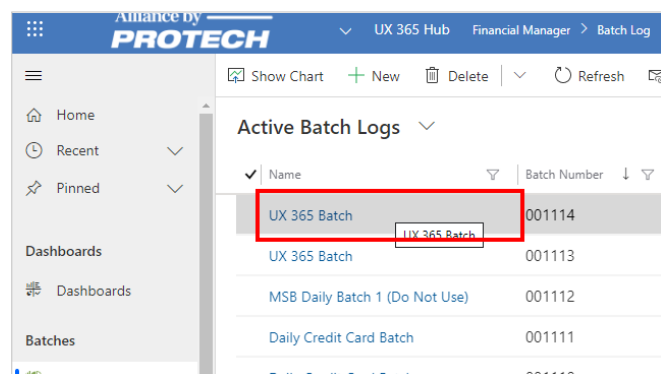
Count:Non-empty (Benefit Status)

Click on the item **Batch Log**

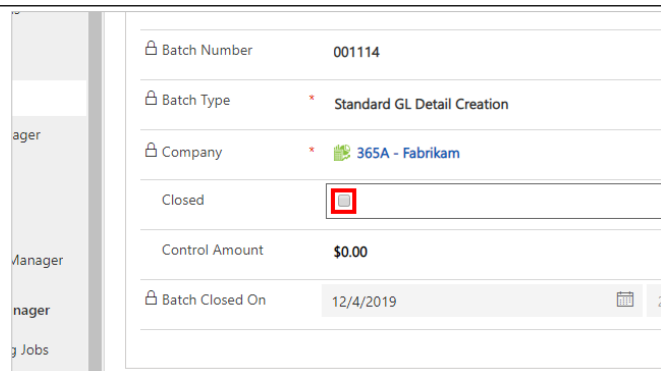


In the Batch Log list, locate and open the batch you want to close.

Click on the cell **Name**

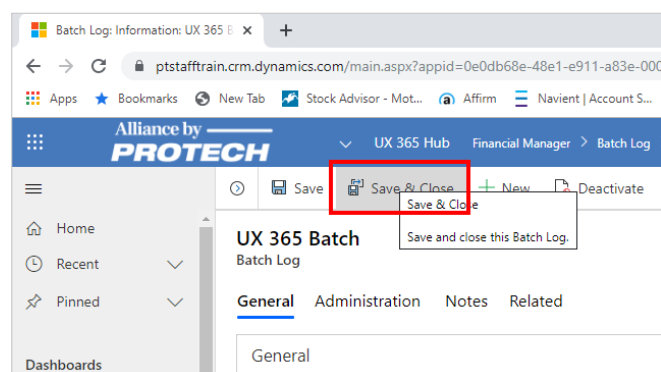


Click on the checkbox **Closed**



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](#).

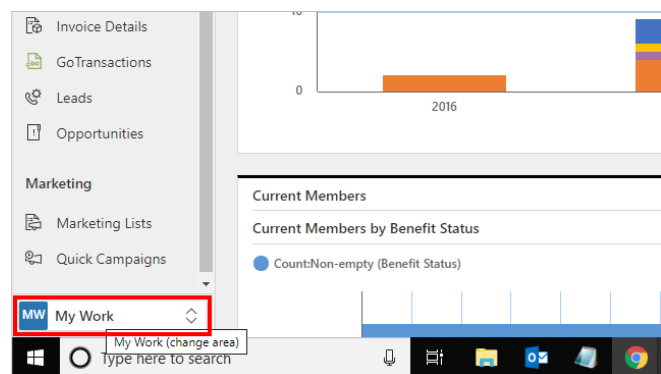
Click on the menu item **Save & Close**



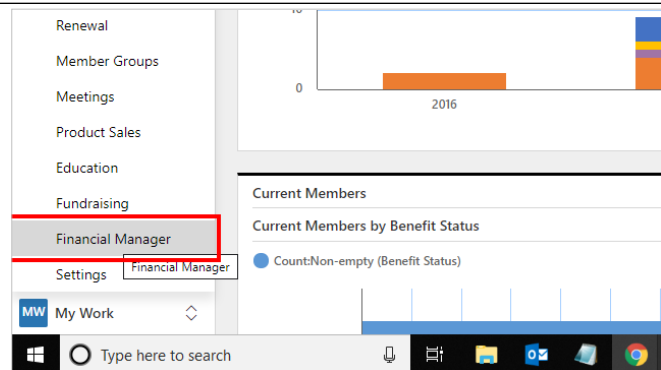
1.7. Creating a Batch

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.

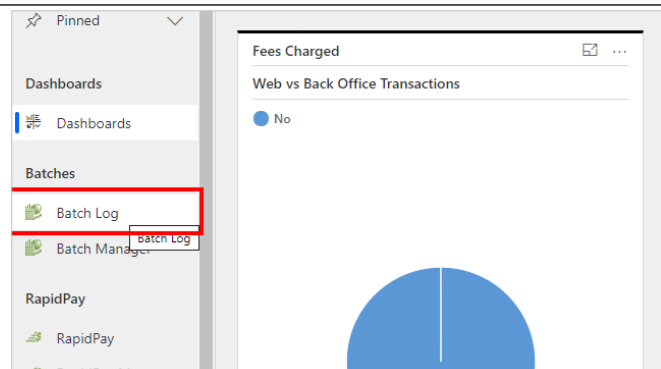
Click on the button **My Work (change area)**



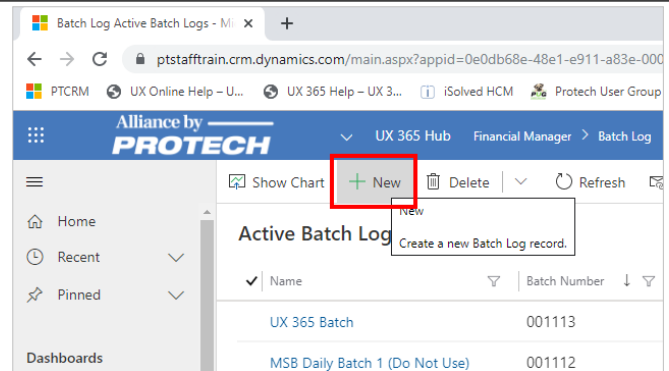
Click on the item **Financial Manager**



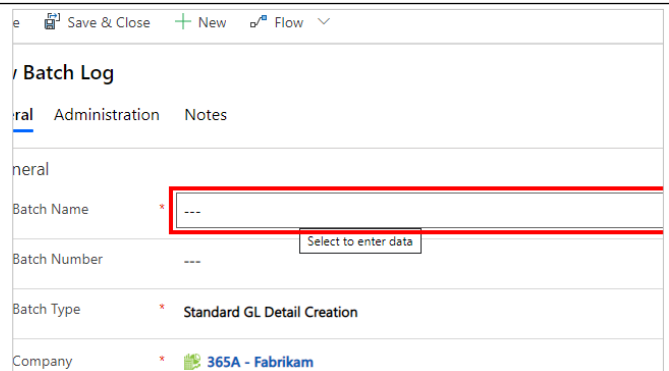
Click on the item **Batch Log**



Click on the menu item **New**

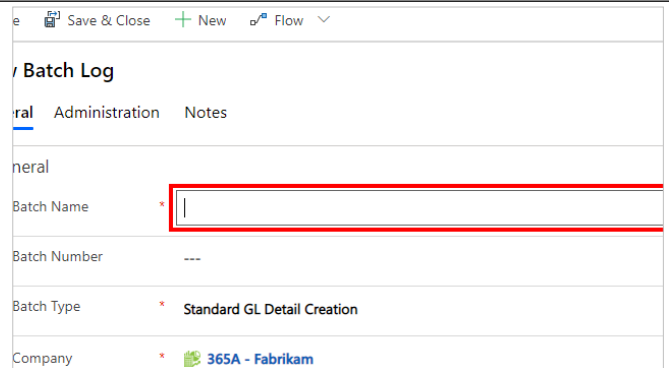


Click on the text field **Batch Name**



The screenshot shows the 'Batch Log' form. The 'Batch Name' field is highlighted with a red rectangle. The form includes fields for Batch Name, Batch Number, Batch Type, and Company. The Batch Type is set to 'Standard GL Detail Creation' and the Company is '365A - Fabrikam'.

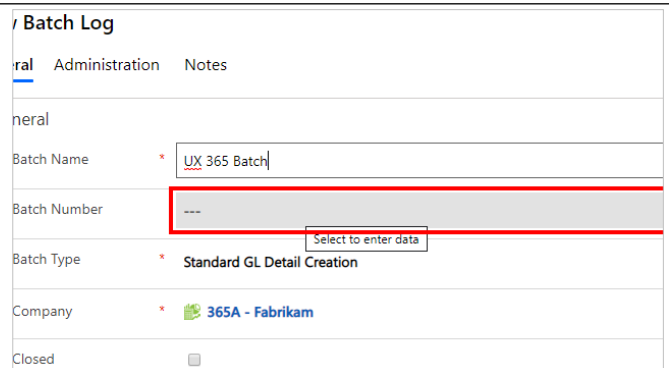
Enter Batch Name



The screenshot shows the 'Batch Log' form. The 'Batch Name' field is highlighted with a red rectangle. The form includes fields for Batch Name, Batch Number, Batch Type, and Company. The Batch Type is set to 'Standard GL Detail Creation' and the Company is '365A - Fabrikam'.

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.



The screenshot shows the 'Batch Log' form. The 'Batch Number' field is highlighted with a red rectangle. The form includes fields for Batch Name, Batch Number, Batch Type, and Company. The Batch Type is set to 'Standard GL Detail Creation' and the Company is '365A - Fabrikam'.

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 Date	*	12/4/2019
Event		---
Web Batch		No
Owner	*	Goldman, Bryan

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.

Batch Name	*	UX 365 Batch
Batch Number		---
Batch Type	*	Standard GL Detail Creation
Company	*	365A - Fabrikam
Closed		<input type="checkbox"/>
Control Amount		---

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.

Batch Date	*	12/4/2019
Event		Look for Event
Web Batch		No
Owner	*	Goldman, Bryan
Go Transaction Batch		No


Company

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

Batch Name	*	UX 365 Batch
Batch Number		---
Batch Type	*	Standard GL Detail Creation
Company	*	365A - Fabrikam
Closed		<input type="checkbox"/>
Control Amount		---
Batch Closed On		---



Web Batch

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

Batch Date	* 12/4/2019
Event	---
Web Batch	No
Owner	*  Goldman, Bryan
Go Transaction Batch	No
Close from Nightly Process	No



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.

Batch Name	UX 365 Batch
Batch Number	---
Batch Type	* Standard GL Detail Creation
Company	*  365A - Fabrikam
Closed	<input type="checkbox"/>
Control Amount	---
Batch Closed On	---  ---


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.

Batch Number	---
Batch Type	* Standard GL Detail Creation
Company	*  365A - Fabrikam
Closed	<input type="checkbox"/>
Control Amount	---
Batch Closed On	---  ---
Detail Information	

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.

Batch Closed On	---  ---
Detail Information	
Ready for GL Detail	No
Created Date	---
Accounting System Posting	

GL Detail Created

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

Close from Nightly Process	No
GL Detail Created	No

Created Date

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

Detail Information	
Ready for GL Detail	No
Created Date	---
counting System Posting	
Ready To Post	No

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.

Ready for GL Detail	No
Created Date	---
counting System Posting	
Ready To Post	No
Posted Date	---

Posted

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

GL Detail Created	No
Posted	No

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.

Created Date: ---

Counting System Posting

Ready To Post: No

Posted Date: ---

Active: |

Click on the menu item Save

Batch Log: Information: New Batch

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

PTCRM UX Online Help - U... UX 365 Help - UX 3... iSolved HCM Protech User Group

Alliance by **PROTECH** UX 365 Hub

Save Save & Close + New Flow

Save (CTRL+S)

New Save this Batch Log.

General Administration Notes

Batch Type * Standard GL Detail Creation

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)**

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

MW My Work

My Work (change area)

Type here to search

Click on the item **Financial Manager**

Renewal

Member Groups

Meetings

Product Sales

Education

Fundraising

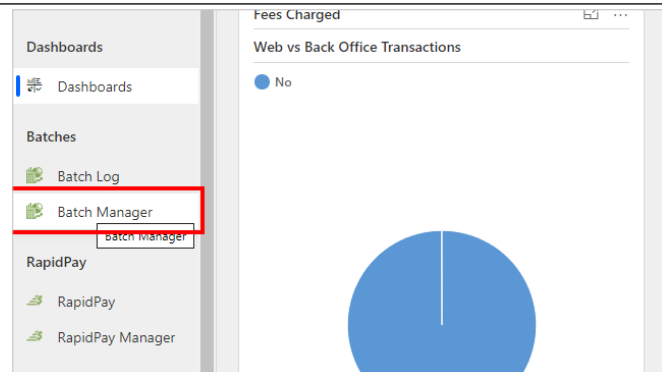
Financial Manager

Settings Financial Manager

MW My Work

Type here to search

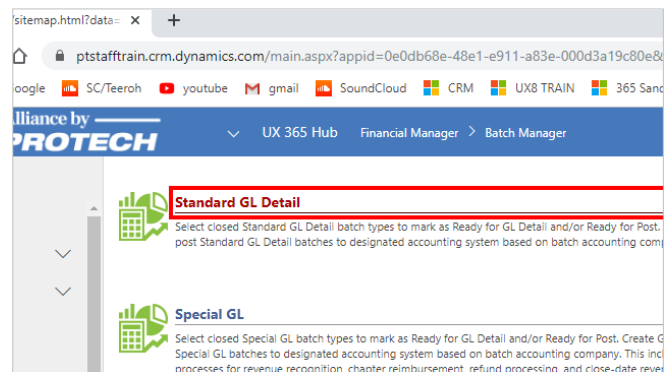
Click on the item **Batch Manager**



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

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

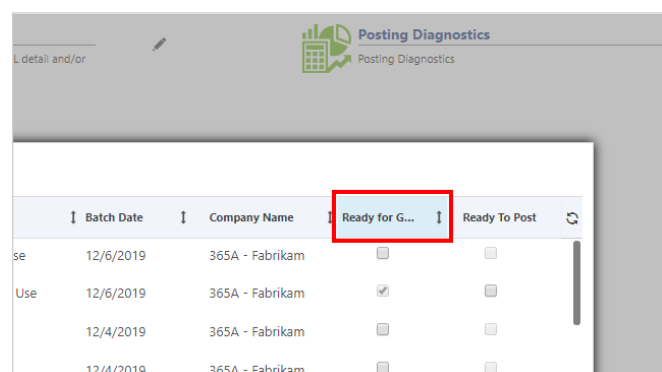
Click on **Standard GL Detail**



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.

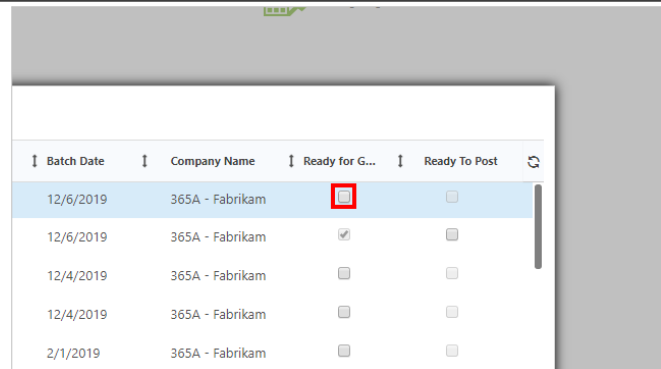
'Ready For GL Detail' column



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.

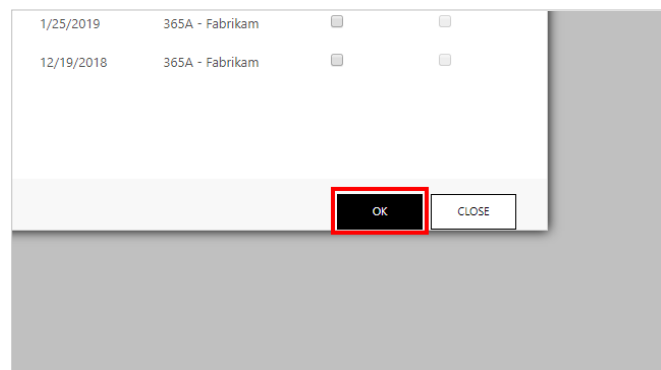
Click on the checkbox under 'Ready For GL Detail'



Batch Date	Company Name	Ready for G...	Ready To Post
12/6/2019	365A - Fabrikam	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12/6/2019	365A - Fabrikam	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12/4/2019	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>
12/4/2019	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>
2/1/2019	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>

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

Click the button OK, to initiate the process

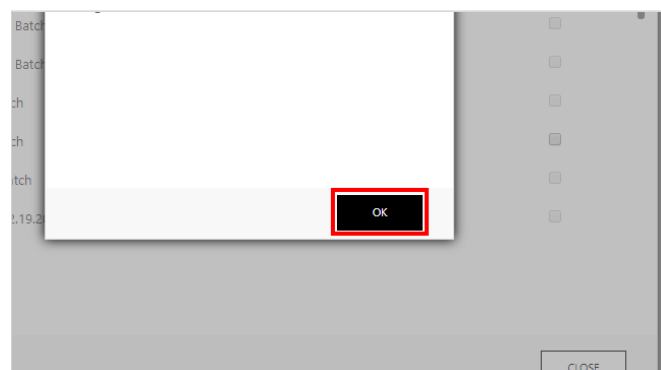


1/25/2019	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>
12/19/2018	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>

OK CLOSE

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**

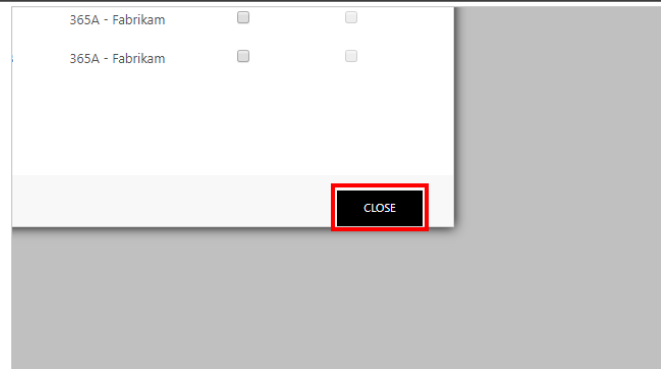


OK

CLOSE

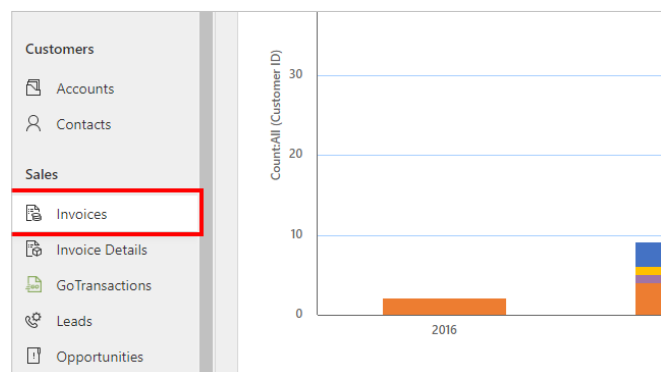
If you discover a mistake in a transaction after creating GL detail or after posting, you can reset the batch and correct the error.

Click on the button **CLOSE**



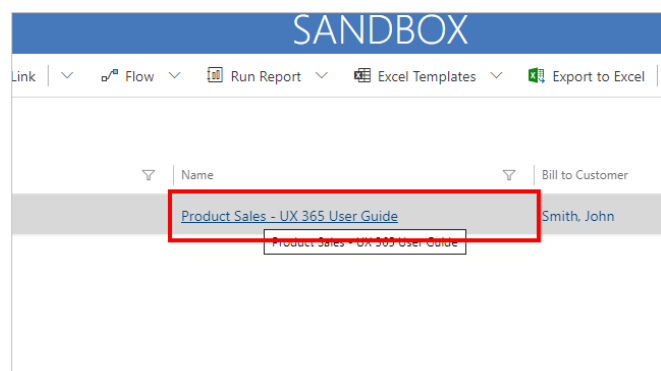
1.9. Issuing a Credit Card Refund

Click on the item **Invoices**

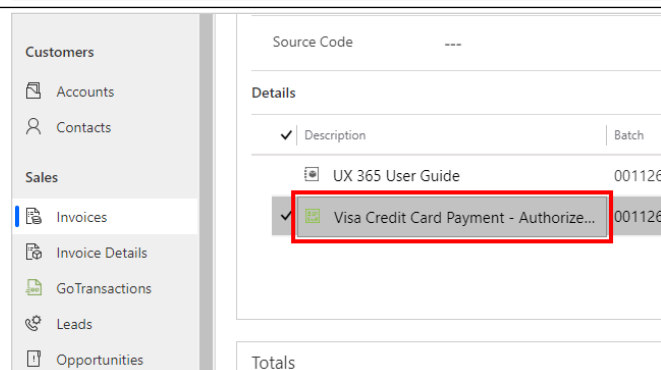


To access Invoices, you can select Invoices from the My Work section. You can also navigate to Accounts or Contacts from any of the UX work areas on the Navigation Tile Bar. Open the account or contact where you want to enter a cash or check payment. In the Navigation Pane of the account or contact record,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

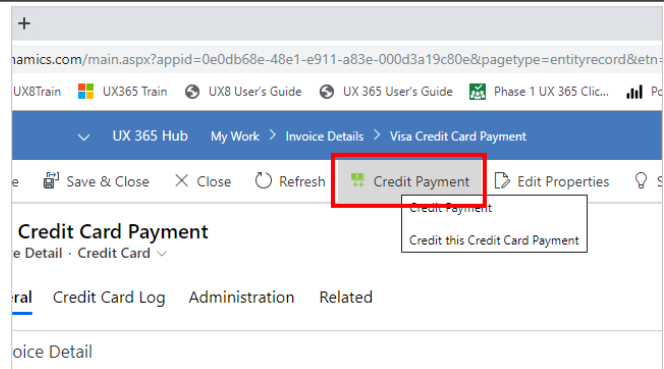
Select the desired Invoice



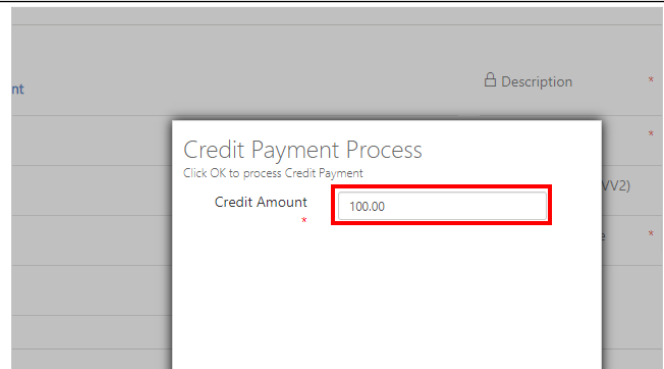
Select the Credit Card payment line item



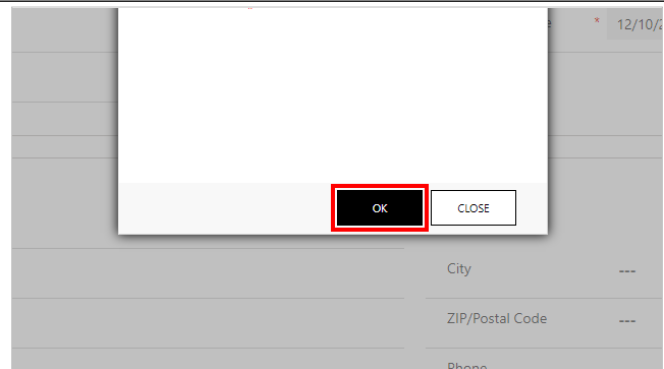
Click on the menu item **Credit Payment**



Enter the amount to be credited

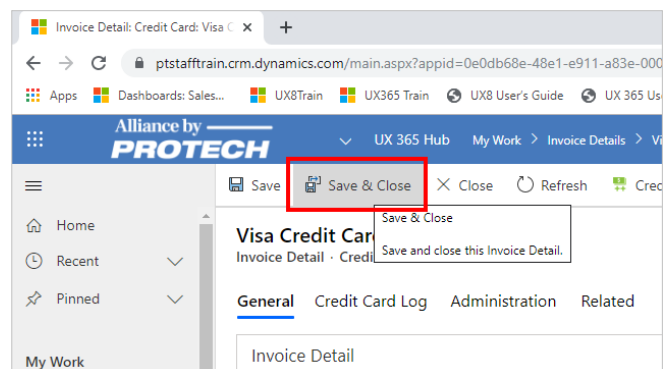


Click on the button **OK**



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

Accounts	Details
Contacts	<div> <div>✓</div> <div>Description</div> <div>Batch</div> </div>
Sales	<div> <div>UX 365 User Guide</div> <div>001126</div> </div>
Invoices	<div> <div>Visa Credit Card Payment - Authorize...</div> <div>001126</div> </div>
Invoice Details	<div> <div>Visa Credit Card Payment - Credit Tra...</div> <div>001108</div> </div>
GoTransactions	<div> <div>Visa Credit Card</div> </div>
Leads	
Opportunities	
Marketing	Totals
	<div> <div>Total Detail Amount</div> <div>\$100.00</div> </div>

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

GoTransactions
Leads
Opportunities
Marketing
Marketing Lists
Quick Campaigns
MW My Work

0

2016

Current Members

Current Members by Benefit Status

Count:Non-empty (Benefit Status)

New

Type here to search

Click on the item **Financial Manager**

Renewal
Member Groups
Meetings
Product Sales
Education
Fundraising
Financial Manager
Settings
Financial Manager

0

2016

Current Members

Current Members by Benefit Status

Count:Non-empty (Benefit Status)

New

Type here to search

Click on the item **Gift Certificates**

Cash Reconciliation
Manager
Accounting Settings
Accounting Curre...
Companies
GL Account Categ...
Chart of Accounts
Gift Certificates
Financial Manager

Cash Activity - This Year

This Year's Cash Activity by Month

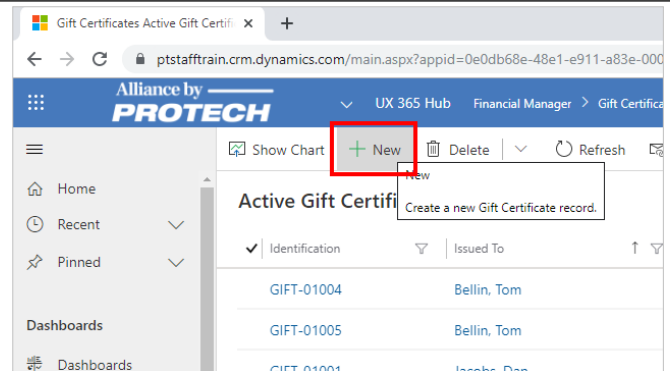
Sum (Payment Amount) (\$)

800.00

700.00

Type here to search

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

The screenshot shows the 'New Gift Certificate' form. The 'Identification' field is highlighted with a red box. The form includes fields for 'Issued to:', 'Date Issued:', and 'Payment Option:'. The 'Issued to:' field has a 'Select to enter data' button. The 'Date Issued:' field is pre-filled with '12/10/2019'.

Click on the lookup field Issued to

The screenshot shows the 'New Gift Certificate' form. The 'Issued to:' field is highlighted with a red box. The field is currently empty, and a 'Look for Issued To' button is visible next to it. The 'Date Issued:' field is pre-filled with '12/10/2019'.

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

The screenshot shows the 'New Gift Certificate' form. The 'Issued to:' field is highlighted with a red box. A dropdown menu is open, showing a list of recent contacts. The first contact listed is 'deGrom, Jacob'. There is also a '+ New Contact' option at the bottom of the list. The 'Date Issued:' field is pre-filled with '12/10/2019'.


Select the contact you are issuing this gift certificate to


General Notes


Identification ---

Issued to: * jacob

Date Issued: * Contacts

Payment Option *  deGrom, Jacob
jdegrom@aol.com

 Jacobs, Dan
Bacon's Furniture & Design

 Jacobs, Lisa
Bacon's Furniture & Design


Apply Gift Certificate

Click on Date Issued

Gift Certificate

General Notes

Identification ---


Issued to: *  deGrom, Jacob X

Date Issued: * 12/10/2019

Payment Option * ---

Apply Gift Certificate

Enter the date that this gift certificate was issued


Issued to: *  deGrom, Jacob


Date Issued: * 12/10/2019


Payment Option * December 2019 ↑ ↓ 2019 ↑ ↓

Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar	Apr
1	2	3	4	5	6	7				
8	9	10	11	12	13	14	May	Jun	Jul	Aug
15	16	17	18	19	20	21				
22	23	24	25	26	27	28	Sep	Oct	Nov	Dec
29	30	31	1	2	3	4				

Apply Gift Certificate


 Membership

 Meetings

 Subscriptions No

Click on the field **Payment Option**

Identification ---

Issued to: *  deGrom, Jacob

Date Issued: * 12/11/2019

Payment Option * --Select--

--Select--

Apply Gift Certificate

Membership No

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

Identification	---
Issued to:	* deGrom, Jacob
Date Issued:	* 12/11/2019
Payment Option	* --Select--
	--Select--
	Use in Full
	Multiple payments allowed
Only Gift Certificate	
Membership	No
Meetings	No

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

Currency	US Dollar X
Expiration Date	* ---
Amount	* ---
Product	* ---

Click on **Expiration Date**

Currency	US Dollar
Expiration Date	---
Amount	* ---
Product	* ---

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

Expiration Date	* ---																																																						
Amount	* ---																																																						
Product	* ---																																																						
	<div> <div> December 2019 ↑ ↓ </div> <table border="1"> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </table> </div> <div> 2019 ↑ ↓ </div> <table border="1"> <tr> <td>Jan</td><td>Feb</td><td>Mar</td><td>Apr</td></tr> <tr> <td>May</td><td>Jun</td><td>Jul</td><td>Aug</td></tr> <tr> <td>Sep</td><td>Oct</td><td>Nov</td><td>Dec</td></tr> </table>	Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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May	Jun	Jul	Aug																																																				
Sep	Oct	Nov	Dec																																																				
All Products																																																							
Specific Type	No																																																						

Click on the text field **Amount**

Currency	US Dollar
Expiration Date	* 12/26/2019
Amount	* ---
Product	* ---

Enter the amount of the gift certificate

Currency	US Dollar
Expiration Date	* 12/26/2019
Amount	* 1
Product	* ---

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

Dollar	
2019	
0	
or Product	

Select the payment product for this gift certificate

Expiration Date	* 12/26/2019
Amount	* \$100.00
Product	* Look for Product
	Products
	Gift Certificate GIFTCERT
All Products	
Specific Type	No

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.

Amount	\$100.00
Product	Gift Certificate X
All Products	Yes
Specific Type	No

Click on **Received On**

Subscriptions	No
Product Sales	No
Gift Certificate Tracking	
Received On	---
Certificate Balance	\$100.00
Status	Issued

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

Apply Gift Certificate																																											
Membership	No																																										
Meetings	December 2019 ↑ ↓ 2019 ↑ ↓																																										
Subscriptions	<table border="1"> <tr> <th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th></tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </table>	Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4
Su	Mo	Tu	We	Th	Fr	Sa																																					
1	2	3	4	5	6	7																																					
8	9	10	11	12	13	14																																					
15	16	17	18	19	20	21																																					
22	23	24	25	26	27	28																																					
29	30	31	1	2	3	4																																					
Product Sales	<table border="1"> <tr> <th>Jan</th><th>Feb</th><th>Mar</th><th>Apr</th></tr> <tr> <td>May</td><td>Jun</td><td>Jul</td><td>Aug</td></tr> <tr> <td>Sep</td><td>Oct</td><td>Nov</td><td>Dec</td></tr> </table>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec																														
Jan	Feb	Mar	Apr																																								
May	Jun	Jul	Aug																																								
Sep	Oct	Nov	Dec																																								
Gift Certificate Tracking																																											
Received On	---																																										

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.

Product sales	No
Gift Certificate Tracking	
Received On	12/11/2019
Certificate Balance	\$100.00
Status	Issued

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

Gift Certificate Tracking	
Received On	12/11/2019
Certificate Balance	\$100.00
Status	Issued
<div>Active</div> <div>Created On: ---</div> <div>Created By: ---</div>	

-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

Used On	---
Amount Used	---
Owner	* Panos, Nicholas

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

Used On	---
Amount Used	---
Owner	* Panos, Nicholas

-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

Used On	---
Amount Used	---
Owner	* 👤 Panos, Nicholas ✕
Modified On	---

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

Gift Certificate: Information: New

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

UX 365 Hub

Save Save & Close + New Flow

New Gift Certificate

General Notes

Issued to: * 👤 deGrom, Jacob

Date Issued: * 12/11/2019

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

Click on the item **Contacts**

Activities Reports Easy Print Reports Customers Accounts **Contacts** Sales Invoices Invoice Details GoTransactions

CountAll (Customer ID)

40 30 20 10

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

My Work Dashboards Activities Reports Easy Print Reports Customers Accounts **Contacts** Sales

Colón, Benjamin G.	Trial Analysis Corporation
Colon, Clara	---
Creed, Sharon	---
Daly, Becca	---
deGrom, Jacob	---
Delacour, Rebecca	Hogwarts
Dill, Steve	---
DiNozzo, Anthony J.	Naval Criminal Investigative

Click on the item **Related**

The screenshot shows the 'deGrom, Jacob' contact record in the UX 365 Hub. The 'Related' tab is selected and highlighted with a red box. Below the tabs, the 'CONTACT INFORMATION' section is visible, showing 'First Name: Jacob' and 'Last Name: deGrom'.

Click on the menu item **Gift Certificates**

The screenshot shows the left sidebar of the UX 365 Hub. The 'Gift Certificates' menu item is highlighted with a red box. The main area shows the 'deGrom, Jacob' contact record with various tabs and a list of related items on the right.

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

The screenshot shows the left sidebar of the UX 365 Hub. The 'Add New Gift Certificate' button is highlighted with a red box. The main area shows the 'deGrom, Jacob' contact record with the 'Gift Certificates' tab selected.

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

The screenshot shows the 'Gift Certificate' form in the UX 365 Hub. The 'Identification' field is highlighted with a red box. The form includes fields for 'Issued to:', 'Date Issued:', and 'Payment Option:'. The 'Issued to:' field is populated with 'deGrom, Jacob'.

Notice the Contact Name is already populated in the Issued to field

Gift Certificate

General Notes

Identification ---

Issued to: *

Date Issued: * 12/10/2019

Payment Option * ---

Click on Date Issued

Gift Certificate

General Notes

Identification ---

Issued to: *

Date Issued: *

Payment Option * ---

Apply Gift Certificate

Enter the date that this gift certificate was issued

Date Issued: * 12/10/2019

Payment Option * December 2019 ↑ ↓ 2019

Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar
1	2	3	4	5	6	7			
8	9	10	11	12	13	14	May	Jun	Jul
15	16	17	18	19	20	21	Sep	Oct	Nov
22	23	24	25	26	27	28			
29	30	31	1	2	3	4			

Apply Gift Certificate

☐ Membership

☐ Meetings

☐ Subscriptions **No**

Click on the field **Payment Option**

Identification ---

Issued to: *

Date Issued: * 12/16/2019

Payment Option *

Apply Gift Certificate

Membership **No**

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

Identification	---
Issued to:	* deGrom, Jacob
Date Issued:	* 12/16/2019
Payment Option	* --Select-- <div style="border: 1px solid red; padding: 2px;"> --Select-- Use in Full Multiple payments allowed </div>
Only Gift Certificate	
Membership	No
Meetings	No

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

Currency	US Dollar X
Expiration Date	* ---
Amount	* ---
Product	* ---


Click on **Expiration Date**

Currency	US Dollar
Expiration Date	<div style="border: 1px solid red; padding: 2px;">---</div>
Amount	* ---
Product	* ---


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

Expiration Date	* ---																																																												
Amount	* February 2020 ↑ ↓ 2020 ↑ ↓																																																												
Product	* <table border="1"> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td> <td>Jan</td><td>Feb</td><td>Mar</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td> <td></td><td></td><td></td> </tr> <tr> <td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td> <td>May</td><td>Jun</td><td>Jul</td> </tr> <tr> <td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td> <td></td><td></td><td></td> </tr> <tr> <td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td> <td>Sep</td><td>Oct</td><td>Nov</td> </tr> <tr> <td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td> <td></td><td></td><td></td> </tr> </table>	Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar	26	27	28	29	30	31	1				2	3	4	5	6	7	8	May	Jun	Jul	9	10	11	12	13	14	15				16	17	18	19	20	21	22	Sep	Oct	Nov	23	24	25	26	27	28	29			
Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar																																																				
26	27	28	29	30	31	1																																																							
2	3	4	5	6	7	8	May	Jun	Jul																																																				
9	10	11	12	13	14	15																																																							
16	17	18	19	20	21	22	Sep	Oct	Nov																																																				
23	24	25	26	27	28	29																																																							
All Products																																																													
Specific Type	No																																																												

Click on the text field **Amount**

Currency	 US Dollar
Expiration Date	* 2/18/2020
Amount	* ---
Product	* --- Select to enter data


Enter the amount of the gift certificate

Currency	 US Dollar
Expiration Date	* 2/18/2020
Amount	* 2
Product	* ---

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

Dollar	
020	
or Product	

Select the payment product for this gift certificate

Expiration Date	* 2/18/2020
Amount	* \$200.00
Product	* Look for Product
	Products
	 Gift Certificate GIFTCERT
All Products	
Specific Type	No

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.

Amount	\$200.00
Product	* Gift Certificate
All Products	<input checked="" type="checkbox"/> Yes
Specific Type	No

Click on **Received On**

Subscriptions	No
Product Sales	No
Gift Certificate Tracking	
Received On	---
Certificate Balance	\$200.00
Status	Issued

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

Membership	No
Meetings	
Subscriptions	
Product Sales	
Gift Certificate Tracking	
Received On	---
Certificate Balance	\$200.00

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

Product Sales	No
Gift Certificate Tracking	
Received On	12/16/2019
Certificate Balance	\$200.00
Status	Issued \$200.00

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


Gift Certificate Tracking	
Received On	12/16/2019
Certificate Balance	\$200.00
Status	Issued
<div>Active</div> <div>Created On: ---</div> <div>Created By: ---</div>	

-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

Used On	


Amount Used	

Owner	*  Panos, Nicholas

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

Used On	

Amount Used	

Owner	*  Panos, Nicholas

-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

Used On: ---

Amount Used: ---

Owner: * [User Icon] Panos, Nicholas [X]

Modified On: --- [Calendar Icon] --- [Up Arrow]

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

Gift Certificate: Information: New x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Alliance by **PROTECH** UX 365 Hub

Save [Save & Close] + New [Flow]

New Gift Certificate

General Notes

Issued to: * [User Icon] deGrom, Jacob

Date Issued: * 12/16/2019

1.11. Posting a Batch

Click on the button **My Work**

Invoice Details

Go Transactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

MW My Work

My Work (change area)

Current Members

Current Members by Benefit Status

Count:Non-empty (Benefit Status)

Click on the item **Financial Manager**

Renewal

Member Groups

Meetings

Product Sales

Education

Fundraising

Financial Manager

Settings

Financial Manager

MW My Work

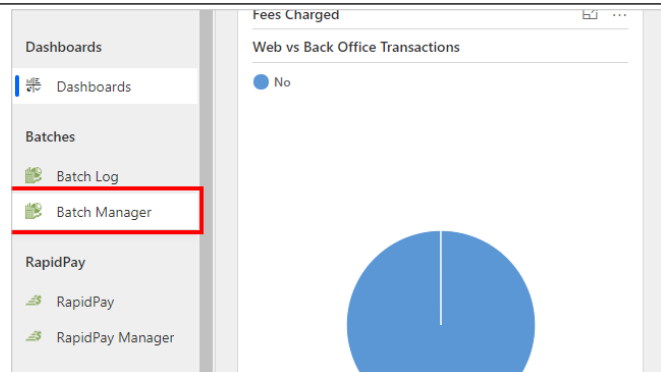
My Work (change area)

Current Members

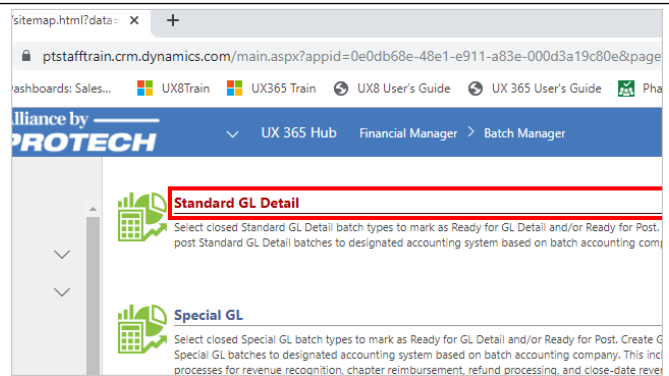
Current Members by Benefit Status

Count:Non-empty (Benefit Status)

Click on the item **Batch Manager**

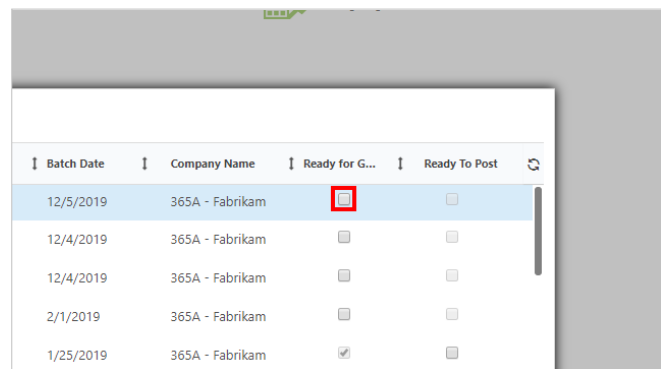


Click on **Standard GL Detail**

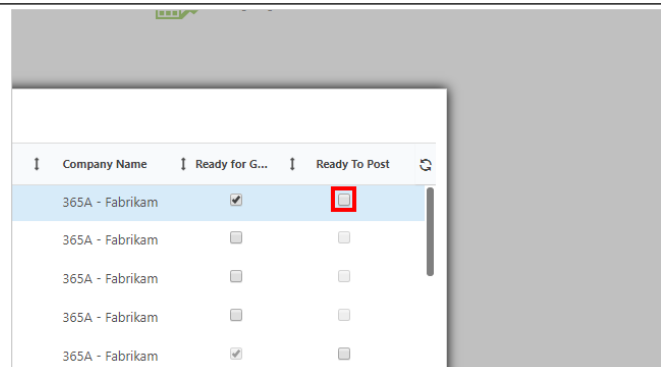


Selecting Standard GL Detail will open a new window listing closed batches where batch type = Standard GL Detail that have not been processed for GL Detail and/or Post to Accounting.

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**

12/19/2018	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>
11/6/2018	365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>

OK
CLOSE

Click on the button **OK**

OK

CLOSE

Click on the button **CLOSE**

365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>
365A - Fabrikam	<input type="checkbox"/>	<input type="checkbox"/>

CLOSE

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

Click on the item **Batch Log**

Pinned

Dashboards

Dashboards

Batches

Batch Log

Batch

Batch Log

RapidPay

RapidPay

RapidPay Manager

Special GL

Select closed Special GL batch types to mark as Ready for GL Detail and/or R
Special GL batches to designated accounting system based on batch account
processes for revenue recognition, chapter reimbursement, refund processin

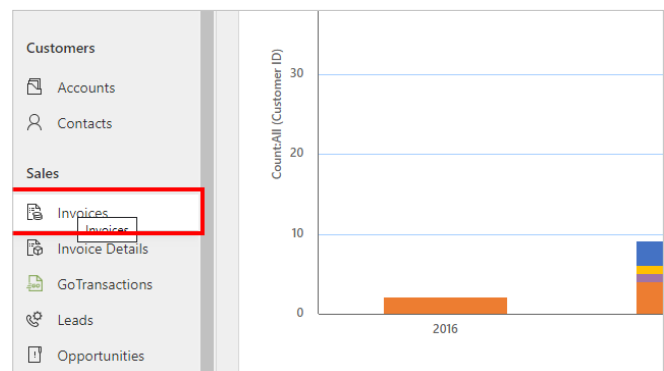
Note that the GL Detail Created and Posted flags are set to Yes and the GL Detail and Posted Dates are updated.

SANDBOX						
a Link Flow Run Report Excel Templates Export to Excel						
Date	Company	Closed	GL Detail Created	GL Detail Date		
/2019	365A - Fabrikam	Yes	Yes	12/5/2019		
/2019	365A - Fabrikam	No	No	---		
/2019	365A - Fabrikam	Yes	No	---		
/2019	365A - Fabrikam	Yes	No	---		
/2019	365A - Fabrikam	No	No	---		

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.)

Alliance by PROTECH			
UX 365 Hub My Work > Invoices			
Show Chart + New Delete Refresh			
My Invoices			
Invoice Date	Invoice ID	Customer	
12/12/2019	INV-01391-F3Z4K3	Test	

Click on the menu item **Write Off**

Alliance by PROTECH			
UX 365 Hub My Work > Invoices			
Show Chart Edit Write Off Delete Assign			
My Invoices			
Invoice Date	Invoice ID	Customer	
12/12/2019	INV-01391-F3Z4K3	Test, AROSS	

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.

Batch Nu...	Batch Date	Name
<input checked="" type="checkbox"/> 001129	12/12/2019	AROSS Write-...
<input type="checkbox"/> 001128	12/11/2019	Test Batch 2
<input type="checkbox"/> 001125	12/10/2019	Batch for Bul...
<input type="checkbox"/> 001124	12/6/2019	Michael Click ...
<input type="checkbox"/> 001118	12/6/2019	test

Click on the button **ADD**

<input type="checkbox"/> 001110	10/11/2019	Daily Credit C...	365A - Fabrik...
<input type="checkbox"/> 001108	6/4/2019	New Batch Log	365A - Fabrik...
<input type="checkbox"/> 001098	10/30/2018	Go-Transaction	365A - Fabrik...
<input type="checkbox"/> 001095	10/23/2018	Go-Transaction	365A - Fabrik...
<input type="checkbox"/> 001091	9/26/2018	sbm	365A - Fabrik...
<input type="checkbox"/> 001086	8/10/2018	lab batch	365A - Fabrik...

Showing 1 to 17 of 17 rows

ADD CANCEL REMOVE VALUE

11:39 AM 12/12/2019

Select the write-off payment product to use.

Product Name	Product Number
<input checked="" type="checkbox"/> Write Off	WO
<input type="checkbox"/> Write Off_EURO	WO_EURO

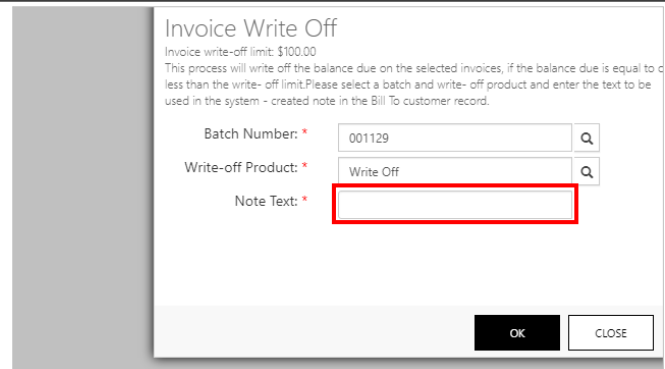
Click on the button **ADD**

Showing 1 to 2 of 2 rows

ADD CANCEL REMOVE VALUE

11:39 AM 12/12/2019

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



Invoice Write Off
 Invoice write-off limit: \$100.00
 This process will write off the balance due on the selected invoices, if the balance due is equal to or less than the write-off limit. Please select a batch and write-off product and enter the text to be used in the system - created note in the Bill To customer record.

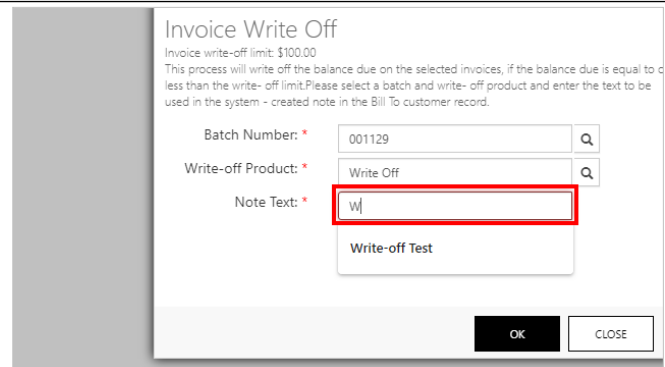
Batch Number: * 001129

Write-off Product: * Write Off

Note Text: *

OK CLOSE

Enter the Note text here



Invoice Write Off
 Invoice write-off limit: \$100.00
 This process will write off the balance due on the selected invoices, if the balance due is equal to or less than the write-off limit. Please select a batch and write-off product and enter the text to be used in the system - created note in the Bill To customer record.

Batch Number: * 001129

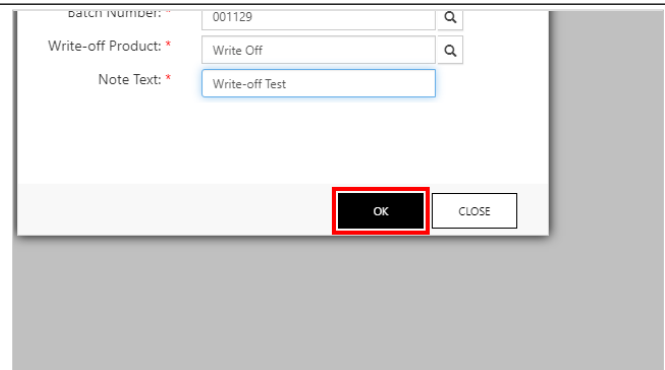
Write-off Product: * Write Off

Note Text: *

Write-off Test

OK CLOSE

Click on the button **OK**



Batch Number: * 001129

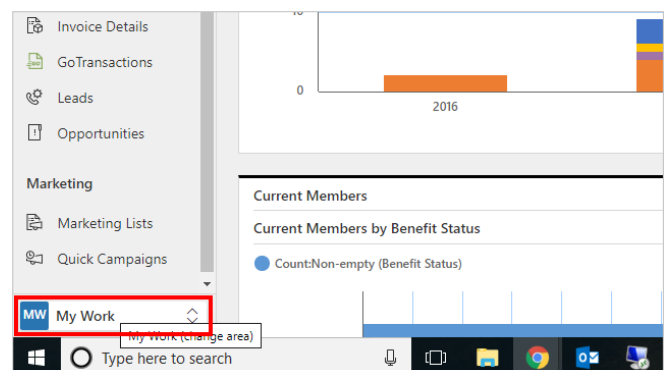
Write-off Product: * Write Off

Note Text: *

OK CLOSE

1.13. Rapid Pay Processing

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



Invoice Details
 GoTransactions
 Leads
 Opportunities
 Marketing
 Marketing Lists
 Quick Campaigns
MW My Work
 My Work (change area)

Current Members
 Current Members by Benefit Status
 CountNon-empty (Benefit Status)

Click on the item **Financial Manager**

The screenshot shows the Protech application interface. On the left, a navigation menu lists various options: Renewal, Member Groups, Meetings, Product Sales, Education, Fundraising, **Financial Manager** (highlighted with a red box), Settings, and Financial Manager. Below this is a 'My Work' section. The main area displays a bar chart for the year 2016 and a table titled 'Current Members' with a sub-header 'Current Members by Benefit Status'. A legend indicates 'CountNon-empty (Benefit Status)'.

Click on the item **RapidPay**

The screenshot shows the Protech application interface. On the left, a navigation menu lists various options: Batches, Batch Log, Batch Manager, **RapidPay** (highlighted with a red box), RapidPay Manager, Accounting Manager, Accounting Jobs, and Cash Reconciliation. The main area displays a large blue pie chart representing a total value of \$51,823.65.

Click on the menu item **New**

The screenshot shows the Protech application interface. The top navigation bar includes 'Alliance by PROTECH', 'UX 365 Hub', 'Financial Manager', and 'RapidPay'. The main area features a '+ New' button (highlighted with a red box) and a 'Show Chart' button. Below the button is a form titled 'Active Rapid Pay' with a 'Create a new RapidPay record.' button. The form includes a table with columns for Customer, Batch, and Payment, showing entries for 'Chapter Test Account' and 'Baltimore Orioles'.

Click on the link **Search All Records**

The screenshot shows the Protech application interface. The top navigation bar includes 'Alliance by PROTECH', 'UX 365 Hub', 'Financial Manager', and 'RapidPay'. The main area features a 'Search All Records' button (highlighted with a red box) and a 'Show Chart' button. Below the button is a form titled 'Active Rapid Pay' with a 'Create a new RapidPay record.' button. The form includes a table with columns for Customer, Batch, and Payment, showing entries for 'Chapter Test Account' and 'Baltimore Orioles'.

Select the customer

The screenshot shows the 'New RapidPay' form with tabs for 'General', 'Customer Information', and 'Administration'. The 'Customer' field is active, showing a dropdown menu with the following options: 'Euro Account A-001009', 'Hogwarts wizards@hogwarts.com', and 'International School of Wizardry international@wizardry.com'. The 'Euro Account A-001009' option is highlighted with a red box.

Click on the menu item **Select Batch**

The screenshot shows the 'New RapidPay' form with the 'Select Batch' button highlighted with a red box. The button is located in the top right corner of the form, next to the 'Save & New' button. The dropdown menu for 'Select Batch' is open, showing options 'Select Batch' and 'Select Open Batch'.

Enter the name of the batch you would like to use

The screenshot shows the 'New RapidPay' form with the 'Select Batch' button highlighted with a red box. The button is located in the top right corner of the form, next to the 'Save & New' button. The dropdown menu for 'Select Batch' is open, showing options 'Select Batch' and 'Select Open Batch'.

Click on the desired batch

The screenshot shows the 'Lookup Records' dialog box with the 'Batch Log' table. The table has columns for 'Batch' and 'Amount'. The row '001124_Michael Click learn_365A - Fabrikam Michael Click learn' is highlighted with a red box. The dialog box also includes a search bar with the text 'mich' and buttons for '+ New Batch Log' and 'Change View'.

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

Payment

ral Customer Information Administration

Customer	* Euro Account	Name
Payment Product	* Visa Credit Card Payment_EURO	Currency
Credit Card No	* <input type="text"/>	Expire Date (MM/YY)

Mastercard ****1239
Expires on 07/21

Manage payment methods... G Pay

Invoice Number Invoice Date Invoice Balance

Click on the Expiration Date

Name	Euro Account	Batch
Currency	* Euro	Amount
Expire Date (MMYY)	* <input type="text"/>	CVV2

Select to enter data

Invoice Number Invoice Date Invoice Balance

Enter Date

Name	Euro Account	Batch
Currency	* Euro	Amount
Expire Date (MMYY)	* <input type="text"/>	CVV2

07/21
Mastercard ****1239, expires on 07/21

Manage payment methods... G Pay

Invoice Number Invoice Date Invoice Balance

Click on the CVV2 field

Batch	* 001124
Amount	* ---
CVV2	* <input type="text"/>

Select to enter data

Invoice Balance Payment Amount

Enter security code

Batch	* 001124
Amount	* ---
CVV2	5

Click on amount field

Batch	* 001124
Amount	* --- Select to enter data
CVV2	123

Enter payment amount

Batch	* 001124
Amount	*
CVV2	123

Make sure you are using the correct currency.

Name	Euro Account
Currency	* Euro X
Expire Date (MMYY)	* 1023

Click on the item **Customer Information**

The screenshot shows the 'New RapidPay' form in the PROTECH system. The 'Customer Information' tab is selected and highlighted with a red box. The form shows fields for Customer, Payment Product, and Credit Card No.

Click on the customer name field.

The screenshot shows the 'New RapidPay' form with the 'Customer Information' tab selected. The 'Customer Name' field is highlighted with a red box, and a 'Select to enter data' dropdown is visible.

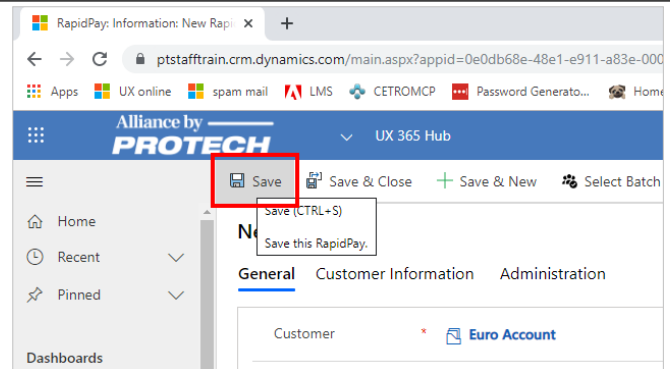
Enter customer name

The screenshot shows the 'New RapidPay' form with the 'Customer Information' tab selected. The 'Customer Name' field is highlighted with a red box, and a Google account suggestion is visible.

Click on the item **General**

The screenshot shows the 'New RapidPay' form with the 'General' tab selected and highlighted with a red box. The 'Customer Name' field contains the text 'Testing Rapidpay'.

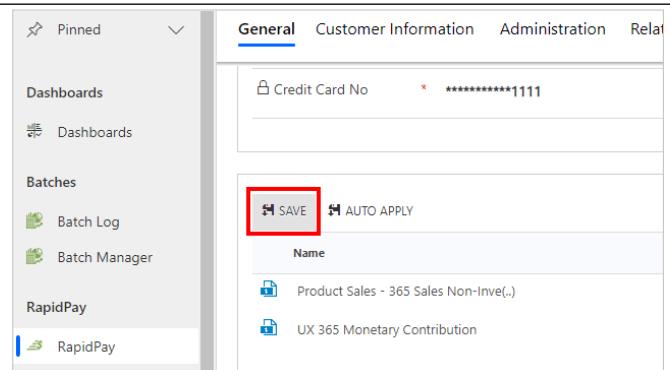
Click on the menu item **Save**



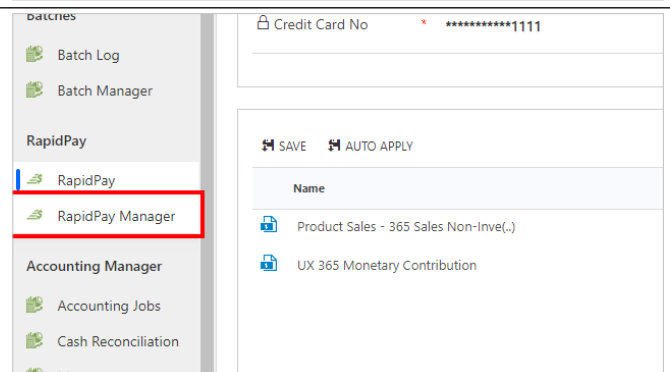
Select the invoices you would like to pay

Balance Due	Dist.	Payment Amount
€120.00	<input checked="" type="checkbox"/>	0.00
-	<input type="checkbox"/>	0.00

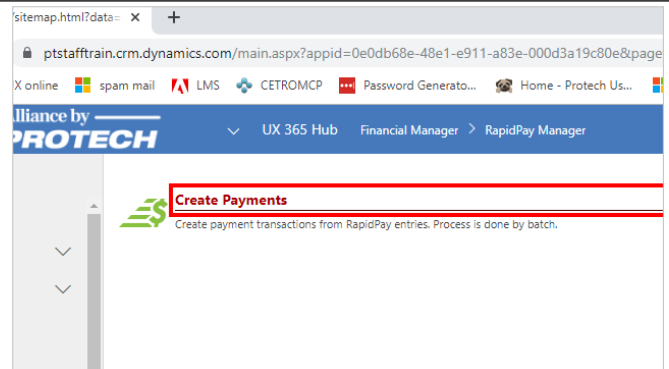
Click on **SAVE**



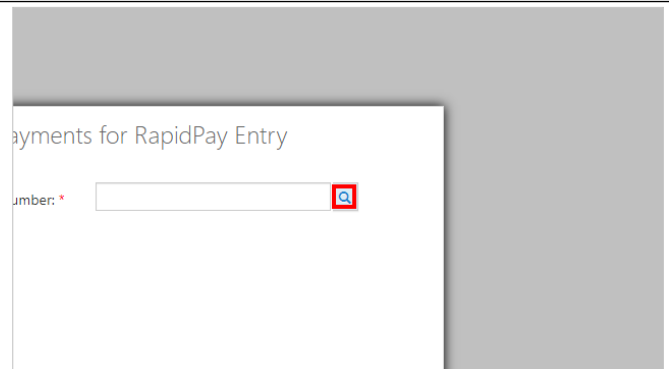
Click on the item **RapidPay Manager**



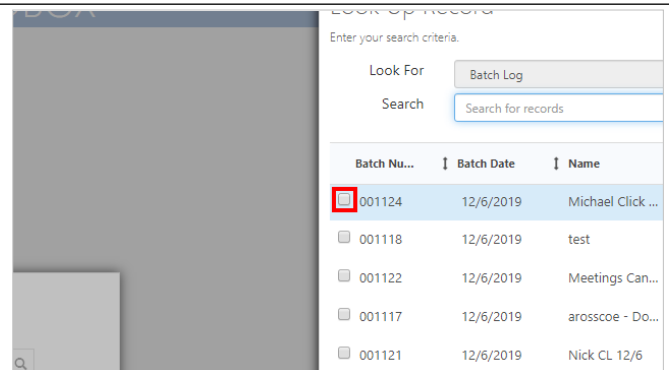
Click on **Create Payments**



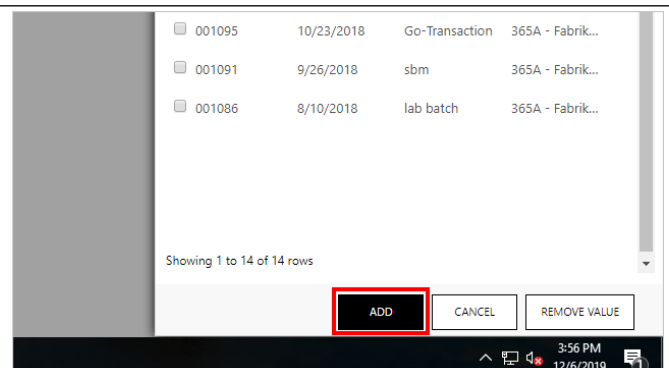
Select the batch you used when creating the new Rapid pay process



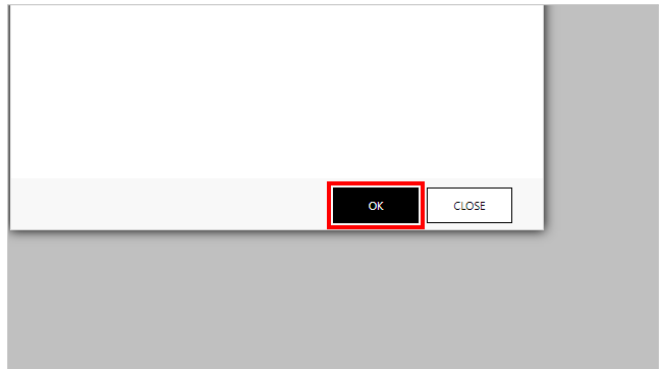
Click on the checkbox **on**



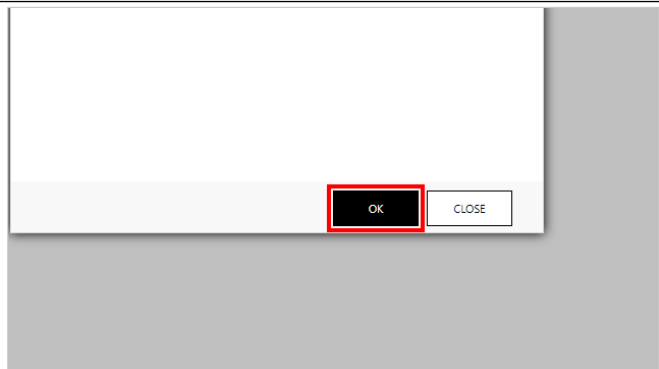
Click on the button **ADD**



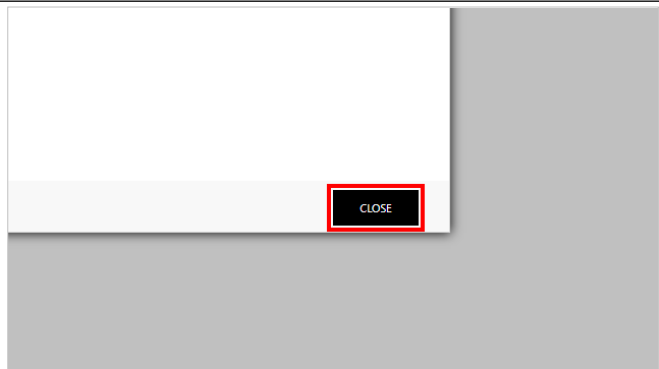
Click on the button **OK**



Click on the button **OK**



Click on the button **CLOSE**








Click on the item **RapidPay**



Check to see the payment has been created successfully.

\$200.00	\$0.00	Yes	12/6/2019 3:...	✔ O'Ro
\$30.00	\$0.00	Yes	12/6/2019 3:...	✔ O'Ro
\$120.00	\$0.00	Yes	9/26/2018 1...	✔ Laura
\$300.00	\$0.00	Yes	7/25/2018 1...	✔ Laura
\$200.00	\$0.00	Yes	7/25/2018 1...	✔ Laura
€120.00	€0.00	Yes	12/6/2019 3:...	✔ O'Ro
\$100.00	\$0.00	Yes	7/24/2018 3:...	✔ Laura
\$142.00	\$0.00	Yes	8/1/2018 9:3...	✔ Laura
\$200.00	\$0.00	Yes	7/25/2018 1...	✔ Laura

Double click on the Rapidpay line item

Dashboards		Batches		RapidPay	
	Dashboards		Batch Log		Batch Manager
	RapidPay		RapidPay Manager		

Account Name	Account ID	Account Type
Chapman, Test Account	001124	Visa Cre
Baltimore Orioles	001124	Visa Cre
Black, Sirius D.	001092	Check P
Chang, Cho	001058	Visa Cre
Delacour, Fleur	001059	Check P
✓ Euro Account	001124	Visa Cre
Hagrid, Rubeus	001057	Visa Cre
Jacobs, Dan	001080	Visa Cre
Lovegood, Luna	001059	Visa Cre

Review invoices paid

	Invoice Number	Invoice Date
Sales Non-Inve(..)	INV-01011-J6Z1G9	6/28/2011
Contribution	INV-01011-J6Z1G9	

Move the mouse to **Invoice Detail Transactions**

Print Reports

Source Code

Details

Name

Product Sales - 365 Sales Non-Inventory_Memo

Source Code

Details

✓

Description

Batch

001001

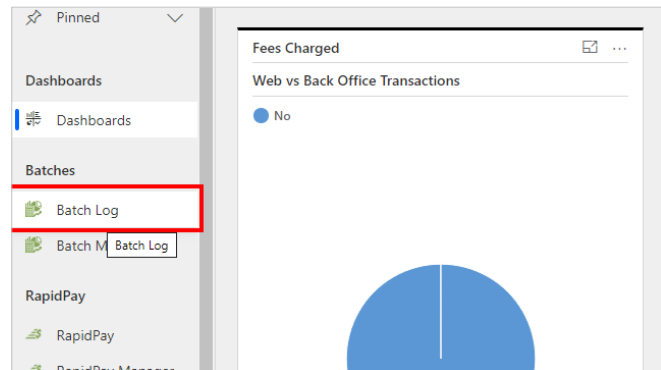
001124

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.

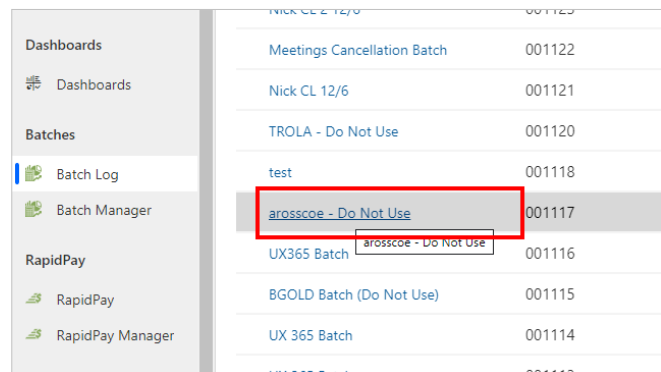
In the Navigation Tile Bar, select the Financial Manager work area > Accounting Manager > Batch Management > Batch Log to view a list of batch log records. This View will open in a new window.

Click on the item **Batch Log**



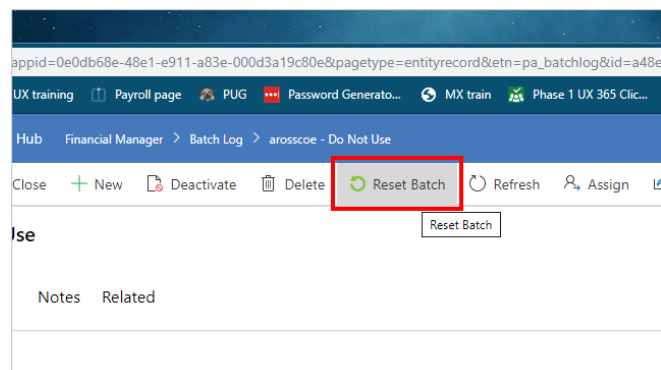
In the Batch Log list, locate and open the batch log record you want to reset. The batch log record will open in a new window.

Click on the link in cell **Name**

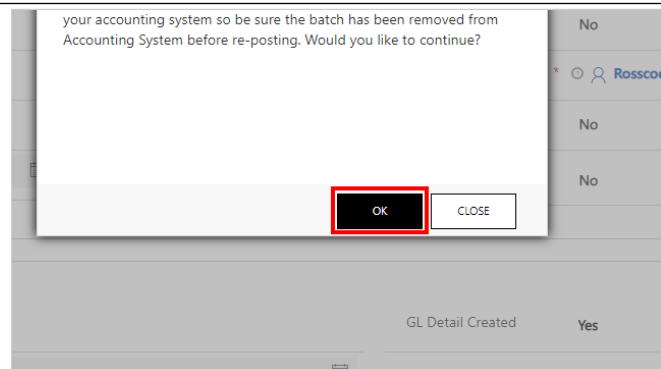


In the batch log record, select Reset Batch on the Record toolbar.

Click on the menu item **Reset Batch**

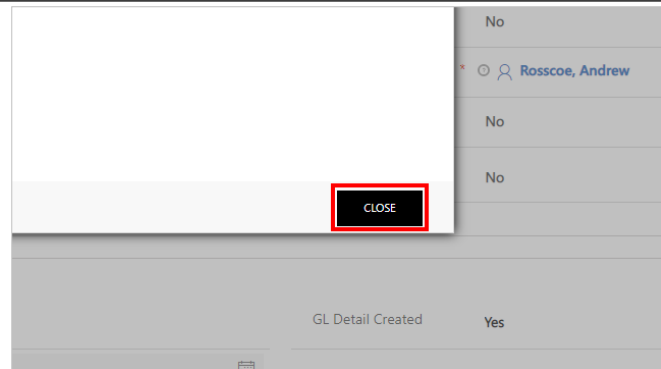


Click on the button **OK**



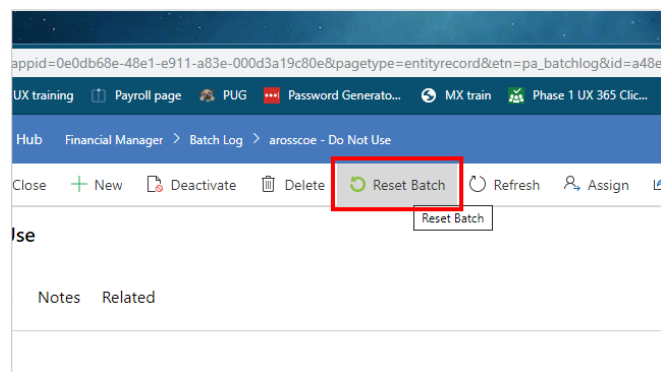
The Posted option will be reset to No, but the GL Detail Created option will still be Yes.

Click on the button **CLOSE**

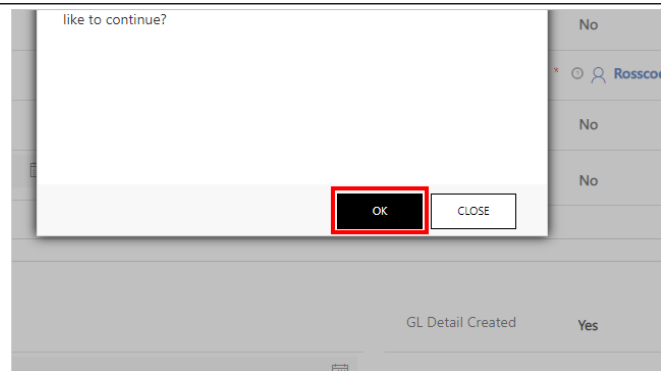


You must reset the batch again before you will be able to correct the transaction error.

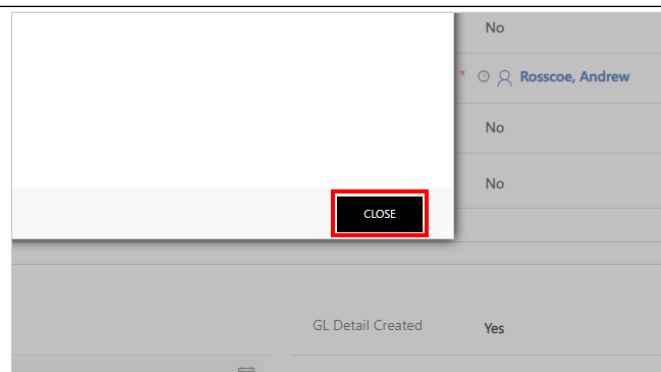
Click on the menu item **Reset Batch**



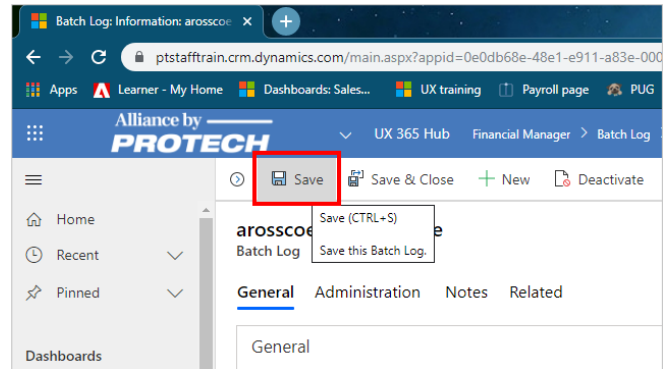
Click on the button **OK**



Click on the button **CLOSE**



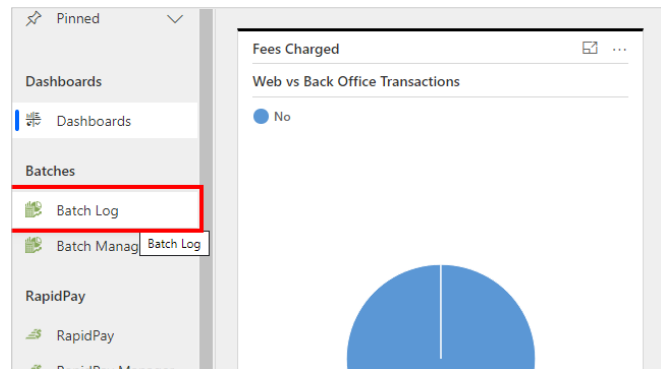
Click on the menu item **Save (CTRL+S)**



1.15. Resetting an Unposted Batch

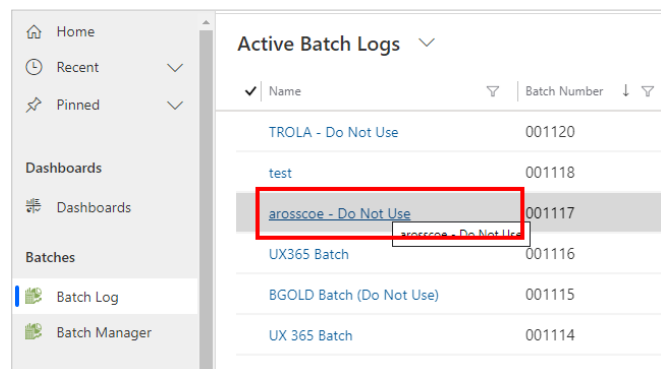
In the Navigation Tile Bar, select the Financial Manager work area > Accounting Manager > Batch Management > Batch Log to view a list of batch log records.

Click on the item **Batch Log**



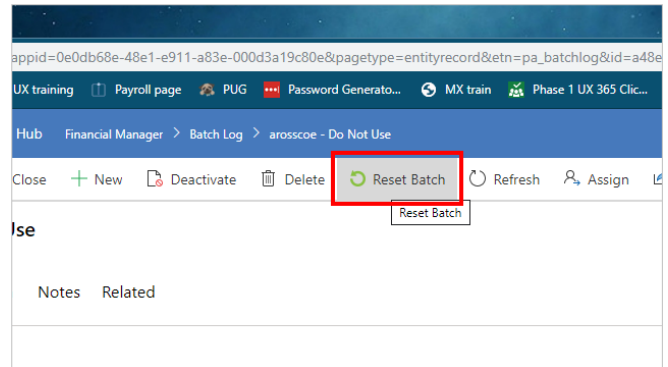
In the Batch Log list, locate and open the batch you want to reset. The batch log record will open in a new window.

Click on the link in cell **Name**

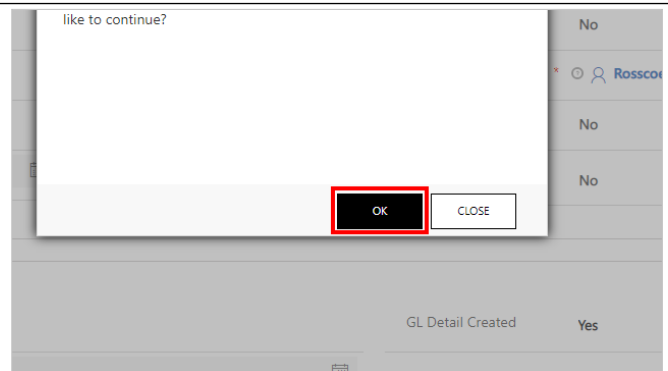


In the batch log record, select Reset Batch on the Record toolbar.

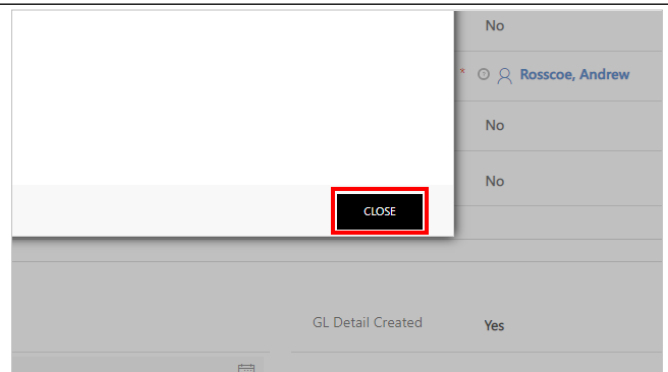
Click on the menu item **Reset Batch**



Click on the button **OK**

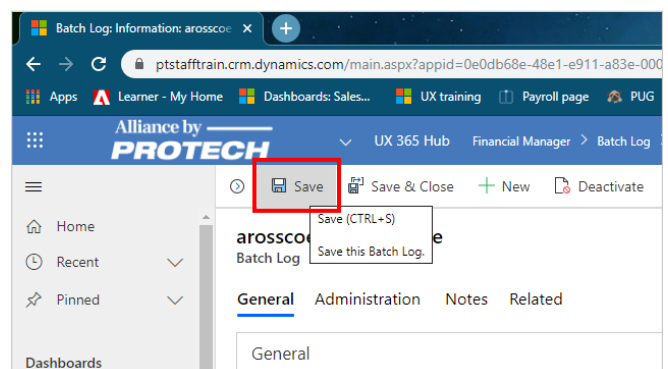


Click on the button **CLOSE**



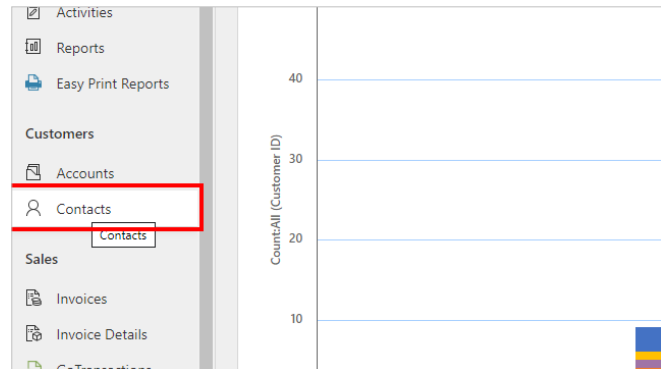
The GL Detail Created option will reset to No. You can now unmark the Closed checkbox, make any necessary changes to the transactions in the batch, and then mark the batch as Closed. When you process the batch to create GL detail, the existing GL detail for this batch will be deleted and replaced with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

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

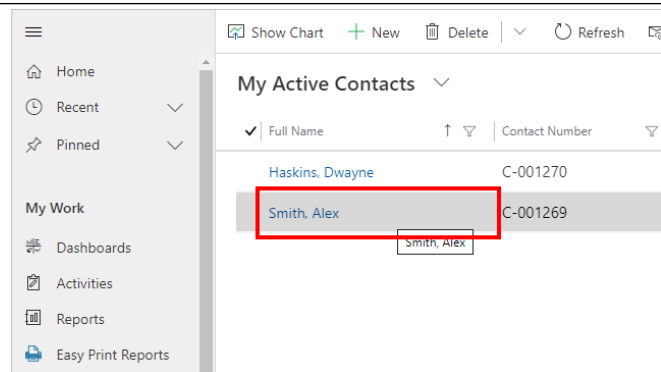


1.16. Transferring a Payment

Click on the item **Contacts**

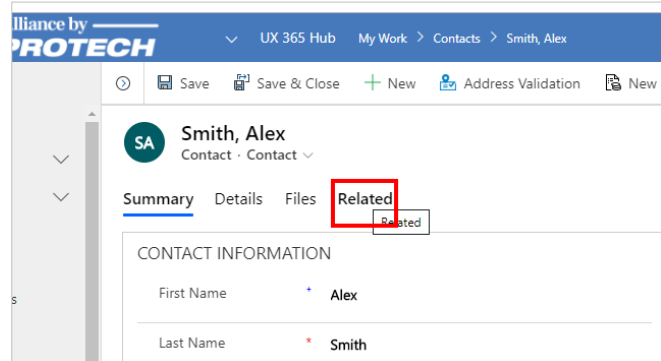


Click on the cell **Full Name**



Full Name	Contact Number
Haskins, Dwayne	C-001270
Smith, Alex	C-001269

Click on the item **Related**



Smith, Alex
Contact · Contact

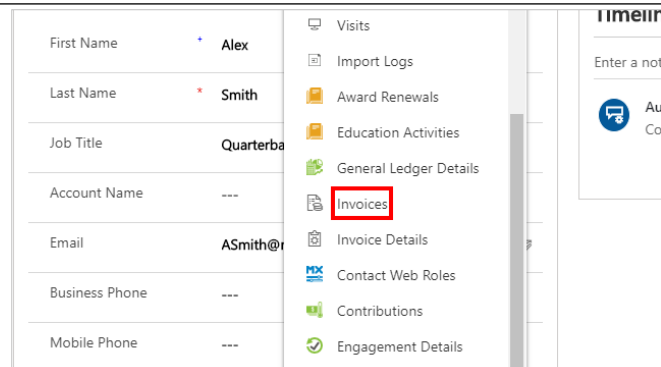
Summary Details Files **Related**

CONTACT INFORMATION

First Name * Alex

Last Name * Smith

Click on the menu item **Invoices**



First Name * Alex

Last Name * Smith

Job Title Quarterba

Account Name ---

Email ASmith@v

Business Phone ---

Mobile Phone ---

Visits

Import Logs

Award Renewals

Education Activities

General Ledger Details

Invoices

Invoice Details

Contact Web Roles

Contributions

Engagement Details

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

Invoice Nu...	Customer	B...	Billto ...	Name
INV-01048-...	Hagrid, Rubeus	\$0.00	Hagrid, R...	Anniversary
INV-01054-...	Weasley, Fred	\$0.00	Weasley, ...	Anniversary
INV-01102-P...	Mallard, Donald	\$40....	Mallard, ...	Anniversary

Click on the checkbox for the target invoice.

Invoice Nu...	Customer	B...	Billto
INV-01369-...	Haskins, Dwayne	\$10...	Has

Click on the button **ADD**

Click on the Transfer Amount field

Price List * Non-Member

Transfer Payment Process

Source Invoice: * INV-01370-V3Y1T2

Target Invoice: * INV-01369-H3W3L8

Transfer Amount: *

User Guide

Batch

001113

001113

Enter the amount to be transferred to the target invoice.

Price List * Non-Member

Transfer Payment Process

Source Invoice: * INV-01370-V3Y1T2

Target Invoice: * INV-01369-H3W3L8

Transfer Amount: *

User Guide

Batch

001113

001113

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**

Transfer Amount: *

OK CLOSE

account

\$0.00

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

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Details

Description Batch

UX 365 User Guide 001113

Visa Credit Card Payment - Authorized 001113

Transfer Payment To: INV-01369-H3... 001113

Totals

Total Detail Amount \$100.00

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

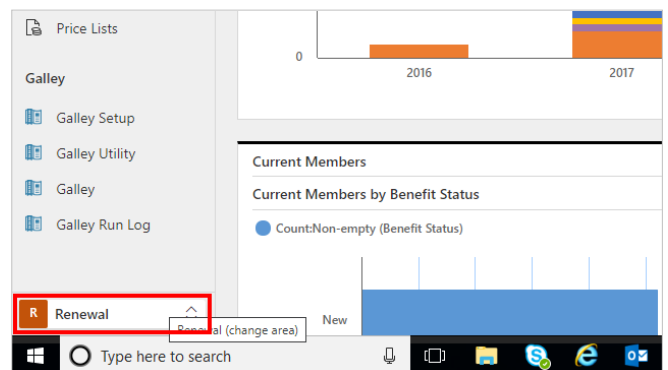
Customers	Source Code	---
Accounts	Details	
Contacts	✓ Description	Batch
Sales	UX 365 User Guide	001113
Invoices	Transfer Payment From: INV-01370-V...	001113
Invoice Details	Transfer Payment	
GoTransactions		
Leads		
Opportunities		
	Totals	

2. Basic Procedures

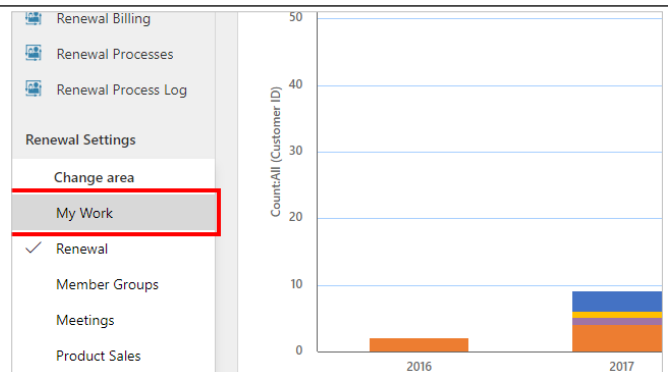
2.1. Account and Contact Record Maintenance

2.1.1. Account Record Maintenance

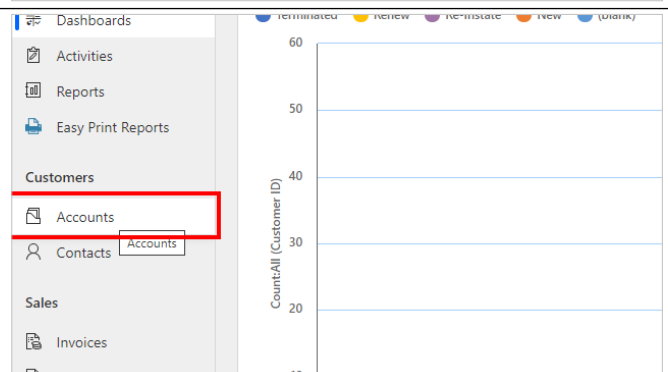
Click on the Change Area button



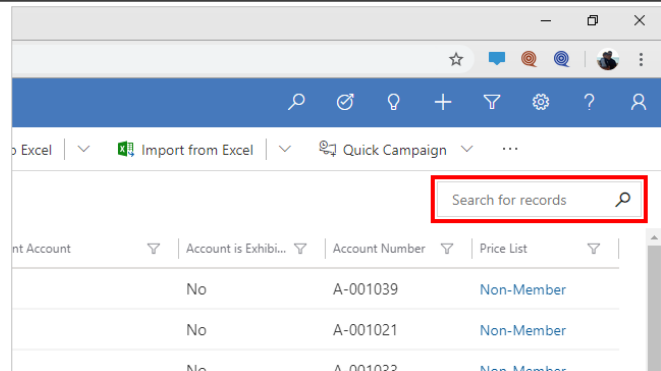
Click on the item **My Work**



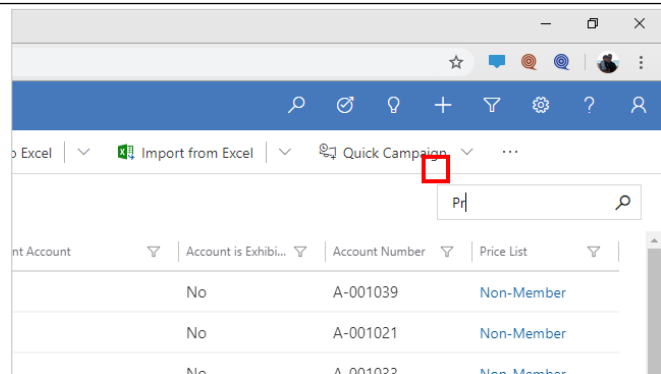
Click on the item **Accounts**



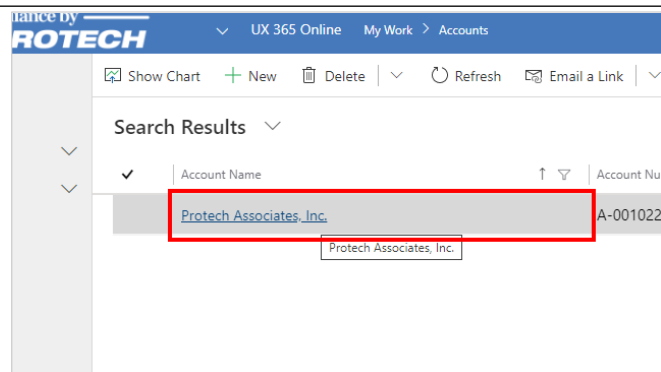
Click on the Search box



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

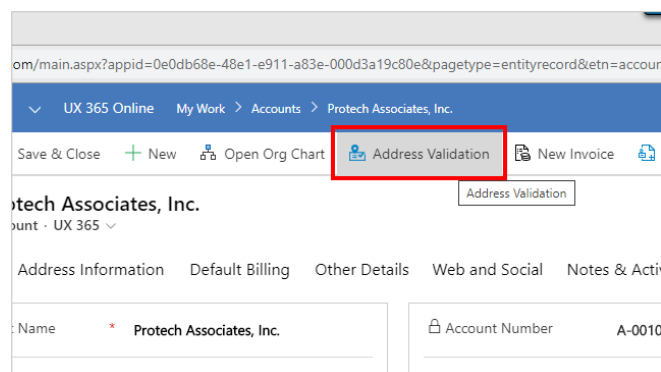


Click on the Account Name in the search results



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



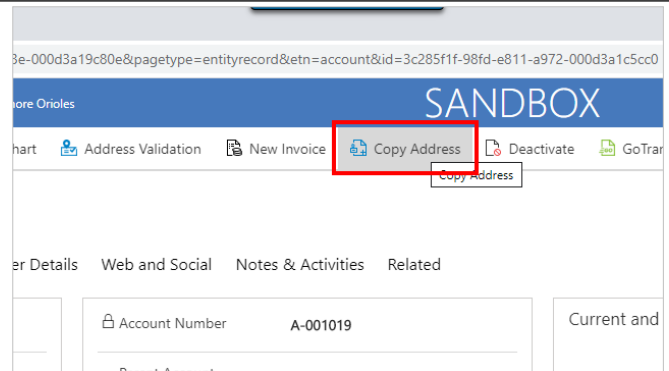
Here you can review the Accounts primary and secondary addresses for accuracy...

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

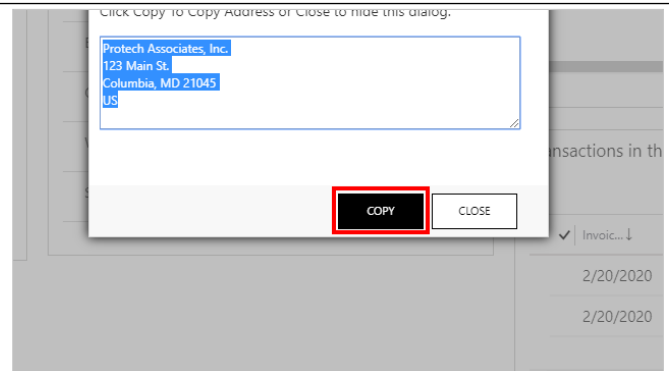
Click on the menu item **New Transactions**

Select the transaction type you would like to process

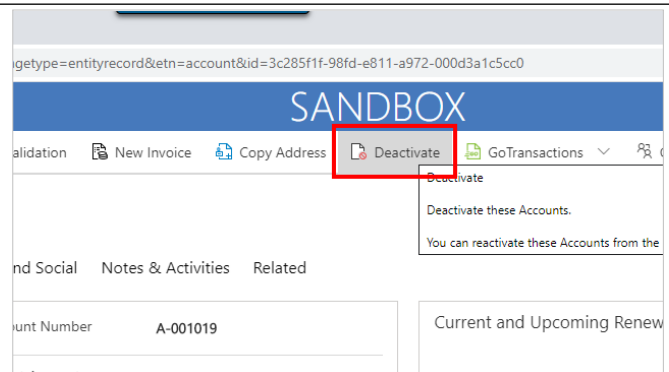
You can copy the Accounts address to your local clip board by selecting, Copy Address



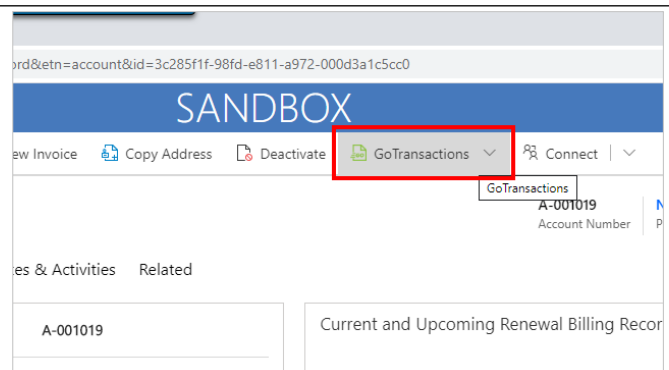
Click on the button **COPY**



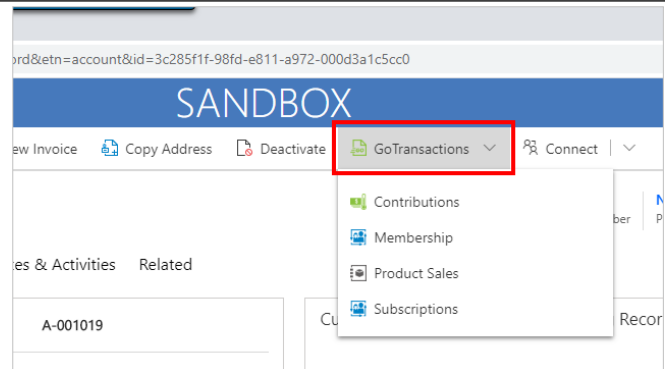
As an alternative to deleting an Account, you can Deactivate the Account. This will remove the Account from all views and searches within the system. In addition, the Account will be set to read only. Please note: If at any time you wish to restore the Account you simply use the same button to Reactivate.



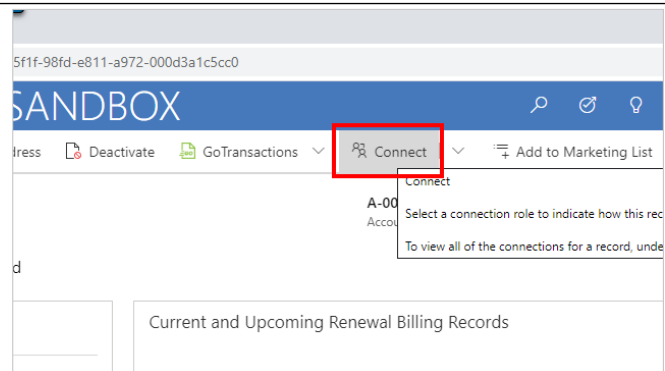
If you would like to expedite the process of creating a New Invoice, click on, Go Transactions



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

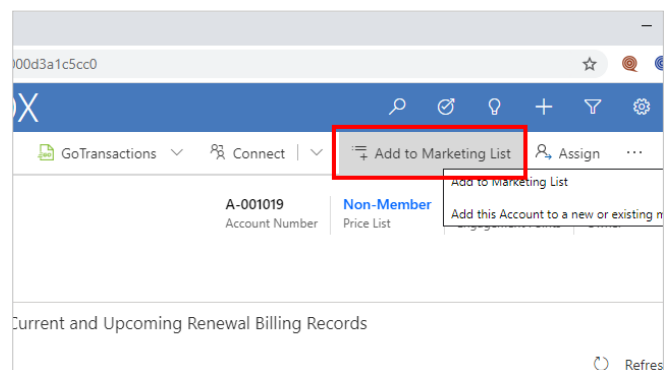


Click on the button, Connect. This will allow you to define a relationship with another record in the system.

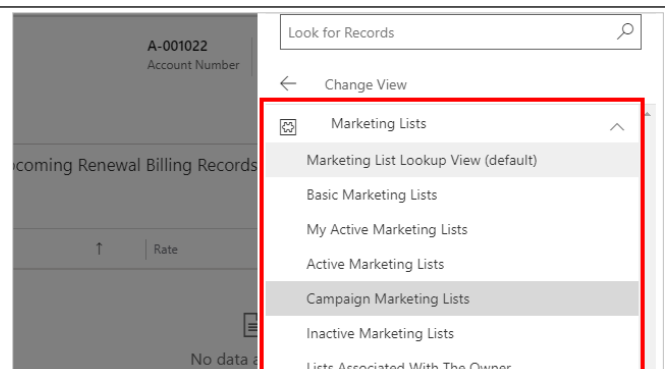


1. The Name field looks up the record you are connecting to...
2. Define the relationship by select a role. For example, Partner.

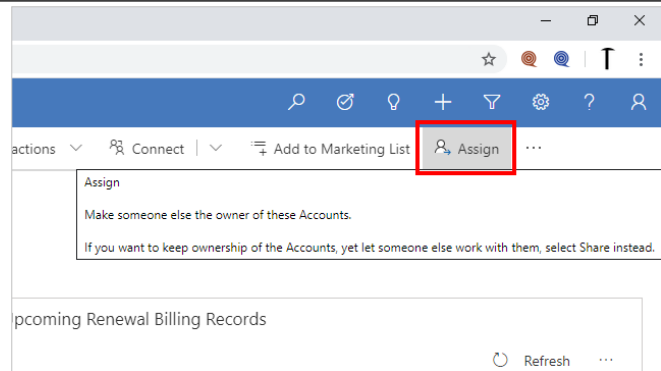
Quickly add the Account to an existing Marketing List by clicking on Add to Marketing List



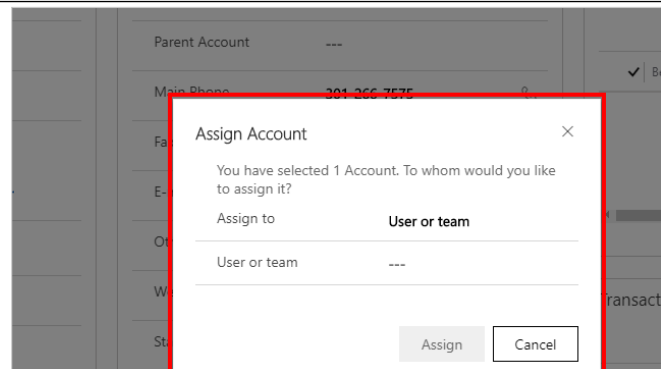
Click on an option from the list



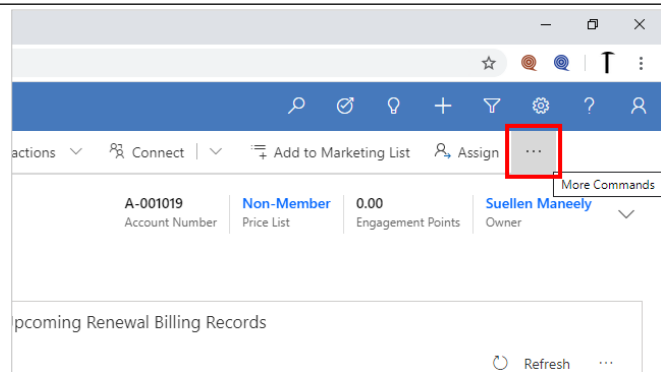
If you would like to assign ownership of the Account record to another user, click on the button, Assign



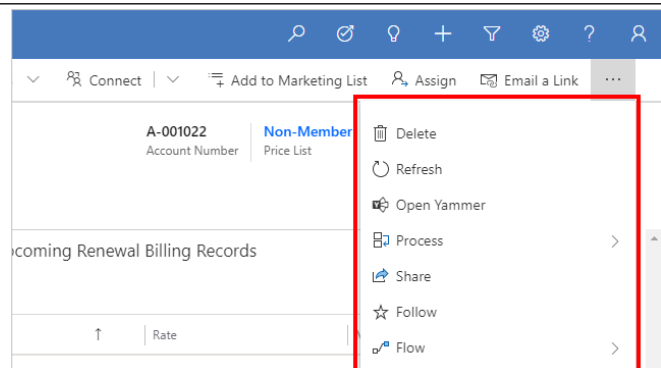
Assign Account to another User or Team



To see additional menu options click on the ellipses drop down



Here you will find a list of additional actions 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.

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a

Alliance by **PROTECH**

UX 365 Online My Work > Accounts > Protech Associates, Inc.

Save Save & Close + New Open Org Chart

Home Recent Pinned My Work Dashboards

Protech Associates, Inc.
Account UX 365

Summary Address Information Default Billing Other Details

Account Name * **Protech Associates, Inc.**

Acronym **PT**

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.

Account

Summary Address Information Default Billing Other Details

Account Name * **Baltimore Orioles**

Acronym **BO**

Primary Contact [Weaver, Earl A.](#)

Chapter Territory [Maryland State Chapter](#)

Override Charter

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

Alliance by **PROTECH**

UX 365 Hub My Work > Accounts > Baltimore Orioles

Save Save & Close + New Open Org Chart

Home Recent Pinned My Work Dashboards Activities

Baltimore Orioles
Account

Summary **Address Information** Default Billing Other Details

Address Information

Account Name * **Baltimore Orioles**

Acronym **BO**

Primary Contact [Weaver, Earl A.](#)

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

Account

Summary **Address Information** Default Billing Other Details

Primary Address

Use Parent's Address ☐

Address Type ---

Address Name **Memorial Stadium**

Address 1: Street 1 **3300 Stadium Drive**

Address 1: Street 2 **On the Field**

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 screenshot shows the 'Web and Social' tab selected in the account management interface. The tab is highlighted with a red box. The interface includes a top navigation bar with 'Hub', 'My Work', and 'Accounts > Baltimore Orioles'. Below the navigation bar, there are tabs for 'Information', 'Default Billing', 'Other Details', 'Web and Social', 'Notes & Activities', and 'Related'. The 'Web and Social' tab is active, showing a form with fields for 'Description', 'Business Type', and 'Territory'. A red box highlights the 'Web and Social' tab label.

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.

The screenshot shows the 'Web and Social' tab selected in the account management interface. The tab is highlighted with a red box. The interface includes a top navigation bar with 'Hub', 'My Work', and 'Accounts > Baltimore Orioles'. Below the navigation bar, there are tabs for 'Summary', 'Address Information', 'Default Billing', and 'Other Details'. The 'Web and Social' tab is active, showing a form with sections for 'Web' and 'Social'. The 'Web' section has a field 'Include in Directory' with a value of 'Yes'. The 'Social' section has fields for 'Social - LinkedIn' and 'Social - Twitter', both with a value of '---'. A red box highlights the 'Web and Social' tab label.

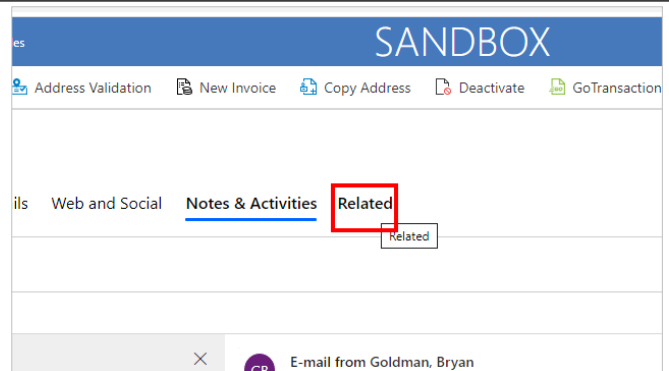
Click on the Notes and Activities tab

The screenshot shows the 'Notes and Activities' tab selected in the account management interface. The tab is highlighted with a red box. The interface includes a top navigation bar with 'Accounts > Baltimore Orioles' and 'SANDBO'. Below the navigation bar, there are tabs for 'Billing', 'Other Details', 'Web and Social', 'Notes & Activities', and 'Related'. The 'Notes & Activities' tab is active, showing a form with a field for 'Company'. A red box highlights the 'Notes & Activities' tab label.

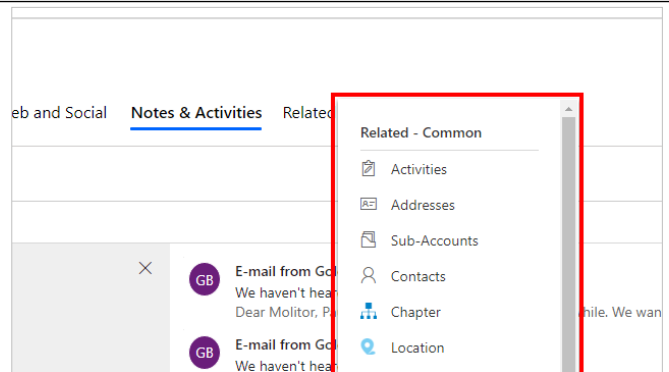
Here you will find the Timeline section that consist of all the Accounts activities in the format of a timeline. You can add additional Notes or Activities here as well.

The screenshot shows the 'Timeline' section in the account management interface. The section is highlighted with a red box. The interface includes a top navigation bar with 'Hub', 'My Work', and 'Accounts > Baltimore Orioles'. Below the navigation bar, there are tabs for 'Summary', 'Address Information', 'Default Billing', and 'Other Details'. The 'Timeline' section is active, showing a form with a field for 'Enter a note...' and a section for 'Loading filters'. A red box highlights the 'Timeline' section label.

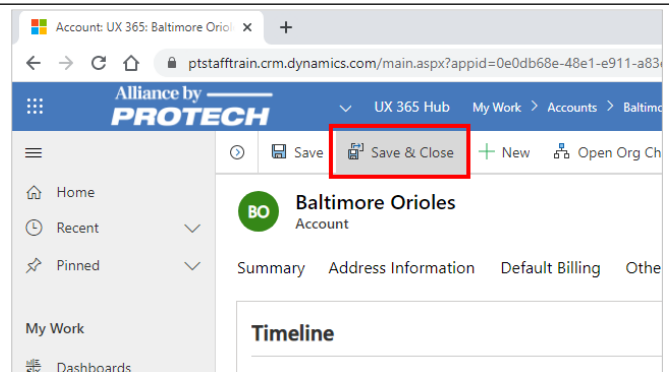
To view related records, click on the tab Related



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

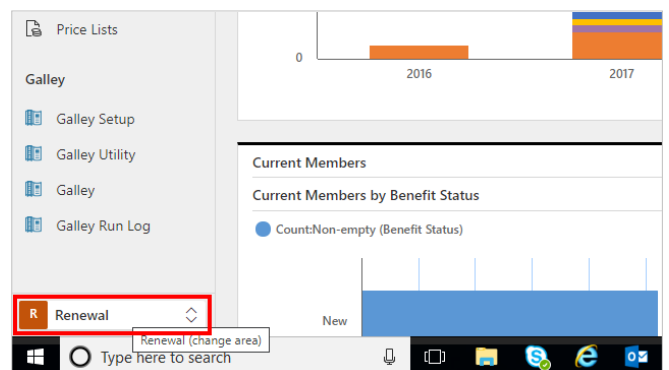


Click save or Save and Close to keep any changes made to the Account

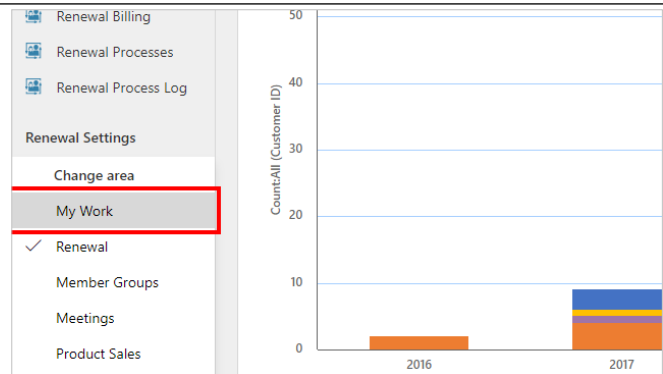


2.1.2. Contact Record Maintenance

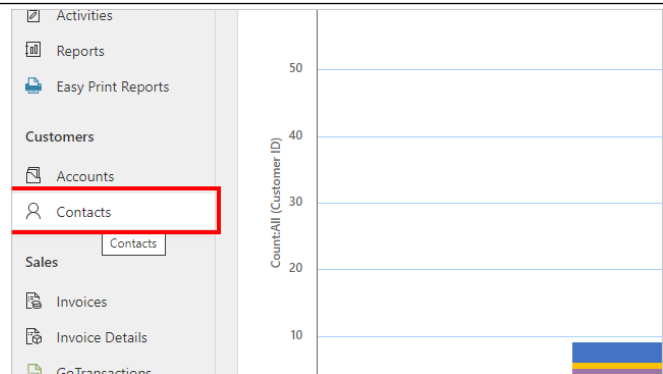
Click on the Change Area button



Click on the item **My Work**



Click on the item **Contacts**



Search for the Contact you are working with...

The screenshot shows a search interface with a search bar at the top right containing the text 'Search for records' and a magnifying glass icon. Below the search bar is a table with the following columns: Address 1: City, Address 1: State/Pro..., and Created On. The table contains three rows of data:

Address 1: City	Address 1: State/Pro...	Created On
---	---	1/25/2019 11:00 AM
---	---	12/17/2019 10:40 AM
---	---	12/17/2019 9:28 AM

Enter the name, last name first and hit ENTER

The screenshot shows the same search interface as the previous one, but with the text 'Bj' entered into the search bar. The table below the search bar remains the same:

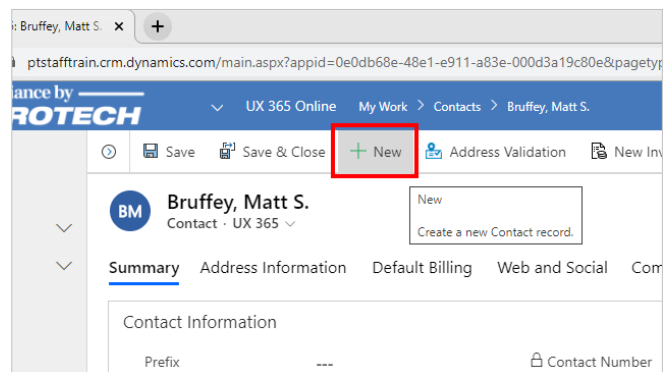
Address 1: City	Address 1: State/Pro...	Created On
---	---	1/25/2019 11:00 AM
---	---	12/17/2019 10:40 AM
---	---	12/17/2019 9:28 AM

Click on the Contacts name in the search results

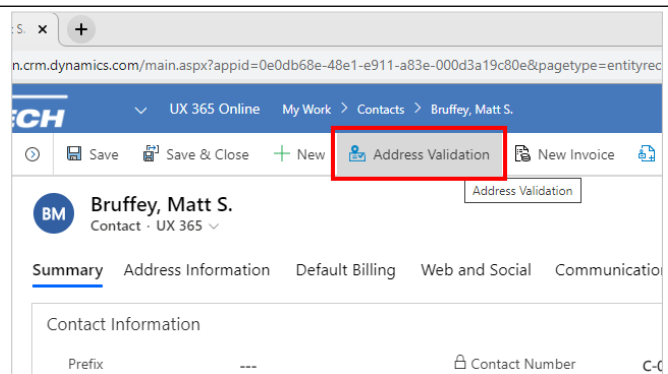


Once you are within the Contact record there are a number of actions you can perform against the Contact located on the top menu bar...

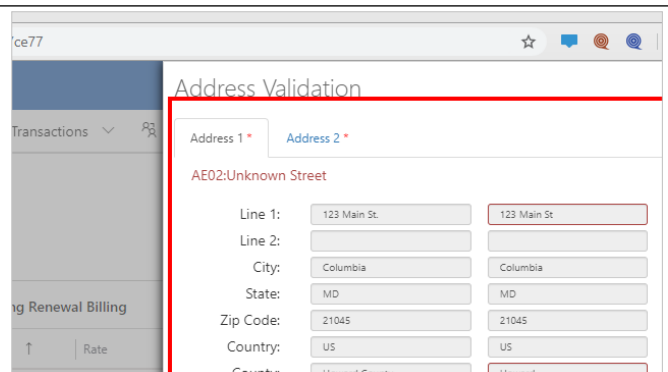
The New button allows you to quickly create a New Contact from within the Contact record you are working on. This is especially nice when you are performing a large amount of data entry.



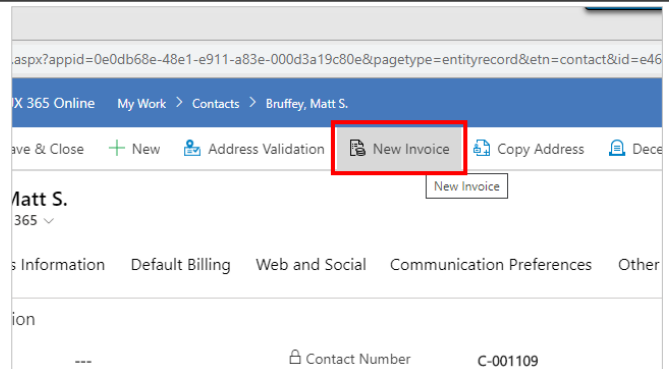
Click on the menu item **Address Validation**



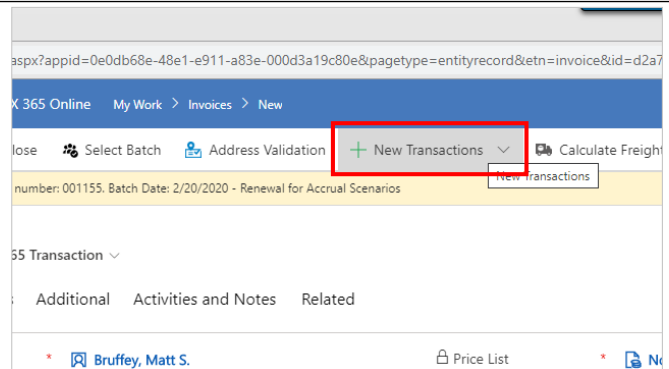
Address Validation allows you to review both the Primary and Secondary addresses of the Contact for accuracy. If you have a Melissa Data subscription it will update it automatically once you click ok



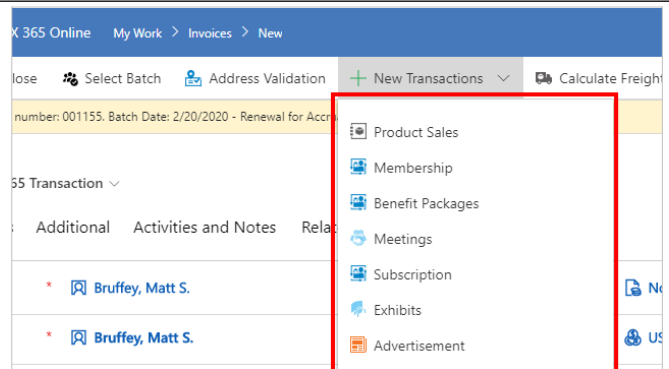
New Invoice button allows you to create a new transaction for the Contact



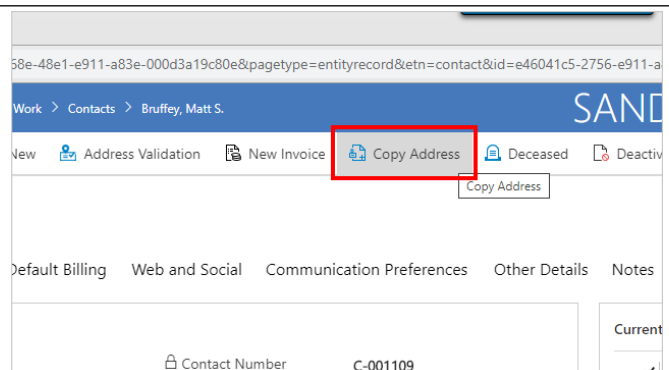
Click on New Transactions to see a list of transaction types you can perform



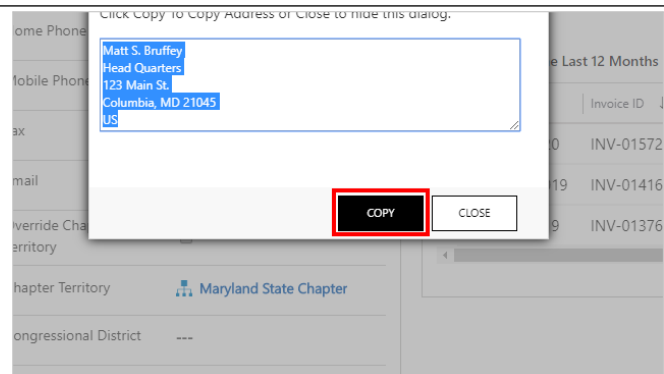
Here you will find a list of transaction types. For example, you can create a new membership, meetings or products sales invoice. As well as much more...



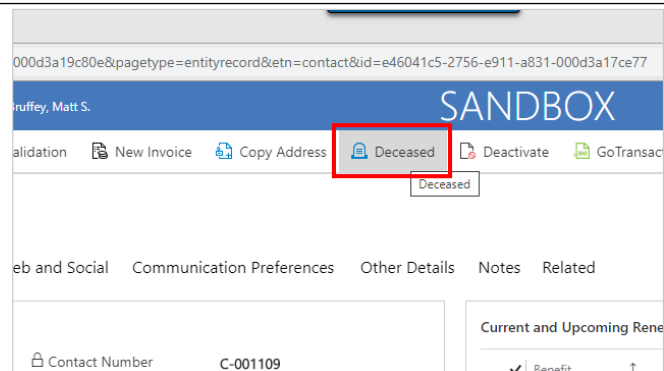
Click on the menu item **Copy Address**



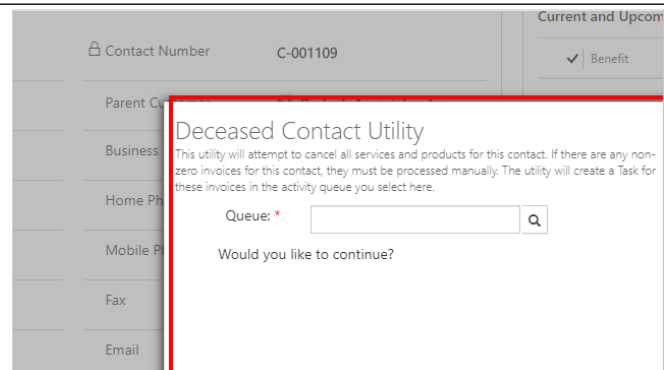
Click on the button COPY to copy the primary address to your local clip board.



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

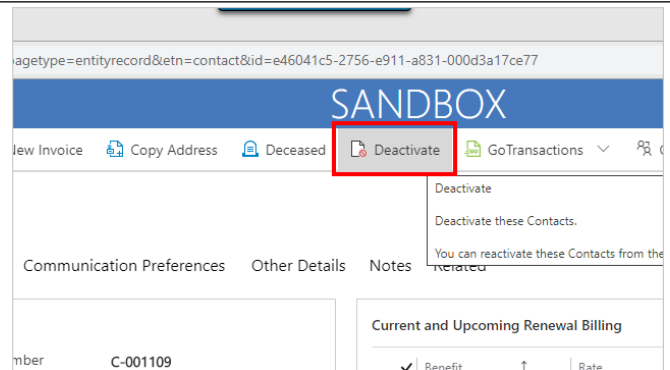


The utility will prompt you to select a queue where it will move all invoices with an open balance in the form of a Task record as a reminder to close those invoices out. If one of your contacts is deceased, there are several records that you should update, including roster and committee memberships, 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

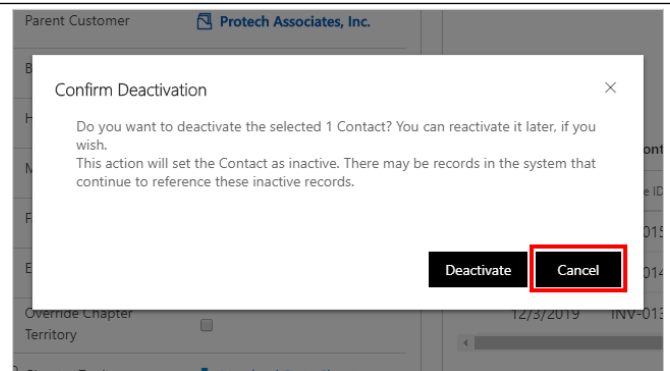


do that manually after you have resolved any remaining open invoices.

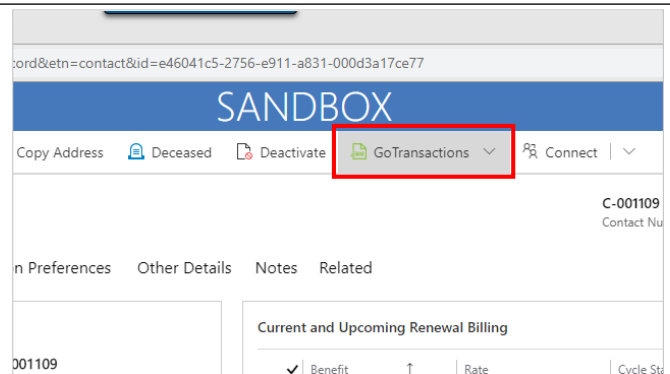
Click on the menu item **Deactivate**



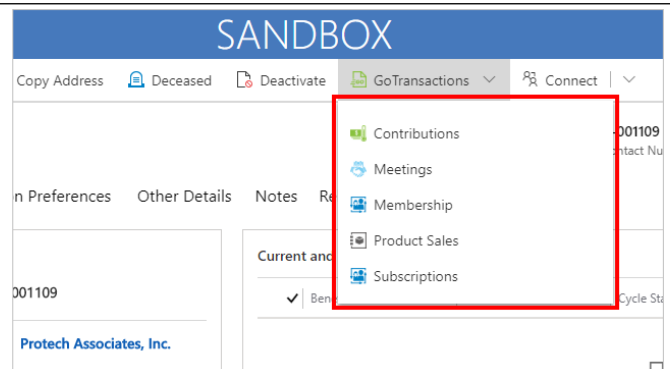
Deactivating a Contact is an alternative to deletion. This action will remove the Contact from all searches and views and will make the Contact read only. If for some reason you need to undo this action you can use the same button to reactivate the Contact.



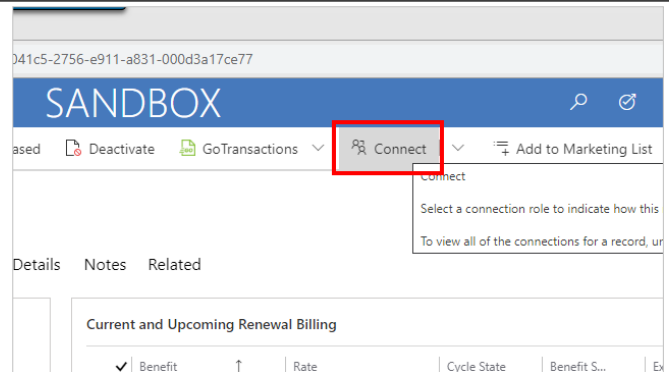
Click on the menu item **GoTransactions**



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

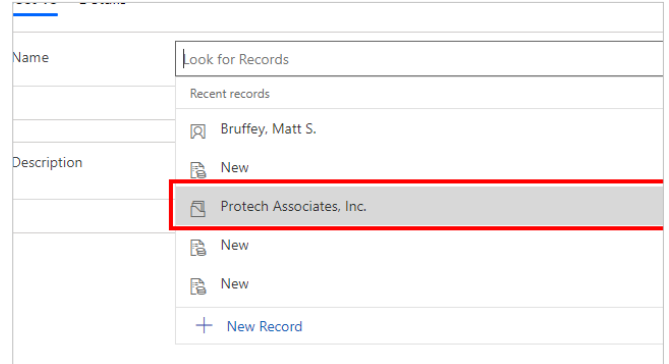


Use the Connect button to create a relationship with another record...



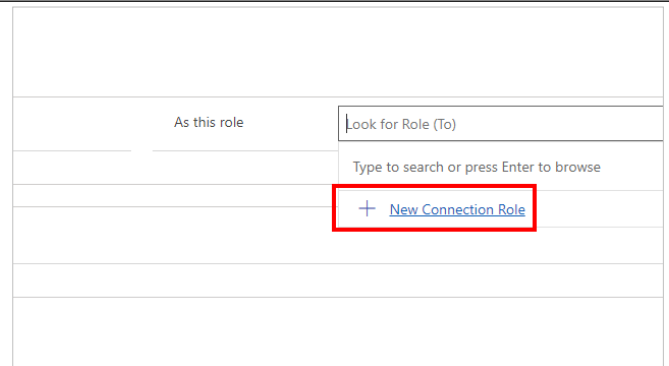
The screenshot shows the 'Sandbox' record page. The 'Connect' button is highlighted with a red box. A dropdown menu is open, showing options to 'Connect' and 'Add to Marketing List'. The 'Connect' option is selected, and a sub-menu is visible with the text 'Select a connection role to indicate how this' and 'To view all of the connections for a record, ur'.

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



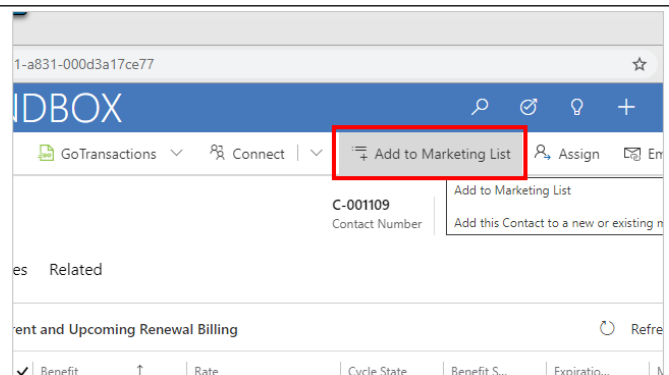
The screenshot shows the 'Look for Records' dropdown menu. The 'Protech Associates, Inc.' option is highlighted with a red box. Other options include 'Recent records', 'Bruffey, Matt S.', 'New', and 'New Record'.

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



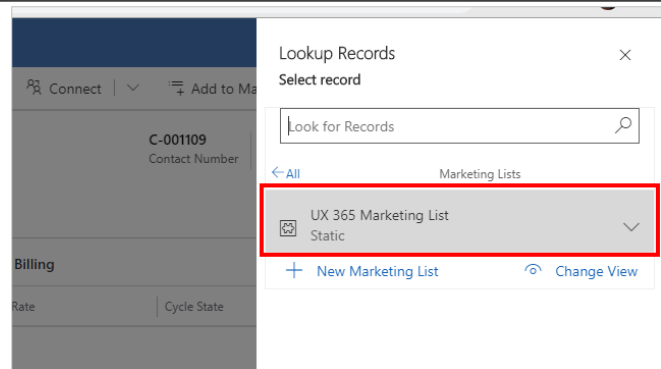
The screenshot shows the 'Look for Role (To)' dropdown menu. The 'New Connection Role' option is highlighted with a red box. Other options include 'As this role' and 'Type to search or press Enter to browse'.

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

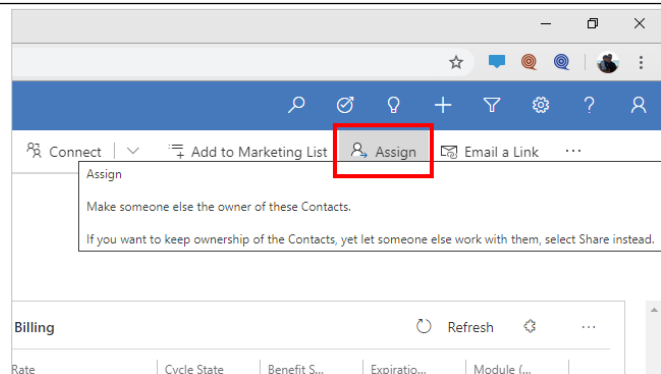


The screenshot shows the 'Sandbox' record page. The 'Add to Marketing List' button is highlighted with a red box. A dropdown menu is open, showing options to 'Add to Marketing List' and 'Assign'. The 'Add to Marketing List' option is selected, and a sub-menu is visible with the text 'Add this Contact to a new or existing n'.

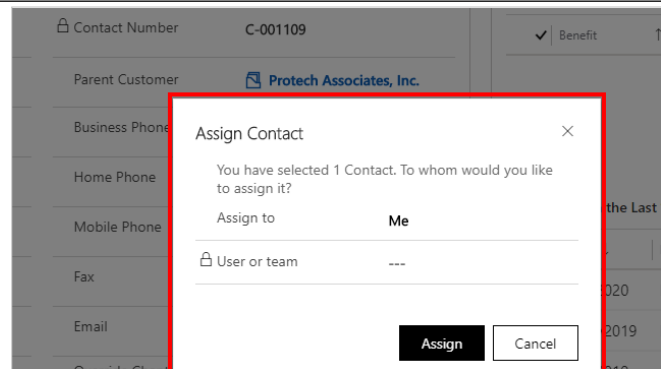
Quickly add the Contact to an existing Marketing List to begin receiving email updates



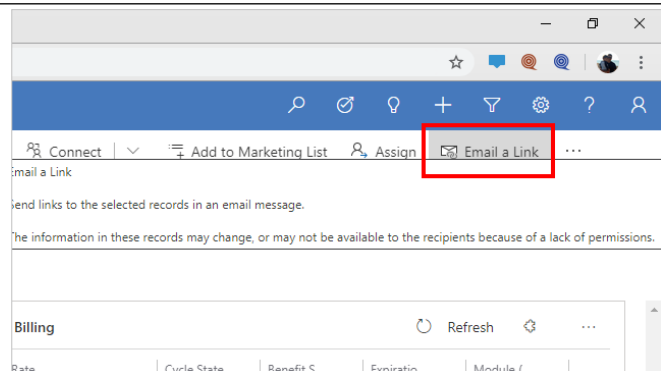
Click on the menu item **Assign**



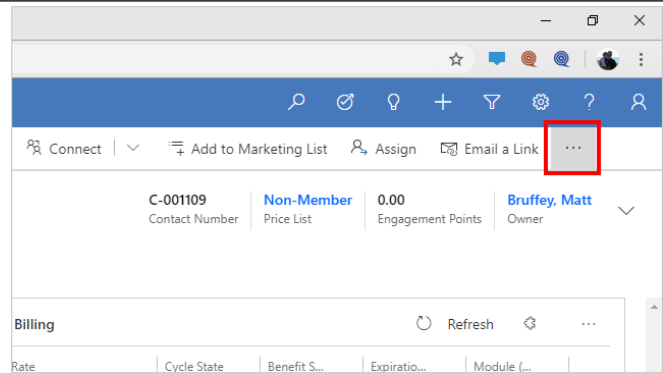
You can assign ownership of the Contact to another User or Team within your organization given you have the appropriate permissions.



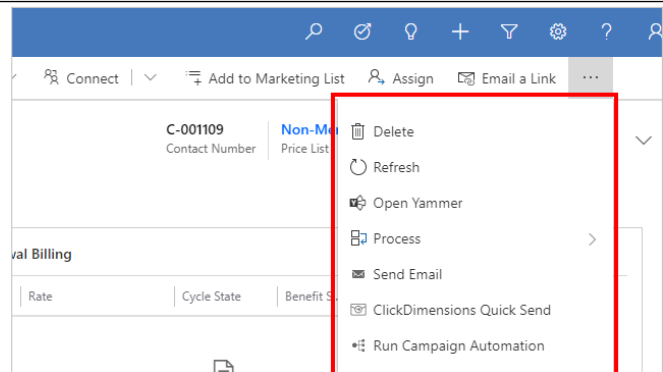
Email Link will allow you to share a Contact record with another user within your network via Email. When you click on the Email Link button it will automatically copy the URL to your email client for you to send another user where they can simply click on the Contact link to access and review.



Click on the elipses to see additional commands

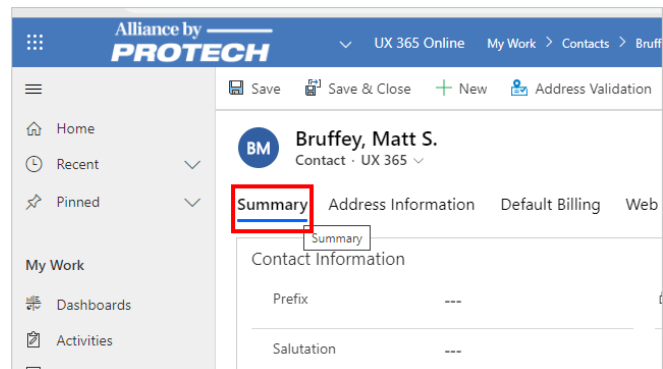


Here you will find more actions you can perform against the Contact

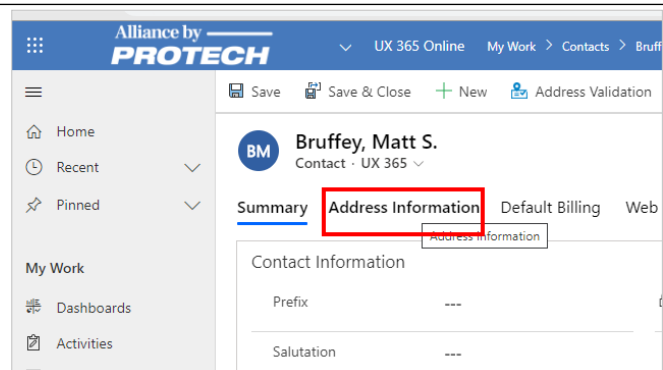


The Contact form is made up of Tabs across the top that contain sections and fields

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 screenshot shows the 'SANDBOX' contact record interface. At the top, there's a blue header with the word 'SANDBOX'. Below it, a navigation bar contains icons and labels for 'Copy Address', 'Deceased', 'Deactivate', 'GoTransactions', and 'Connect'. The main content area has several tabs: 'Communication Preferences', 'Other Details', 'Notes' (highlighted with a red box), and 'Related'. Below the tabs, there are sections for 'Annual Income', 'Education', 'Department', 'Shipping Preferences', 'Shipping Method', and 'Freight Terms'.

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.

This screenshot shows the 'Notes' tab selected. On the left is a sidebar with navigation options like 'Recent', 'Pinned', 'Work', 'Dashboards', 'Activities', 'Reports', 'Easy Print Reports', 'omers', and 'Accounts'. The main area shows the 'Timeline' section, which includes a text input field 'Enter a note...' and a 'Filter by' section with 'Record type' and checkboxes for 'Posts (1)' and 'Activities (4)'. The 'Timeline' section is highlighted with a red box.

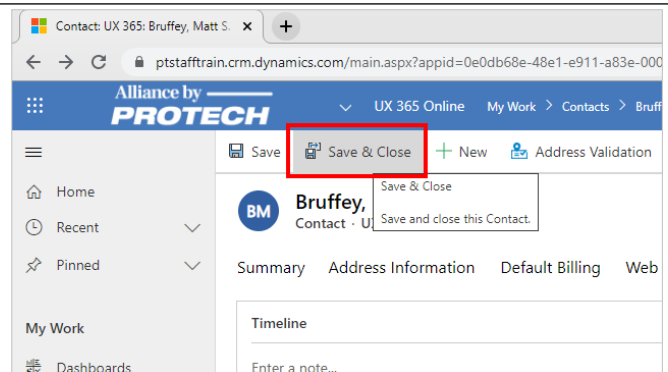
Click on the tab Related

The screenshot shows the 'Related' tab selected. The interface is similar to the previous one, but the 'Related' tab is highlighted with a red box. Below the tabs, there's a section for 'Related' with a 'Related' button. At the bottom, there's a preview of an email from 'Goldman, Bryan' with the subject 'We haven't heard from you... CRM-0034552'.

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 screenshot shows the 'Related' tab with a list of related record types. The list is titled 'Related - Transactions' and includes items like 'Opportunities', 'Leads', 'Invoices', 'Renewal Billing', 'Meeting Registrations', and 'Gift Certificates'. The list is highlighted with a red box. Below the list, there's a preview of an email from 'Goldman, Bryan' with the subject 'We haven't heard from you... CRM-0034552'.

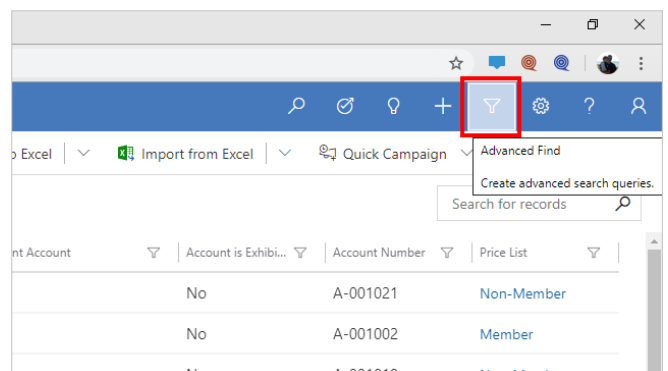
This concludes the review of the Contact record, please click on Save and Close to exit.



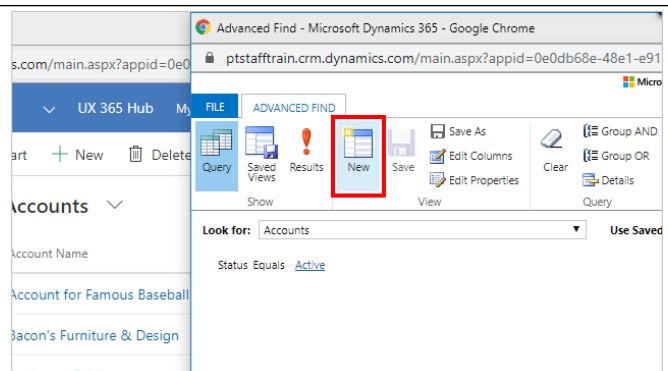
2.2. Advanced Find and Saved Views

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

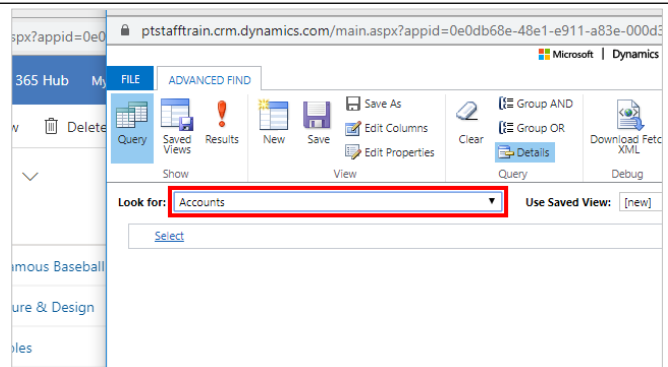
Click on the menu item **Advanced Find**



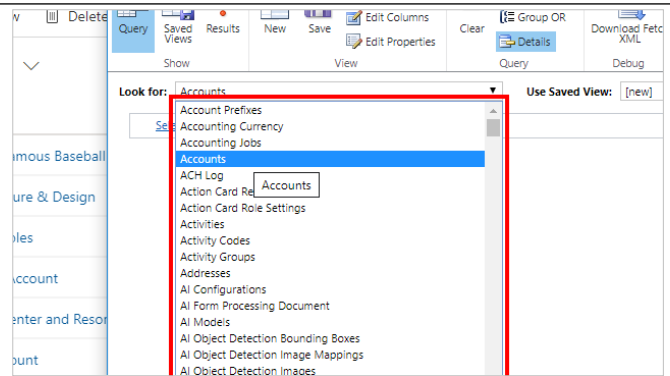
Click on the ribbon item **New**



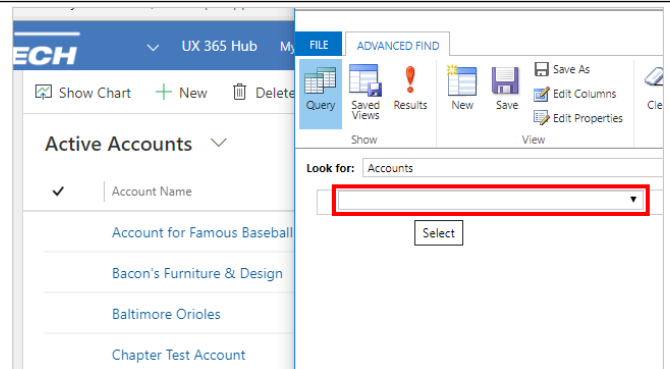
In the Look for list, select a record type



Select Accounts

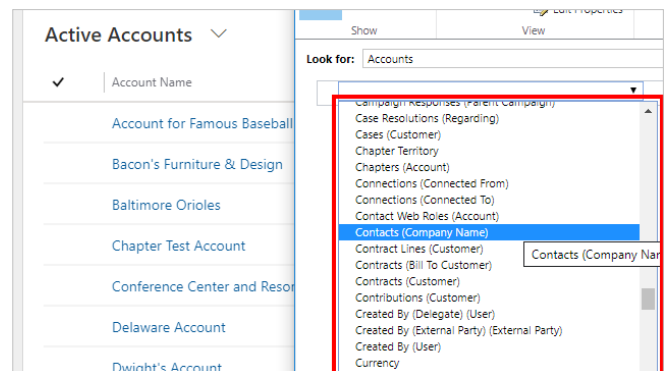


Define search criteria

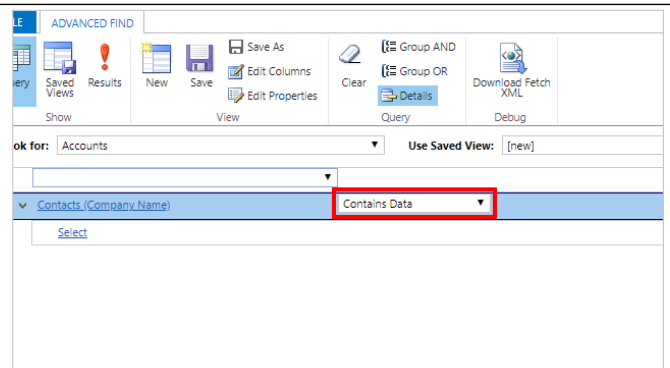


For example, find Accounts without any related Contact records

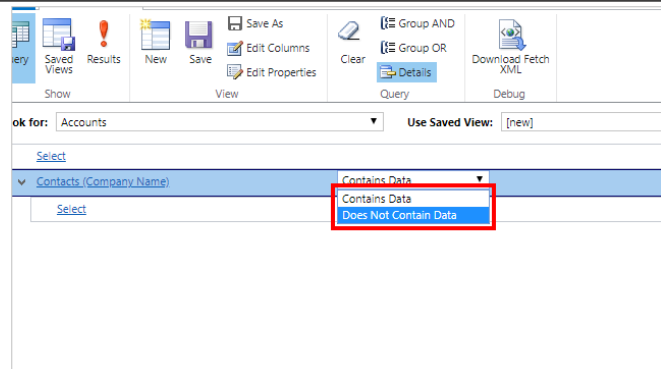
Click on the regarding entity, Contacts



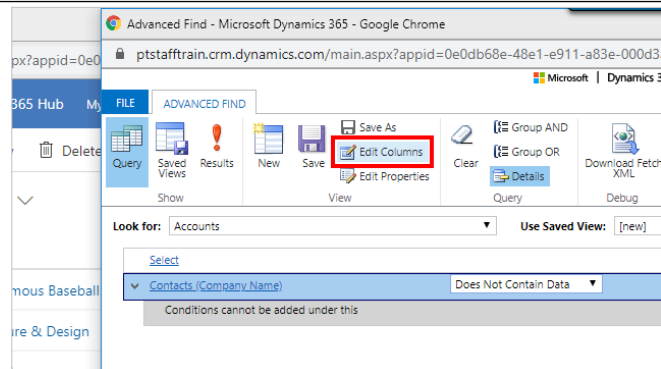
Open the selection criteria



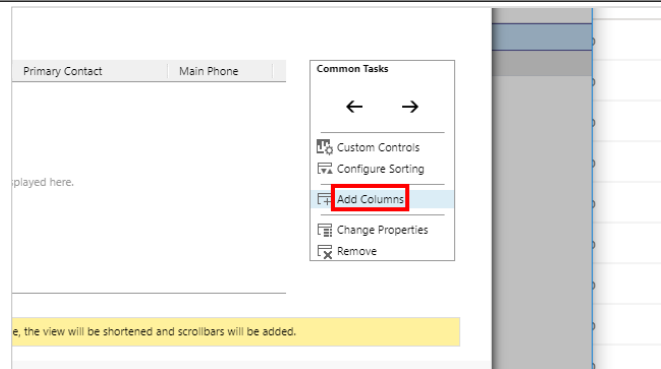
Choose, Does Not Contain Data. This will return all Accounts that do not have any related Contact records



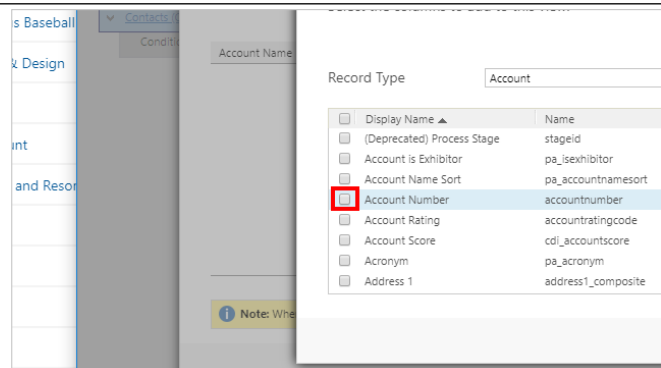
Specify the columns to include in the search results. Click on the button, Edit Columns



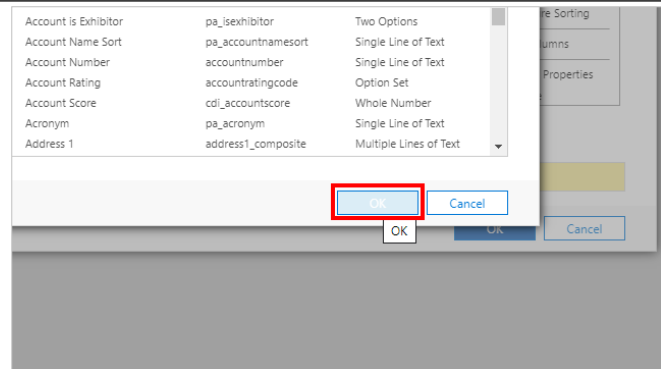
Click on the link **Add Columns**



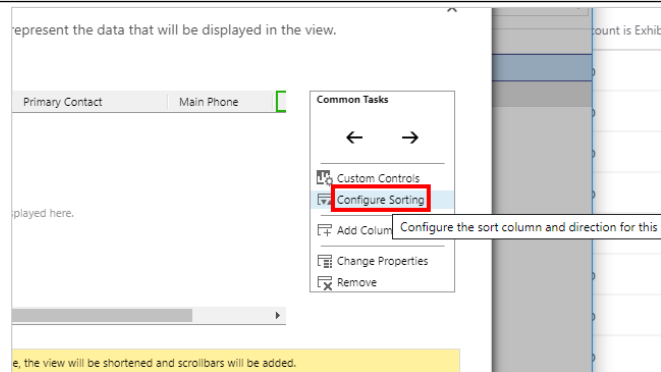
Check mark the fields you would like included in the search results



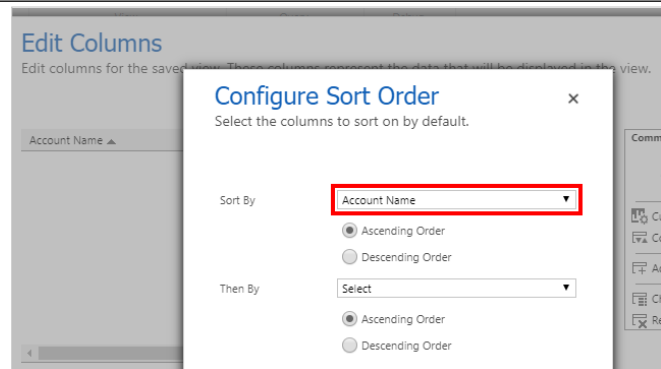
Click on the button **OK**



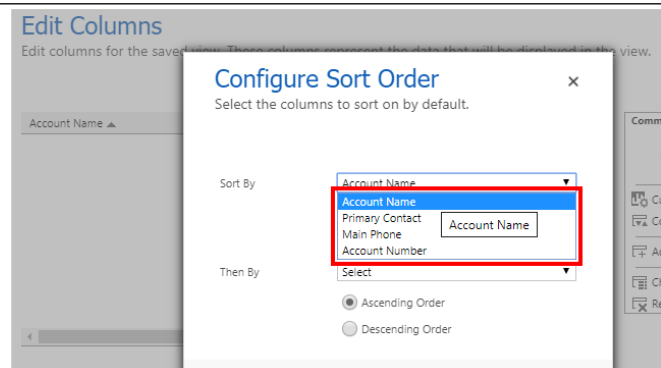
Configure sorting



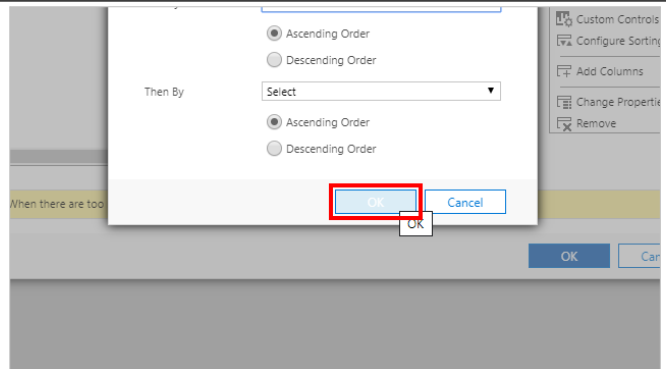
Configure Sort By



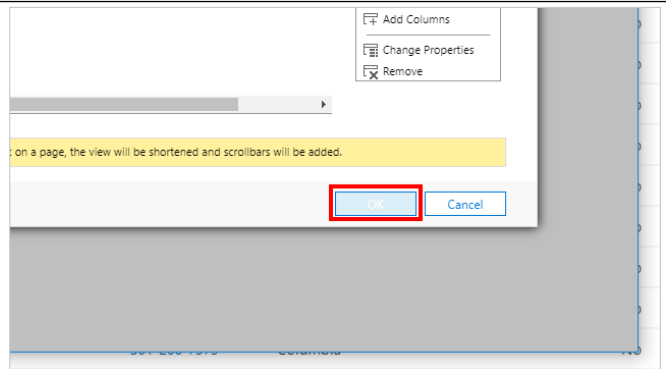
Click on the item **in the list**



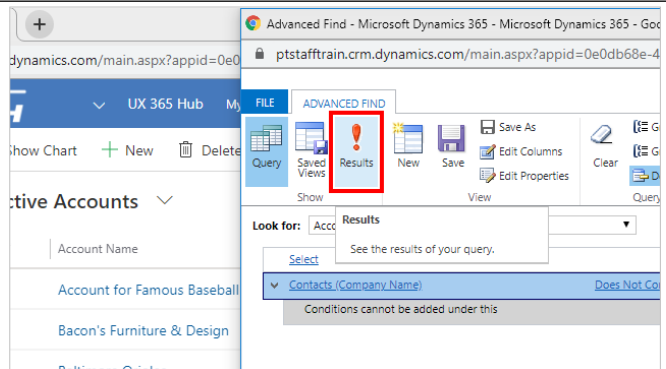
Click on the button **OK**



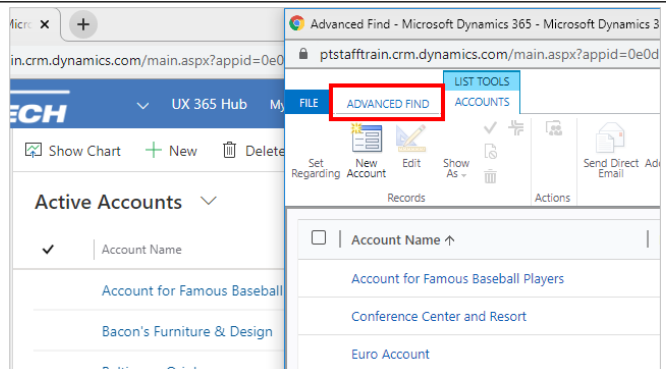
Click on the button **OK**



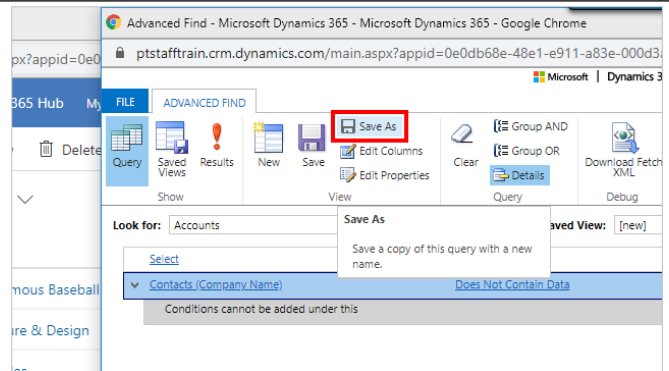
Click on the ribbon item Results to execute the query



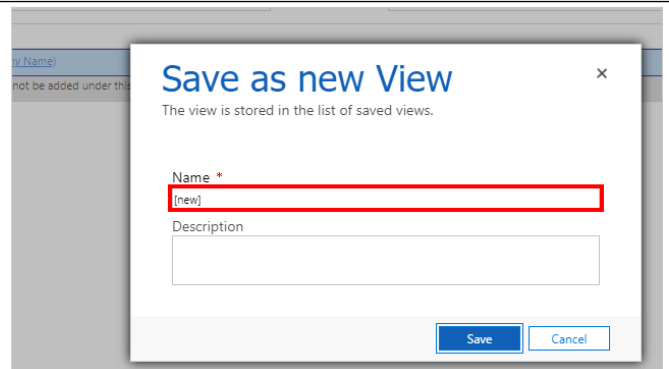
Review results and return to the Advanced Find query builder



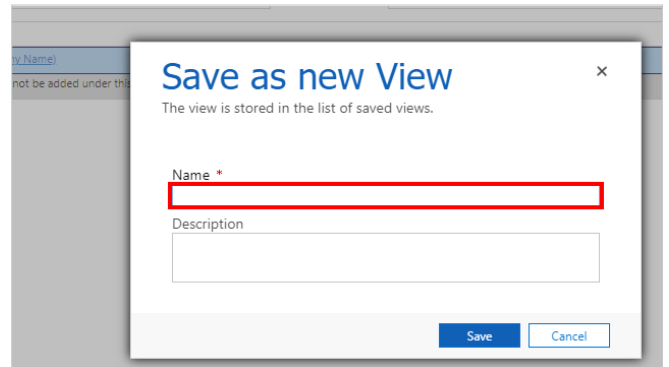
Click on the link **Save As**



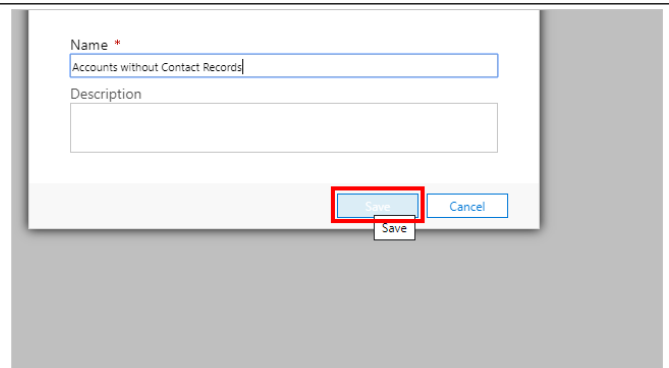
Give your query a name



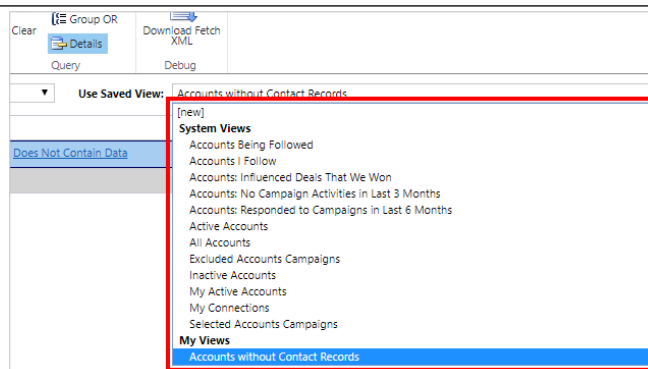
For example, enter the text Accounts without Contact Records



Click on the button **Save**



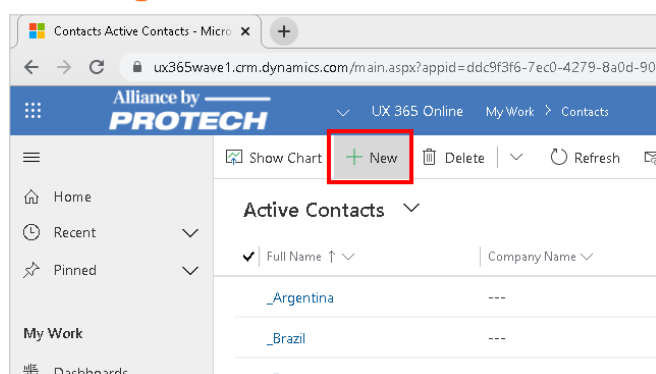
Your new query is now accessible from, My Views



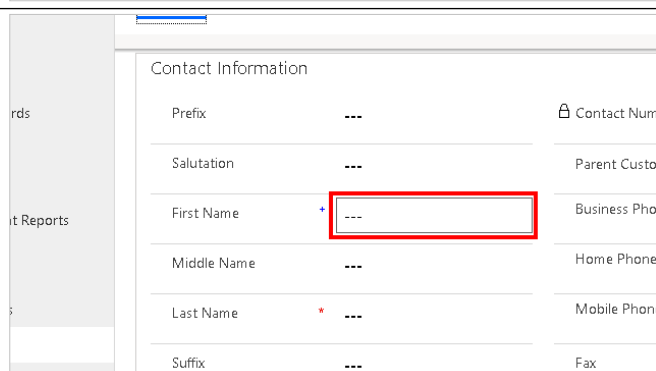
2.3. Country-based Address and Telephone Number Formatting

2.3.1. Country-based address formatting

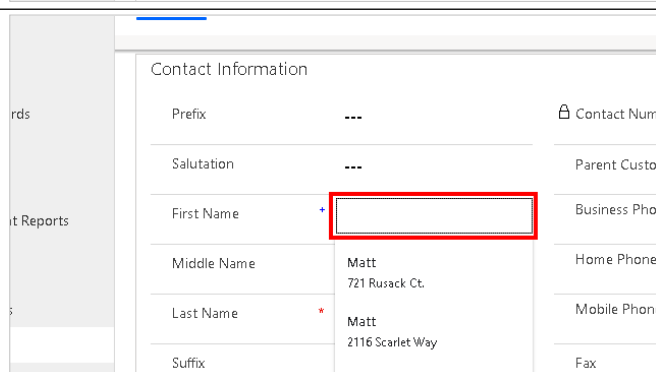
First, create a new contact by clicking on New



Click on the First Name field



Enter name



Click on the Last Name field

A screenshot of a contact details form. The form has a sidebar on the left with options like 'Reports', 'Details', and 'Actions'. The main area contains fields for Salutation, First Name (with a plus icon and the text 'Jack'), Middle Name, Last Name (highlighted with a red box), Suffix, Job Title, Professional Designation, Parent Customer, Business Phone, Home Phone, Mobile Phone, Fax, Email, and Override Change. The Last Name field is currently empty and is highlighted with a red rectangular box.

Enter name

A screenshot of the same contact details form. The Last Name field now contains the letter 'J' and is highlighted with a red rectangular box. The other fields remain the same as in the previous screenshot.

Select the Address Information tab to expose the Primary Address

A screenshot of the 'New Contact' form in the 'Alliance by PROTECH' application. The form has a sidebar with 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', and 'Activities'. The main area shows tabs for 'Summary', 'Address Information' (highlighted with a red box), 'Default Billing', and 'Web'. Below the tabs, there are fields for 'Contact Information' including Prefix, Salutation, and Address 1 (State/Province, ZIP/Postal Code, Country/Region). The 'Address Information' tab is selected and highlighted with a red rectangular box.

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

A screenshot of the address dialog form. The form has a sidebar with 'Details', 'Actions', and 'Initiatives'. The main area contains fields for Address 1: State/Province, Address 1: ZIP/Postal Code, Address 1: Country/Region, Name (highlighted with a red box), and County. The Name field is highlighted with a red rectangular box.

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**

Address 2: Street 1 ...

Address 2: Street 2 ...

Address 2: Street 3 ...

Country

United States

Street 1

Street 2

Street 3

Click on an option from the list

Country

United States

El Salvador

Equatorial Guinea

Eritrea

Estonia

Ethiopia

Falkland Islands

Faroe Islands

Fiji

Finland

France

French Guiana

French Polynesia

French Southern Territories

Click on Address

Address 2: Street 2 ...

Address 2: Street 3 ...

Country

France

Address 1

Address 2

Postal code

e.g. 75002

City

Enter the address

Address 2: Street 2 ...

Address 2: Street 3 ...

Country

France

Address 1

3

721 Rusack Ct.
21012

2116 Scarlet Way
21771

1005 Duanev Pl

Click on City

This screenshot shows a form with several input fields. The 'City' field is highlighted with a red border. The form includes fields for 'Address 1' (containing '33 Boulevard de cimiez'), 'Address 2', 'Postal code' (with a hint 'e.g. 75002'), and 'City'. A 'CLOSE' button is visible at the bottom right of the form area.

Enter **City**.

This screenshot shows the same form as the previous one, but the 'City' field now contains the letter 'N' and remains highlighted with a red border. The 'Postal code' field still has the hint 'e.g. 75002'.

Click on Postal Code

This screenshot shows the form with the 'Postal code' field highlighted in red. The 'Country' dropdown is set to 'France'. The 'City' field now contains 'Nice'. The 'Postal code' field has the hint 'e.g. 75002'.

Enter Postal Code

This screenshot shows the form with the 'Postal code' field highlighted in red and containing the text 'e.g. 75002'. The 'Country' dropdown is still 'France' and the 'City' field is 'Nice'.

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

The screenshot shows a contact form with several fields. The 'Phone Number' field is highlighted with a red box. The form includes sections for 'Current and Upcoming Renewal Billing' and 'Transactions in the Last 12 Months'.

Enter phone number

The screenshot shows the same contact form as before, but now the 'Phone Number' field contains the digit '0' and is highlighted with a red box. The form also displays a list of addresses for the contact.

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.

The screenshot shows the contact form with the 'Business Phone' field highlighted by a red box. The field now contains the formatted number '+33 4657714085'. Other fields like 'Contact Number', 'Parent Customer', 'Home Phone', 'Mobile Phone', and 'Fax' are also visible.

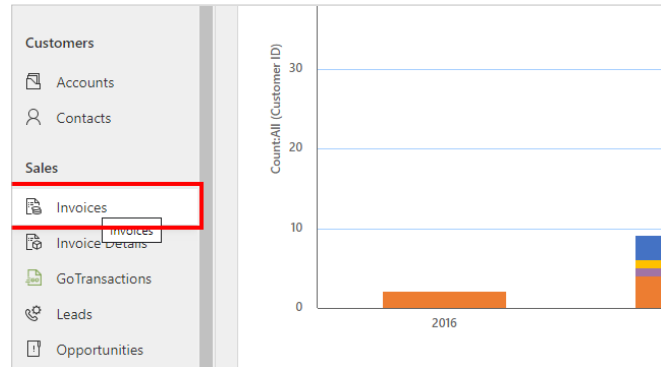
Click on the menu item Save

The screenshot shows the contact form with the 'Save' button highlighted by a red box. The button is located in the top right corner of the form. The form also displays a list of addresses for the contact.

2.4. Invoices Management

2.4.1.1. Invoice Record Elements

Click on the item **Invoices**

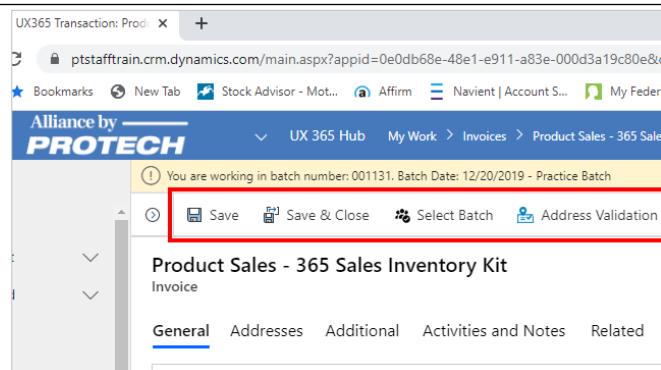


Click on the invoice you would like to view.

Link Flow Run Report Excel Templates Export to Excel		
Name	Bill to Customer	
Test	Calendar - Begin Jan	Testingrejoin, Test
Product Sales - 365 Sales Inventory Kit	Baltimore Orioles	
Product Sales - 365 Sales Inventory Kit	Baltimore Orioles	
Test	Calendar - Begin Jan	Testingrejoin, Test

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

General	Addresses	Additional	Activities and Notes	Related
BILL TO				
Bill To Name	Memorial Stadium			
Bill To Attention	Gen Earl Alabaster Weaver, IV			
Bill To Street 1	3300 Stadium Drive			
Bill To Street 2	On the Field			
Bill To Street 3	In the Dugout (most of the time)			
Bill To City	Baltimore			

Ship to Address

SHIP TO	
Ship To Name	Memorial Stadium
Ship To Attention	Gen Earl Alabaster Weaver, IV
Ship To Street 1	3300 Stadium Drive
Ship To Street 2	On the Field
Ship To Street 3	In the Dugout (most of the time)
Ship To City	Baltimore

2.4.1.2. Creating an invoice and entering invoice basic information

Click on the item **Invoices**

Customers	Bill To Street 1	3300 Stadium Drive
Accounts	Bill To Street 2	On the Field
Contacts	Bill To Street 3	In the Dugout (most of the time)
Sales	Bill To City	Baltimore
Invoices	Bill To State/Province	MD
Invoice Details	Bill To ZIP/Postal Code	21229
Go Transactions	Bill To Country/Region	US
Leads		
Opportunities		

Click on the menu item **New**

Invoices My Invoices - Microsoft x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Bookmarks New Tab Stock Advisor - Mot... Affirm Navient | Account S...

Alliance by **PROTECH** UX 365 Hub My Work > Invoices

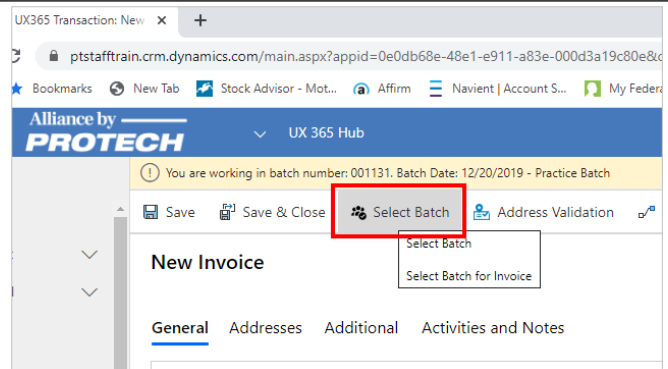
Show Chart **+ New** Delete Refresh

My Invoices

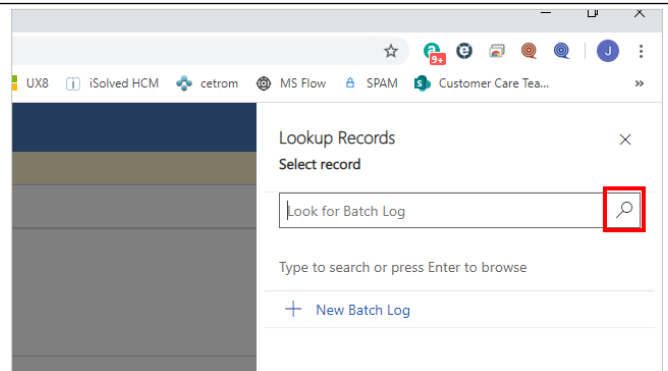
Invoice Date	Invoice ID	Custo
12/11/2019	INV-01388-V4K6H3	Testi
12/6/2019	INV-01372-D1H5G1	Balti

Click on the menu item **Select Batch**

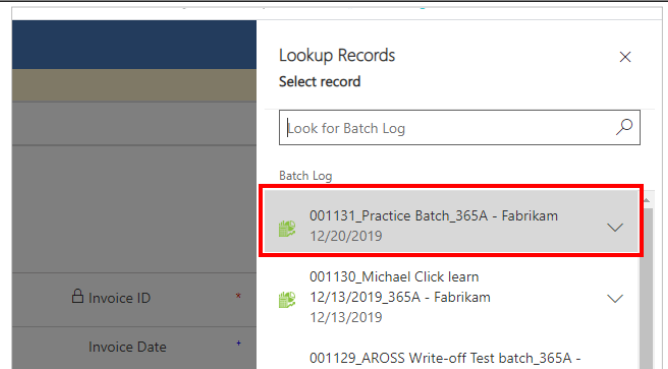
Click Select Batch to select the appropriate open batch based on your organization's business rules. For information about batches, see Batch overview . You must be in an open batch in order to enter or open invoice detail. If you are not in an open batch, a warning message directs you to select a batch.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



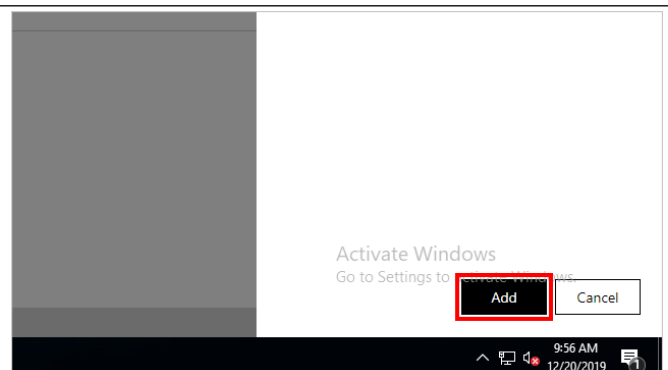
Click on the magnifying glass to search all records.



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

The screenshot shows the 'New Transactions' dropdown menu in the 365 Hub interface. The 'Product Sales' option is highlighted with a red box. Other options visible include Membership, Benefit Packages, Meetings, and Subscription. The background shows the 'Invoices > New' page with a batch number and date.

Using the search bar, look for the product you want to add to this invoice.

The screenshot shows the 'Look for Product' search bar in the 365 Hub interface. The search icon is highlighted with a red box. The search bar is empty, and the background shows the 'Invoices > New' page with a batch number and date.

For this example we are using the 365 Sales Inventory Kit.

The screenshot shows the 'Product' dropdown menu in the 365 Hub interface. The '365 Sales Inventory Kit' option is highlighted with a red box. Other options visible include '365 Sales Inventory Product' and '365 Sales Non-Inventory_Member and Non-Member Pricing'. The background shows the 'Invoices > New' page with a batch number and date.

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.

The screenshot shows the 'Quantity Ordered' field in the 365 Hub interface. The field is highlighted with a red box, and a red error message is displayed below it: 'Required fields must be filled in.' The background shows the 'Invoices > New' page with a batch number and date.

Enter the quantity.

Invoice Detail	
Product	* 365 Sales Inventory Kit
Warehouse	* Internal Warehouse
Transaction Date	* 12/20/2019
Quantity Ordered	1
Required fields must be filled in.	
Back Ordered	---
Overridden Pricing	<input type="checkbox"/>

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

2.4.1.4. Adding a comment to an invoice

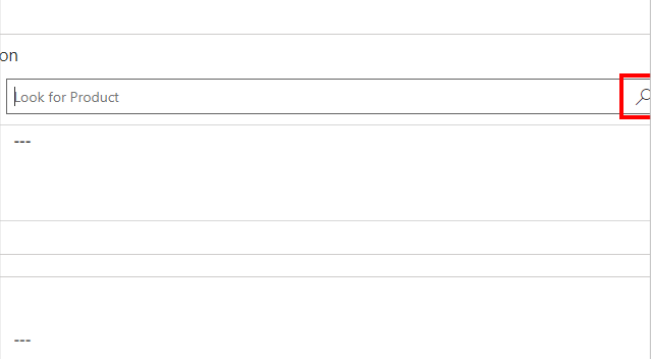
Click on the menu item **New Transactions**

Click on the menu item **Comment**

* Baltimore Orioles	Meetings	
* Baltimore Orioles	Subscription	
* Product Sales - 365 Sales Inventory Kit	Promotion Package	
---	Contributions	>
---	Payment & Adjustment	>
---	Comment	Comment

	Batch	Batch Date (Batch)	Price Per Unit
365 Sales Inventory Kit	001131	12/20/2019	

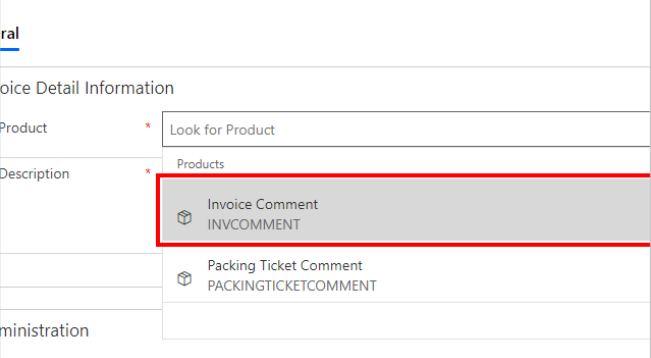
Click on the link **Product**



on

Look for Product

Select a invoice comment product.



ral

oice Detail Information

Product * Look for Product

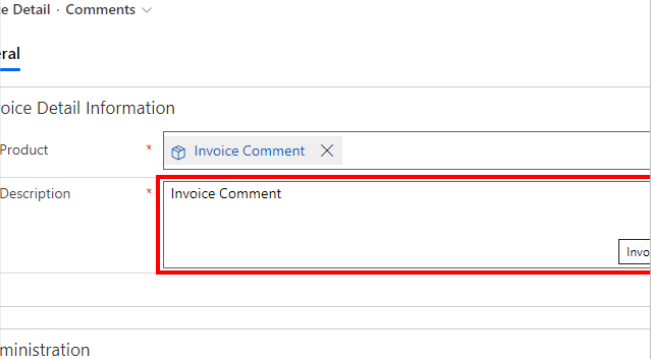
Description * Products

Invoice Comment INVCOMMENT

Packing Ticket Comment PACKINGTICKETCOMMENT

ministration

Enter in the comment text here.



e Detail · Comments

ral

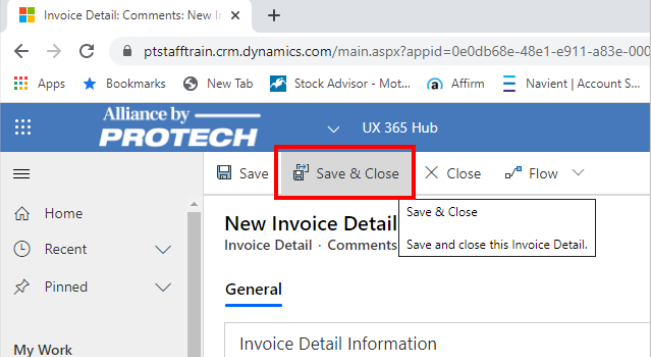
oice Detail Information

Product * Invoice Comment

Description * Invoice Comment

ministration

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



Invoice Detail: Comments: New Invoice Detail · Comments

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Bookmarks New Tab Stock Advisor - Mot... Affirm Navient | Account S...

Alliance by **PROTECH** UX 365 Hub

Save Save & Close Close Flow

New Invoice Detail

Invoice Detail · Comments

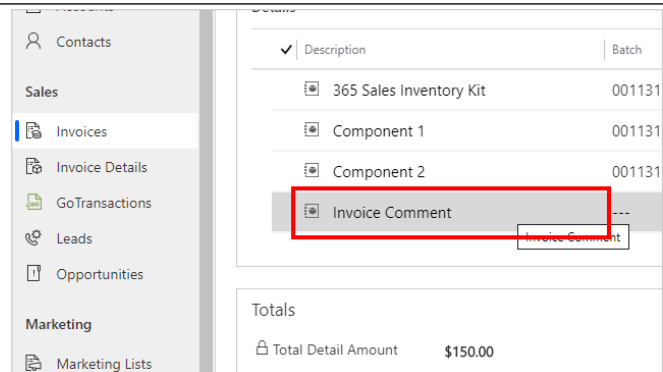
Save & Close

Save and close this Invoice Detail.

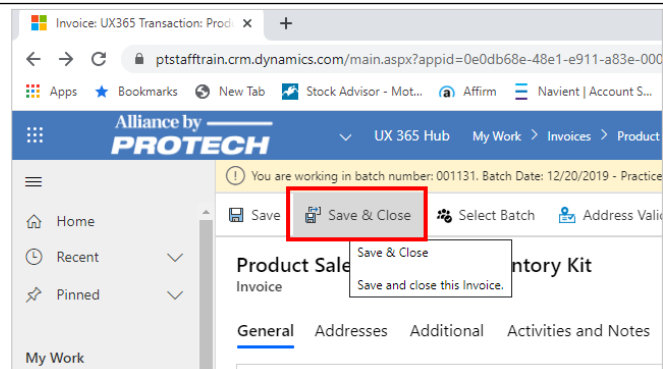
General

Invoice Detail Information

Your comment will appear just like a usual transaction.



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

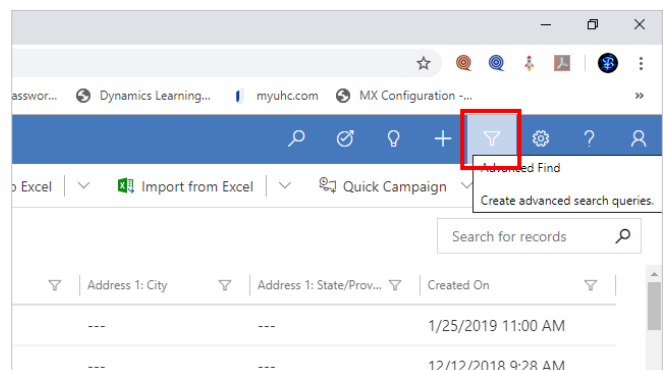


2.5. Sending Email

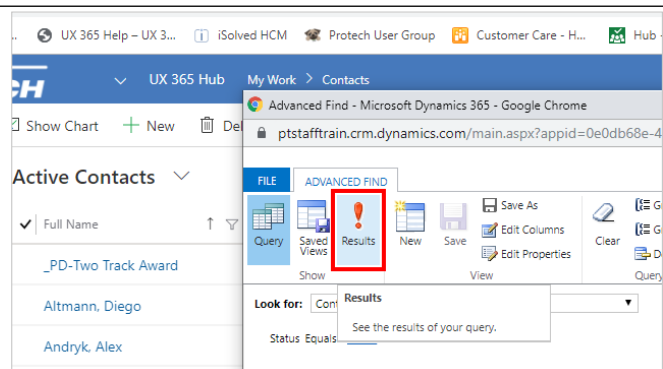
2.5.1. Sending email from a Quick Campaign

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.

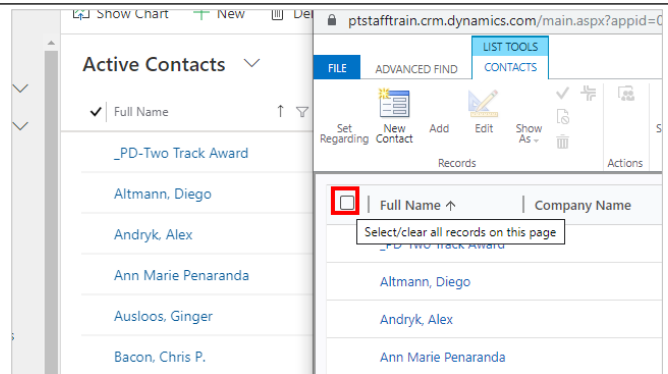
Click on the menu item Advanced Find and query on who you want to target through the quick campaign.



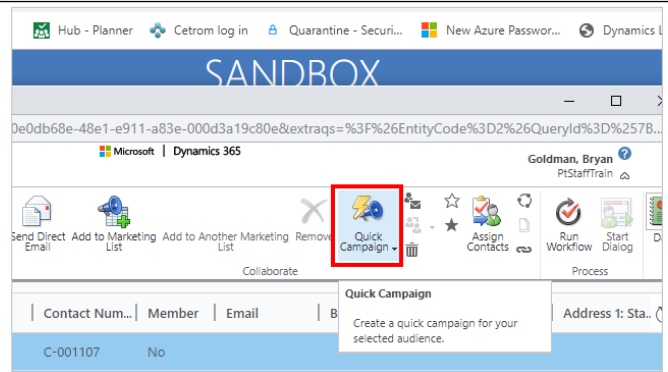
Click on the ribbon item **Results**



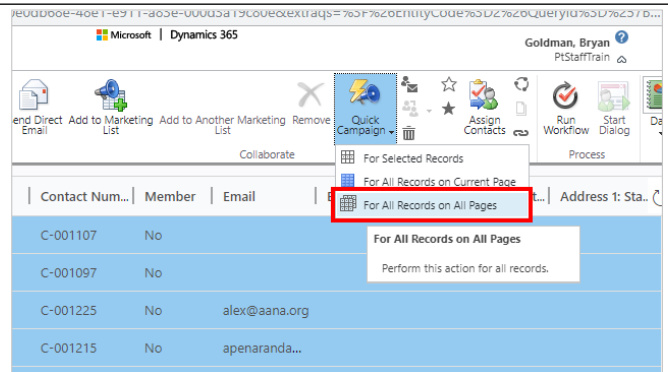
Select all or specific records you will want to email using quick campaign.



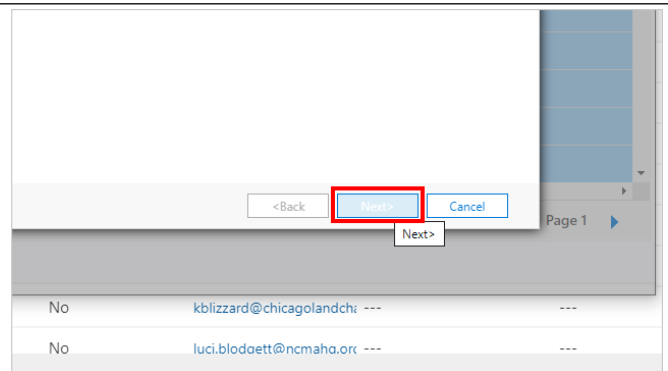
Click on the ribbon item **Quick Campaign**



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



Click on the button Next



Click on **Name:**

The screenshot shows a 'Create a Quick Campaign' dialog box. The title is 'Create a Quick Campaign'. Below the title, it says 'Specify the Campaign Name'. A note states: 'Specify the name for this Quick Campaign. The maximum number of characters is 200.' The 'Name' field is highlighted with a red rectangle.

Enter a descriptive name for the Quick Campaign

The screenshot shows the same 'Create a Quick Campaign' dialog box. The 'Name' field now contains the letter 'd' and is highlighted with a red rectangle.

Click on the button Next

The screenshot shows the bottom of the 'Create a Quick Campaign' dialog box. The 'Next' button is highlighted with a red rectangle. Other buttons visible are '<Back' and 'Cancel'. Below the dialog box, a table with email addresses is partially visible.

Click on the item **E-mail**

The screenshot shows a 'Select the Activity Type and Owners' dialog box. Under 'Activity Type', the 'E-mail' option is highlighted with a red rectangle. Below this, there is a section 'Select who will own these new activities.' with radio buttons for 'Me', 'The owners of the records that are included in the quick campaign', and 'Assign to another user or team'.

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**

The screenshot shows the 'Create a Quick Campaign' dialog box. The 'Specify the Content of the Activity' section is active. The 'Use Template' checkbox is highlighted with a red box. The 'From' field is set to 'Goldman, Bryan' and the 'Subject' field is empty.

Click on the link **Select Template**

The screenshot shows the 'Create a Quick Campaign' dialog box. The 'Specify the Content of the Activity' section is active. The 'Use Template' checkbox is checked. The 'Select Template' link is highlighted with a red box. The 'From' field is set to 'Goldman, Bryan' and the 'Subject' field is empty.

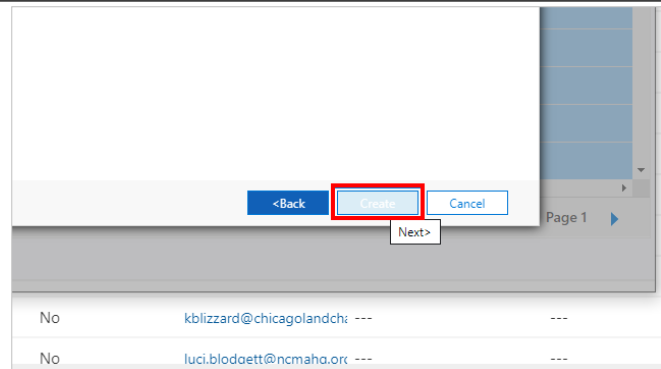
Click on desired email template.

The screenshot shows the 'Create a Quick Campaign' dialog box. The 'Specify the Content of the Activity' section is active. The 'Select Template' link is highlighted with a red box. The 'Contact Reconnect' template is highlighted with a red box. The 'From' field is set to 'Goldman, Bryan' and the 'Subject' field is empty.

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.

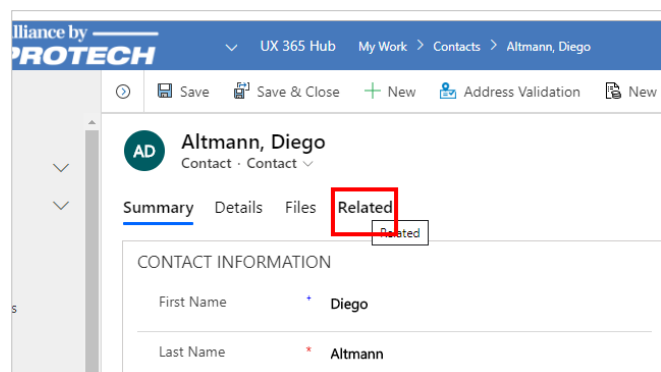
The screenshot shows the 'Create a Quick Campaign' dialog box. The 'Specify the Content of the Activity' section is active. The 'Next' button is highlighted with a red box. The 'From' field is set to 'Goldman, Bryan' and the 'Subject' field is empty.

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.

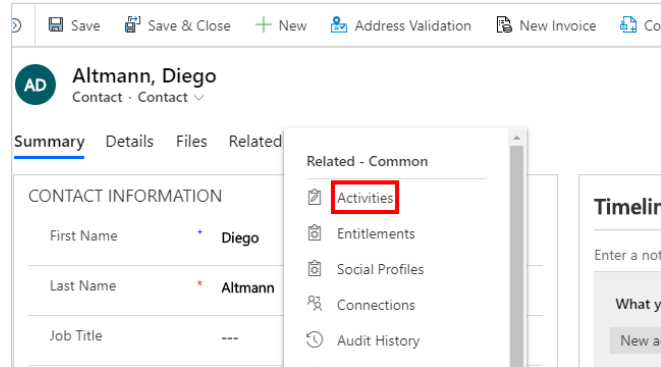


2.5.2. Sending email from a single contact record

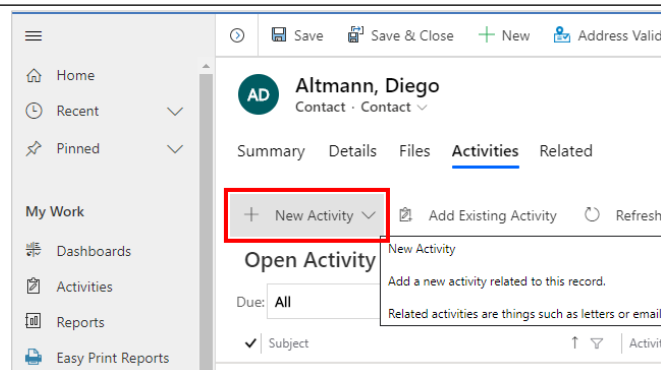
From the contact record, click on the item Related



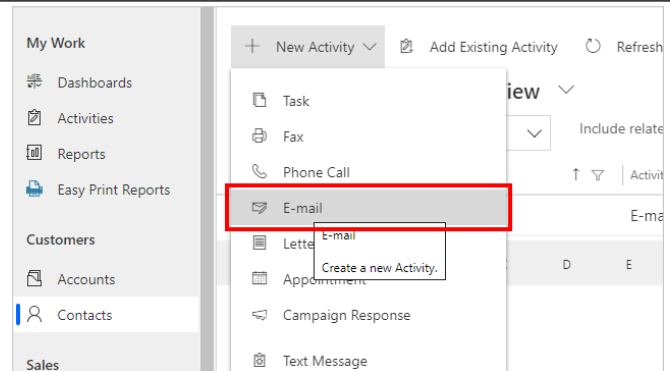
Click on the menu item **Activities**



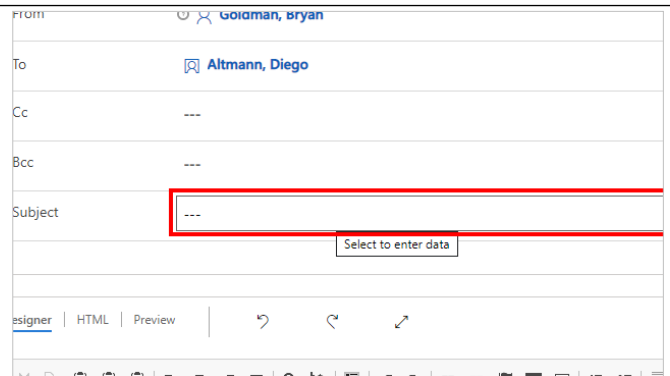
Click on the menu item **New Activity**



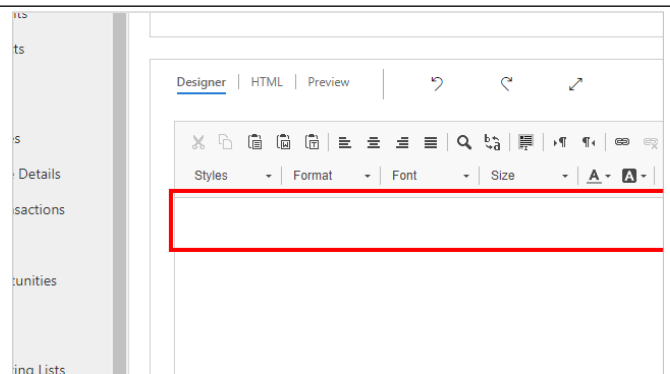
Click on the menu item **E-mail**



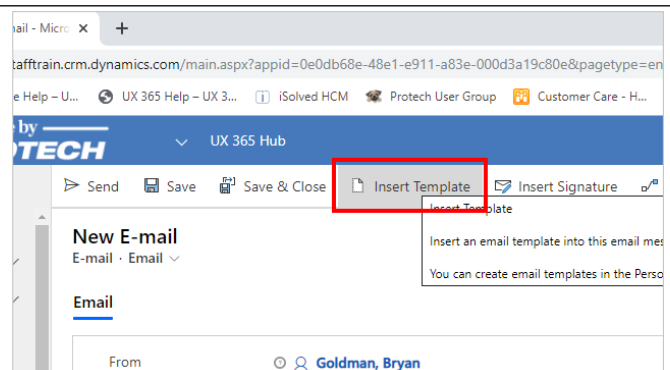
When composing an email message, enter a subject and the message content.



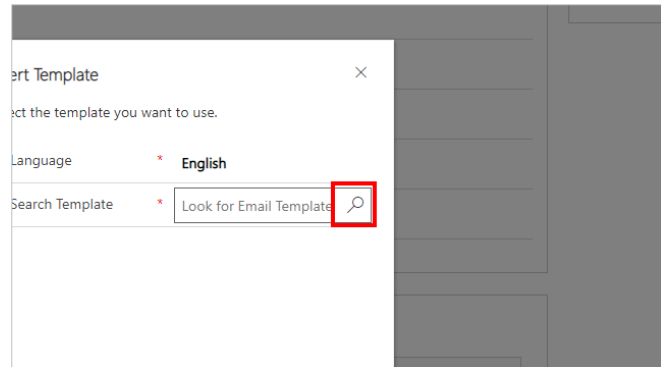
Email Content



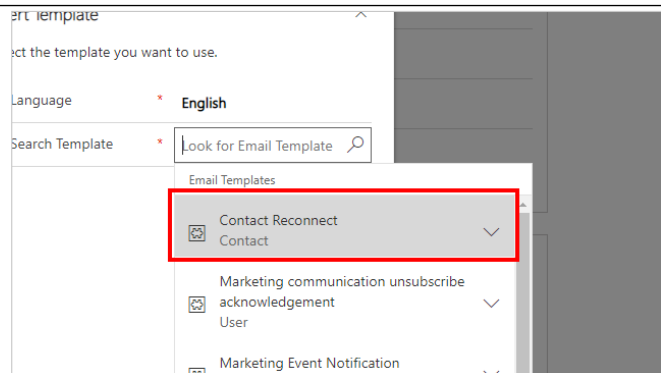
Click on the menu item **Insert Template**



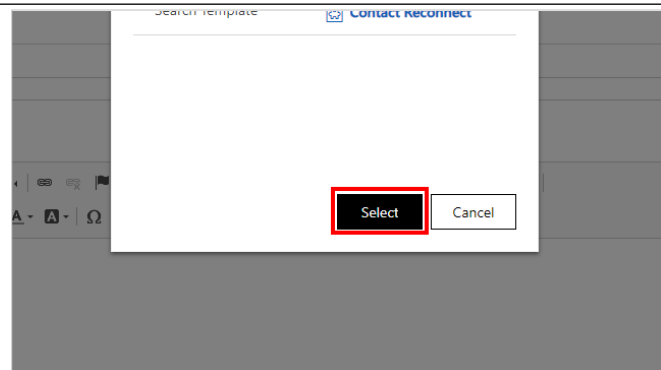
Click on the link **Search Template**



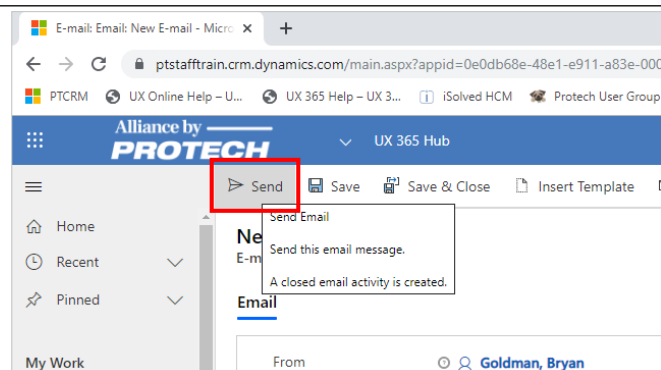
Click on desired email template.



Click on the button **Select**

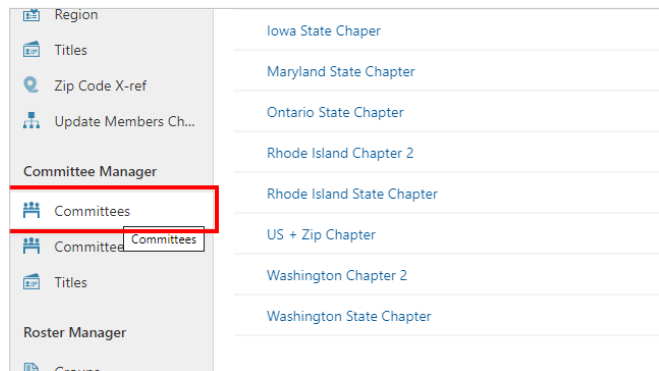


Click On Send to send email.

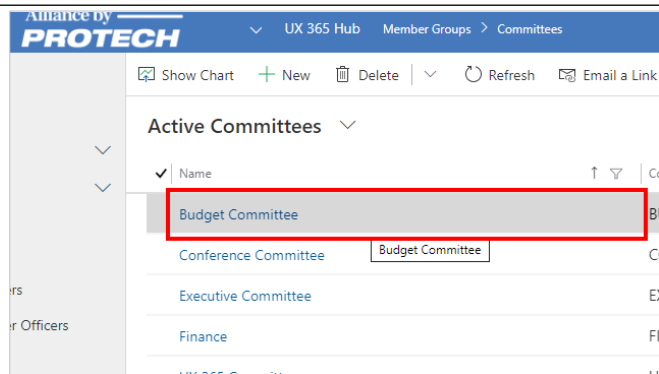


2.5.3. Sending email to a Committee or Roster

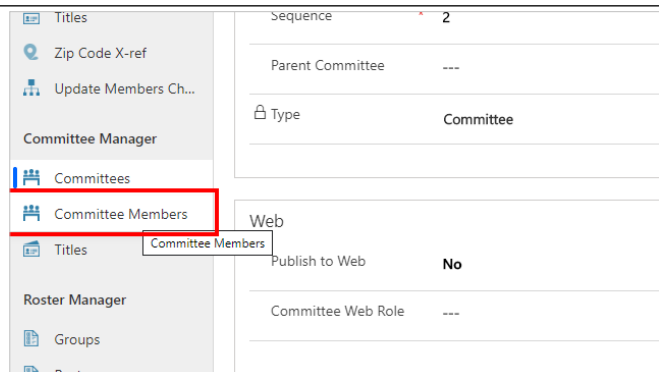
Click on the item **Committees**



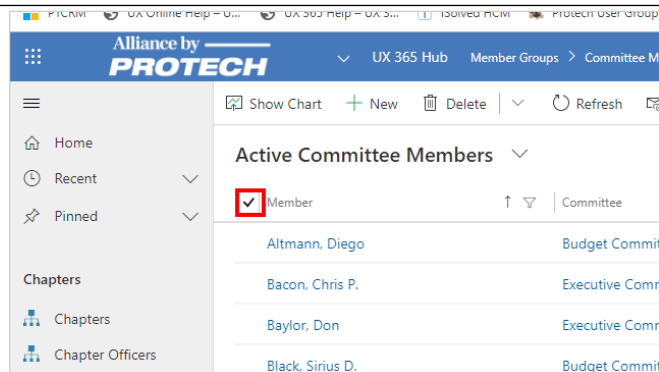
Open Committee record.



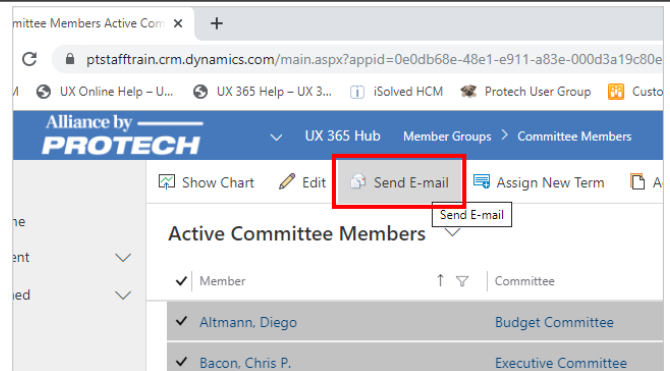
Click on the item **Committee Members**



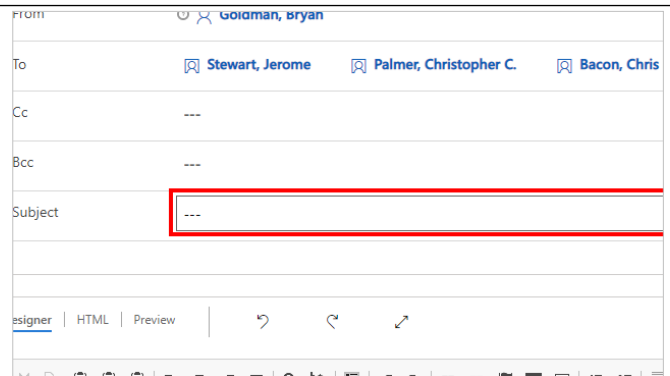
Click on specific committee members to send email to.



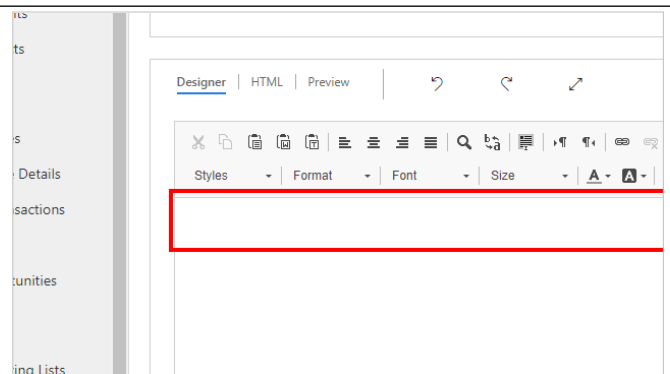
Click on the menu item **Send E-mail**



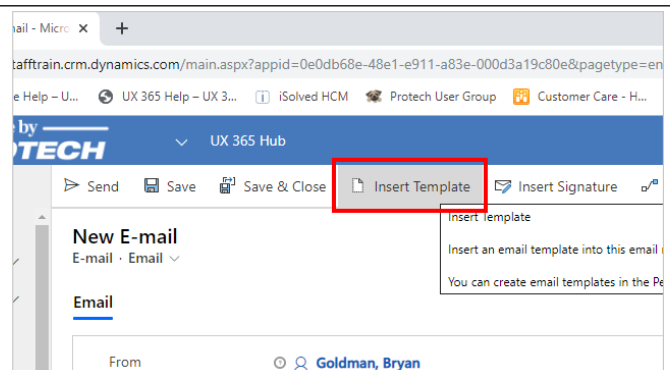
When composing an email message, enter a subject and the message content.



Email Content



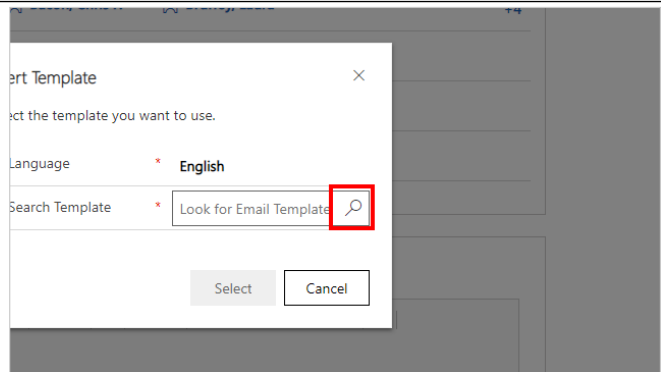
Click on the menu item **Insert Template**



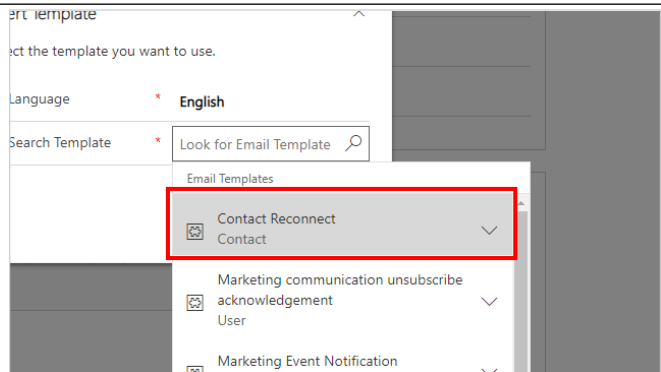
Click on the button **Select**



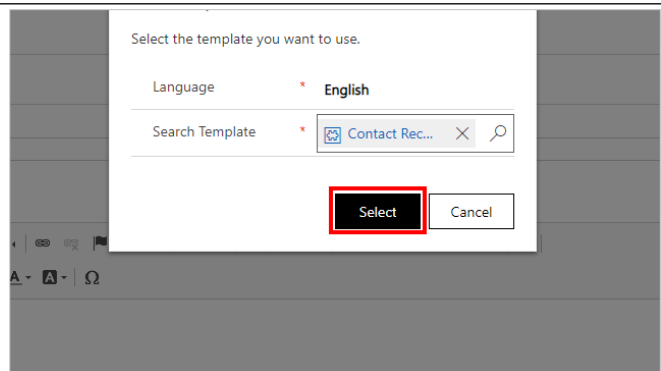
Click on the link **Search Template**



Click on desired email template.

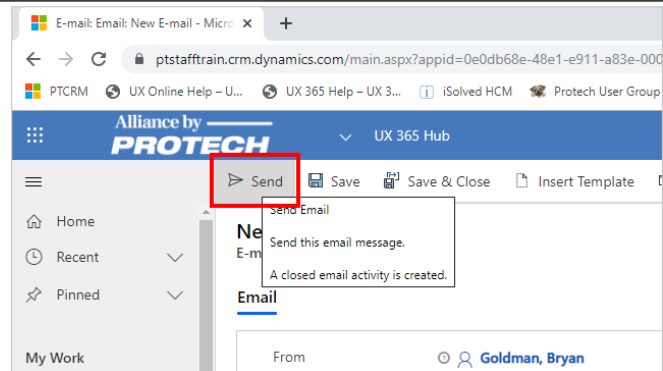


Click on the button **Select**



Click On Send to send email.

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

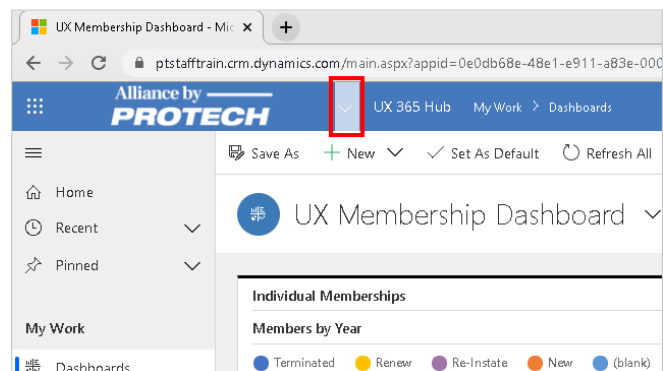


2.6. UX 365 User Interface

Welcome to the UX 365 User Interface!

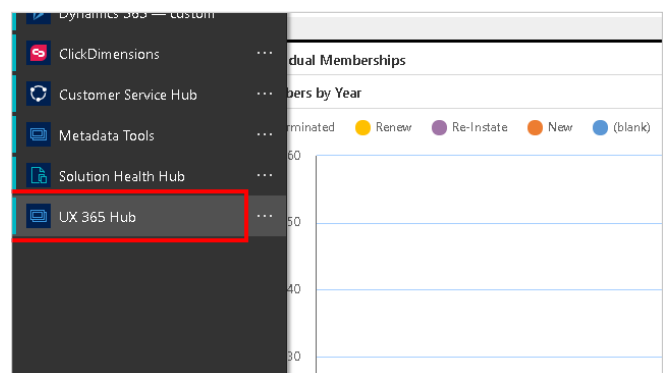
2.6.1. Top Navigational Toolbar

Click on the **switch app** button

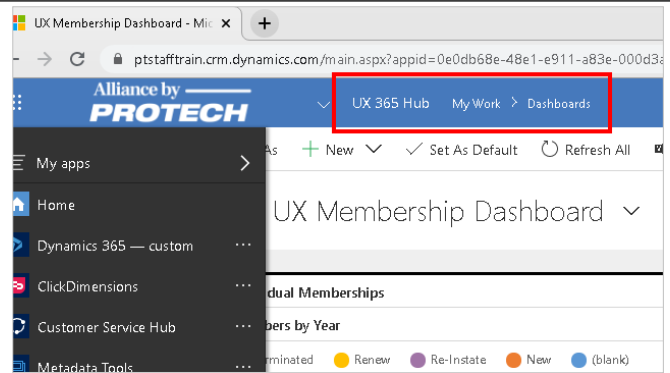


Click here to change the app your working in

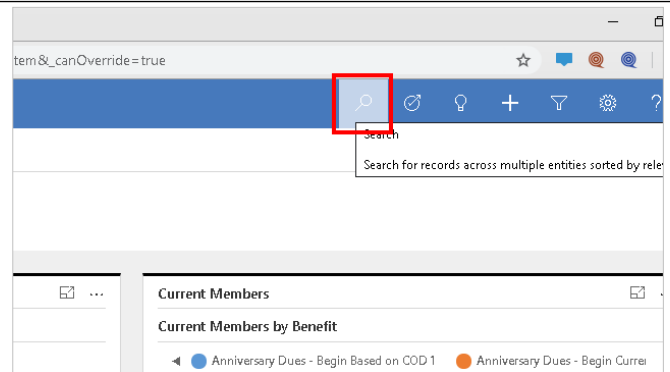
Click on the UX 365 Hub app



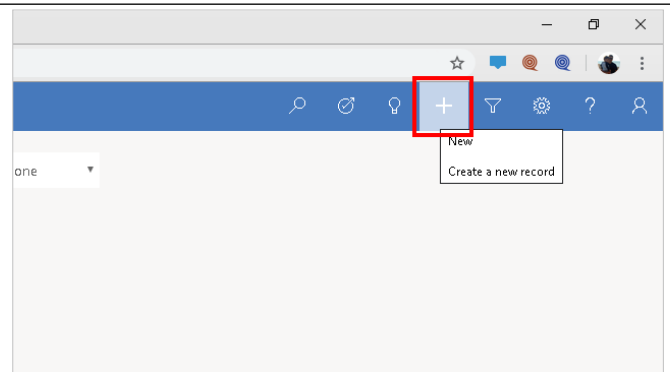
Navigational bread crumbs



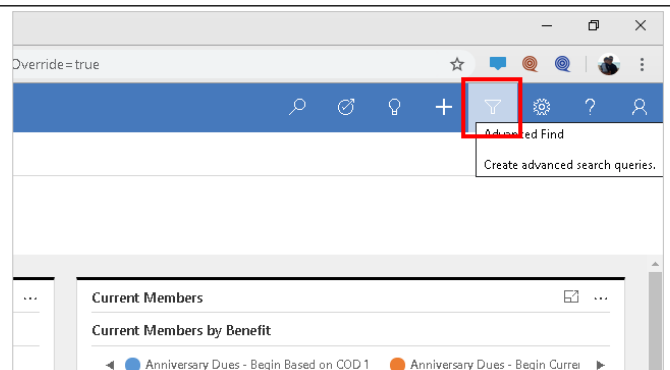
Search for records



Create a new record

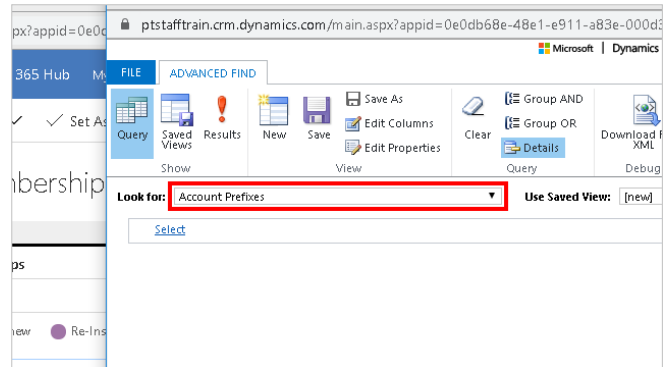


Click on the menu item **Advanced Find**

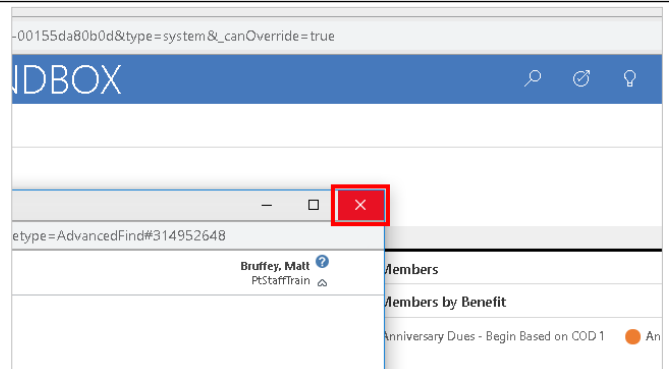


Click on the combo box **Look for:**

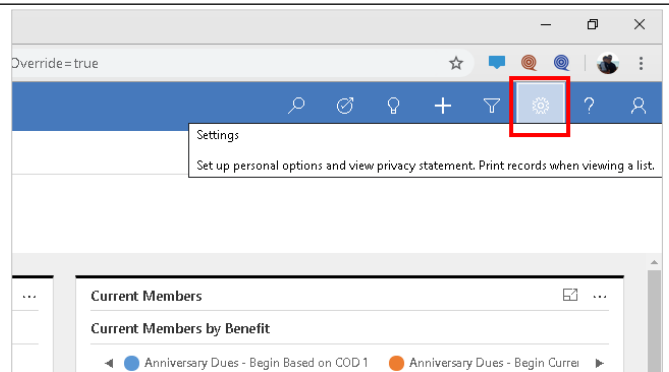
Here you can submit an advanced search and save views



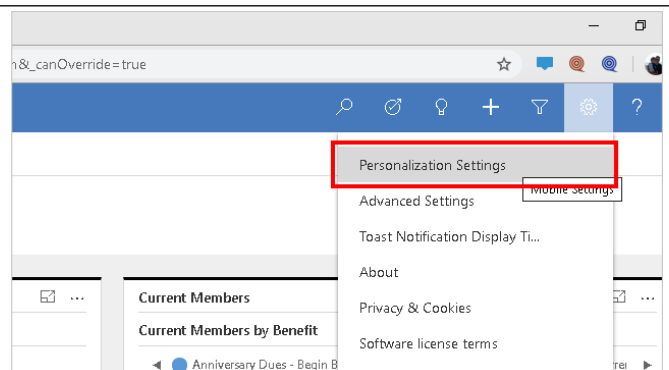
Click on the button **Close**.



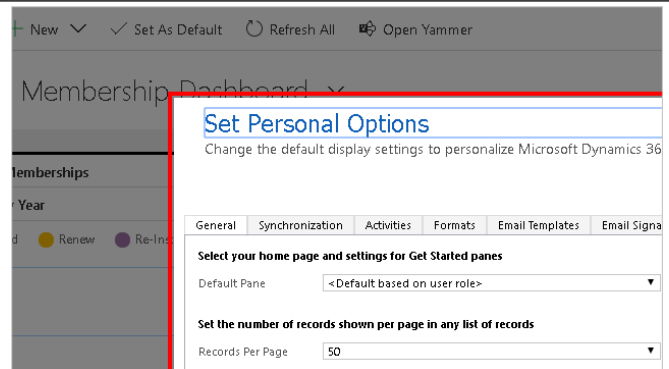
Click on the menu item **Settings**



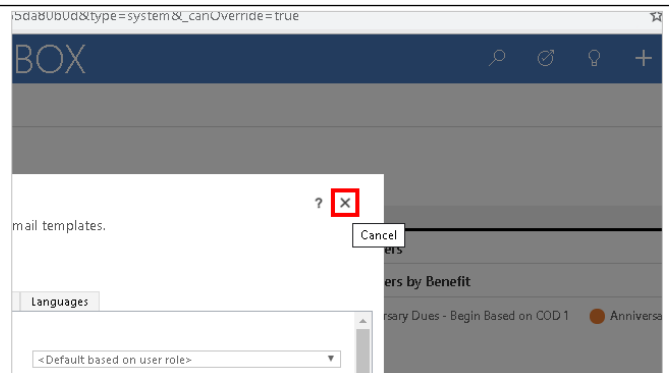
Click on the menu item **Personalization Settings**



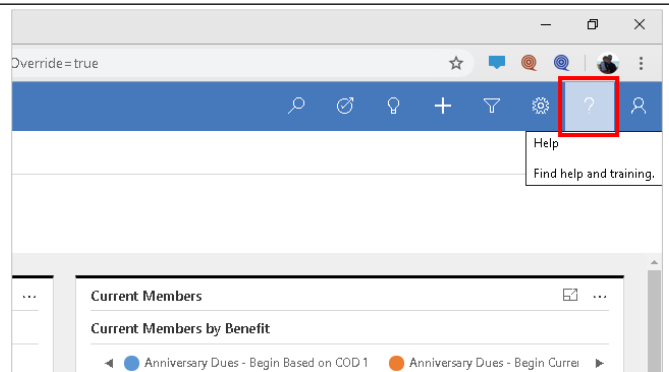
Change your personal settings here



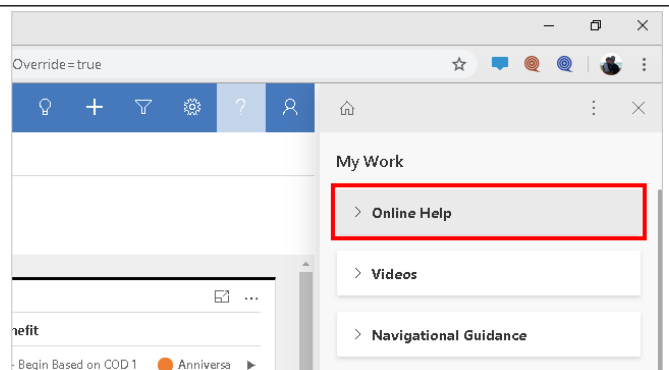
Click on the link **Cancel**



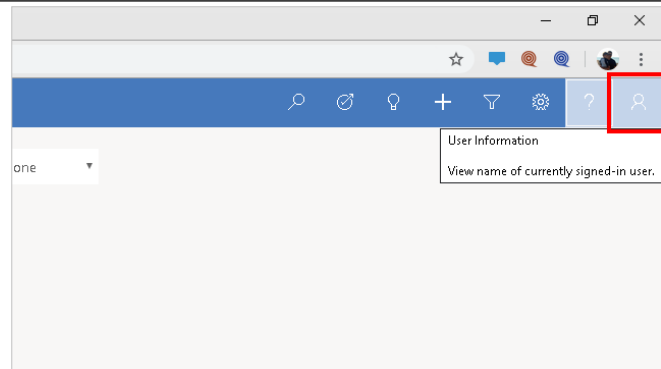
Click on the menu item **Help**



Click on the button **Online Help**

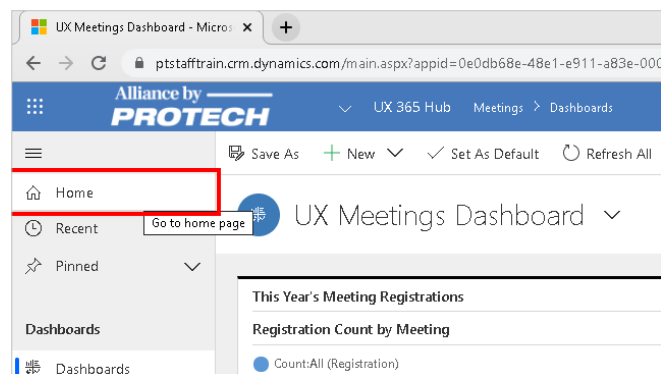


Sign out of the system

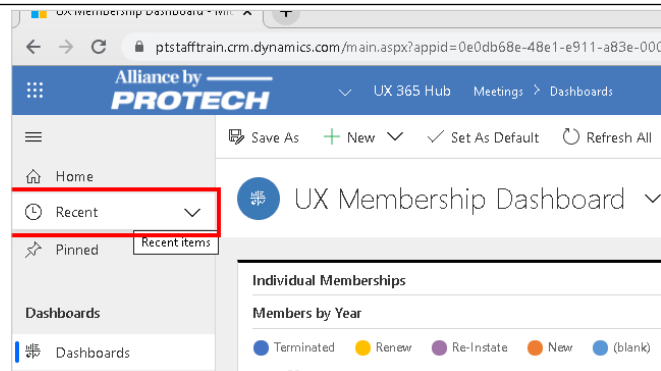


2.6.2. Left Navigation Toolbar

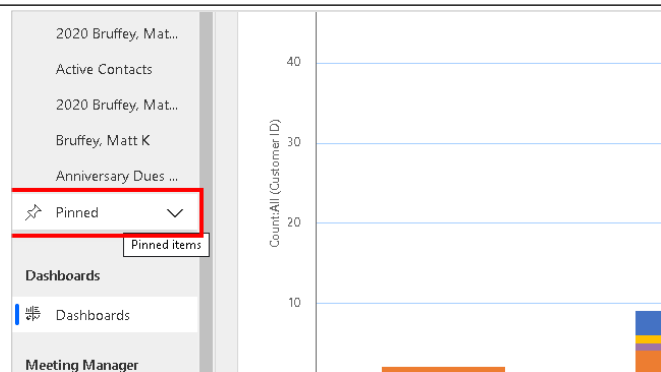
Home Page. This can be defined within the Personal Settings section to fit your needs



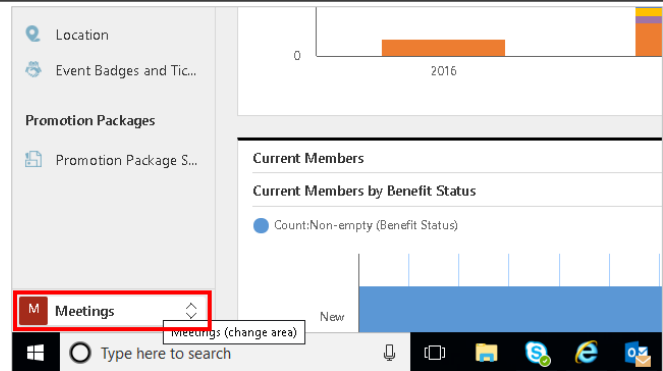
Recent items. Displays the last 10 areas you have navigated to within the system



Show all your pinned system views or favorites

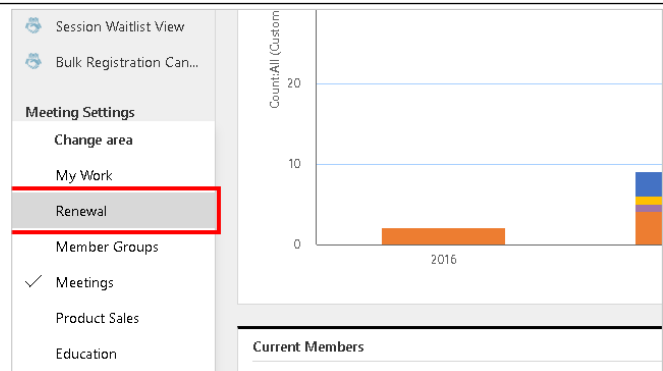


Change area. Displays all the areas of the system you can navigate to. This is based on module. For example, Renewal, Meetings or Product Sales



Module area

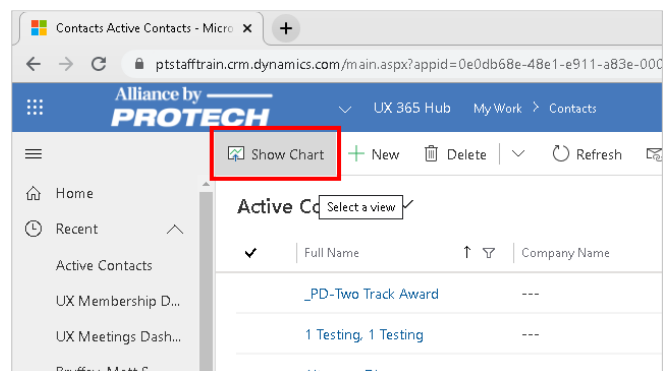
This is an example of a Module area, Renewal



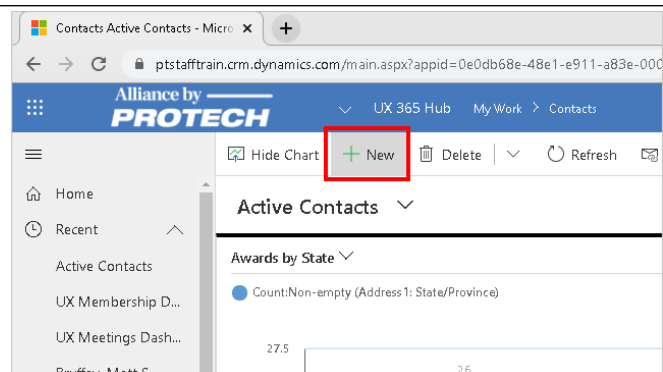
2.6.3. List View Toolbar

2.6.3.1. List View Toolbar without a record selected

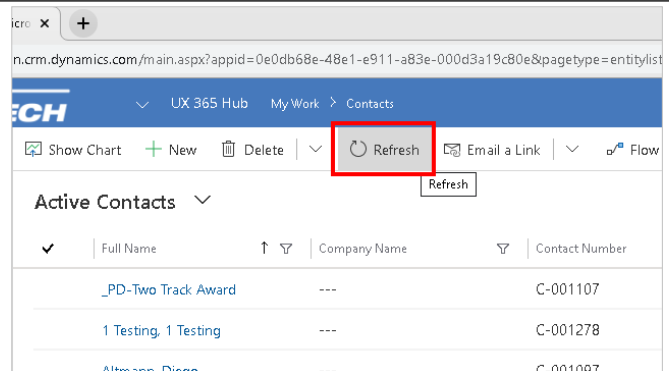
Show Chart. Displays any saved charts related to the record view



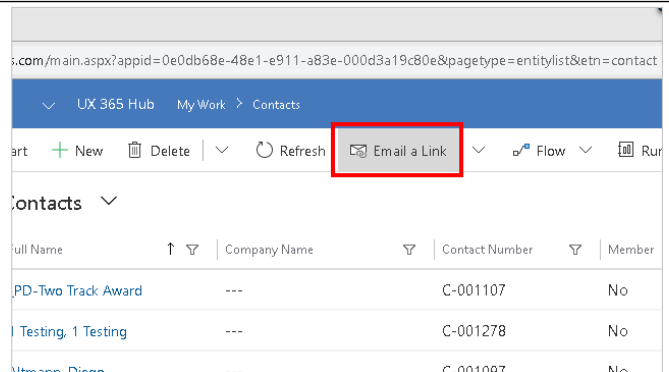
Create a New record



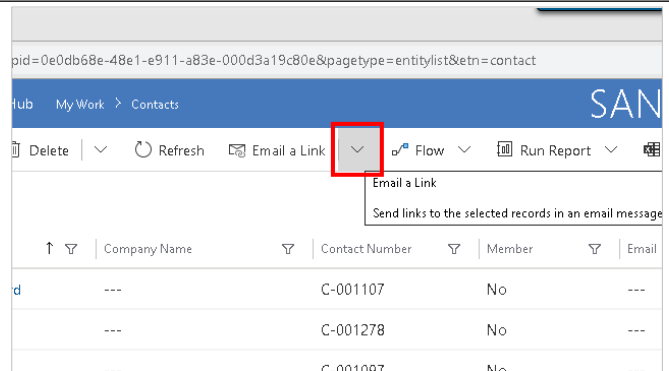
Refresh button. Allows you to refresh the view to see any changes made real time



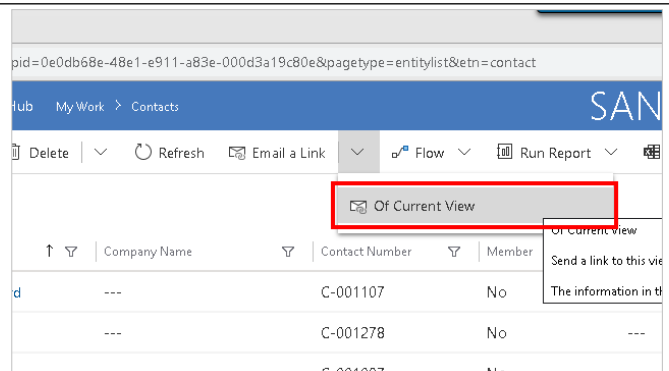
Email a Link. User can send a link to another user within their organization to the view they are working in



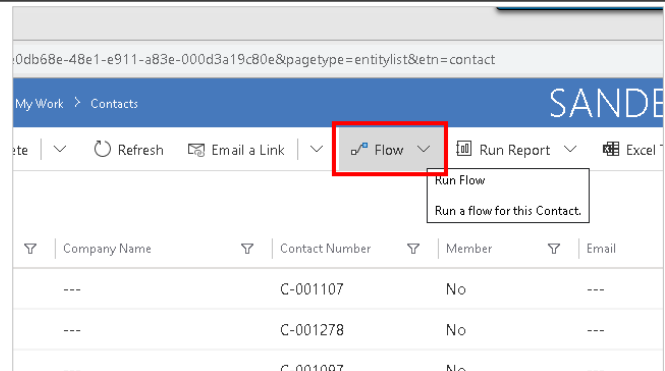
Click on the menu item **Email a Link**



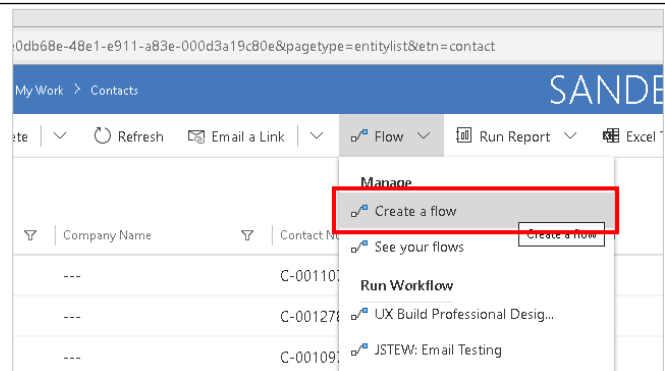
Click on the menu item **Of Current View**



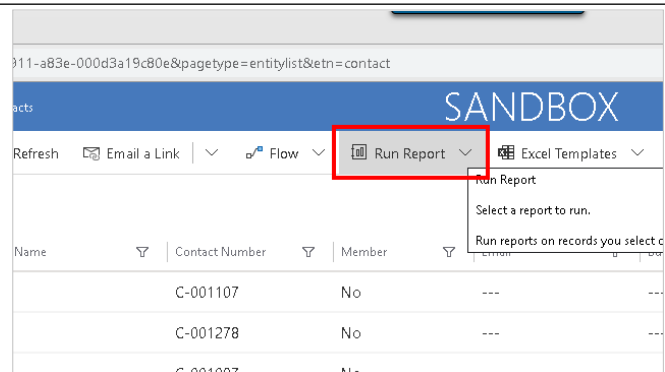
Run Flow. User can run a saved Microsoft Flow



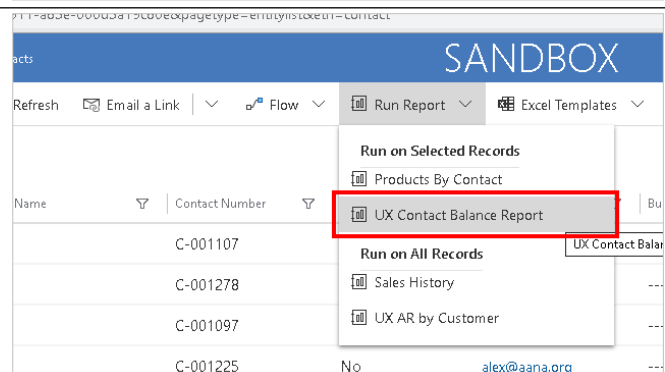
Flow Options



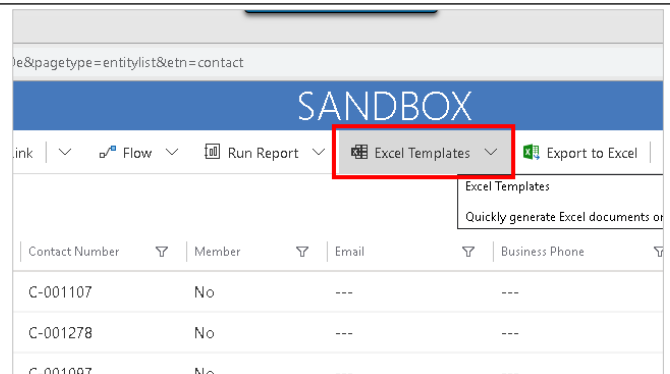
Run reports



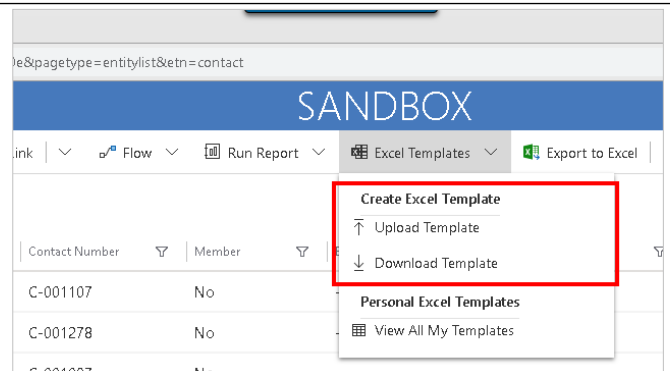
Report options



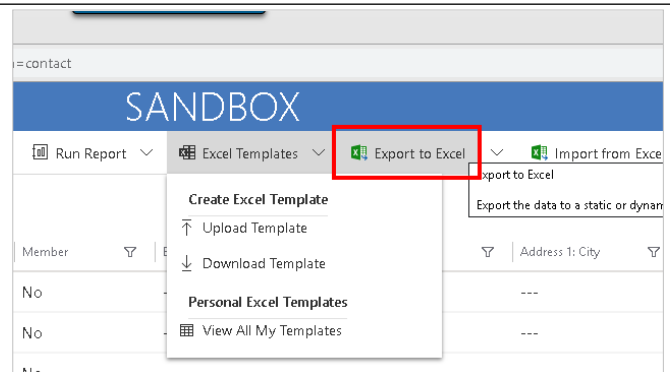
Upload and download Excel templates



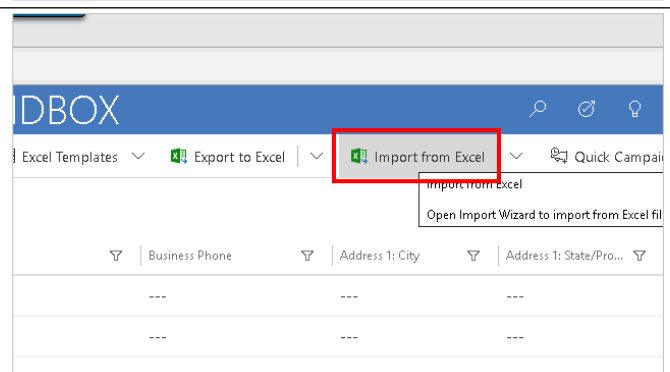
Template options



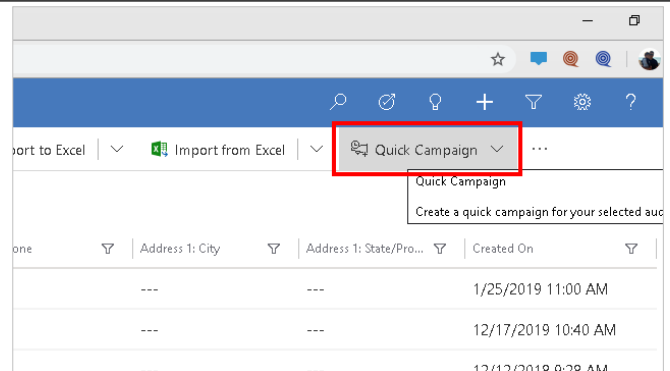
Export to Excel



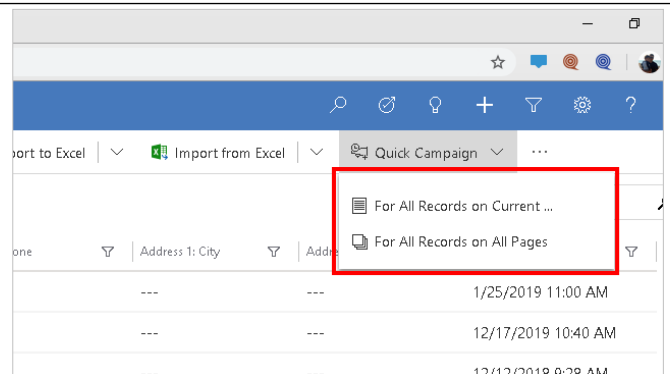
Import records from Excel



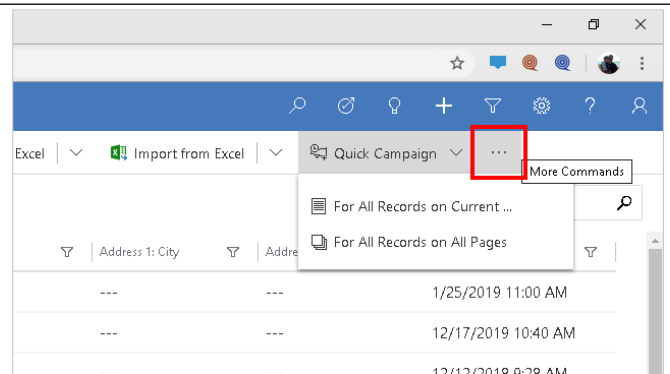
Create a Quick Campaign



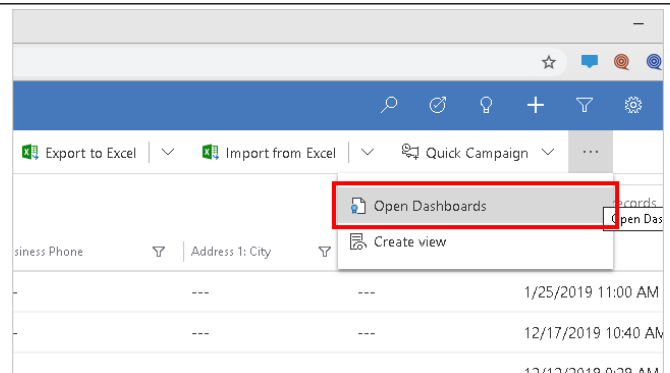
Quick Campaign options



Additional options

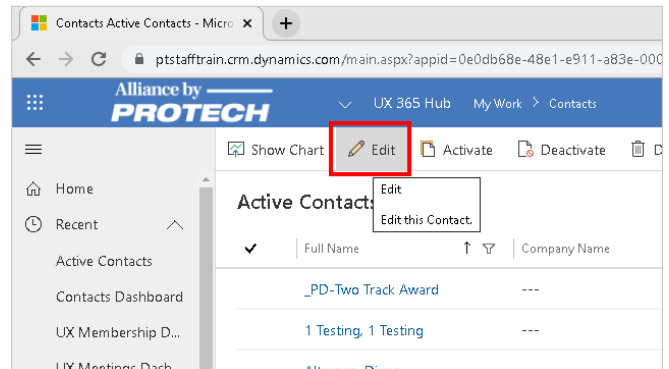


Open Dashboards and Create a View

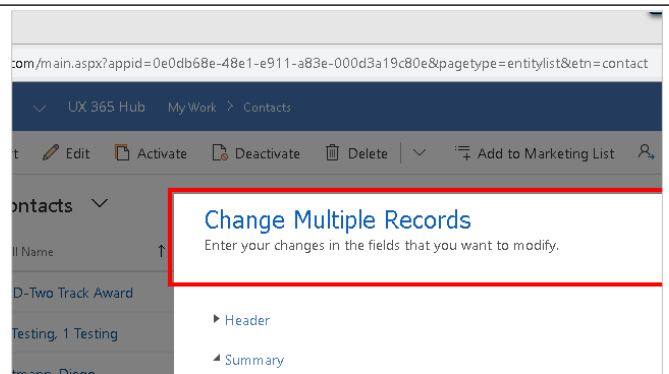


2.6.3.2. List View Toolbar with a record selected

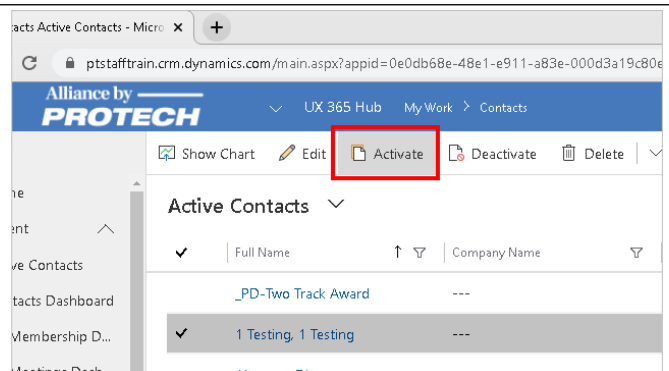
Edit. You can edit one or multiple records at the same time



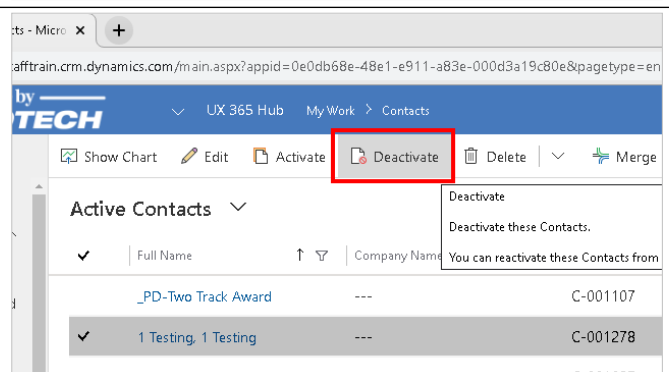
Edit mode



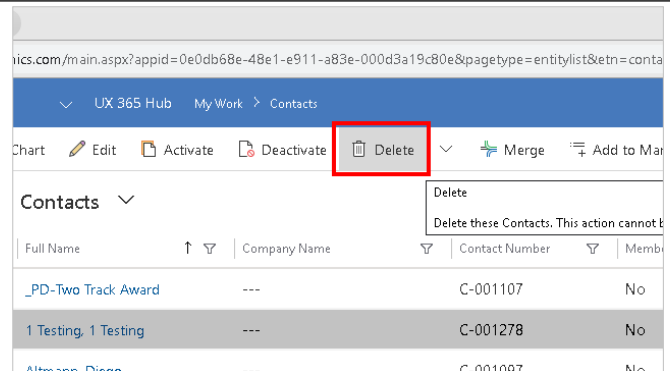
Activate a deactivated record



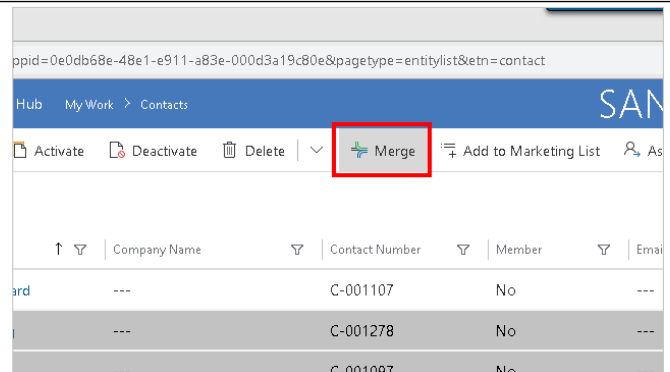
Deactivate an Active record



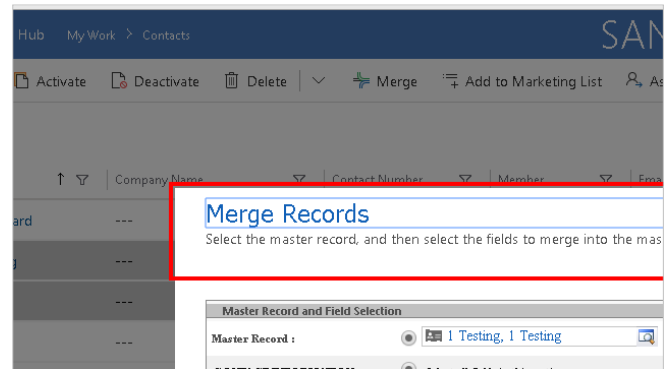
Delete. This will Permanently remove the record from the database



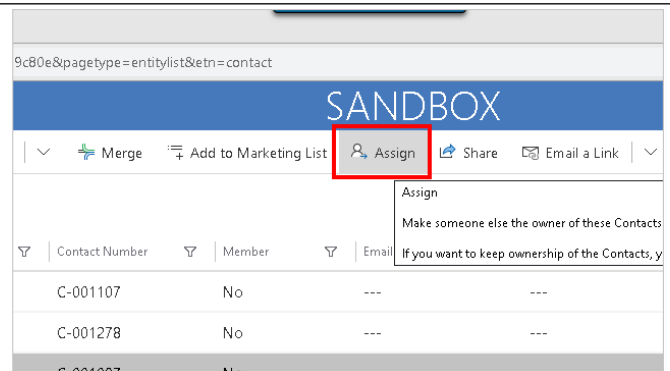
Merge. You can merge duplicate records. Please note, the Master record will retain all the history from the subordinate record.



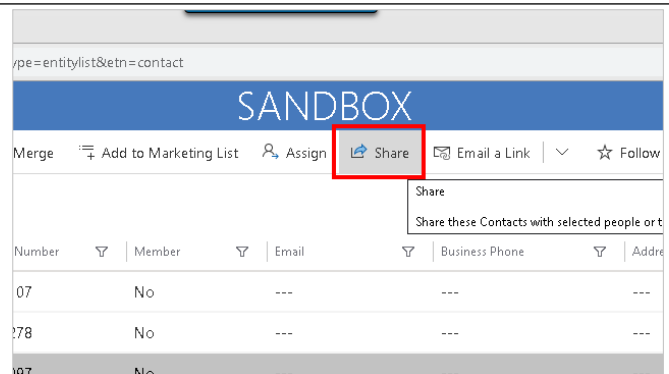
Merge wizard



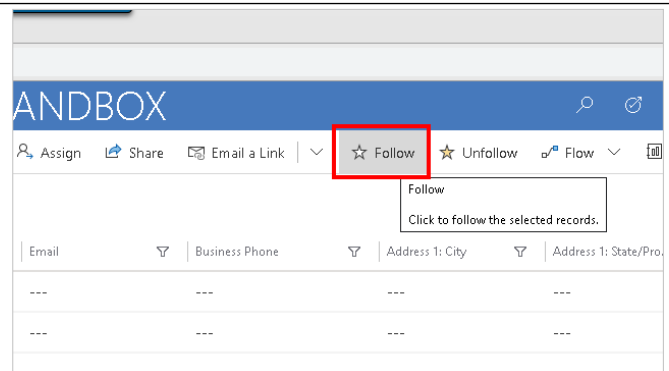
Assign. Users can assign ownership of records they own to other users in the organization.



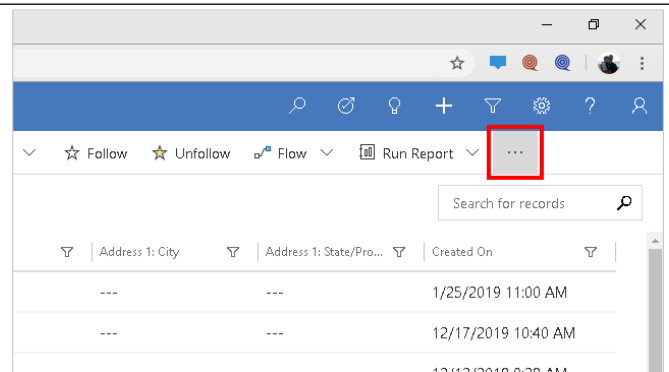
Share. Users can share records with other Users to allow for collaboration on maintaining a record



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

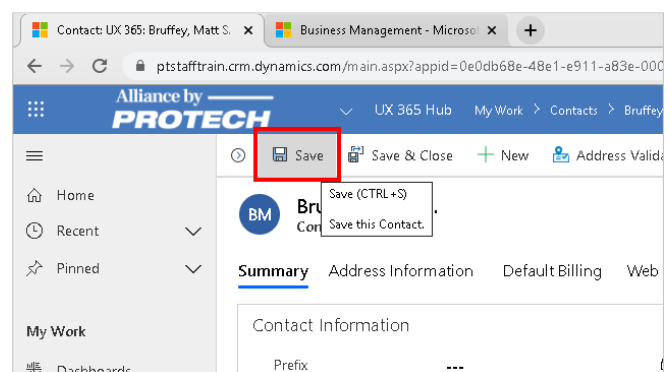


More Commands

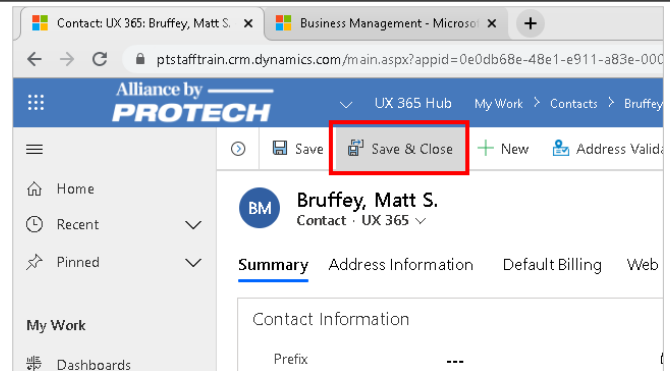


2.6.4. Record Toolbar

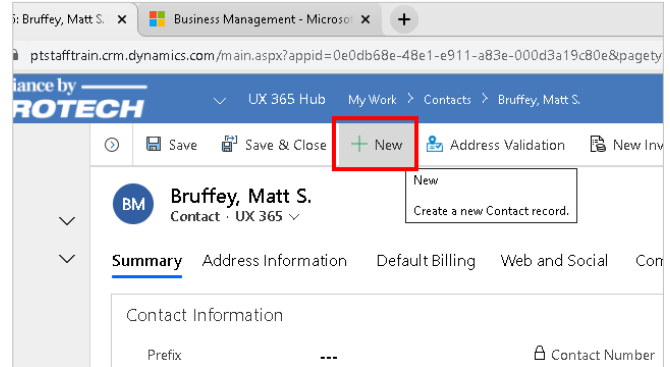
Save record changes



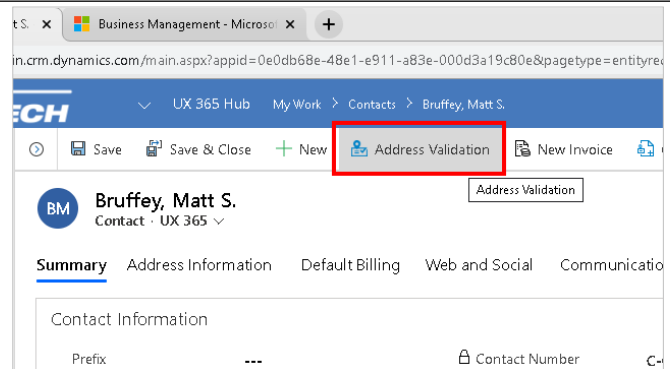
Save record changes and close



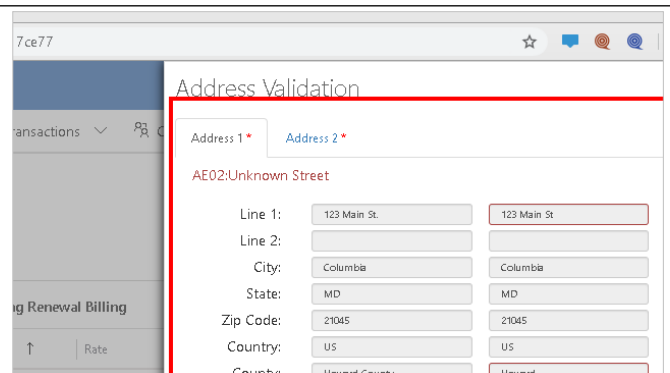
Create a new Contact



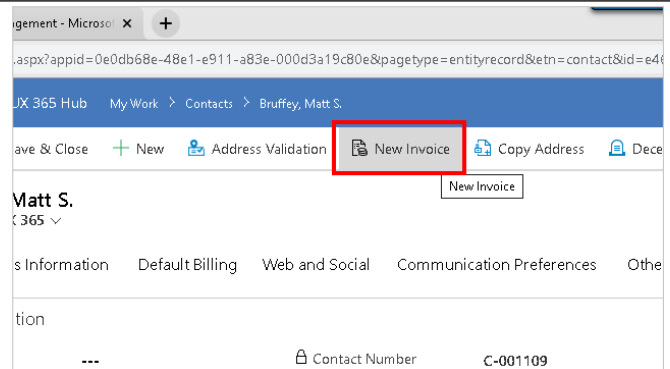
Address validation allows you to add the zip plus 4 and correct any mistakes in the primary address block



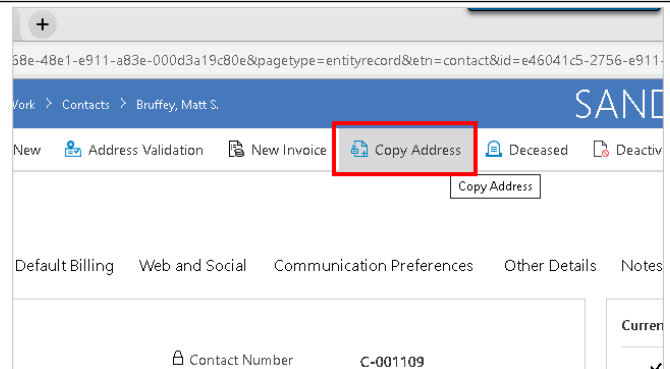
Address Validation panel



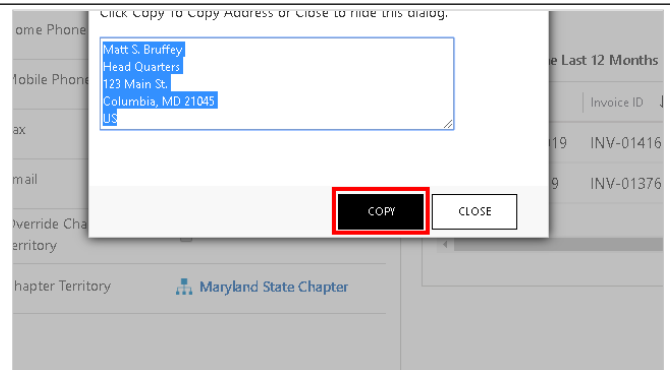
Create a New Invoice



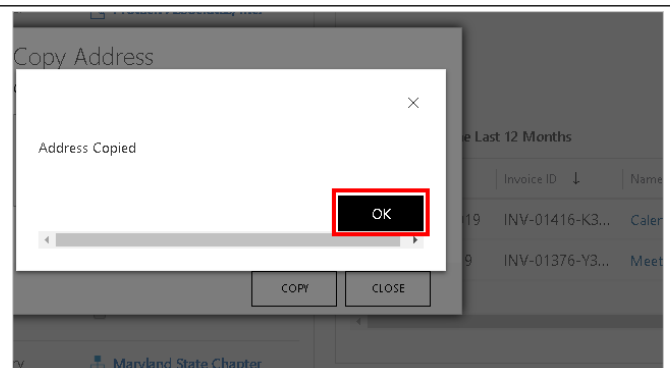
Copy Address allows you to copy the primary address block to your clipboard for use in other applications



Click on the button **COPY**

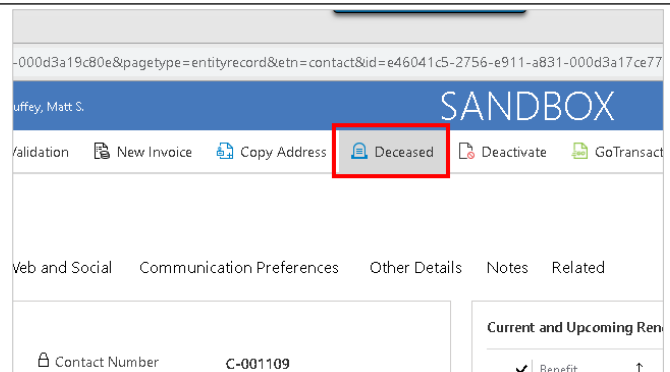


Click on the button **OK**

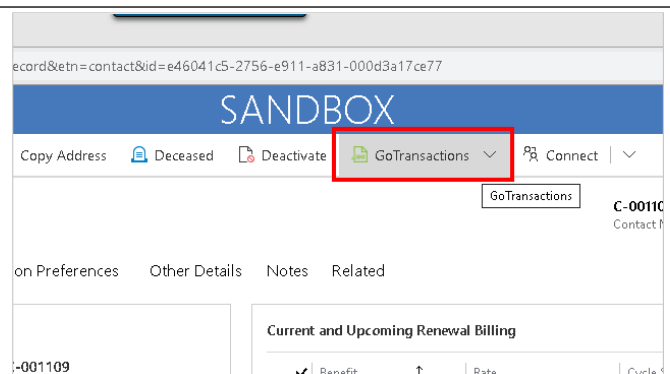


Deceased utility

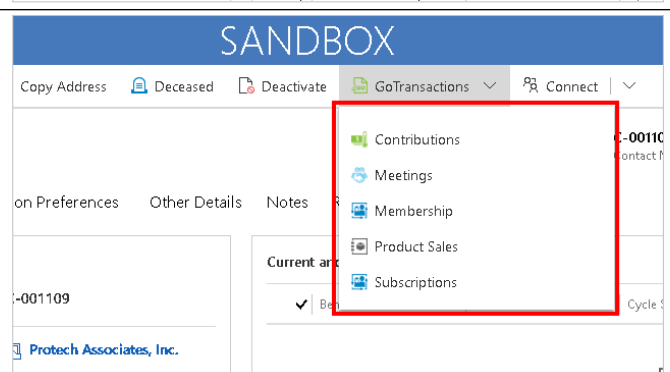
If one of your contacts is deceased, there are several records that you should update, including roster and committee memberships, renewal billing records and invoices with a balance due or a credit balance. You can use the Deceased Contact Utility to update this information. This utility will perform 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.



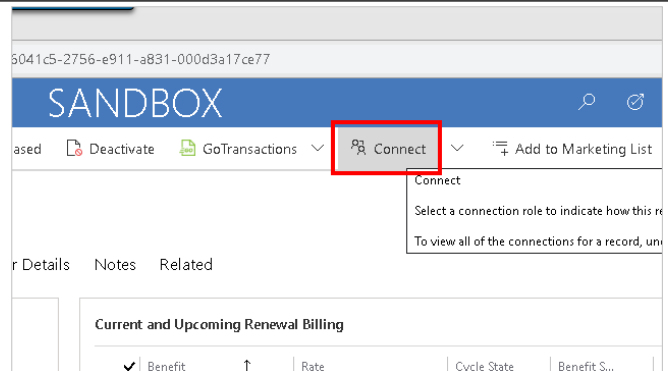
Go Transactions allows you to quickly create an invoice using the Go Transaction wizard that walks you through the data entry for fast invoice creation



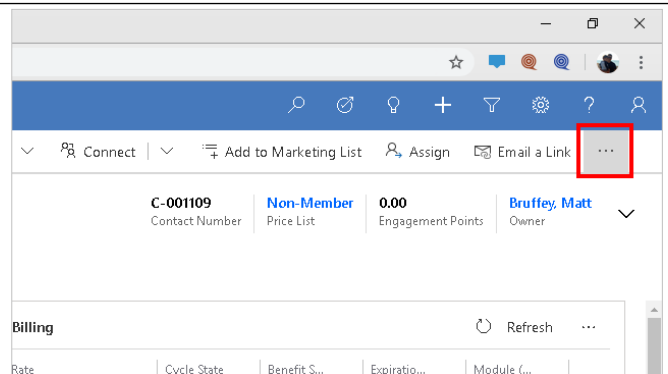
Go Transaction options



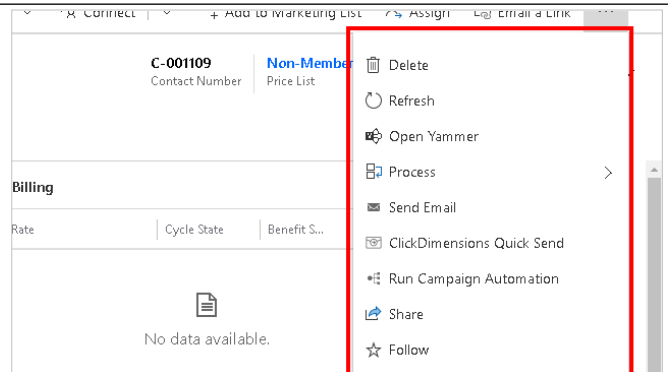
Connect allows you to associate the record with another record using a specific relationship definition. Relationship roles are setup within system settings



More commands

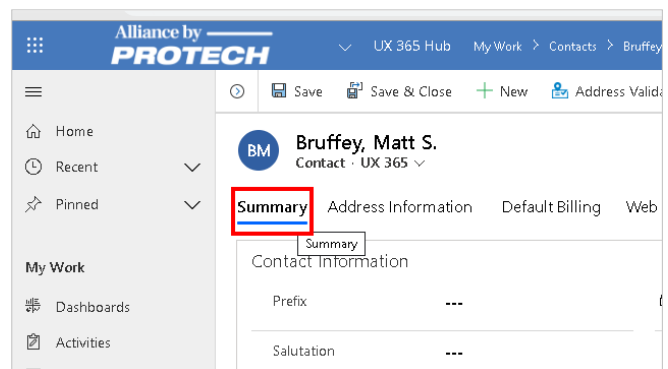


More command options



2.6.4.1. Record Tabs

Click on the item **Summary**



Click on the item **Address Information**

The screenshot shows the contact page for Matt S. Bruffey in the UX 365 Hub. The left sidebar contains navigation links: Home, Recent, Pinned, My Work, Dashboards, and Activities. The top navigation bar includes 'Alliance by PROTECH', 'UX 365 Hub', 'My Work', 'Contacts', and 'Bruffey, Matt S.'. The main content area has tabs: Summary, Address Information (highlighted with a red box), Default Billing, and Web and Social. The 'Address Information' tab displays 'Contact Information' with fields for Prefix, Salutation, and Address.

Click on the item **Default Billing**

The screenshot shows the contact page for Matt S. Bruffey. The 'Default Billing' tab is highlighted with a red box. The left sidebar and top navigation bar are the same as in the previous screenshot. The 'Default Billing' tab displays 'Primary Address' and 'Secondary Address' sections, each with a 'Use Parent Address' checkbox and an 'Address Type' dropdown menu.

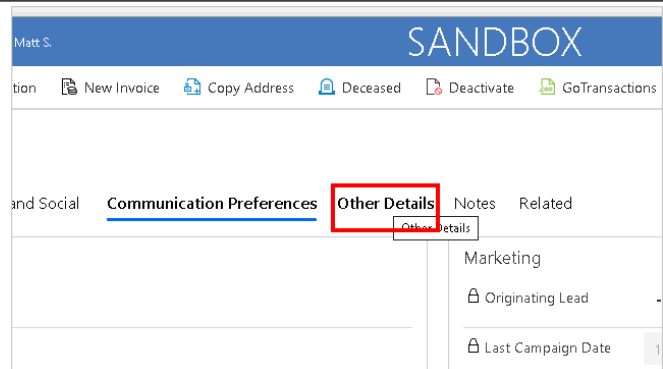
Click on the item **Web and Social**

The screenshot shows the contact page for Matt S. Bruffey. The 'Web and Social' tab is highlighted with a red box. The left sidebar and top navigation bar are the same as in the previous screenshots. The 'Web and Social' tab displays 'Web and Social' information, including a 'Parent Price' field and a 'Level' dropdown menu set to 'Non-Member'.

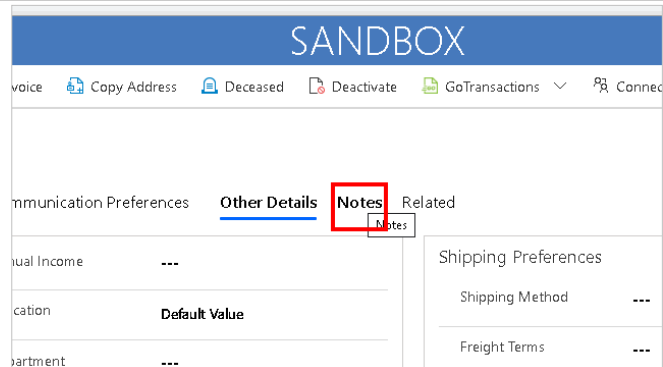
Click on the item **Communication Preferences**

The screenshot shows the contact page for Matt S. Bruffey. The 'Communication Preferences' tab is highlighted with a red box. The left sidebar and top navigation bar are the same as in the previous screenshots. The 'Communication Preferences' tab displays a list of communication preferences, including an email address 'matt.bruffey@gmail.com' and a phone number 'C-001109'.

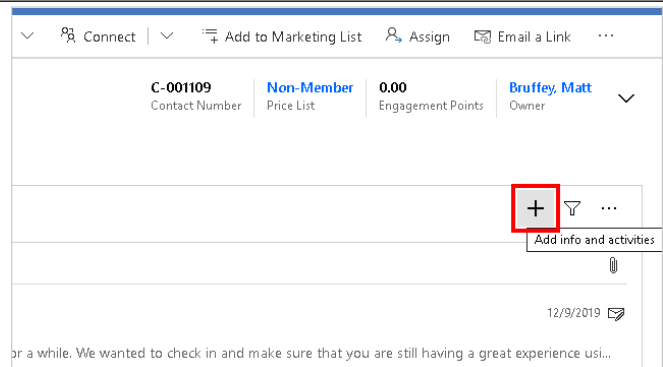
Click on the item **Other Details**



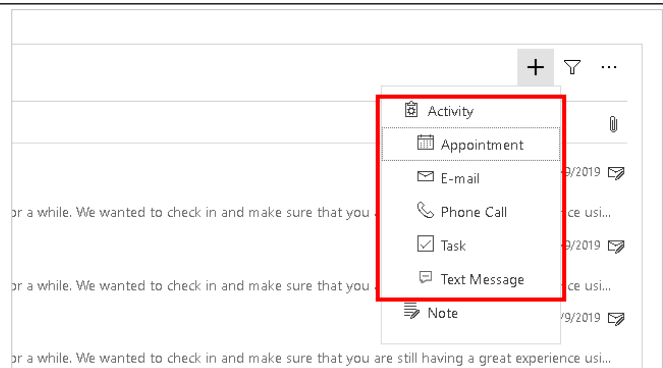
Click on the item **Notes**



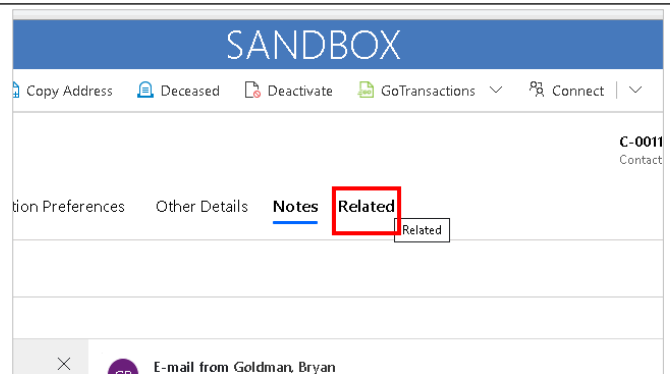
Add new activities



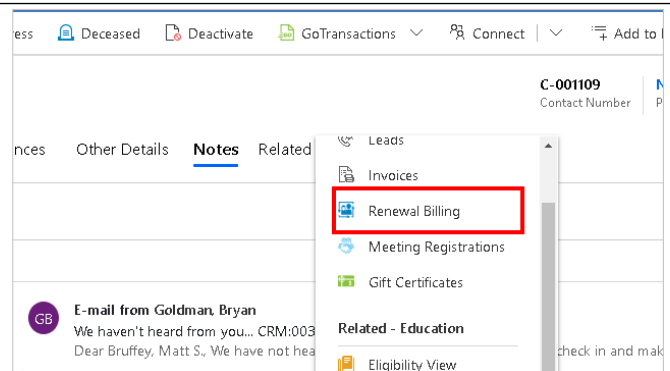
Activity options



Related records can be found here



For example, associated Renewal Billing record and Meeting Registrations

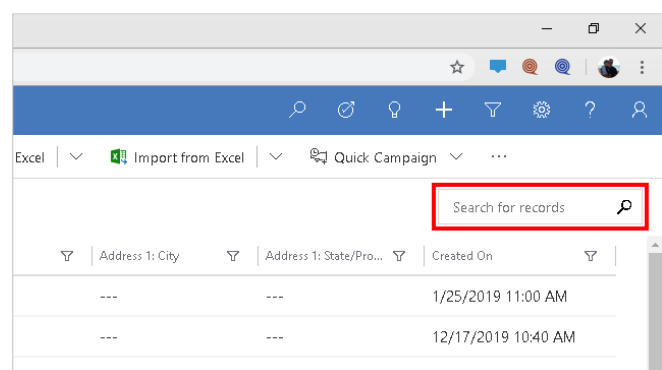


2.6.5. List Views

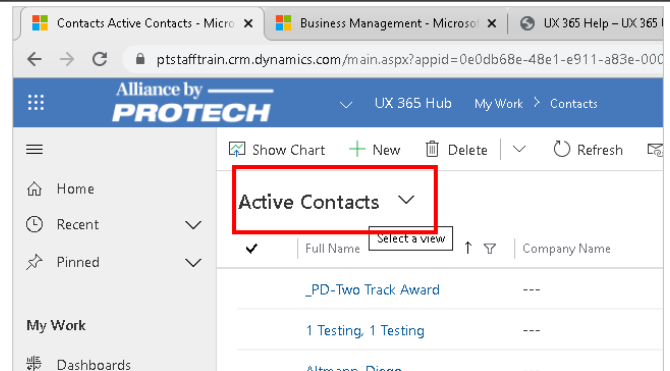
2.6.5.1. Look For and View Filters

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.

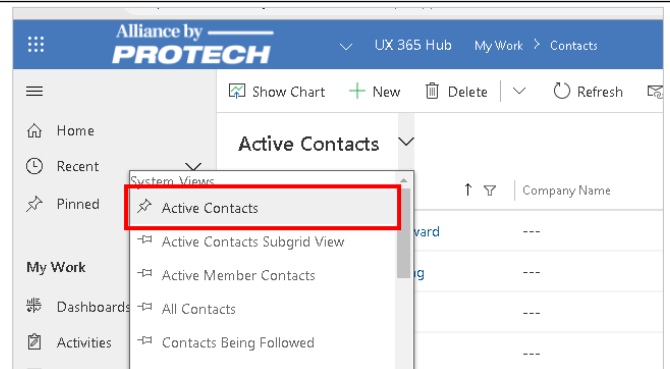
Search for records



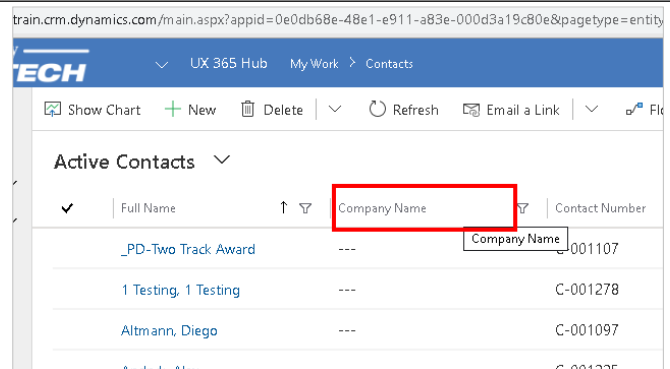
Select a view



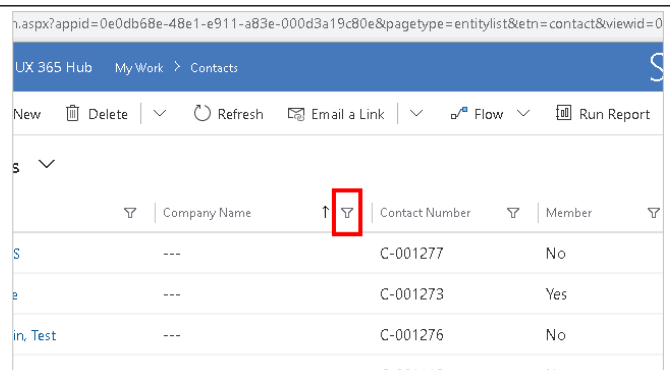
Pin the Active Contacts view



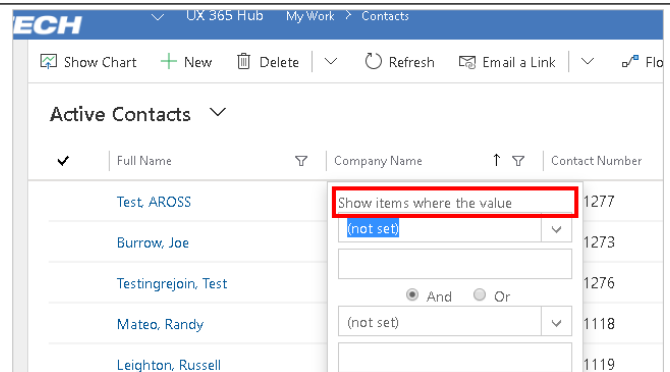
Sort list view by Column header



Filter list view by Column header values

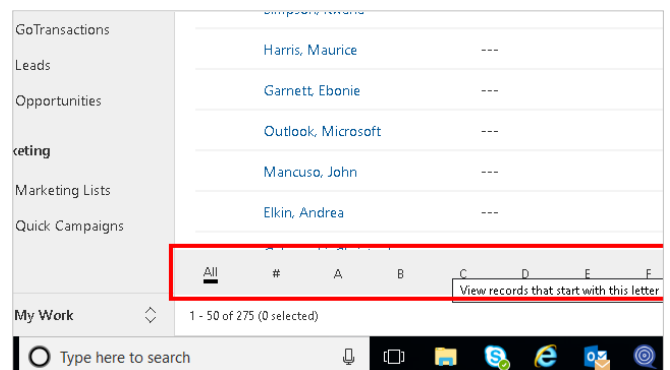


Filter options

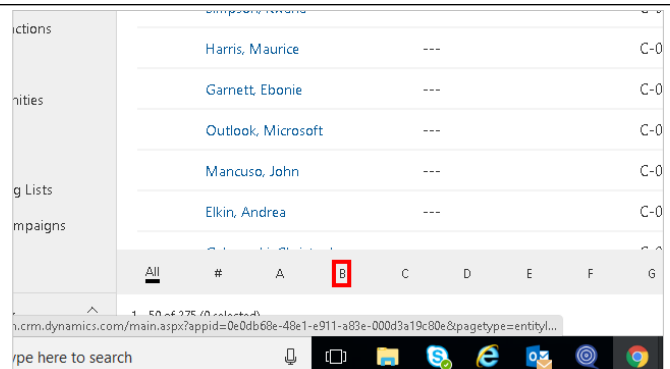


The Alphabet bar is available at the bottom of List Views that open in the same UX 365 window, such as accounts, or contacts. Click on a letter to view a list of records that begin with that letter. Directly above the alphabet bar, the number of records being displayed in the view is shown. To view more 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



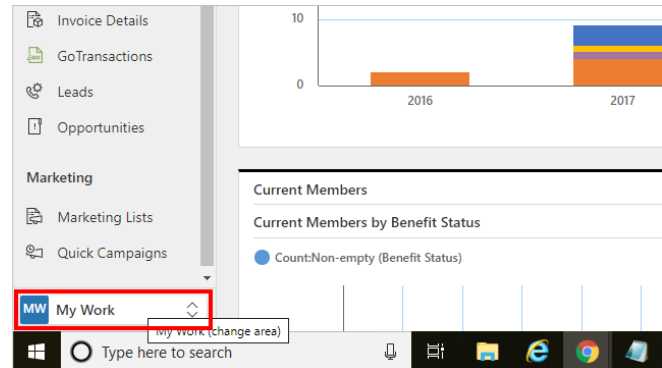
Click on a letter to sort by



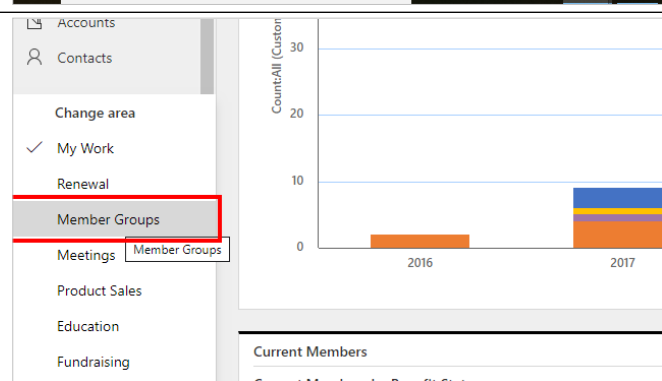
3. Chapters

3.1. Creating a Chapter

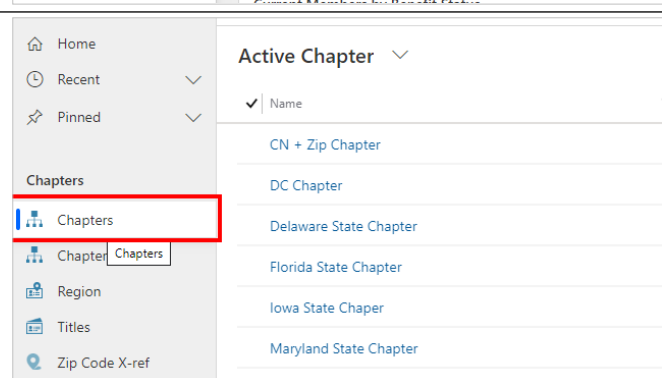
To create a chapter, first click on the button my work to change areas.



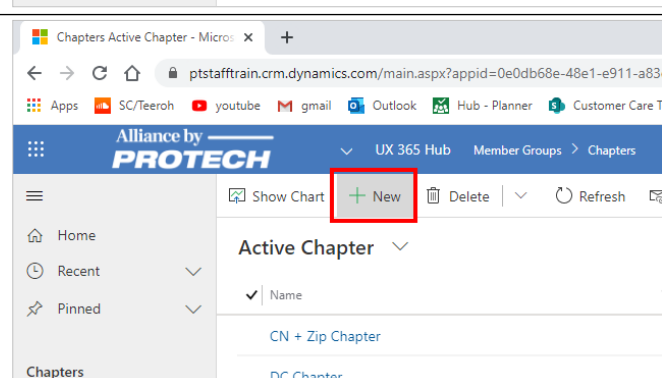
Click on the item 'member groups'



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.

New Chapter

General Chapter Officers Web Notes Administration

Name ---

Chapter Code * ---

Chapter Type * ---

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

UX 365 Hub

Save & Close + New Flow

Chapter

General Chapter Officers Web Notes Administration

Name ---

Chapter Code * ---

Chapter Type * ---

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

Save & Close + New Flow

Chapter

General Chapter Officers Web Notes Administration

Name Test Chapter

Chapter Code * ---

Chapter Type * ---

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

Chapter

General Chapter Officers Web Notes Administration

Name Test Chapter

Chapter Code * TC1

Chapter Type * --Select--

Choose which type of chapter you would like to create

The screenshot shows the 'New Chapter' form with the following fields: Name (Test Chapter), Chapter Code (TC1), and Chapter Type. The Chapter Type dropdown menu is open, showing options: --Select--, State (highlighted in blue), and Local. A red box highlights the dropdown menu.

This is where you can change the region of your chapter

The screenshot shows the 'New Chapter' form with the following fields: Region (Look for Region), Account (Select to enter data), and Acctg System Vendor (#). A red box highlights the Region dropdown menu.

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

The screenshot shows the 'New Chapter' form with the following fields: Region (---), Account (Look for Account), and Acctg System Vendor (#). A red box highlights the Account dropdown menu.

You must save the chapter record before adding chapter officers

The screenshot shows the 'New Chapter' form with the following fields: Name (Test Chapter). A red box highlights the 'Save' button in the top right corner of the form.

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

The screenshot shows the 'Test Chapter' form in the Protech UX system. The 'Chapter Officers' tab is selected and highlighted with a red box. A dropdown menu is open, showing options to 'Save (CTRL+S)' or 'Save this Chapter'. The form fields include 'Name', 'Chapter Code' (set to 'TC1'), and 'Chapter Type' (set to 'State').

To change web info, click the button 'Web'

The screenshot shows the 'Test Chapter' form with the 'Web' tab highlighted by a red box. Below the tabs, the 'Current Chapter Officers' section is visible, showing a table with columns for 'Contact' and 'Title'.

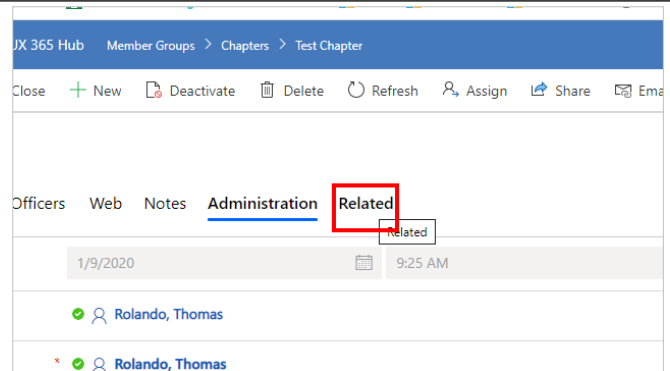
Click on the section 'Notes' to see the timeline and notes of the chapter.

The screenshot shows the 'Test Chapter' form with the 'Notes' tab highlighted by a red box. Below the tabs, the 'Publish to Web' section is visible, showing a 'No' status.

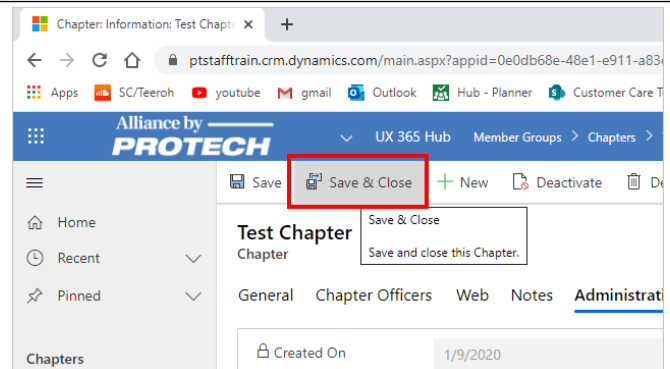
Click on the administration tab to see information such as Created on and by, as well as modified on and by.

The screenshot shows the 'Test Chapter' form with the 'Administration' tab highlighted by a red box. Below the tabs, the 'Timeline' section is visible, showing a text input field for notes.

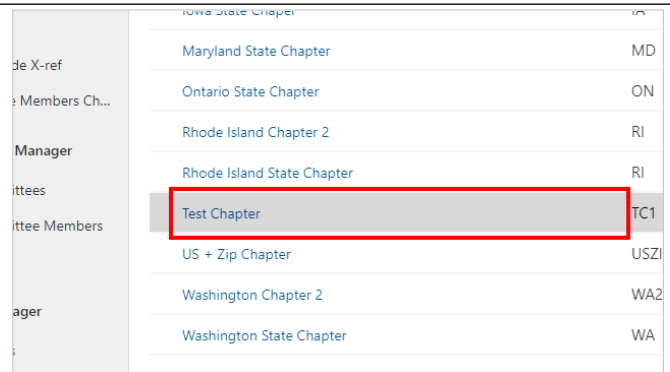
Once the chapter is saved, the related tab will appear showing all related records associated with the chapter.



Click save and close to finish creating the new chapter

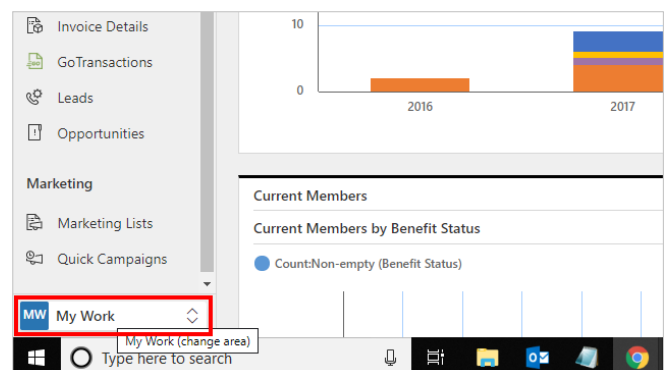


You can see the new chapter in the 'active chapter' associated view.

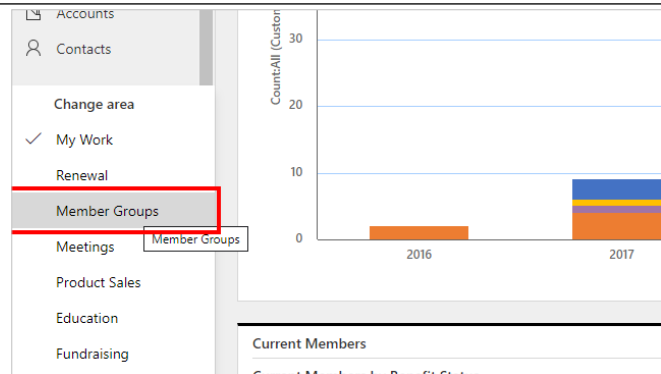


3.2. Creating a Region

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**

The screenshot shows a navigation menu on the left with the following items: Pinned, Chapters, Chapters, Chapter Officers, **Region** (highlighted with a red box), Titles, Zip Code X-ref, and Update Members Ch... A tooltip labeled 'Region' appears next to the highlighted item. To the right, a list of regions is displayed under the heading 'Current Members'. The regions listed are: CN + Zip Chapter, DC Chapter, Delaware State Chapter, Florida State Chapter, Iowa State Chapter, Maryland State Chapter, Ontario State Chapter, and Rhode Island Chapter 2.

Click on the menu item **New**

The screenshot shows a web browser window with the URL 'ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000'. The page title is 'Alliance by PROTECH'. The navigation menu on the left includes Home, Recent, Pinned, and Chapters. The main content area shows a 'Show Chart' button, a '+ New' button (highlighted with a red box), a 'Delete' button, and a 'Refresh' button. A dropdown menu is open next to the '+ New' button, showing the text 'Active Region' and 'Create a new Region record.'.

Click on the text field **Name**

The screenshot shows a form titled 'Region'. The form has a tabbed interface with 'Administration' selected. The 'Name' field is highlighted with a red box and contains the text '---'. A tooltip labeled 'Select to enter data' appears below the field.

Enter the name of the region

UX 365 Hub

Save & Close + New Flow

Region

General Administration Notes

Name

Click on the menu item Save

Region: Information: New Region

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

PTCRM UX Online Help - U... UX 365 Help - UX 3... iSolved HCM Protech User Group

Alliance by **PROTECH** UX 365 Hub

Save Save & Close + New Flow

Save (CTRL+S) Save this Region. New

General Administration Notes

Name UX 365 Region

Chapters

Related

by **PROTECH** UX 365 Hub Member Groups > Region > UX 365 Region

Save Save & Close + New Deactivate Delete Refresh

UX 365 Region

Region

General Administration Notes Related

Name UX 365 Region

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

General Administration Notes Related

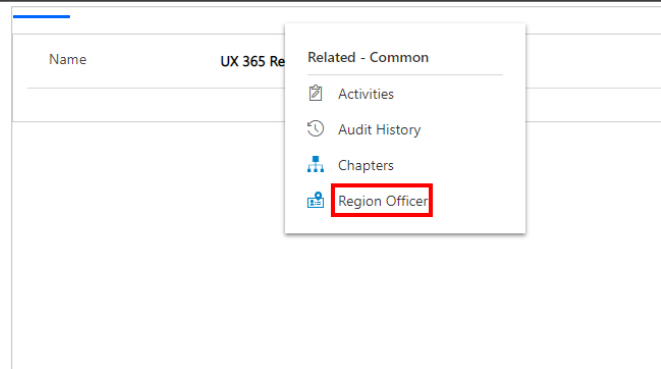
Name UX 365 Region

Related - Common

- Activities
- Audit History
- Chapters**
- Region Officer

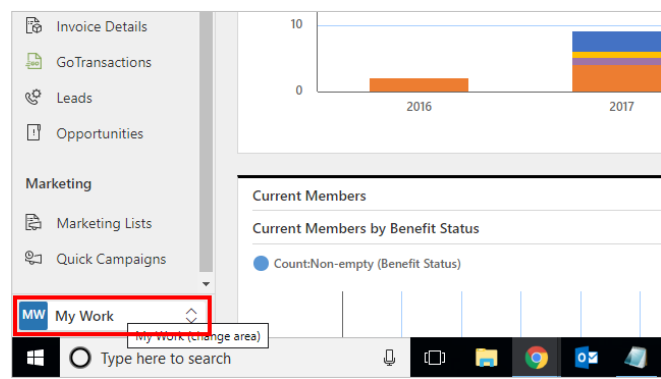
Region Officer

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

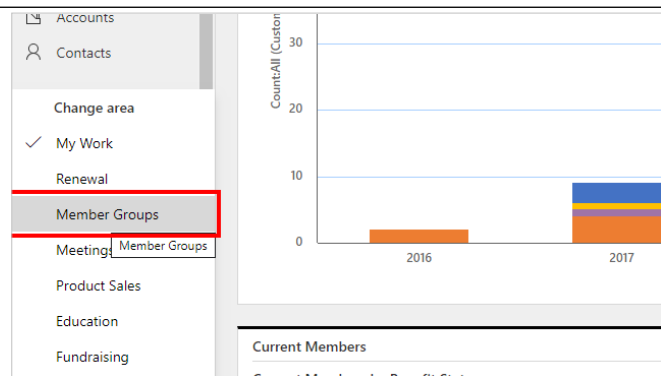


3.3. Setting up a Chapter Officer

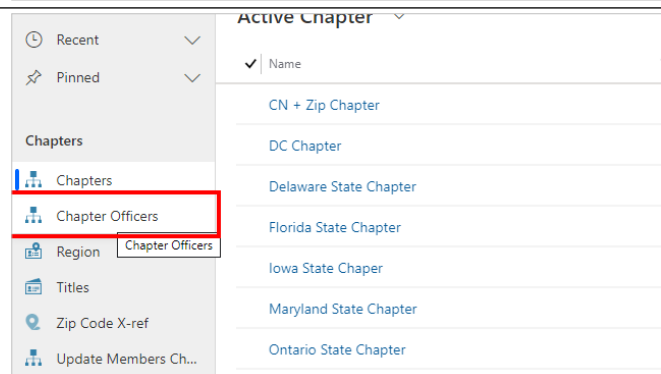
Click on the navigation menu at the bottom left of your screen.



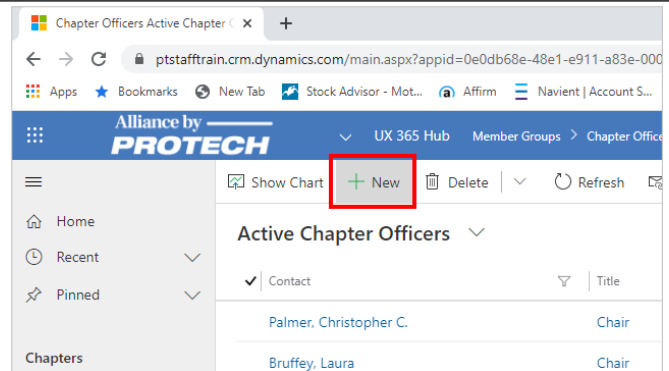
Click on the item **Member Groups**



Click on the item **Chapter Officers**



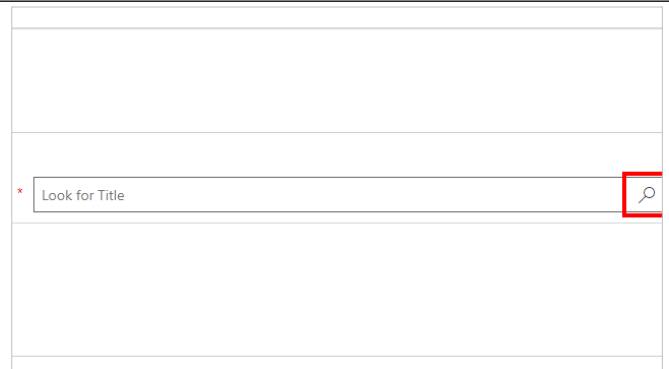
Click on the menu item **New**



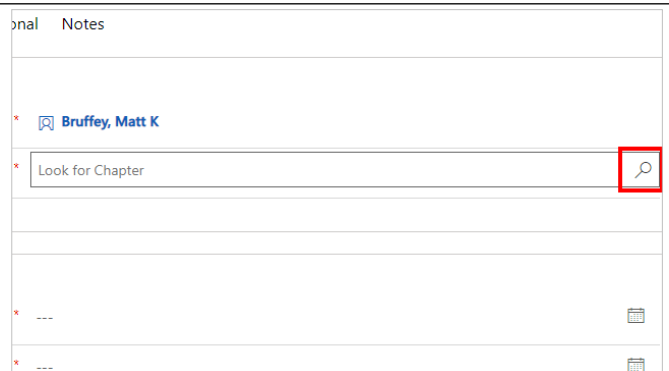
Click on the lookup button to select a contact for the chapter officer.



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.

Chapter	* DC Chapter X
Term	
Term Start	* ---
Term End	* ---

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

Chapter Officer	
Contact	* Bruffey, Matt K
Chapter	* DC Chapter
Term	
Term Start	* 1/7/2020
Term End	* ---

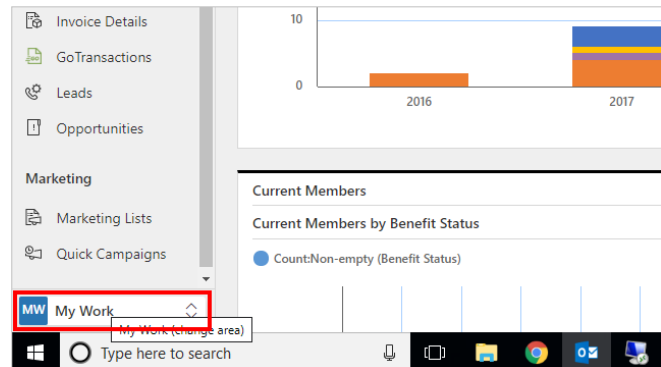
The Officer Status is populated by the system upon saving. This is updated daily by the nightly system job based on term start and end dates.

Chapter Officer Status	
Officer Status	---

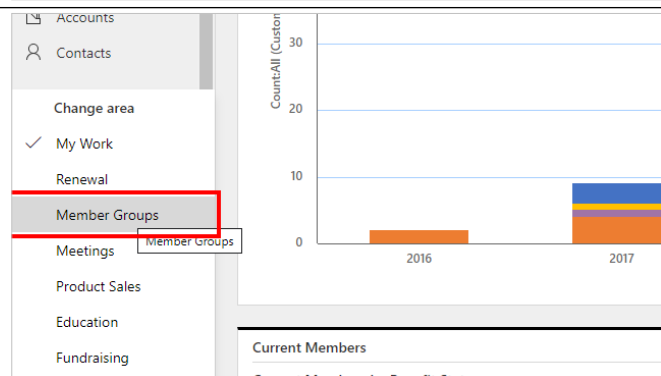
Click on the menu item **Save (CTRL+S)**

3.4. Setting up a Region Officer

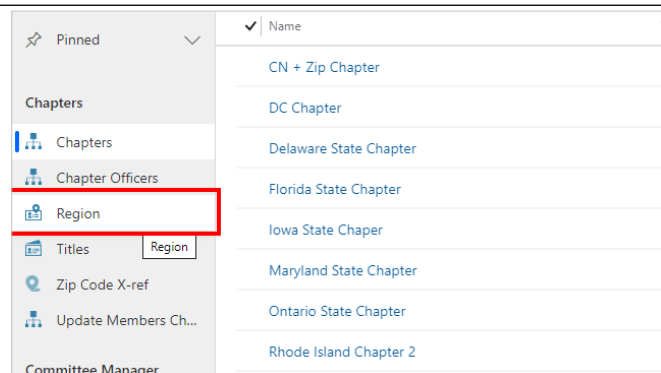
Click on the button **My Work**



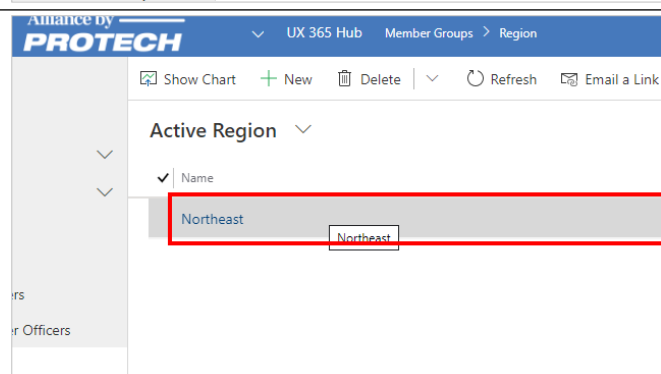
Click on the item **Member Groups**



Click on the item **Region**



Select your Region setup record



Click on the item **Related**

The screenshot shows the 'UX 365 Hub' interface for the 'Northeast' region. The 'Related' tab is highlighted with a red box. The 'Name' field is set to 'Northeast'.

Click on the menu item **Region Officer**

The screenshot shows the 'UX 365 Hub' interface for the 'Northeast' region. The 'Region Officer' menu item is highlighted with a red box. The 'Name' field is set to 'Northeast'.

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

The screenshot shows the 'UX 365 Hub' interface for the 'Northeast' region. The 'Add New Region Officer' button is highlighted with a red box. The 'Name' field is set to 'Northeast'.

Click on the lookup field **Contact**

The screenshot shows the 'UX 365 Hub' interface for the 'Northeast' region. The 'Contact' lookup field is highlighted with a red box. The 'Name' field is set to 'Northeast'.

Select the Contact

Region Officer		Notes	Administration
Region Officer			
Contact	*	Look for Contact	
Region	*	Recent Contacts	
		<div> Smith, John </div>	
		<div> 1 Testing, 1 Testing </div>	
		+ New Contact	
Term Start		---	

Click on the lookup field **Title**

Region Officer Title	
Title	<div>Look for Title</div> <div>Select to enter data</div>

Select the officer Title

Region Officer Title	
Title	<div>Look for Title</div> <div>Recent Titles</div> <div> President </div> <div> + New Title </div>
Region Officer Status	

Click on the input field **Term Start**

Contact	*	Smith, John
Region	*	Northeast
Term		
Term Start		---
Term End		---

Term

Term Start

January 2020

↑

↓

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Term End

2020

↑

↓

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec

Region	
rm	
Term Start	1/1/2020
Term End	---

[illegible]

Region Officer Status	
Officer Status	--Select--
	--Select--

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)**

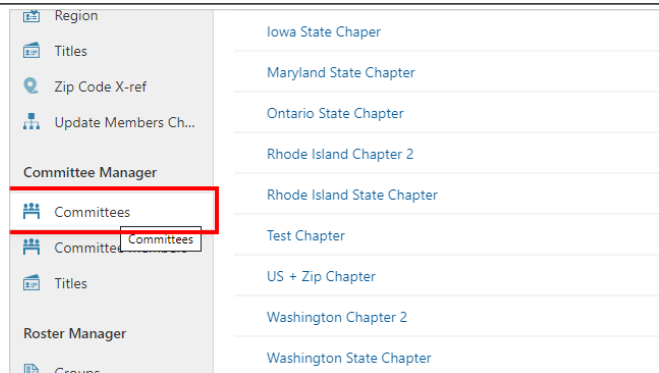
4. Committees and Rosters

4.1. Adding a Committee Member

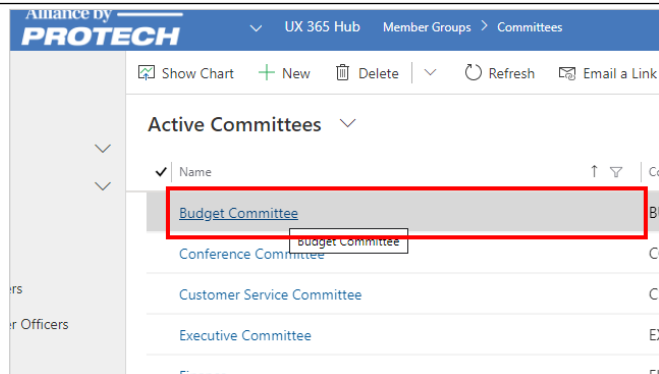
Click on the button **My Work (change area)**

Click on the item **Member Groups**

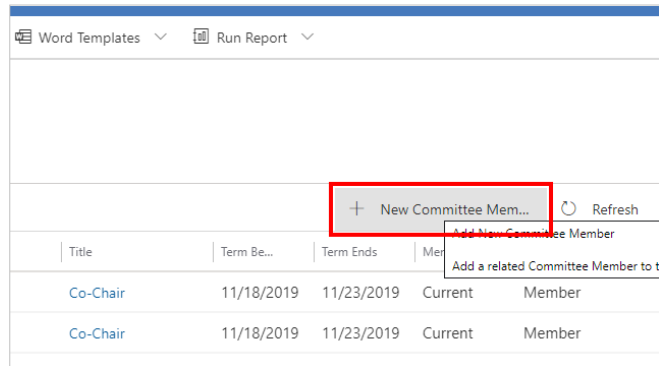
Click on the item **Committees**



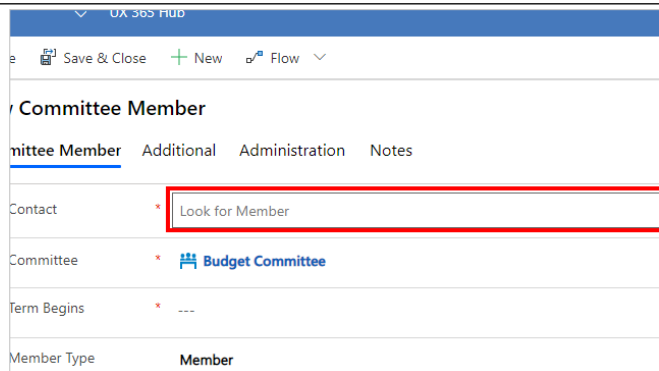
Select the committee you would like to add a member to








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



Click on the lookup field **Contact**




Select the Contact you would like to add









Committee Member	Additional	Administration	Notes
Contact	*	Look for Member	
Committee	*	Recent Contacts	
Term Begins	*	<div>  Burrow, Joe </div> <div>  1 Testing, 1 Testing </div>	
Member Type		<div>  Roni, Mac A. </div> <div>  Lestrangle, Bellatrix </div> <div>  Krum, Viktor </div>	
		+ New Contact	

Click on the link **Title**



Select the position or title of the committee member if appropriate(chair member, CEO, ect.)

Committee Member	Additional	Administration	Notes
for Title		<div>  </div>	

Select the title of the new committee member

Title	*	Look for Title
Title Sequence		Titles
Term Ends	*	<div>  CEO </div> <div>  2 </div>
Member Status		<div>  Chair </div> <div>  1 </div>
		<div>  Co-Chair </div> <div>  2 </div>
		<div>  Member </div> <div>  00 </div>

Click on the field **Term Begins**

Committee Member	Additional	Administration	Notes
Contact	*	 1 Testing, 1 Testing	
Committee	*	 Budget Committee	
Term Begins	*	---	
Member Type		Member	

Click on a date in the calendar

Contact	* 1 Testing, 1 Testing																																																						
Committee	* Budget Committee																																																						
Term Begins	* ---																																																						
Member Type	<div> <div>January 2020</div> <div> <div>↑ ↓</div> <table border="1"> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td> </tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td> </tr> <tr> <td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td> </tr> <tr> <td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td> </tr> <tr> <td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td> </tr> </table> </div> <div>2020</div> <div> <div>↑ ↓</div> <table border="1"> <tr> <td>Jan</td><td>Feb</td><td>Mar</td><td>Apr</td> </tr> <tr> <td>May</td><td>Jun</td><td>Jul</td><td>Aug</td> </tr> <tr> <td>Sep</td><td>Oct</td><td>Nov</td><td>Dec</td> </tr> </table> </div> </div>	Su	Mo	Tu	We	Th	Fr	Sa	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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Jan	Feb	Mar	Apr																																																				
May	Jun	Jul	Aug																																																				
Sep	Oct	Nov	Dec																																																				

Click on the field **Term Ends**

Title	* Chair
Title Sequence	---
Term Ends	* ---
Member Status	---

Click on a date in the calendar

Title	* Chair																																																						
Title Sequence	---																																																						
Term Ends	* ---																																																						
Member Status	<div> <div>January 2020</div> <div> <div>↑ ↓</div> <table border="1"> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td> </tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td> </tr> <tr> <td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td> </tr> <tr> <td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td> </tr> <tr> <td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td> </tr> </table> </div> <div>2021</div> <div> <div>↑ ↓</div> <table border="1"> <tr> <td>Jan</td><td>Feb</td><td>Mar</td><td>Apr</td> </tr> <tr> <td>May</td><td>Jun</td><td>Jul</td><td>Aug</td> </tr> <tr> <td>Sep</td><td>Oct</td><td>Nov</td><td>Dec</td> </tr> </table> </div> </div>	Su	Mo	Tu	We	Th	Fr	Sa	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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19	20	21	22	23	24	25																																																	
26	27	28	29	30	31	1																																																	
Jan	Feb	Mar	Apr																																																				
May	Jun	Jul	Aug																																																				
Sep	Oct	Nov	Dec																																																				

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

The screenshot shows the 'Committee Member: Information' page. The top navigation bar includes a 'Save & Close' button, which is highlighted with a red box. Below the navigation bar, the page title is 'New Committee Member'. The main content area shows the 'Committee Member' tab selected, with a 'Contact' field and a '1 Testing, 1 Testing' status.

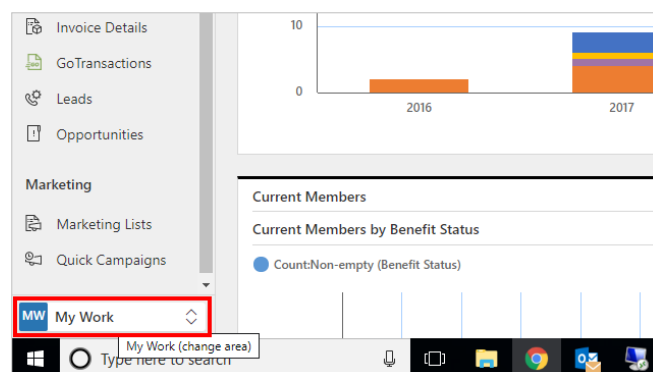
You should now see the new committee member added to the committee member list

ation	Notes	Related
tee		
Committee Members		
<input checked="" type="checkbox"/>	Member	↑ Committee
1	Testing, 1 Testing	Budget Comm
	Altmann, Diego	Budget Comm
	Black, Sirius D.	Budget Comm
	Stewart, Jerome	Budget Comm

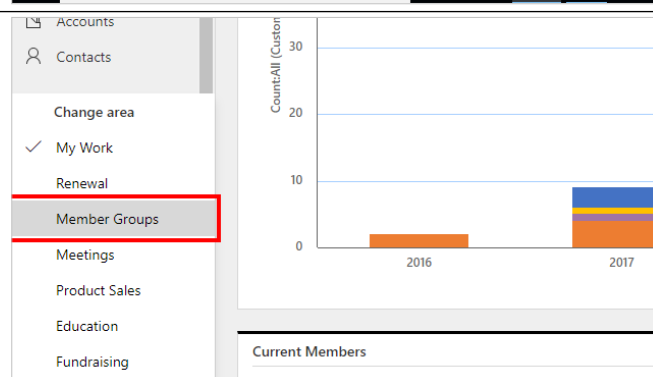
4.2. Adding a Roster Member

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**

Committee manager	Rhode Island State Chapter
Committees	Test Chapter
Committee Members	US + Zip Chapter
Titles	Washington Chapter 2
Roster Manager	Washington State Chapter
Groups	
Rosters	
Roster Members	
Roster Member Utility	

Select the Group

The screenshot shows the 'UX 365 Hub' interface. Under the 'Member Groups > Groups' path, there is a section for 'Active Groups'. A list of groups is displayed, including '365 Group', '365 Group', and 'Nicks Test Group'. The '365 Group' entry is highlighted with a red rectangular box.

Click on the item **Related**

The screenshot shows the '365 Group' details page. The 'Related' tab is selected and highlighted with a red rectangular box. The page displays fields for 'Group Code' (365GROUP), 'Name' (365 Group), and 'Description' (---).

Click on the menu item **Roster Members**

The screenshot shows the '365 Group' details page with the 'Related' tab selected. A dropdown menu is open, showing options: 'Related - Common', 'Activities', 'Audit History', 'Roster Members', and 'Rosters'. The 'Roster Members' option is highlighted with a red rectangular box.

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

The screenshot shows the '365 Group' details page with the 'Roster Members' tab selected. A button labeled '+ New Roster Member' is highlighted with a red rectangular box. Below it, there is a section for 'Roster' with a sub-section for 'Customer' and a list of members, including 'Bruffey, Matt S.'.

Click on the lookup field **Roster**

Roster Member

General Additional User Defined Administration Notes

Group * 365 Group

Roster * Look for Roster

Select to enter data

Select the Roster Member Contact or Roster Member Account

Customer * ---

Select the Roster

Group * 365 Group

Roster * Look for Roster

Recent Rosters

365 Roster

Select the Roster Member New Roster

Customer * ---

Click on the lookup field **Customer**

Group * 365 Group

Roster * 365 Roster X

Select the Roster Member Contact or Roster Member Account

Customer * Look for Records

Select the Customer

Select the Roster Member Contact or Roster Member Account

Customer * Look for Records

Recent records

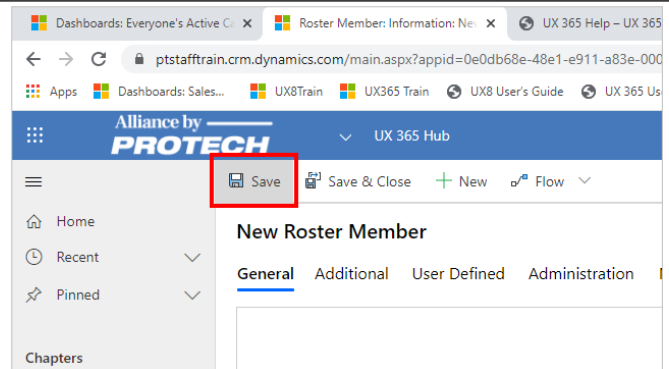
Altmann, Diego

Smith, John

1 Testing, 1 Testing

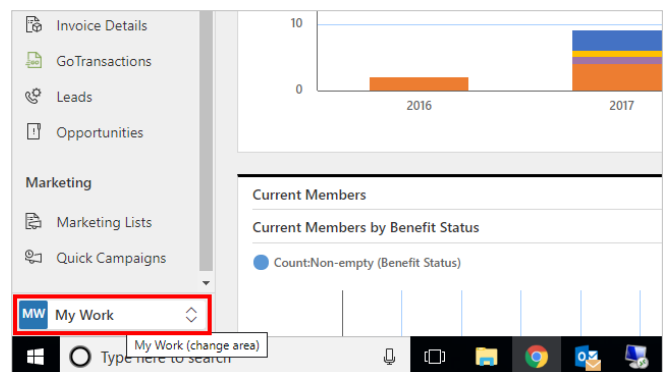
New Record

Click on the menu item Save

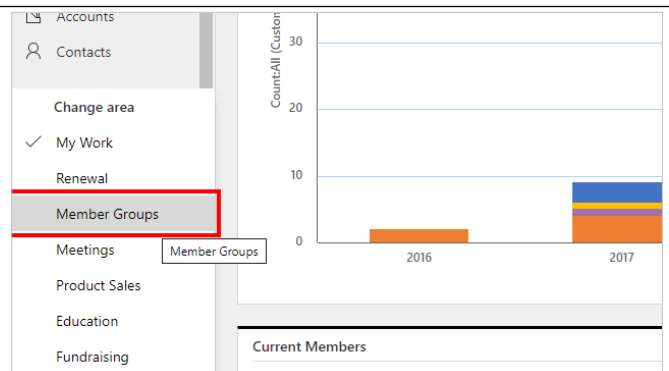


4.2.2. Adding Roster Members using the Roster record

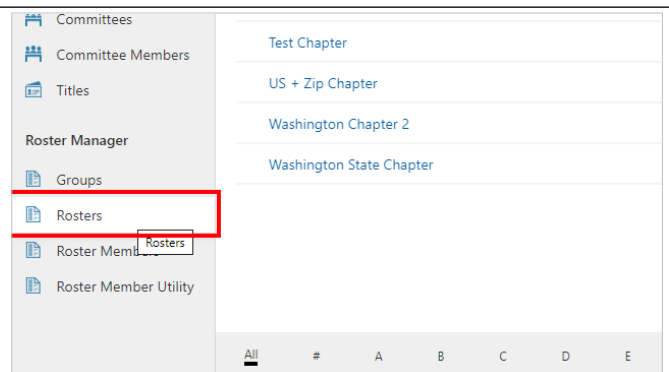
Click on the button **My Work**



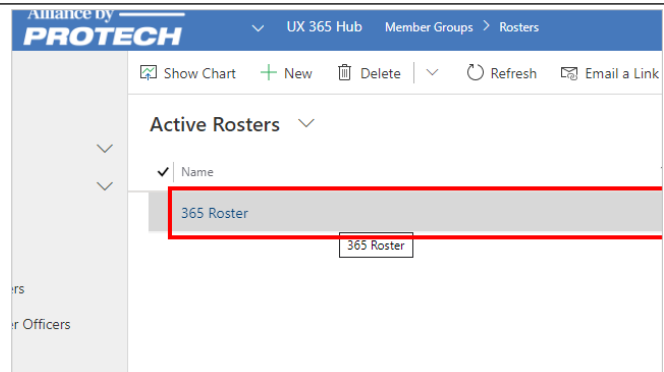
Click on the item **Member Groups**



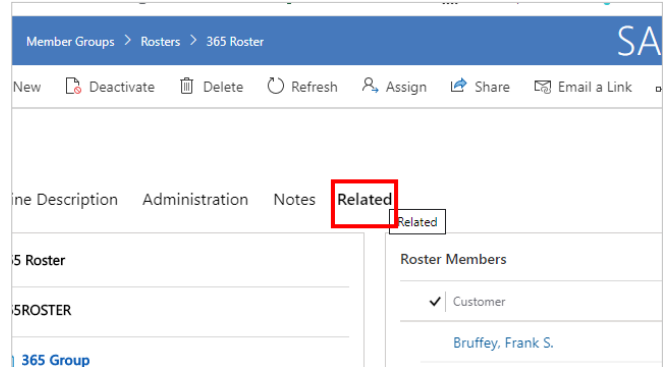
Click on the item **Rosters**



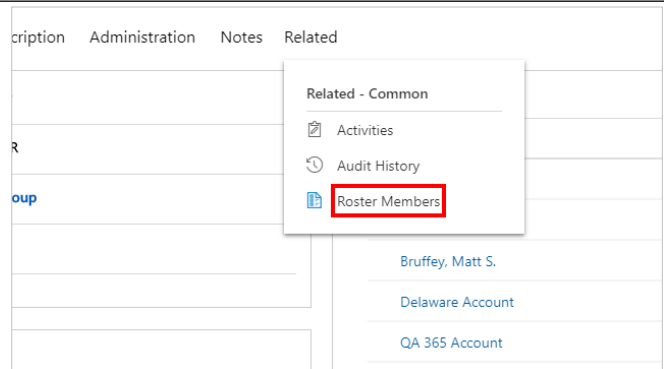
Select the Roster



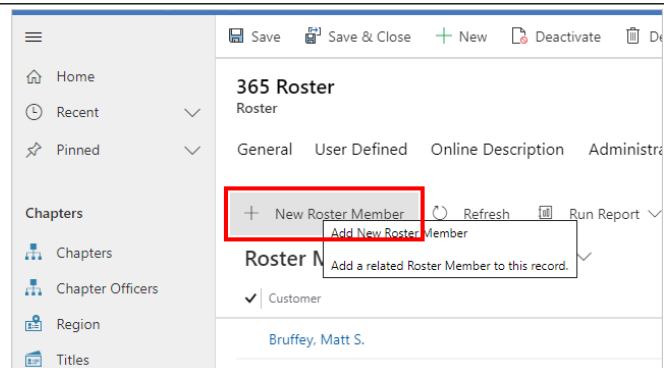
Click on the item **Related**



Click on the menu item **Roster Members**



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



Click on the lookup field **Customer**

Group * 365 Group

Roster * 365 Roster

Select the Roster Member Contact or Roster Member Account

Customer * Look for Records

Select to enter data

Select the customer

Select the Roster Member Contact or Roster Member Account

Customer * Look for Records

Recent records

Altmann, Diego

Smith, John

1 Testing, 1 Testing

+ New Record

Click on the menu item Save

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Hub

Save Save & Close + New Flow

Save (CTRL+S)

Save this Roster Member.

General Additional User Defined Administration

Chapters

4.2.3. Adding Roster members using the Roster Members list

Click on the button **My Work**

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

MW My Work

My Work (changes...)

Type here to search

10

0

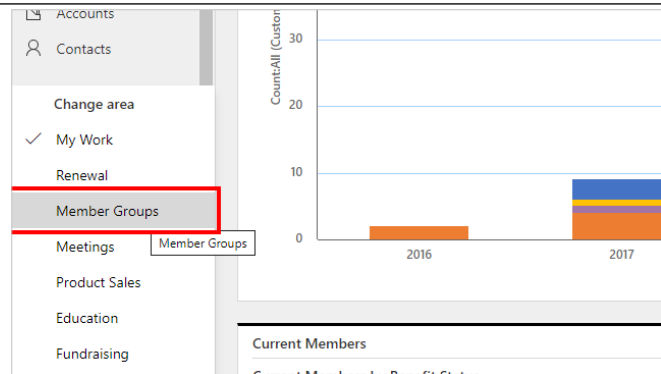
2016 2017

Current Members

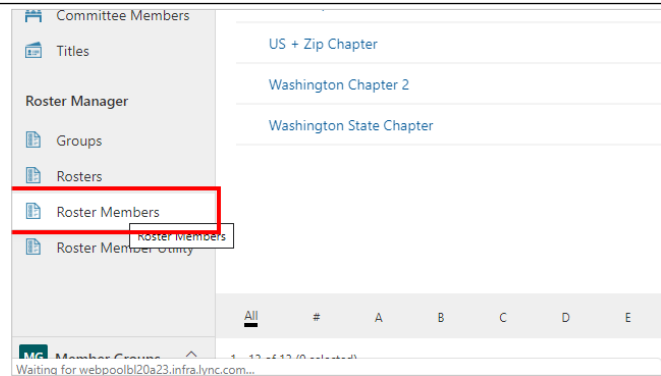
Current Members by Benefit Status

Count:Non-empty (Benefit Status)

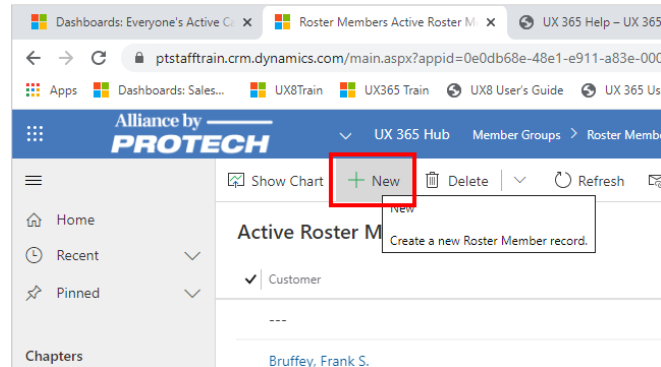
Click on the item **Member Groups**



Click on the item **Roster Members**



Click on the menu item **New**



Click on the lookup field **Group**

The screenshot shows the 'Roster Member' form. The 'Group' field is highlighted with a red box. The field contains the text 'Look for Group'. Below the field, there is a 'Select to enter data' button. The form also includes tabs for 'Additional', 'User Defined', 'Administration', and 'Notes'.

Select the Group

ral	Additional	User Defined	Administration	Notes
Group	*	Look for Group		
Roster	*	Recent Groups		
		365 Group		
		+ New Group		
Select the Roster Member Contact or Roster Member Account				
Customer	*	---		

Click on the lookup field **Roster**

ral	Additional	User Defined	Administration	Notes
Group	*	365 Group X		
Roster	*	Look for Roster		
		Select to enter data		
Select the Roster Member Contact or Roster Member Account				
Customer	*	---		

Select the Roster

Group	*	365 Group		
Roster	*	Look for Roster		
		Recent Rosters		
		365 Roster		
		+ New Roster		
Select the Roster Member Contact or Roster Member Account				
Customer	*	---		

Click on the lookup field **Customer**

Group	*	365 Group		
Roster	*	365 Roster X		
Select the Roster Member Contact or Roster Member Account				
Customer	*	Look for Records		
		Select to enter data		

Select the Customer

Select the Roster Member Contact or Roster Member Account

Customer *

Recent records

- Altmann, Diego
- Smith, John**
- 1 Testing, 1 Testing
- [+ New Record](#)

Click on the menu item Save

Dashboards: Everyone's Active C x Roster Member: Information: Ne x UX 365 Help - UX 365

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Hub

Save Save & Close + New Flow

Save (CTRL+S)
Save this Roster Member.

New

General Additional User Defined Administration

Chapters

4.2.4. Adding Roster Members using the Contact or Account record

Click on the item **Contacts**

Activities Reports Easy Print Reports

Customers

- Accounts
- Contacts**

Sales

- Invoices
- Invoice Details
- GoTransactions

CountAll (Customer ID)

50
40
30
20
10

Select the Contact

Pinned

My Work

- Dashboards
- Activities
- Reports
- Easy Print Reports
- Customers
- Accounts
- Contacts**

Full Name	Company Name
Sims, Ali	---
Sisson, Joanne	---
Smith, Alex	---
Smith, Jerry	---
Smith, John	---
Smith, John	Delaware Account
Smith, Shelly	---
Smith, Tina	---
Smith, Tina	---

Click on the item **Related**

The screenshot shows a web application interface titled 'SANDBOX'. At the top, there are several action buttons: 'Copy Address', 'Deceased', 'Deactivate', 'GoTransactions', and 'Connect'. Below these, there are tabs for 'Preferences', 'Other Details', 'Notes', and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a section for 'Current and Upcoming Renewal Billing' with a table showing 'Benefit', 'Rate', and 'Cycle'. The ID 'C-001274' is visible on the left.

Click on the menu item **Roster Members**

The screenshot shows a sidebar menu with various options. The 'Roster Members' option is highlighted with a red box. Other visible options include 'Anniversaries', 'UX365', 'Activities', 'Addresses', 'Sub-Contacts', 'Committee Members', 'Chapter Officers', 'Region Officer', 'Connections', 'Audit History', and 'Playbooks'. The main content area shows a list of transactions with dates like '12/11/20', '12/10/20', and '6/4/2019'.

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

The screenshot shows a user profile page for 'Smith, John'. The page has tabs for 'Summary', 'Address Information', 'Default Billing', and 'Web'. A 'New Roster Member' button is highlighted with a red box. Below the button, there is a dropdown menu with options like 'Add New Roster Member' and 'Add a related Roster Member to this record.'.

Click on the lookup field **Group**

The screenshot shows a 'Roster Member' form. The 'Group' field is a lookup field and is highlighted with a red box. Below it, there is a 'Roster' field. The form has tabs for 'General', 'Additional', 'User Defined', 'Administration', and 'Notes'. The 'General' tab is selected.

Select the Group

The screenshot shows the 'Roster Member' form with tabs: General, Additional, User Defined, Administration, and Notes. The 'Group' field has a dropdown menu open, showing 'Recent Groups' and '365 Group' (highlighted with a red box). Below the dropdown is a '+ New Group' button. The 'Roster' field is also visible, and the 'Customer' field shows 'Smith, John'.

Click on the lookup field **Roster**

The screenshot shows the 'Roster Member' form with the 'Roster' field highlighted by a red box. The 'Group' field now shows '365 Group' with a close button. The 'Roster' field has a dropdown menu open, showing 'Look for Roster' and 'Select to enter data'.

Select the Roster

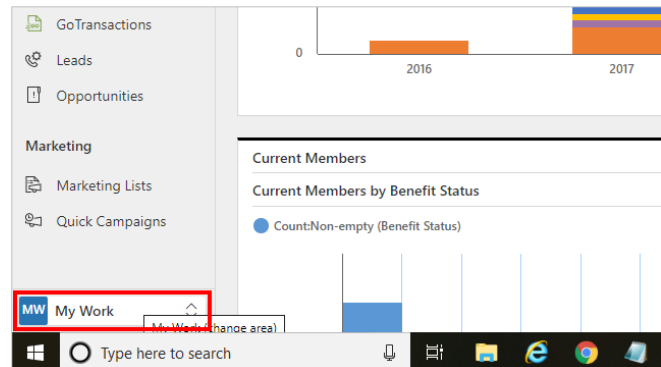
The screenshot shows the 'Roster Member' form with the 'Roster' dropdown menu open, showing 'Recent Rosters' and '365 Roster' (highlighted with a red box). Below the dropdown is a '+ New Roster' button. The 'Group' field shows '365 Group' and the 'Customer' field shows 'Smith, John'.

Click on the menu item Save

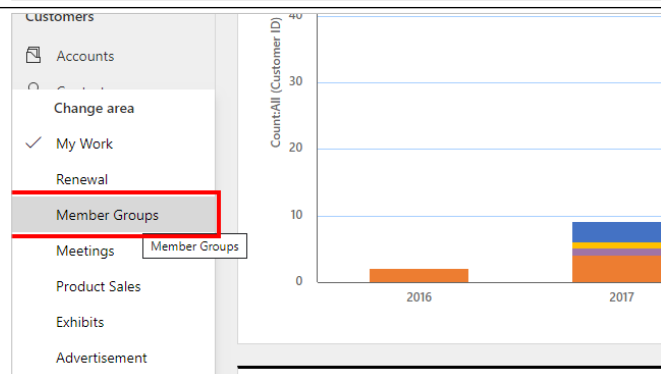
The screenshot shows the 'Roster Member' form with the 'Save' button highlighted in the top menu bar. The menu bar also includes 'Save & Close', 'New', and 'Flow'. The 'Roster' field is visible, and the 'Customer' field shows 'Smith, John'.

4.3. Adding Roster Members using the Roster Members Utility

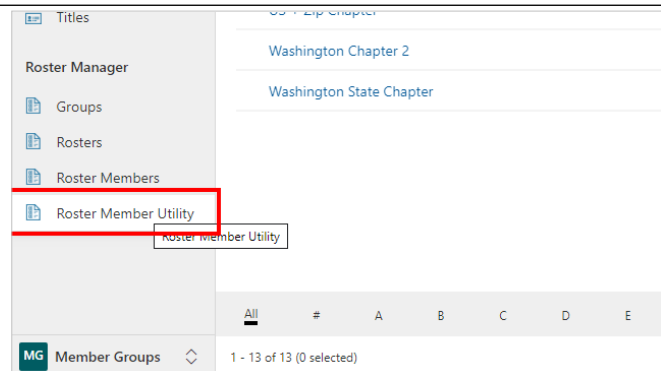
Click on the button **My Work (change area)**



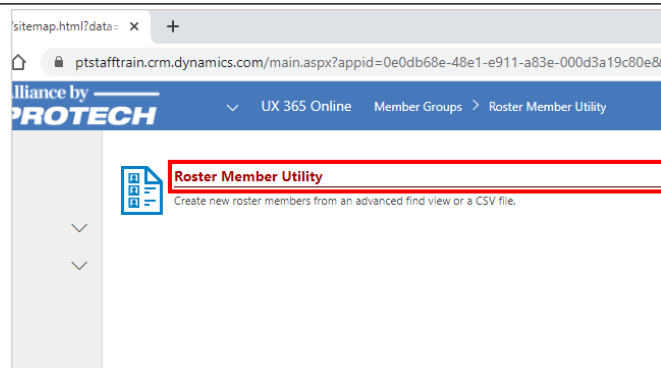
Click on the item **Member Groups**



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 you wish to perform.

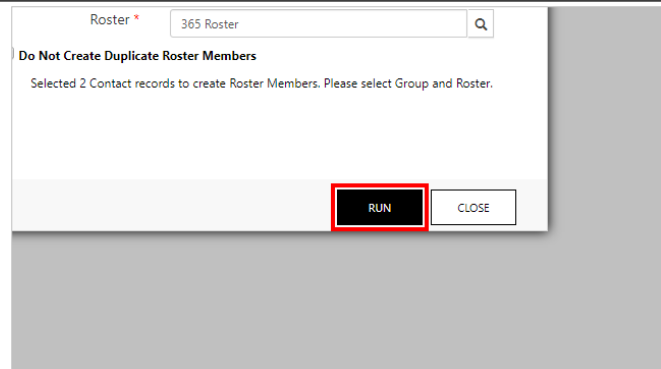
Advanced find view will have you pull an advanced find to find the members you would like to add, CSV file prompts you to upload a file.

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

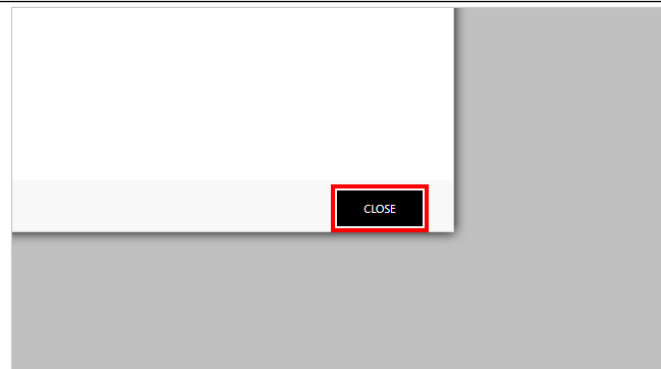
Click on the lookup icon next to group to select the group

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**

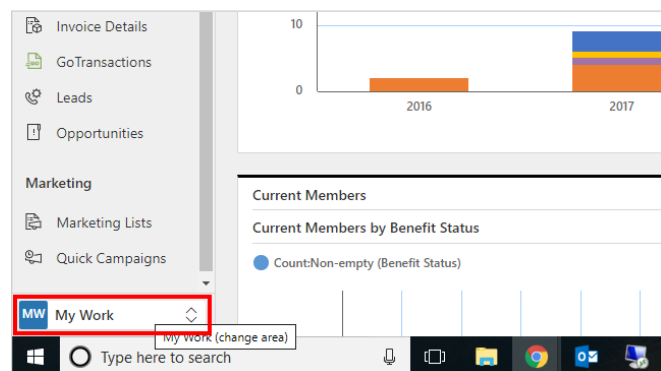


Click close when you are done with the utility

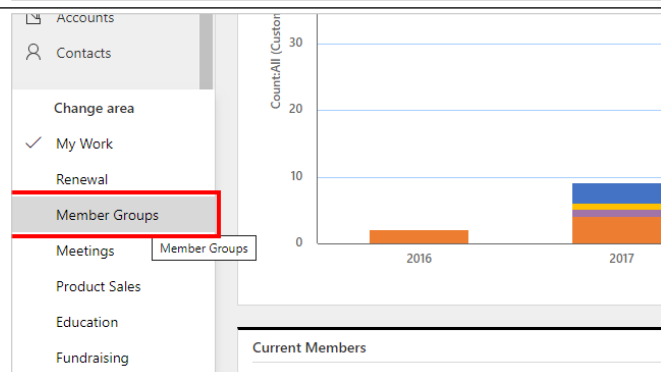


4.4. Assigning a Roster to a Different Group

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



Click on the item **Member Groups**



Click on the item **Rosters**

Committees
Committee Members
Titles
Roster Manager
Groups
Rosters
Roster Member
Roster Member Utility

Test Chapter
US + Zip Chapter
Washington Chapter 2
Washington State Chapter

All # A B C D E

Select the roster you would like to edit

Amance by
PROTECH

UX 365 Hub Member Groups > Rosters

Show Chart + New Delete Refresh Email a Link

Active Rosters

Name

365 Roster

365 Roster

Remove the current group

General User Defined Online Description Administration Notes Related

Name * 365 Roster

Roster Code * 365ROSTER

Group * 365 Group X

Sequence * 1

Web

Select the lookup to find new group

Online Description Administration Notes Related

365 Roster

365ROSTER

Look for Group

Required fields must be filled in.

1

Roster Members

Customer

Bruffey, Frank S.

Bruffey, Laura

Bruffey, Matt S.

Delaware Account

QA 365 Account

Select the desired group to be assigned to the roster

Roster Code * 365ROSTER

Group * Look for Group

Sequence * 365 Group 365GROUP

Nicks Test Group NTG

+ New Group Change View

Publish to Web No

Roster Web Role ---

Click on Save and Close

Roster: Information: 365 Roster - x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps UX online spam mail LMS CETROMCP Password Generato... Home

Alliance by PROTECH UX 365 Hub Member Groups > Rosters > 365

Save Save & Close + New Deactivate De

365 Roster Roster

General User Defined Online Description Administra

Chapters Name * 365 Roster

You should now see your new group assigned to the Roster

Home Recent Pinned

Active Rosters

✓ Name

365 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.

Home Recent Pinned

Active Committee Members

✓ Member Committee

Altmann, Diego Budget Commit

Baton, Chris P. Executive Comr

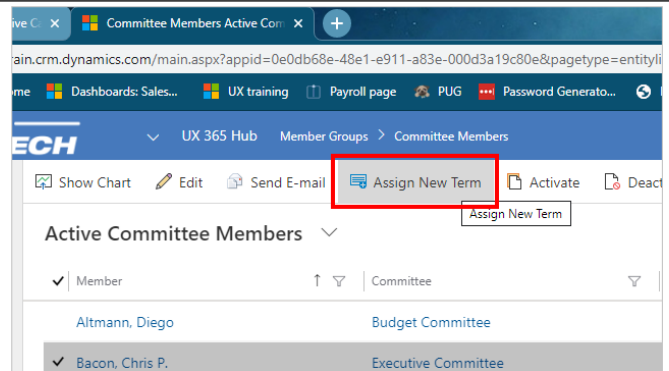
Baylor, Don Executive Comr

Black, Sirius D. Budget Commit

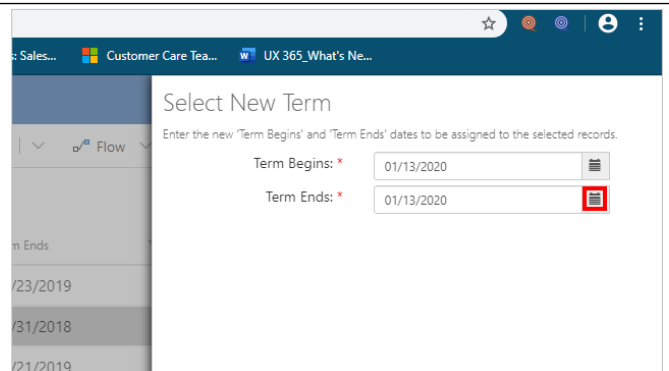
Bruffey, Frank S. UX 365 Commit

Bruffey, Louis UX 365 Commit

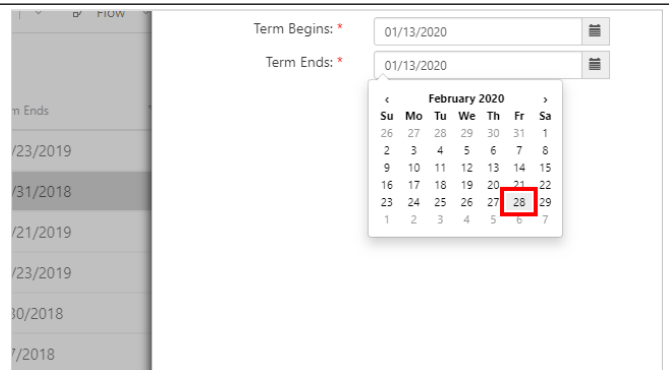
Click on the menu item **Assign New Term**



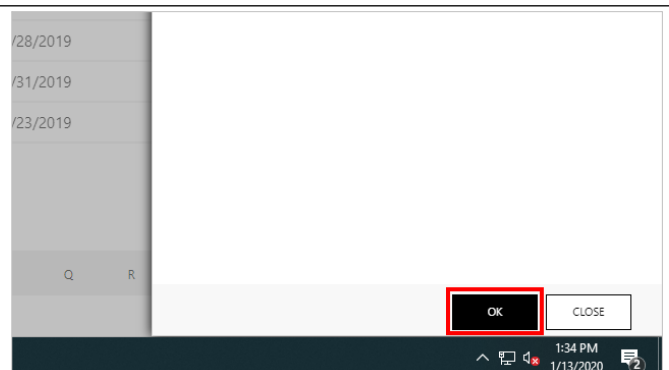
In the Select New Term dialog, enter the new term beginning and ending dates in MM/DD/YYYY format, or click the Calendar button to select the dates.



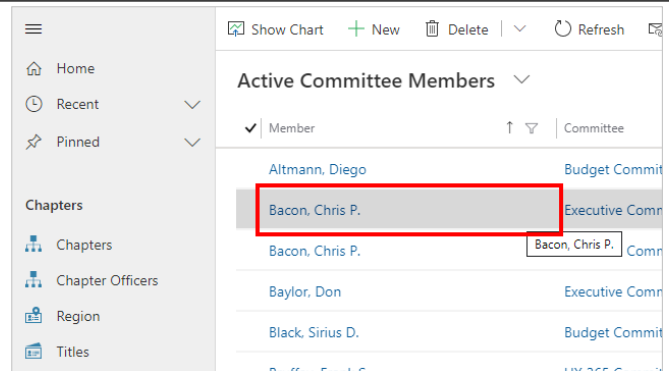
Select the desired dates.



Click on the button **OK**

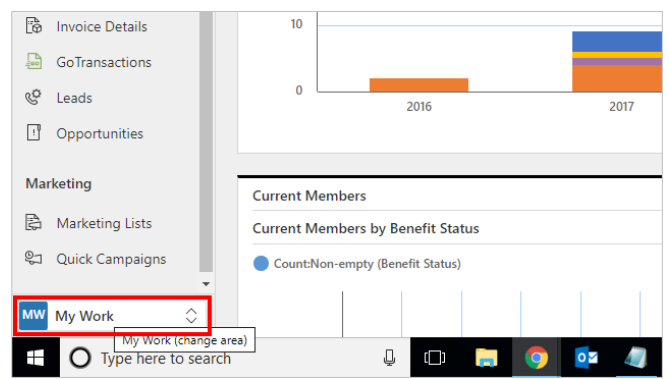


When the process is finished, the Committee Members list will appear. After refreshing the list, verify that the new terms have been added for each committee member you selected.

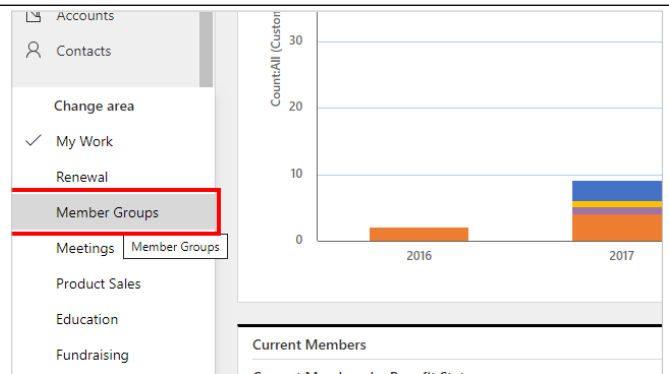


4.6. Creating a Committee

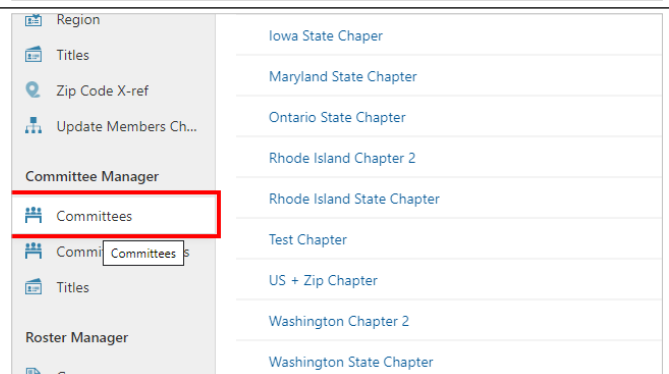
Click on the button **My Work (change area)**



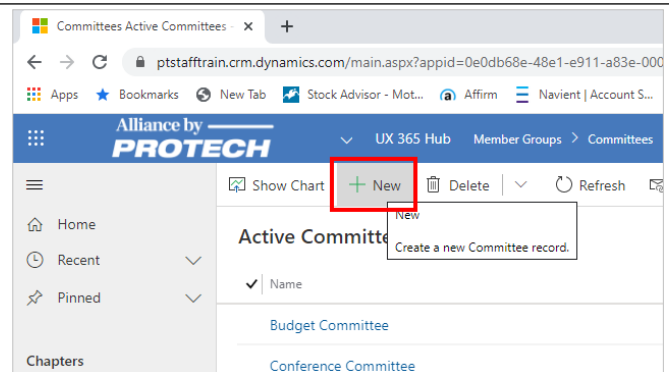
Click on the item **Member Groups**



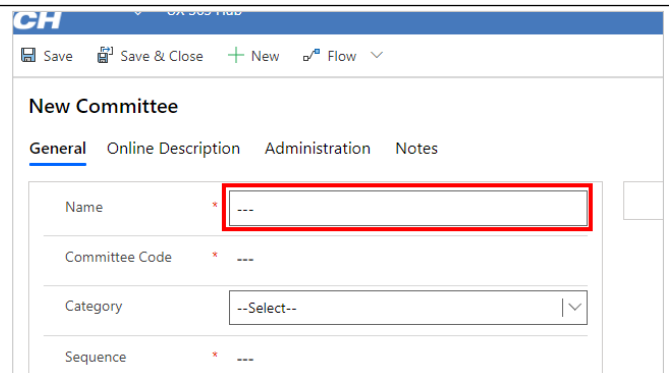
Click on the item **Committees**



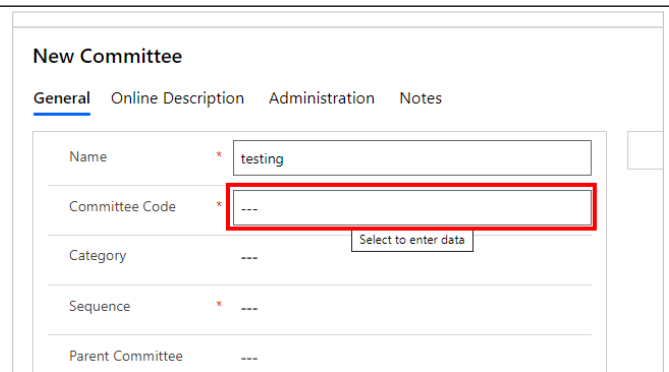
Click on the menu item **New**



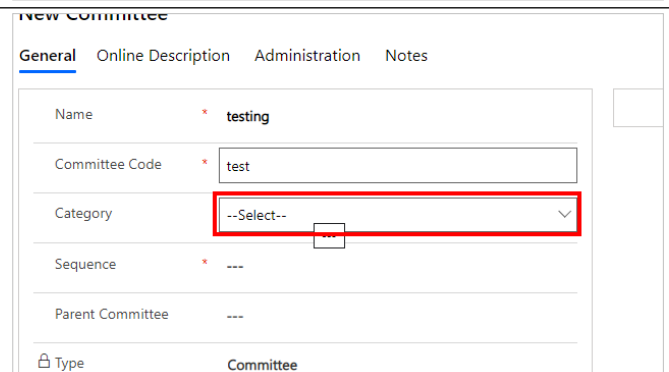
Enter the name of the committee.



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.

General Online Description Administration Notes

Name * testing

Committee Code * test

Category ---

Sequence * ---

Parent Committee --- Select to enter data

Type Committee

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

Name * testing

Committee Code * test

Category ---

Sequence * 9

Parent Committee Look for Parent Committee

Type Committee Select to enter data

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.

Name * testing

Committee Code * test

Category ---

Sequence * 9

Parent Committee ---

Type Committee

Type - Identifies if the Committee is a Sub-Committee

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

Committee: Information: New Co x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Bookmarks New Tab Stock Advisor - Mot... Affirm Navient | Account S...

Alliance by **PROTECH** UX 365 Hub

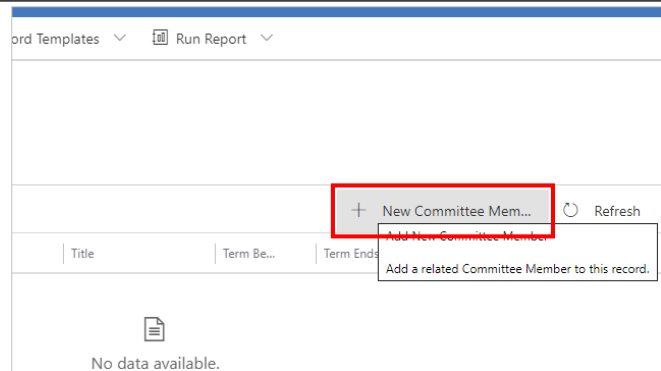
Save Save & Close New Flow

New Committee

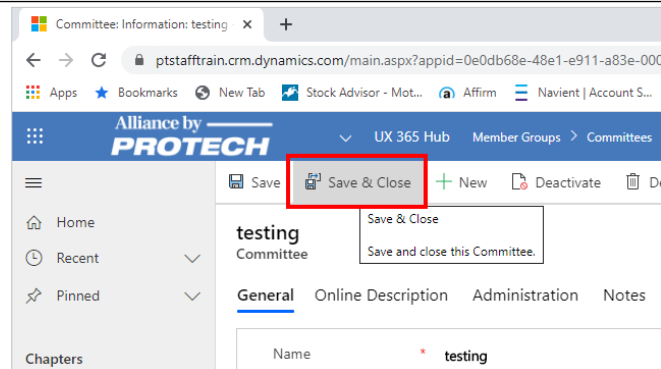
General Online Description Administration Notes

Name * testing

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



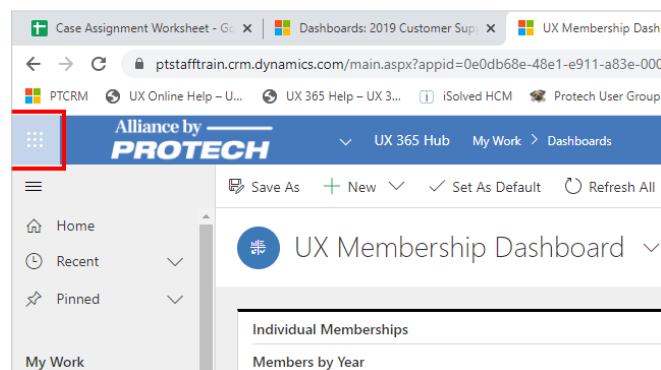
Click on the menu item **Save & Close**



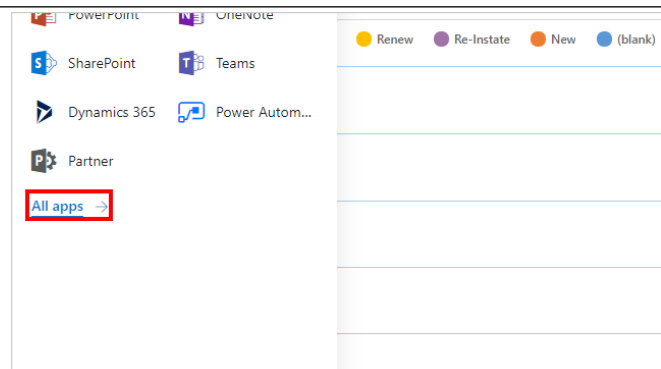
4.7. Creating a Committee Category

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

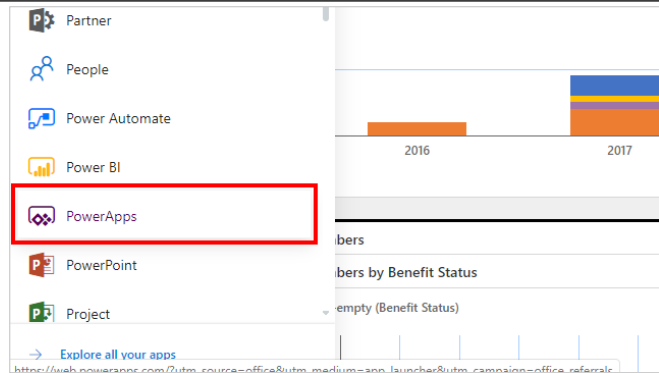
Click on the waffle button



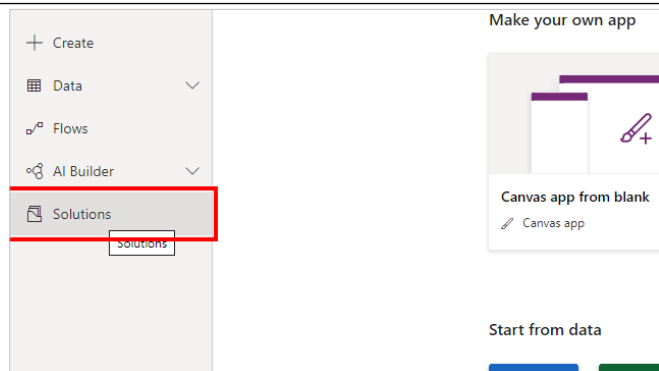
Click on the button **All apps**



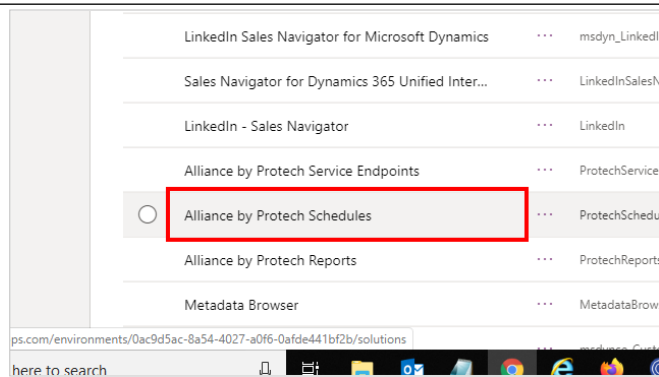
Click on the link **PowerApps**



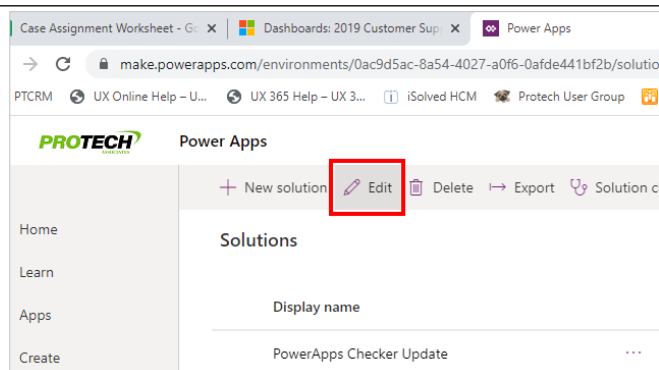
Click on the link **Solutions**



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.

A screenshot of the 'Add existing' dialog in Power Apps. The dialog shows a list of entities. The 'Committee' entity is highlighted with a red box. Other entities visible include 'Engagement Nightly Schedule', 'MX Nightly Schedule', 'Nightly Capture Job Schedule', 'Nightly Job Schedule', 'Professional Development Recurring Schedule', and 'Renewal Nightly Schedule'.

Click on the button Edit

A screenshot of the Power Apps interface. The 'Edit' button is highlighted with a red box. The interface shows a list of entities under the 'Alliance by Protech Schedules' group. The 'Engagement Nightly Schedule' entity is visible.

Double click on **Category**

A screenshot of the 'Committee' entity configuration page. The 'Category' field is highlighted with a red box. The page shows the 'Fields' tab with a list of fields including 'Display name' and 'Category'.

Click on the button **Edit option set**

A screenshot of the 'Edit option set' dialog. The 'Edit option set' button is highlighted with a red box. The dialog shows the configuration for the 'PA_category' option set, including the data type, option set type, default value, and searchability.

Click on the button **Add new item**

<div>Type ▾ Customizable ▾</div> <div>Managed ✓</div>		<div>Category</div> <div>Name *</div> <div>pa_ committee_pa_category</div> <div>View more</div> <div>Items</div> <div>Add new item</div>
---	--	--

Enter the name of the category you are creating.

<div>Type ▾ Customizable ▾</div> <div>Managed ✓</div>		<div>Category</div> <div>Name *</div> <div>pa_ committee_pa_category</div> <div>View more</div> <div>Items (1)</div> <div>New option ...</div> <div>Add new item</div>
---	--	--

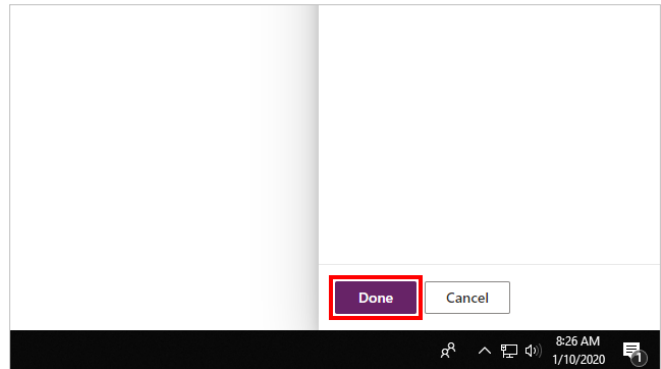
Click on the button **Add new item**

<div>Type ▾ Customizable ▾</div> <div>Managed ✓</div>		<div>Name *</div> <div>pa_ committee_pa_category</div> <div>View more</div> <div>Items (1)</div> <div>Category 1 ...</div> <div>Add new item</div>
---	--	--

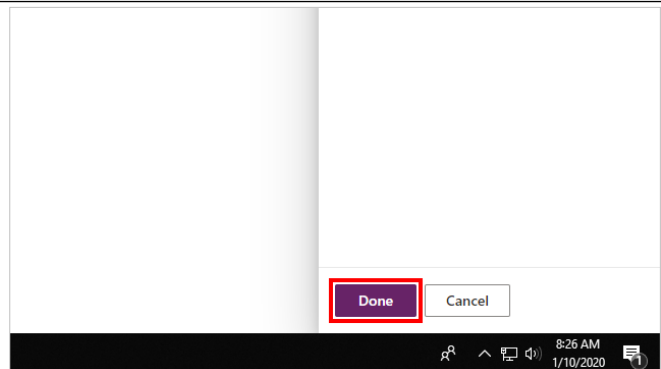
Enter the name of the category you are creating.

<div>Type ▾ Customizable ▾</div> <div>Managed ✓</div>		<div>Name *</div> <div>pa_ committee_pa_category</div> <div>View more</div> <div>Items (2)</div> <div>Category 1 ...</div> <div>New option ...</div> <div>Add new item</div>
---	--	--

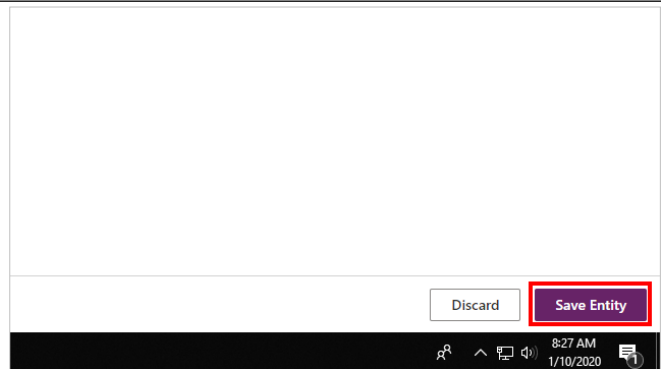
Click on the button **Done**



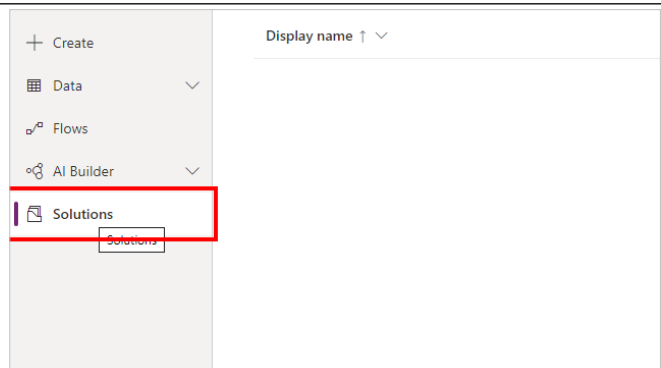
Click on the button **Done**



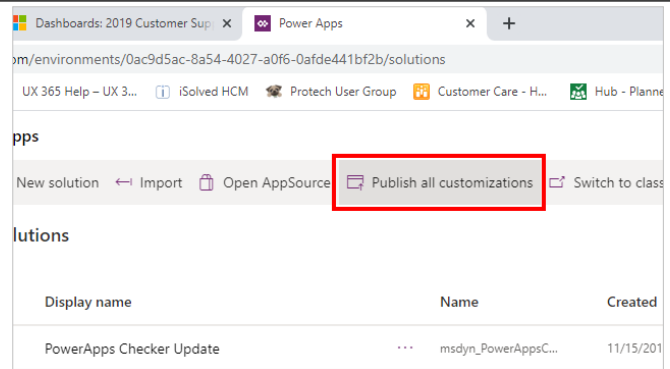
Click on the button **Save Entity**



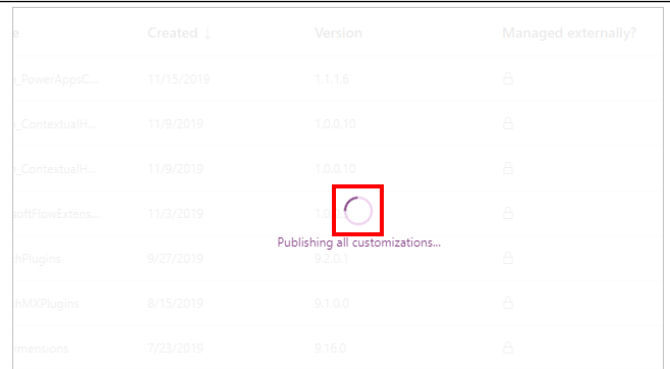
Click on the link **Solutions**



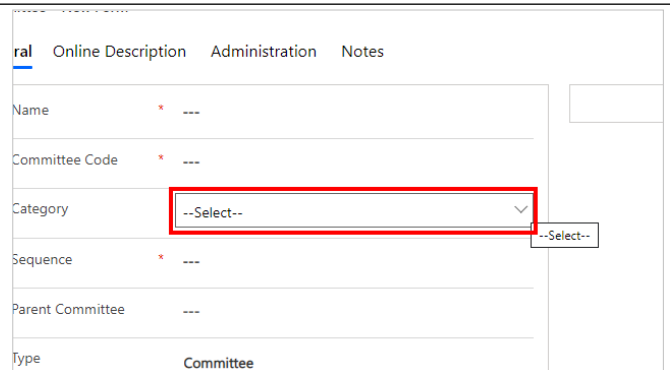
Click on the button Publish all customizations



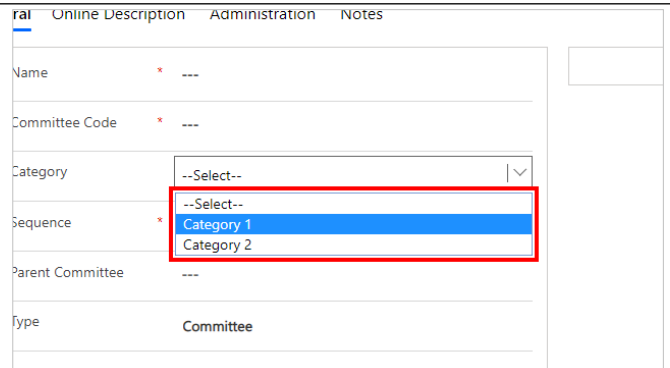
Wait for all customizations to be published.



Now, when you are creating a new committee or editing an existing committee, when you click on Category

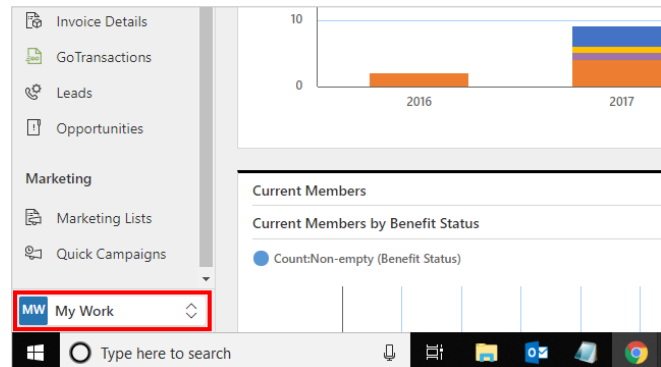


Your credit categories will now be available.

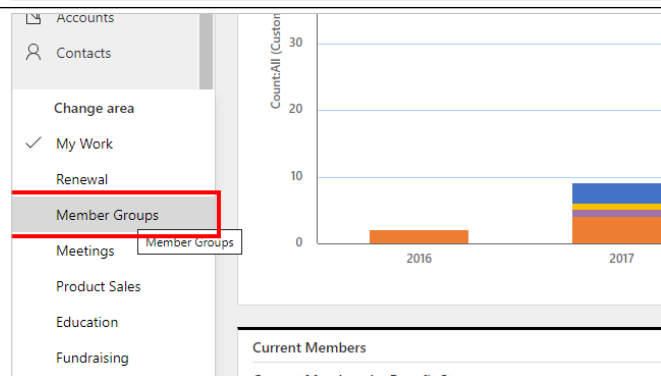


4.8. Creating a Roster

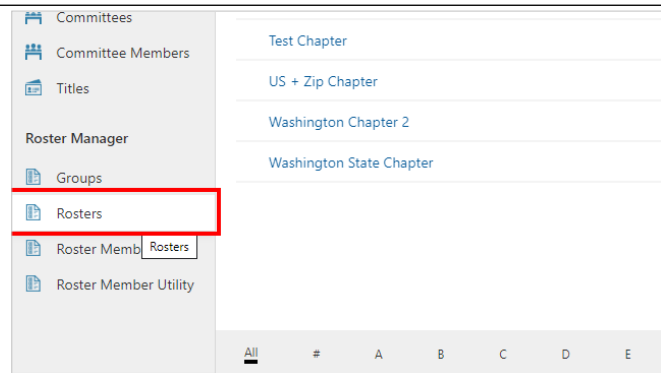
Click on the button **My Work (change area)**



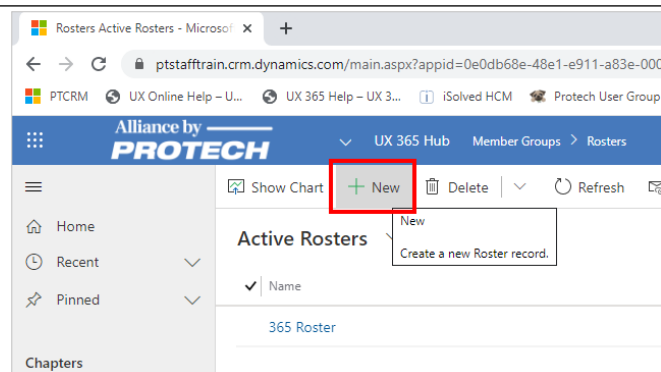
Click on the item **Member Groups**



Click on the item **Rosters**



Click on the menu item **New**



Click on the text field **Name**

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * --- Select to enter data

Roster Code * ---

Group * ---

Sequence * ---

Enter **Name**.

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * U

Roster Code * ---

Group * ---

Sequence * ---

Click on the text field **Roster Code**

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * UX 365 Roster

Roster Code * --- Select to enter data

Group * ---

Sequence * ---

Enter a short Roster ID for your Roster.

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * UX 365 Roster

Roster Code * U

Group * ---

Sequence * ---

Click on the link **Group**

Online Description


Administration

Notes

UX 365 Roster

UX365R

Look for Group



Select the appropriate group to categorize this roster.

Roster Code	UX365R
Group	<input type="text" value="look for Group"/>
Sequence	Groups
	<div>365 Group 365GROUP</div>
b	<div>UX 365 Group UX365G</div>
Publish to Web	<div>+ New Group</div> <div>Change View</div>
Roster Web Role	---

Click on the text field **Sequence**

Name


* UX 365 Roster

Roster Code


* UX365R

Group

*

 UX 365 Group

×



Sequence

*

Select to enter data


Publish to Web

No

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.

Name * UX 365 Roster

Roster Code * UX365R

Group *  UX 365 Group

Sequence *

1 |

b

Publish to Web No

User Defined

The screenshot shows the 'UX 365 Roster' form in the 'User Defined' tab. The 'General' tab is selected, and the 'User Defined' sub-tab is highlighted with a red box. The form fields include: Name (UX 365 Roster), Roster Code (UX365R), Group (UX 365 Group), and Sequence (1). The 'Web' section shows 'Publish to Web' set to 'No'.

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.

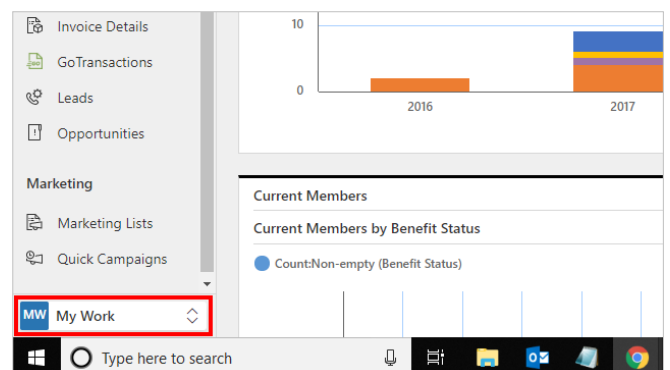
This screenshot is a closer view of the 'User Defined' section of the 'UX 365 Roster' form. It shows the 'Sequence' field with the value '1' highlighted by a red box. The 'Web' section shows 'Publish to Web' set to 'No'.

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

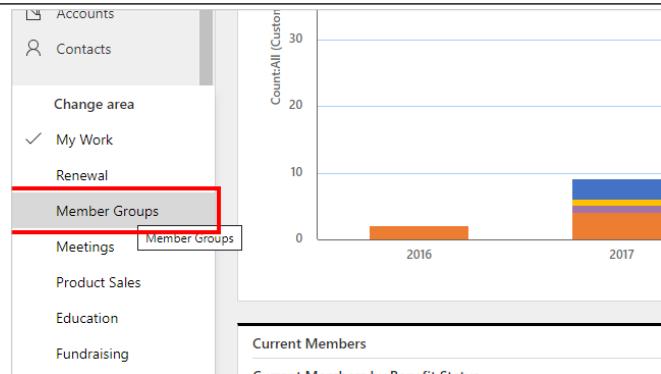
The screenshot shows the 'New Roster' form in the 'User Defined' tab. The 'Save & Close' button is highlighted with a red box. A tooltip is visible over the button, stating 'Save and close this Roster.' The 'General' tab is selected, and the 'Name' field contains 'UX 365 Roster'.

4.9. Creating a Roster Group

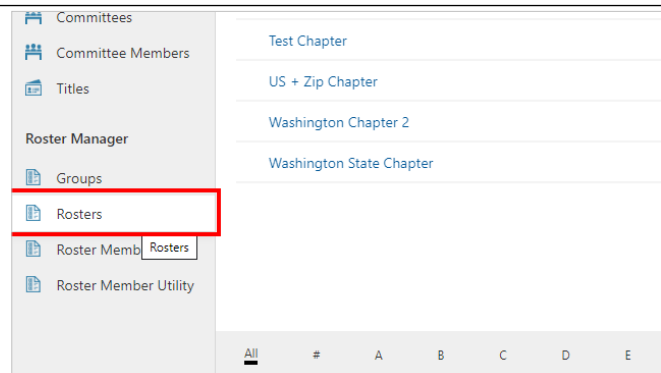
Click on the button **My Work (change area)**



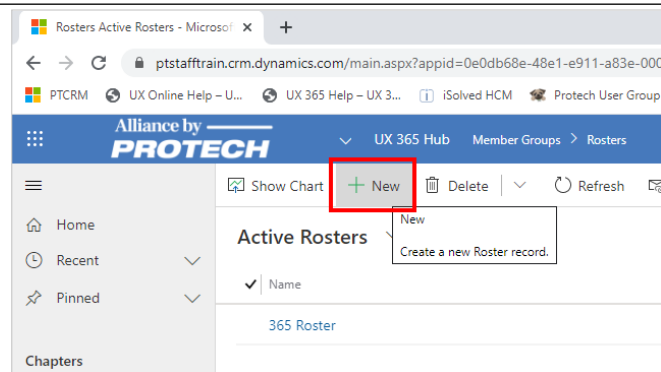
Click on the item **Member Groups**



Click on the item **Rosters**



Click on the menu item **New**



Click on the text field **Name**

The screenshot shows a 'Roster' form. The form has a header with 'UX 365 Hub' and a navigation menu with 'Save & Close', '+ New', and 'Flow'. The form has several fields: Name (highlighted with a red box), Roster Code, Group, and Sequence. Each field has a red asterisk next to it. A tooltip for the 'Name' field says 'Select to enter data'.

Enter **Name**.

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * U

Roster Code * ---

Group * ---

Sequence * ---

Click on the text field **Roster Code**

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * UX 365 Roster

Roster Code * --- Select to enter data

Group * ---

Sequence * ---

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

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

Name * UX 365 Roster

Roster Code * U

Group * ---

Sequence * ---

Click on the link **Group**

UX 365 Hub

Save & Close + New Flow

Roster

General User Defined Online Description Administration Notes

UX 365 Roster

UX365R

Look for Group

Select the appropriate group to categorize this roster.

Roster Code	* UX365R
Group	Look for Group
Sequence	Groups
	365 Group 365GROUP
	UX 365 Group UX365G
Publish to Web	+ New Group Change View
Roster Web Role	---

Click on the text field **Sequence**

Name	* UX 365 Roster
Roster Code	* UX365R
Group	UX 365 Group
Sequence	---
	Select to enter data
Publish to Web	No

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.

Name	* UX 365 Roster
Roster Code	* UX365R
Group	UX 365 Group
Sequence	1
Publish to Web	No

User Defined

Alliance by PROTECH	
UX 365 Hub Member Groups > Rosters > UX 365 Roster	
Save Save & Close + New Deactivate	
UX 365 Roster	
Roster	
General User Defined Online Description Administration	
Name * UX 365 Roster	
Roster Code * UX365R	
Group * UX 365 Group	

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.

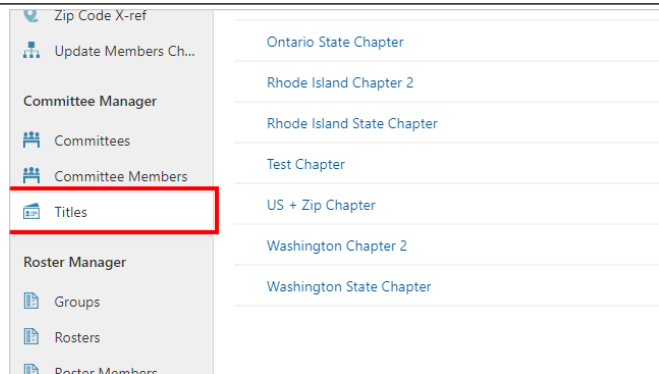
Click on the menu item **Save & Close**

4.10. Creating Committee Member Titles

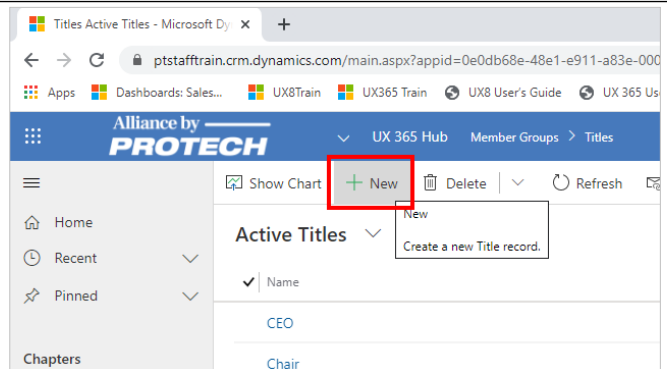
Click on the button **My Work**

Click on the item **Member Groups**

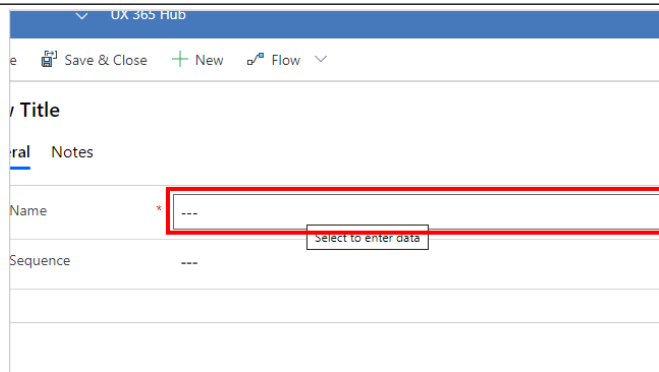
Click on the item **Titles**



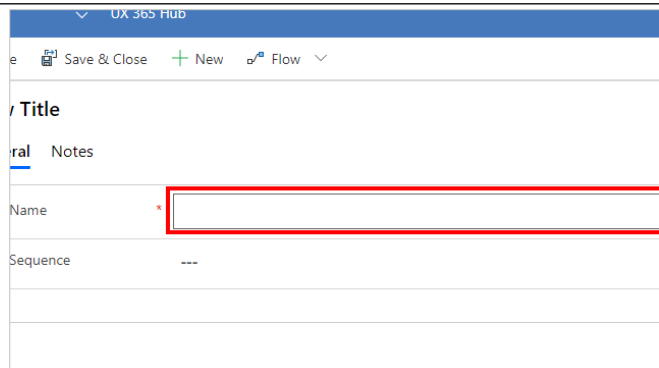
Click on the menu item **New**



Click on the text field **Name**



Enter **Name**.



Move the mouse to the text field **Sequence**

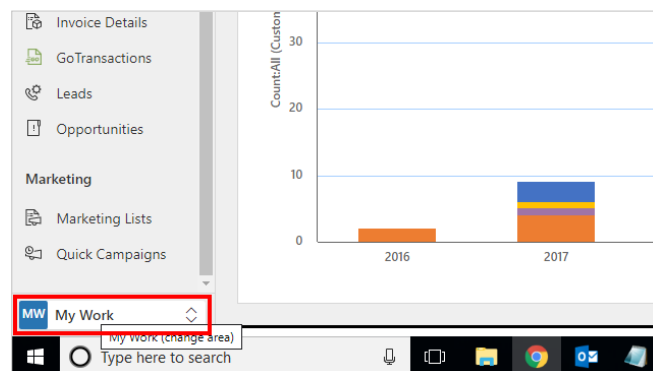
If you want to create a custom report that sorts committee members in order according to their title sequence, enter a title sequence number for this title. For example, if you want the committee president to be listed first, regardless of his/her last name, enter 1 as the sequence when creating the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

Click on the menu item Save

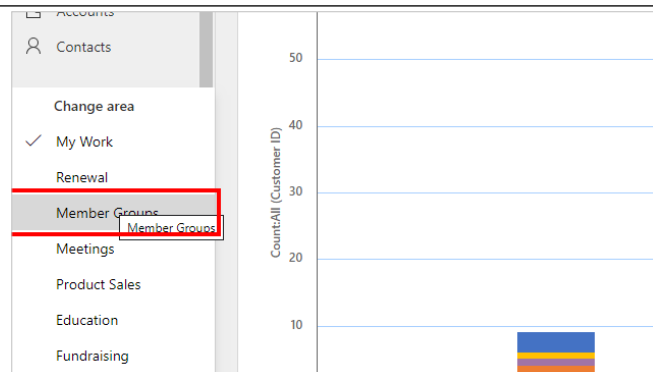
4.11. Deleting a Committee

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

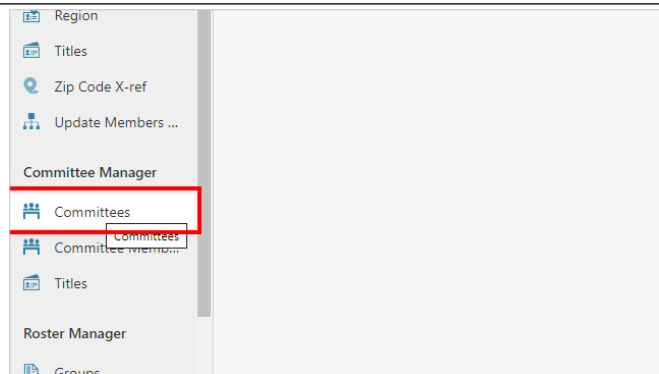
Deleting committees from UX 365 is only possible from one area and only available to those users who have the rights to delete committees. Note If the committee you want to delete has committee members associated with it, you will not be able to delete it until you remove all contacts from the committee. 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.



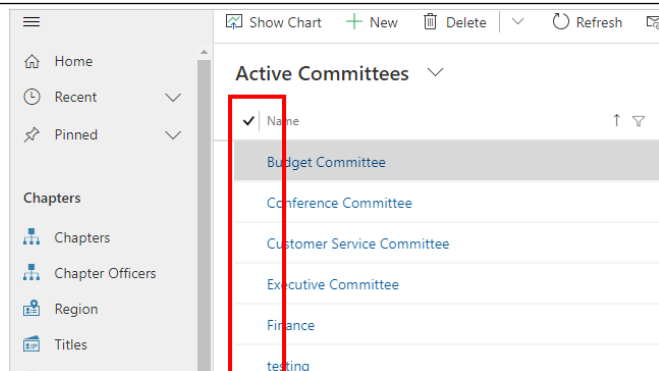
Click on the item **Member Groups**



Click on the item **Committees**

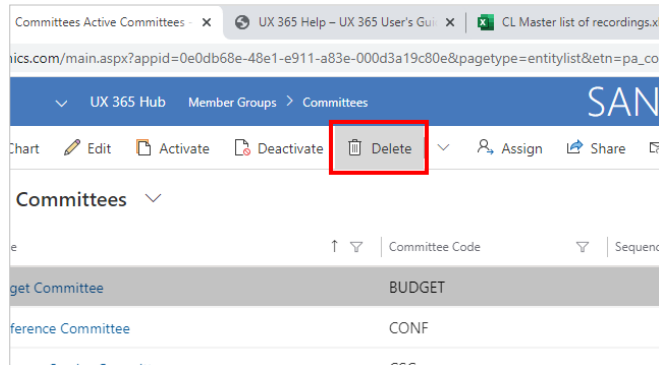


Click on the row selector on any row

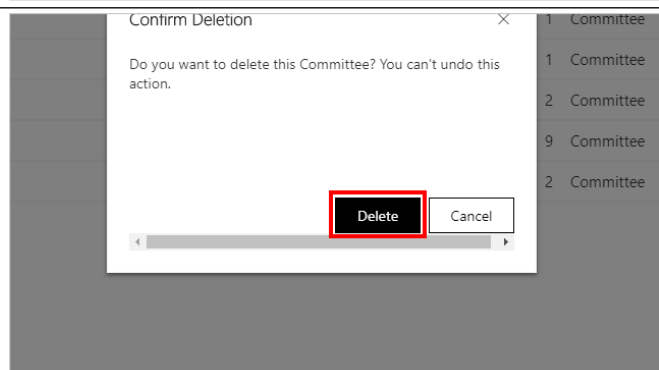


Click on the button **Delete**

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)**

The screenshot shows the Protech UX interface. On the left sidebar, the 'My Work' button is highlighted with a red box. The main area displays a bar chart for the years 2016 and 2017, and a table titled 'Current Members' with a sub-header 'Current Members by Benefit Status'. The 'My Work (change area)' button is also visible in the top right of the sidebar.

Click on the item **Member Groups**

The screenshot shows the Protech UX interface. On the left sidebar, the 'Member Groups' item is highlighted with a red box. The main area displays a bar chart for the years 2016 and 2017, and a table titled 'Current Members' with a sub-header 'Current Members by Benefit Status'.

Click on the item **Groups**

The screenshot shows the Protech UX interface. On the left sidebar, the 'Groups' item is highlighted with a red box. The main area displays a list of groups: Rhode Island State Chapter, Test Chapter, US + Zip Chapter, Washington Chapter 2, and Washington State Chapter.

Click on the cell **Name**

The screenshot shows the Protech UX interface. The 'Active Groups' table is displayed, with the 'Name' cell highlighted by a red box. The table lists the following groups: 365 Group, UX 365 Group, and UX 365 Group.

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**

The screenshot shows the 'UX 365 Group' page in the UX 365 Hub. The 'Related' tab is highlighted with a red box. The page displays fields for Group Code (UX365G), Name (UX 365 Group), and Description (---).

Click on the menu item **Rosters**

The screenshot shows the 'UX 365 Group' page with the 'Rosters' menu item highlighted in a red box. The menu also includes options like 'Related - Common', 'Activities', 'Audit History', and 'Roster Members'.

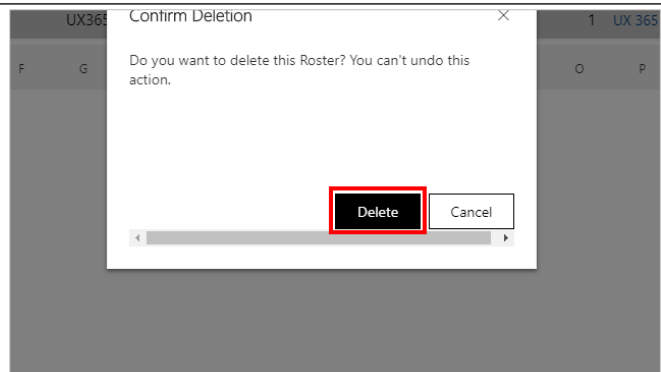
Select roster(s) to be deleted from this group.

The screenshot shows the 'UX 365 Group' page with the 'Rosters' tab selected. The 'UX 365 Roster' is highlighted in a red box. The page displays a table with columns for Name, #, A, B, C, D, and E. The table shows 1 - 1 of 1 (0 selected).

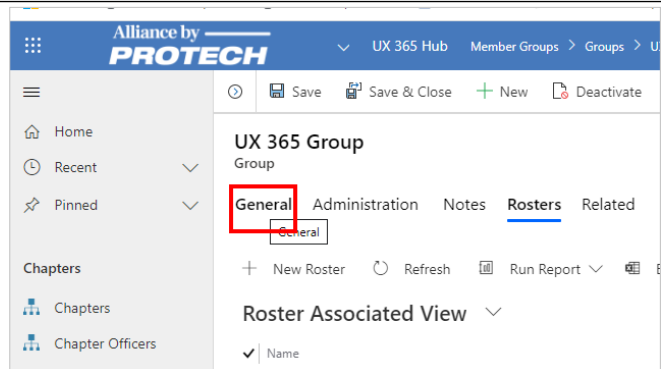
Click on the menu item **Delete Roster**

The screenshot shows the 'UX 365 Group' page with the 'Delete Roster' button highlighted in a red box. The page displays a table with columns for Name, #, A, B, C, D, and E. The table shows 1 - 1 of 1 (0 selected).

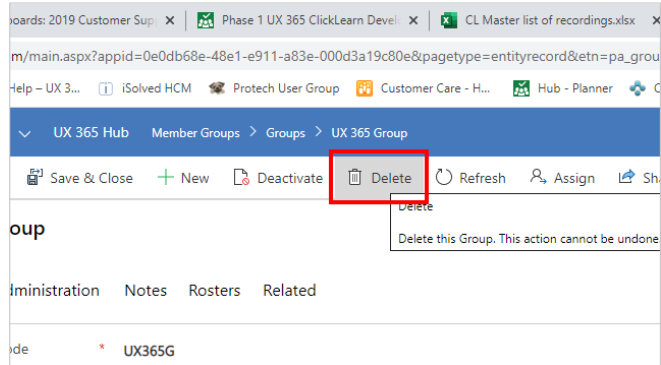
Click on the button **Delete**



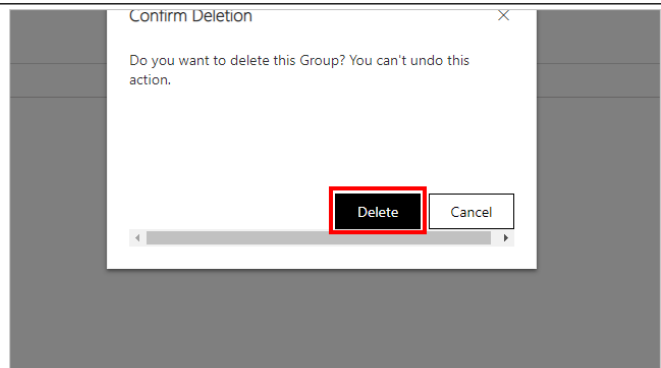
Click on the item **General**



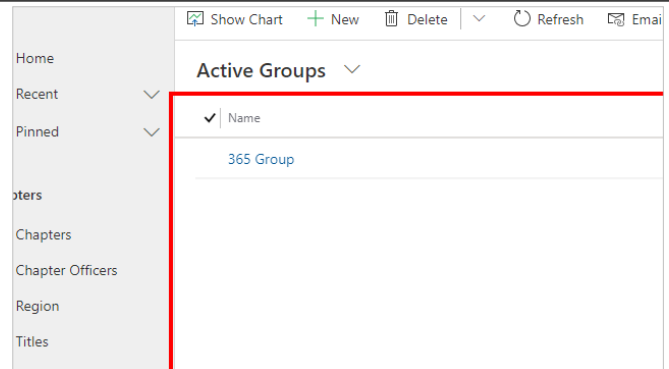
Click on the menu item **Delete**



Click on the button **Delete**

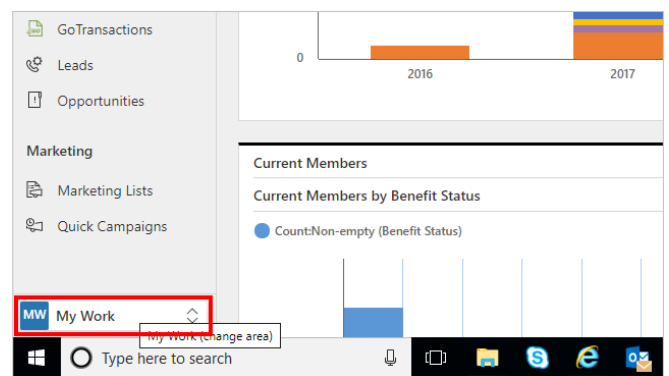


Group is deleted.

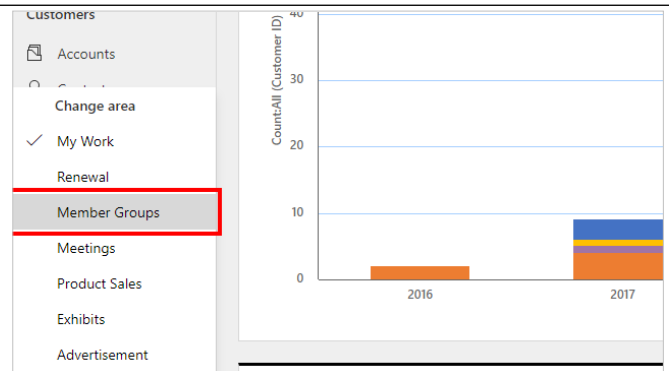


4.13. Deleting a Roster

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

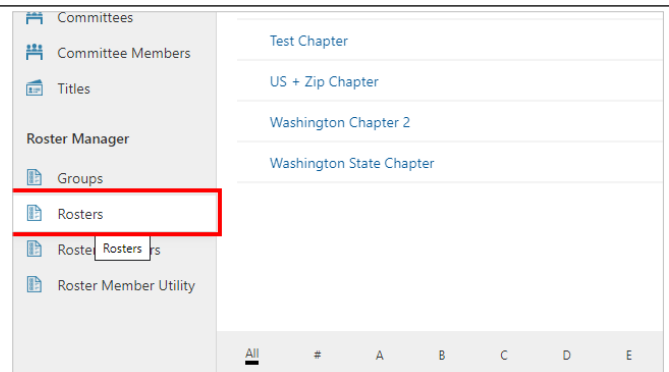


Click on the item **Member Groups**

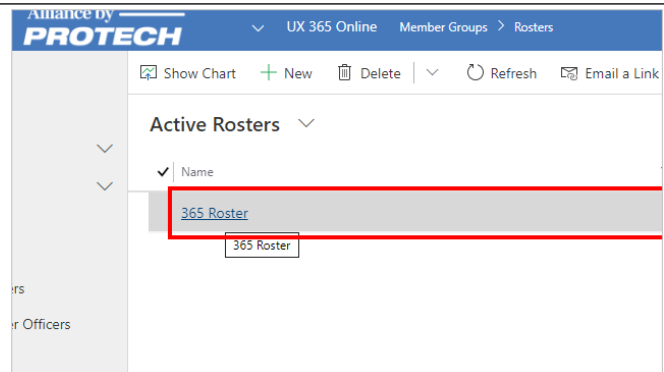


Click on the item **Rosters**

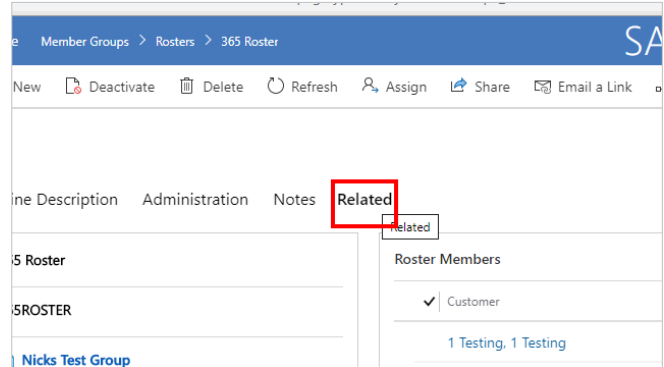
First verify, there are no Roster Members Associated with the Roster you intend to delete. If so, you must delete the Roster Members first.



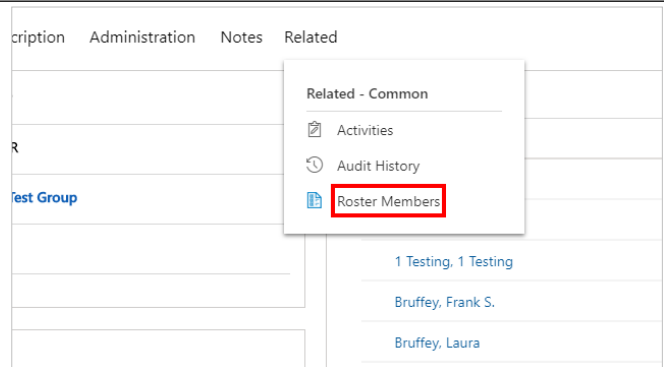
Open the Roster record you intend to delete



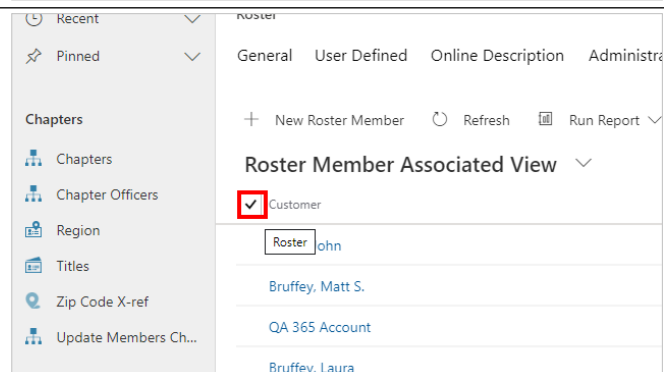
Click on the item **Related**



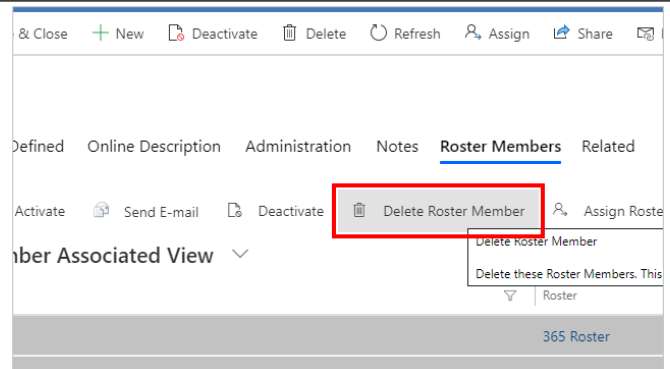
Click on the menu item **Roster Members**



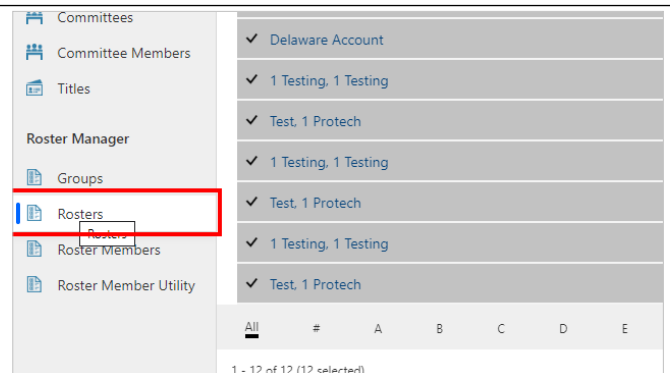
If Roster Members exist, Click on the button Select All



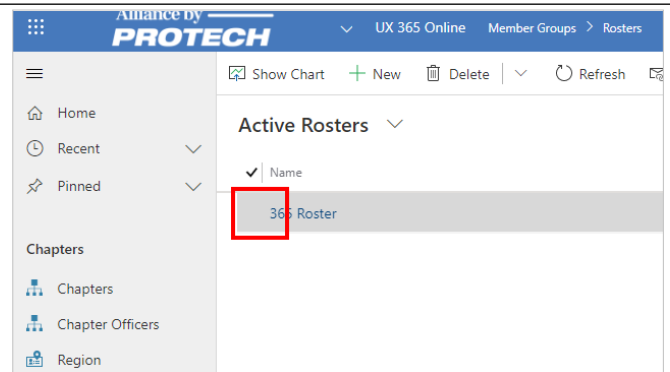
Click on the menu item **Delete Roster Member**



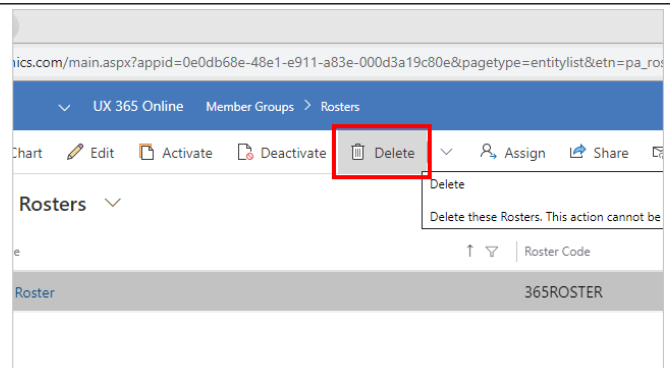
Click on the item **Rosters**
Once the Roster Members are deleted, you can now delete the Roster



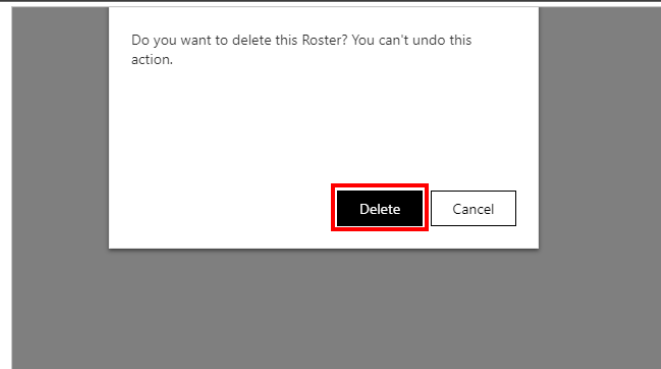
Select the Roster



Click on the button **Delete**



Confirm deletion request by clicking delete

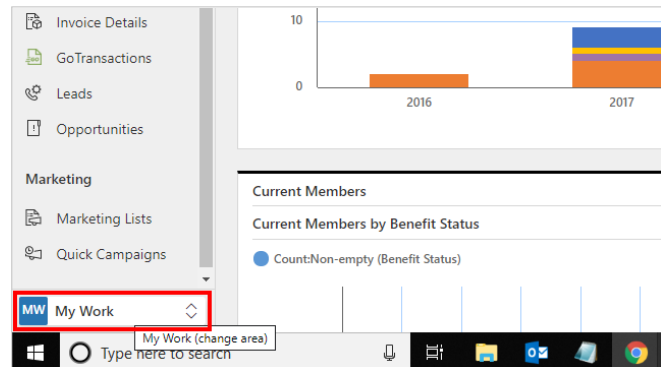


4.14. Removing a Committee Member

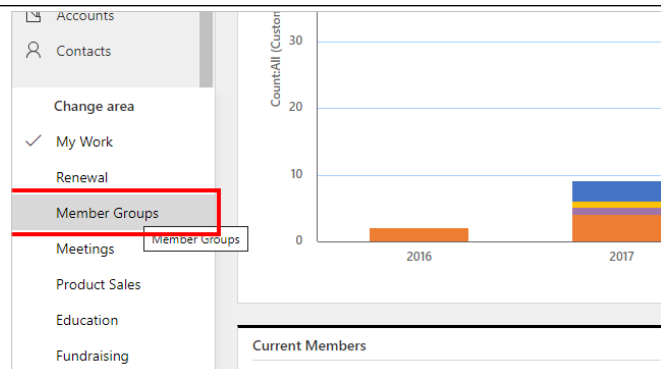
If you have rights to delete members from a committee, you can use any of these three methods: Remove members using the committee record. You can use this method if you have several contacts you want to remove from a single committee. Remove members using the Committee Members list. Use this method if 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**

Region

Titles

Zip Code X-ref

Update Members Ch...

Committee Manager

Committees

Committee Members

Titles

Roster Manager

Groups

Iowa State Chapter

Maryland State Chapter

Ontario State Chapter

Rhode Island Chapter 2

Rhode Island State Chapter

Test Chapter

US + Zip Chapter

Washington Chapter 2

Washington State Chapter

Double click on the cell **Name**

Active Committees

Name

Budget Committee

Conference Committee

Customer Service Committee

Executive Committee

Finance

testing

UX 365 Committee

Click on the item **Related**

UX 365 Hub

Member Groups

Committees

Customer Service Committee

Save & Close

New

Deactivate

Delete

Refresh

Assign

Share

Customer Service Committee

Form

Description

Administration

Notes

Related

Customer Service Committee

CSC

Committee Members

Member

Haskins, Dwayne

Click on the menu item **Committee Members**

Description

Administration

Notes

Related

Customer Service Committee

CSC

1

Committee

Related - Common

Activities

Audit History

Committee Members

Contact Web Roles

Committee Members

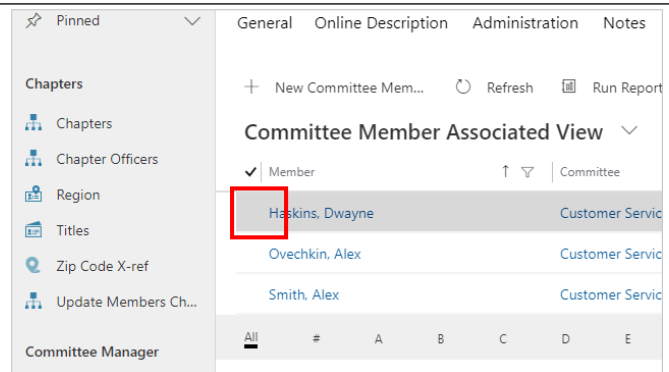
Member

Haskins, Dwayne

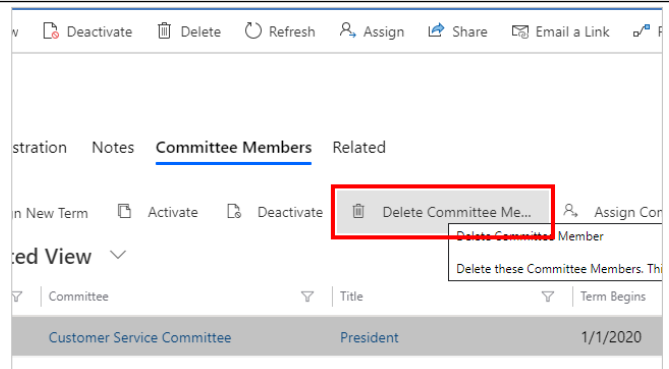
vechkin, Alex

mith, Alex

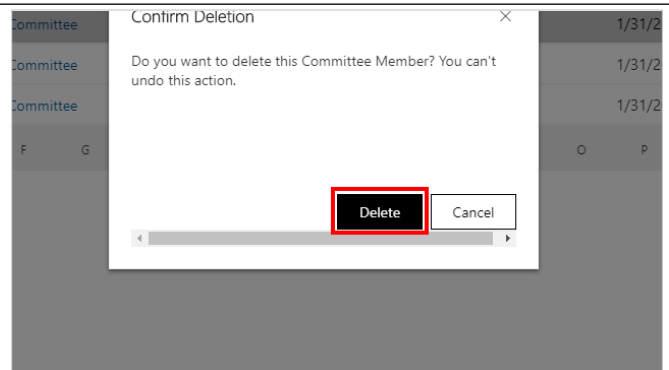
Select the member you want to remove from this committee.
To select more than one member, press the Ctrl key as you click each member.



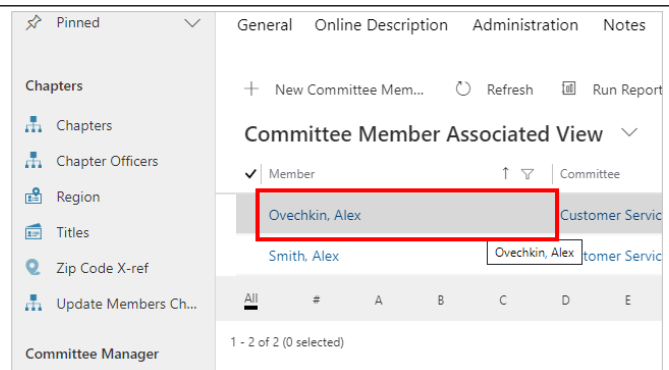
Click on the menu item **Delete Committee Member**



Click on the button **Delete**

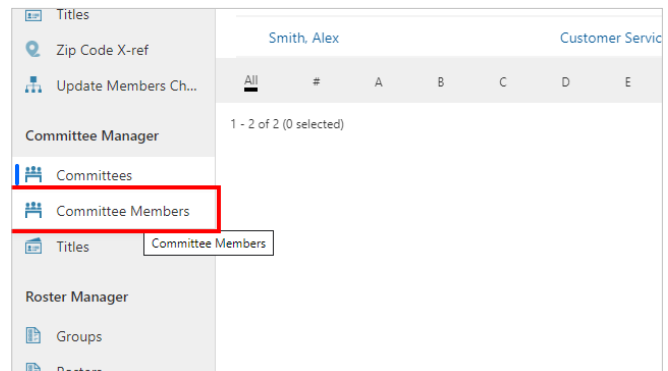


Contact no longer shows as a committee member.

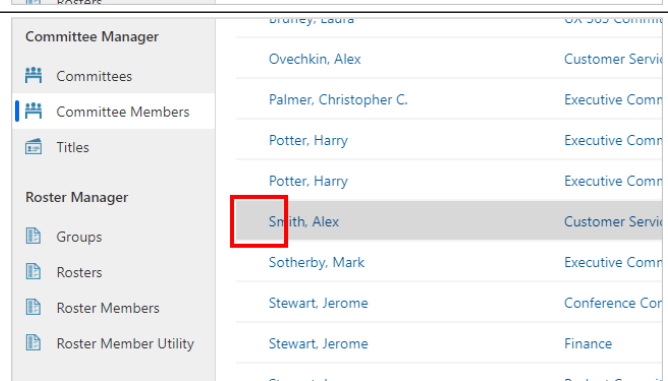


4.14.2. Remove members using the Committee Members list

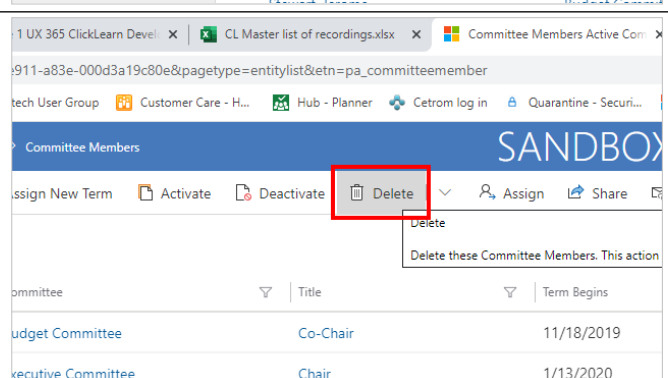
Click on the item **Committee Members**



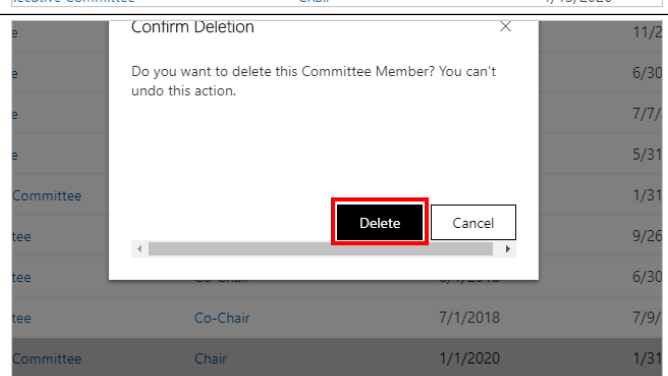
Select the member you want to remove from this committee. To select more than one member, press the Ctrl key as you click each member. Remember that a contact can appear multiple times if they are assigned to more than one committee, or more than one term for a committee. Be sure to select the correct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



Click on the button **Delete**



Click on the button **Delete**



Contact no longer shows as a committee member.

Update Members Ch...	Bruffey, Laura	UX 365 Commit
Committee Manager	Bruffey, Laura	UX 365 Commit
Committees	Ovechkin, Alex	Customer Servi
Committee Members	Palmer, Christopher C.	Executive Comrn
Titles	Potter, Harry	Executive Comrn
Roster Manager	Potter, Harry	Executive Comrn
Groups	Sotherby, Mark	Potter, Harry
Rosters	Stewart, Jerome	Conference Cor
Roster Members	Stewart, Jerome	Finance
Roster Member Utility	Stewart, Jerome	Budget Commi

4.14.3. Remove a member using the contact record

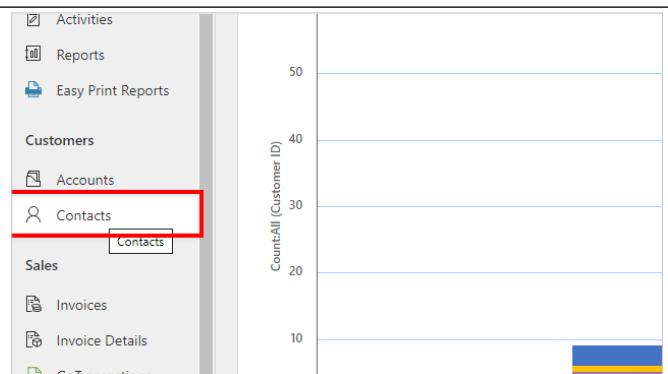
Click on the button **Member Groups (change area)**

Roster Manager	Potter, Harry	Executive Comrn
Groups	Sotherby, Mark	Executive Comrn
Rosters	Stewart, Jerome	Conference Cor
Roster Members	Stewart, Jerome	Finance
Roster Member Utility	Stewart, Jerome	Budget Commi
MG Member Groups	1 - 16 of 16 (0 selected)	
Member Groups (change area)	Member Groups (change area)	

Click on the item **My Work**

Zip Code X-ref	Bruffey, Frank S.	UX 365 Commit
Update Members Ch...	Bruffey, Laura	UX 365 Commit
Committee Manager	Bruffey, Laura	UX 365 Commit
Committees	Ovechkin, Alex	Customer Servi
Change area	Palmer, Christopher C.	Executive Comrn
My Work	Potter, Harry	Executive Comrn
Renewal	Potter, Harry	Executive Comrn
Member Groups	Sotherby, Mark	Executive Comrn
Meetings	Stewart, Jerome	Conference Cor
Product Sales		

Click on the item **Contacts**



Double click on the cell **Full Name**

Full Name	Contact Number
Haskins, Dwayne	C-001270
Ovechkin, Alex	C-001271
Smith, Alex	C-001269

Click on the item **Related**

CONTACT INFORMATION
First Name: Alex
Last Name: Ovechkin

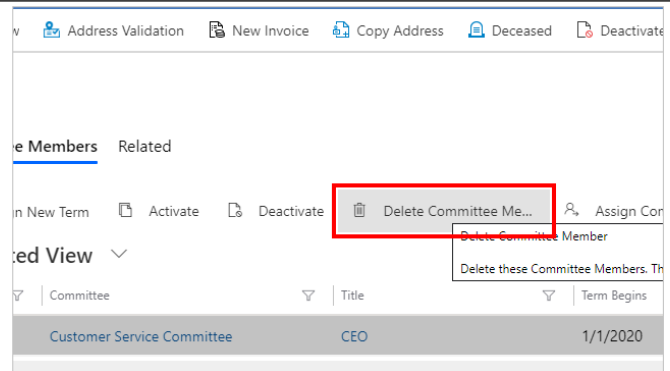
Click on the menu item **Committee Members**

Related - Sales
Opportunities
Leads

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.

Member	Committee
Ovechkin, Alex	Customer Service

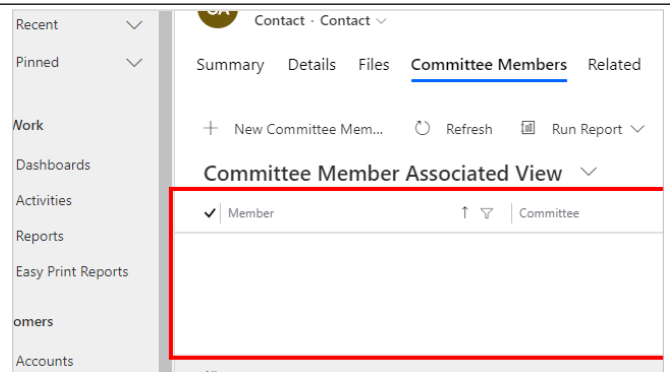
Click on the menu item **Delete Committee Member**



Click on the button **Delete**



Contact no longer shows as a committee member.

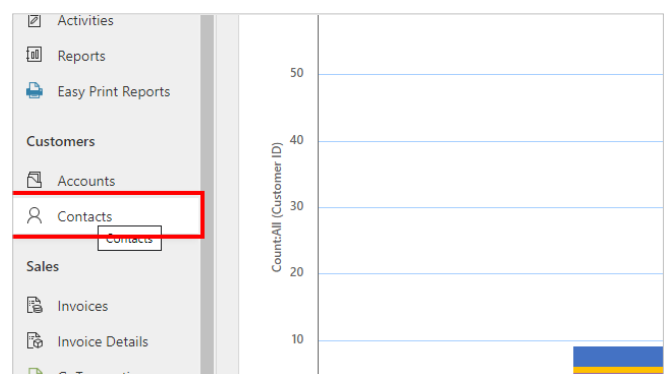


4.15. Removing a Roster Member

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.

The screenshot shows the 'Active Contacts' list. The contact 'Bruffey, Frank S.' is highlighted with a red box. The list includes columns for 'Full Name' and 'Company Name'. Other contacts listed include Bougois, Fred; Brady, Jacqueline; Bruffey, Laura; Bruffey, Matt K; and Bruffey, Matt S.

Click on the item **Related**

The screenshot shows the contact record for 'Bruffey, Frank S.'. The 'Related' tab is selected and highlighted with a red box. The 'CONTACT INFORMATION' section shows 'First Name' as 'Frank' and 'Last Name' as 'Bruffey'.

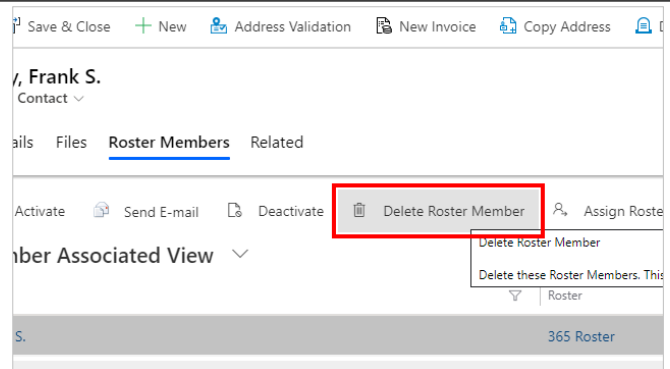
Click on the menu item **Roster Members**

The screenshot shows the 'CONTACT INFORMATION' section. The 'Roster Members' menu item is highlighted with a red box. Other menu items include 'Renewal Billing', 'Social Activity HL', 'Promotion Package', 'MX User Authentication', 'Renewal Process Log', 'Track Detail Status', 'Track Header Status', 'Gift Certificates', and 'MX Shopping Carts'.

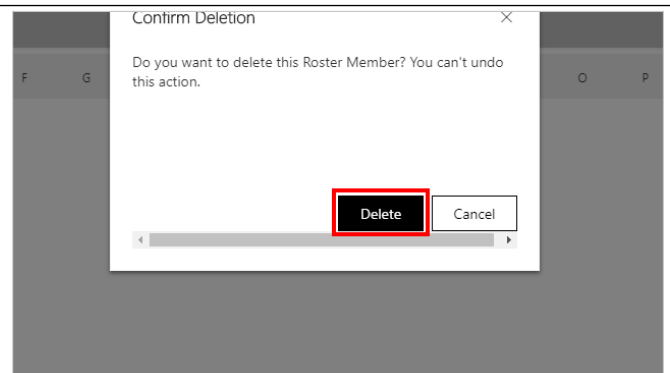
Select the roster member.

The screenshot shows the 'Roster Member Associated View'. The contact 'Bruffey, Frank S.' is selected and highlighted with a red box. The view shows a list of customers with columns for 'All', '#', 'A', 'B', 'C', 'D', and 'E'. The status '1 - 1 of 1 (0 selected)' is displayed at the bottom.

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



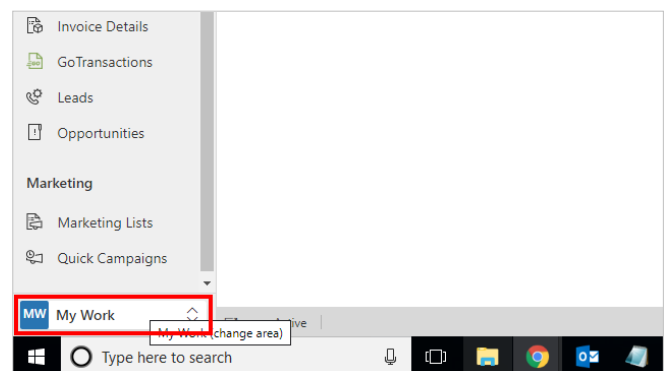
Click on Delete.



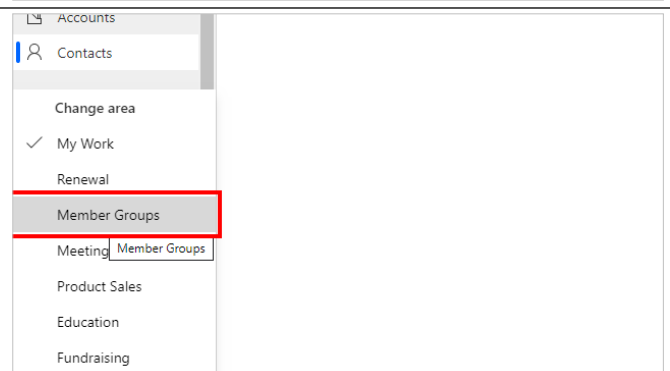
4.15.1.2. Using the roster record

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

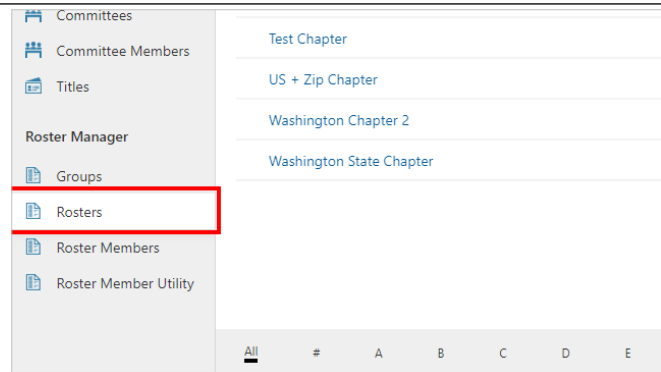
Click on the button **My Work (change area)**



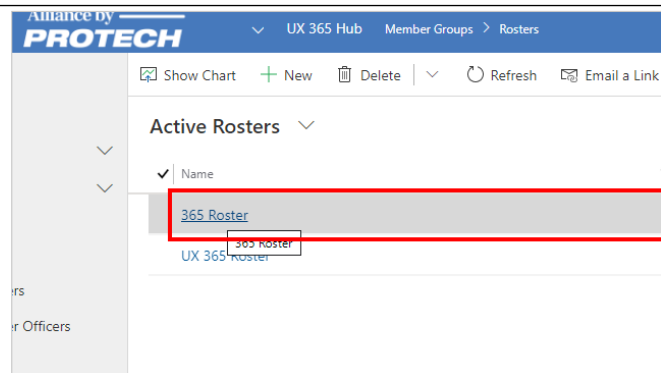
Click on the item **Member Groups**



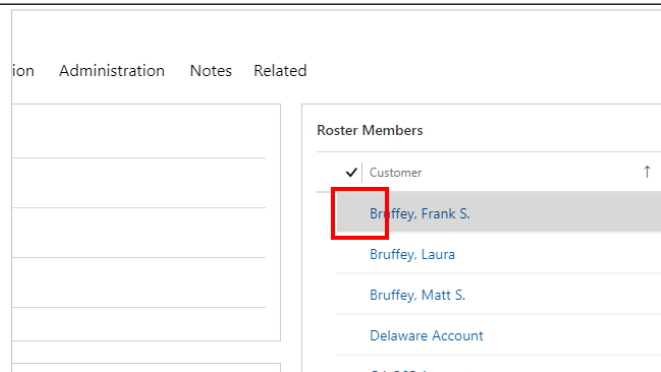
Click on the item **Rosters**



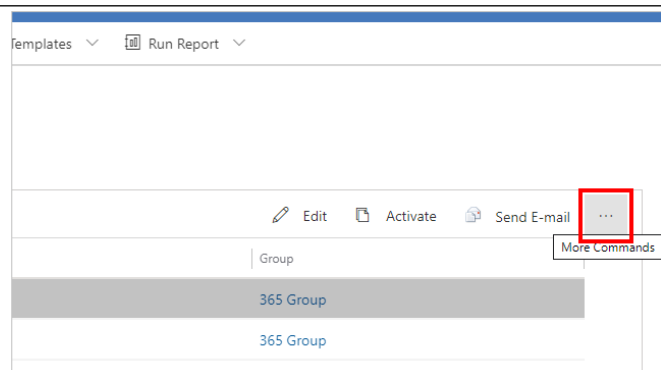
Open the appropriate roster.



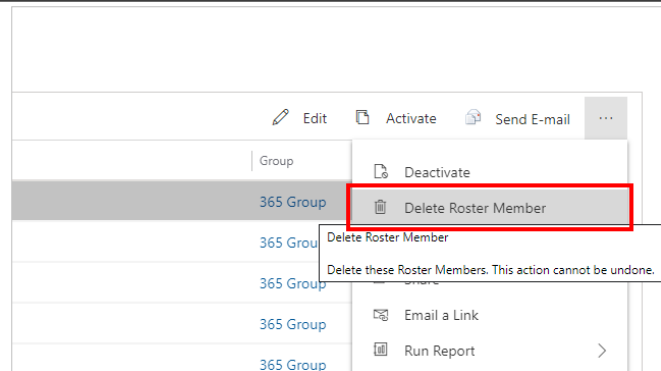
Select the roster member you wish to remove.



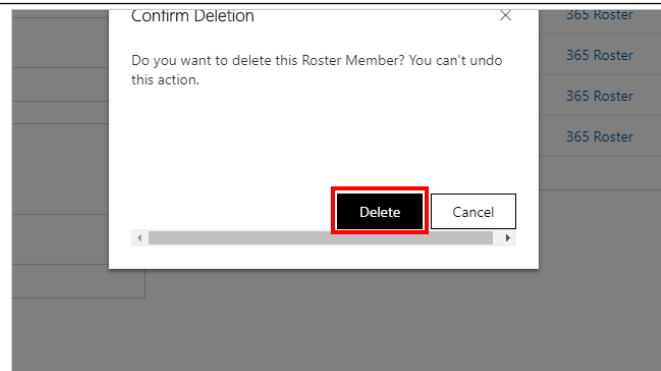
Click on the menu item **More Commands**



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



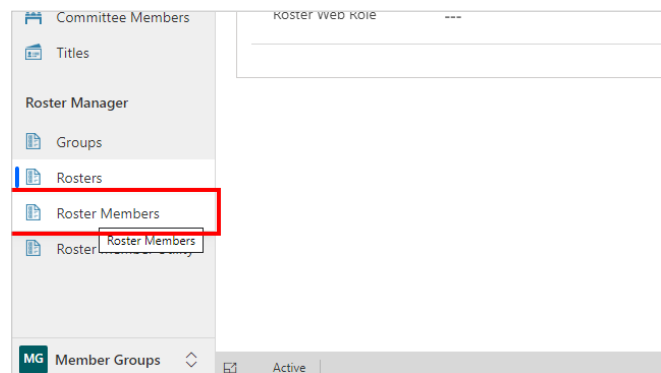
Click on Delete.



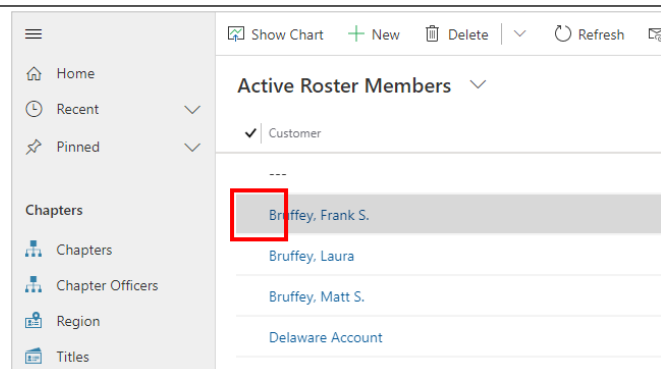
4.15.1.3. Using the roster members list

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

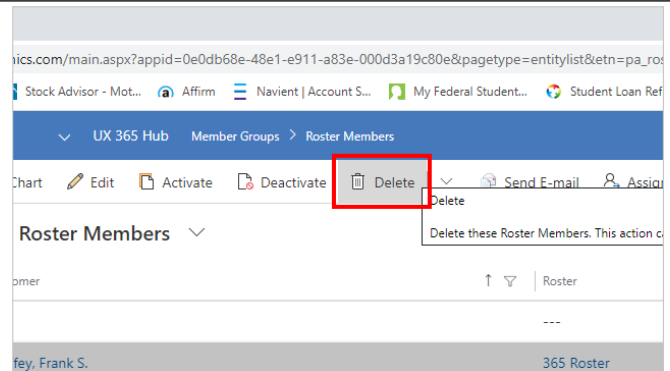
Click on the item **Roster Members**



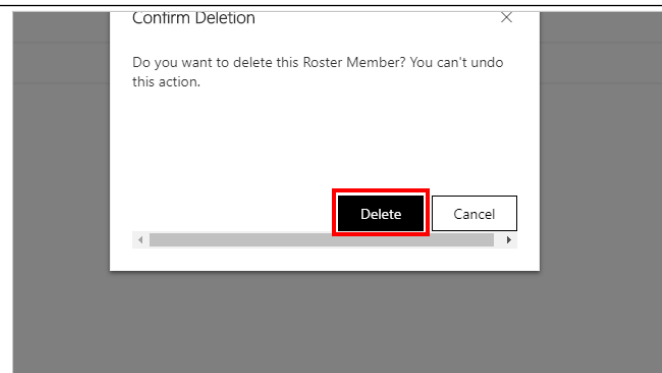
Select the roster member you wish to remove.



Click on the button **Delete**



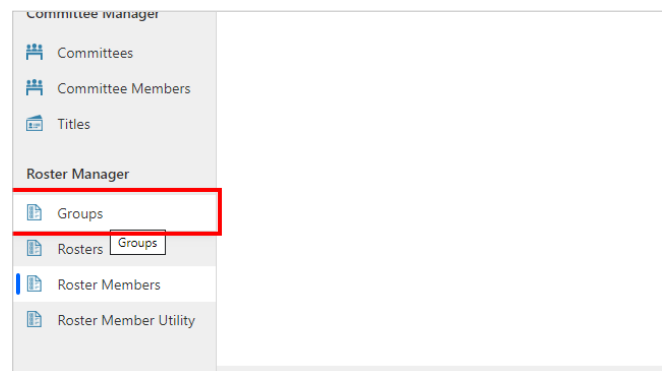
Click on Delete.



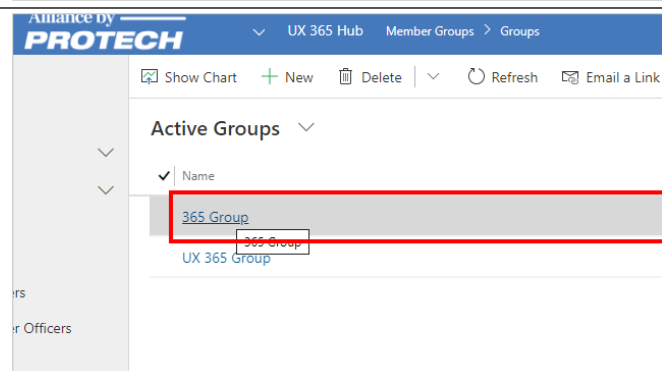
4.15.1.4. Using the group record

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**

The screenshot shows the 'UX 365 Hub' interface. The breadcrumb trail is 'UX 365 Hub > Member Groups > Groups > 365 Group'. The top navigation bar includes 'Save', 'Save & Close', 'New', 'Deactivate', 'Delete', and 'Refresh'. The main content area is titled '365 Group' and has tabs for 'General', 'Administration', 'Notes', and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there are fields for 'Group Code' (365GROUP), 'Name' (365 Group), and 'Description' (---).

Click on the menu item **Roster Members**

The screenshot shows the 'UX 365 Hub' interface with the '365 Group' page. The 'Related' tab is selected. A dropdown menu is open, showing options: 'Related - Common', 'Activities', 'Audit History', 'Roster Members', and 'Rosters'. The 'Roster Members' option is highlighted with a red box.

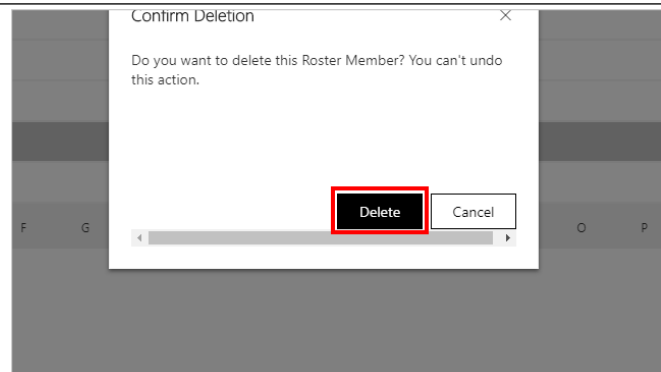
Select the roster member you wish to remove.

The screenshot shows the 'Roster Member Associated View' page. On the left, there is a sidebar with navigation items: 'Chapter Officers', 'Region', 'Titles', 'Zip Code X-ref', 'Update Members Ch...', 'Committee Manager', 'Committees', 'Committee Members', and 'Titles'. The main content area shows a list of roster members: 'Bruffey, Matt S.', 'QA 365 Account', 'Bruffey, Laura', 'Bruffey, Frank S.', and 'Delaware Account'. The 'Bruffey, Frank S.' entry is highlighted with a red box. Below the list, there is a table with columns 'All', '#', 'A', 'B', 'C', 'D', and 'E'. The status '1 - 5 of 5 (0 selected)' is displayed at the bottom.

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

The screenshot shows the 'Roster Members' page. The top navigation bar includes 'Save & Close', 'New', 'Deactivate', 'Delete', 'Refresh', 'Assign', and 'Share'. The main content area has tabs for 'Administration', 'Notes', 'Roster Members', and 'Related'. The 'Roster Members' tab is selected. Below the tabs, there are buttons for 'Activate', 'Send E-mail', 'Deactivate', 'Delete Roster Member', and 'Assign Roster'. The 'Delete Roster Member' button is highlighted with a red box. A dropdown menu is open, showing options: 'Delete Roster Member' and 'Delete these Roster Members. This action c...'. The status '1 - 5 of 5 (0 selected)' is displayed at the bottom.

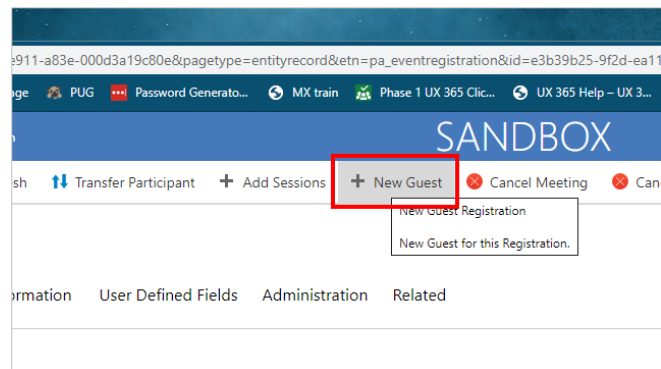
Click on Delete.



5. Meetings

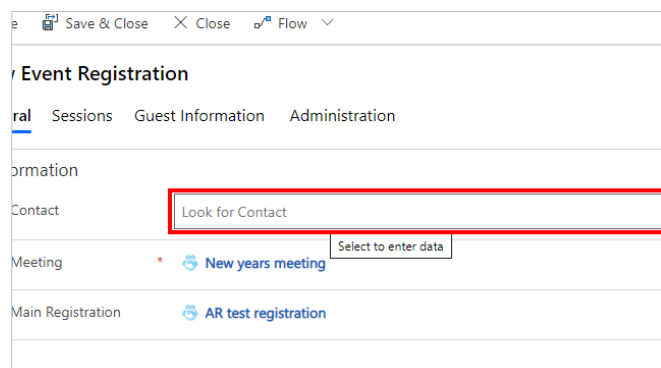
5.1. Adding a Guest Registration

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**.

The screenshot shows the 'Event Registration' form with tabs for 'General', 'Sessions', 'Guest Information', and 'Administration'. The 'Contact' field is highlighted with a red box and contains the text 'ar'. A dropdown menu is open below the field, showing a search prompt 'Type to search or press Enter to browse' and a '+ New Contact' button.

Choose the guest contact.

The screenshot shows the 'Event Registration' form with the 'Contact' field highlighted by a red box. The dropdown menu is open, and the option 'Test, AROSS' is highlighted with a red box. The '+ New Contact' button is also visible.

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**

The screenshot shows the 'Event Registration' form with the 'Registration' field highlighted by a red box. The field contains the text 'Look for Registration'. A red error message is displayed below the field: 'Required fields must be filled in.'.

Enter **Registration**.

The screenshot shows the 'Event Registration' form with the 'Registration' field highlighted by a red box. The field contains the text 'ar'. A dropdown menu is open below the field, showing a search prompt 'Type to search or press Enter to browse' and a '+ New Event Registration Setup' button.

Click on the registration or set one up.

Wait List No

Registration * a

Registration Setup

Exclude from Max Cap

AROSS 1224

+ New Event Registration Setup

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

Event Registration: Registration: x

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Learner - My Home Dashboards: Sales... UX training Payroll page PUG

Alliance by PROTECH UX 365 Hub

Save Save & Close Close Flow

Save (CTRL+S)

Save this Event Registration.

New

General Sessions Guest Information User Defined Fi

Information

Contact Test AROSS

5.2. Adding Session Speakers

5.2.1. Adding Session Speakers

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

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

MW My Work

My Work (change area)

Start a search

0 2016 2017

Current Members

Current Members by Benefit Status

Count:Non-empty (Benefit Status)

New 12

Click on the item **Meetings**

Accounts

Change area

My Work

Renewal

Member Groups

Meetings

Product Sales

Exhibits

Advertisement

Education

Count:All (Custom

30

20

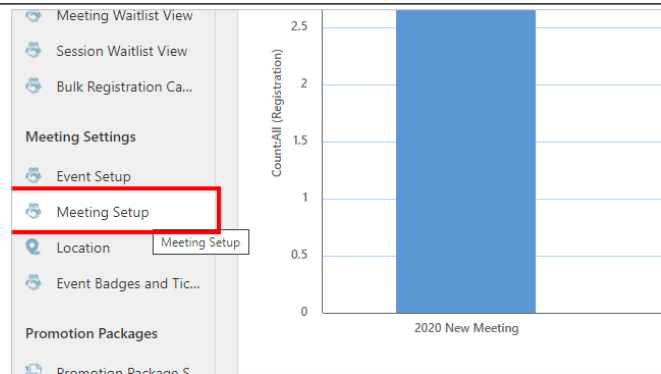
10

0

2016 2017

Current Members

Click on the item **Meeting Setup**



Click on the Meeting name

1/1/2019 12:00...	10/5/2019 12:00...	GoTransactions Meeting
1/1/2019 1:00 PM	1/5/2019 1:00 PM	LAB Max Capacity Meeting
12/18/2019 1:00...	12/20/2019 10:0...	MX 2019 Test Meeting
1/6/2020 11:30 ...	1/6/2020 2:00 PM	New years meeting
3/10/2020 12:00...	3/13/2020 12:00...	Nick Test Meeting
12/16/2019 12:0...	12/20/2019 12:0...	Test Meeting 1
1/31/2020 8:00 ...	2/1/2020 8:00 AM	Test Meeting with course

Click on the ellipses button

The screenshot shows a form interface with a top navigation bar containing icons for search, share, help, and others. Below the navigation bar, there are tabs for 'mail a Link', 'Flow', 'Word Templates', and 'Run Report'. The main content area shows a list of items: 'for...', 'Online Meeting - Contact Us', 'User Defined Fields', and an ellipsis button (three dots) which is highlighted with a red box.

Click on the menu item **Session Setup**

US Dollar	Related - Registrations
	Event Registration
	Event Sessions
	Related - Setup
	Registration Setup
	Session Setup
	Related - Activities
	Activities
	Audit History
	Facility Setup

Click on the Event Session Name

The screenshot shows the 'Event Session Setup Associated View' interface. On the left is a sidebar with navigation options: Pinned, Dashboards, Meeting Manager, View Meeting Partici..., Meeting Waitlist View, Session Waitlist View, and Bulk Registration Ca... The main area displays a table with columns: Name, Code, and a grid of tabs (All, #, A, B, C, D, E). The 'Event session Nick' entry in the 'Name' column is highlighted with a red box. A tooltip for 'Event session Nick' is visible over the 'C' tab.

Click on the item **Related**

The screenshot shows the 'Event session Nick' record page. The breadcrumb trail is 'Meetings > Meeting Setup > Nick Test Meeting >> Event session Nick'. Action buttons include activate, Delete, Refresh, Assign, Share, Email a Link, and Flow. The 'Related' tab is highlighted with a red box. Below the tabs are sections for 'Web Additional Details', 'Administration', and 'Session Options'.

Click on the menu item **Session Speaker**

The screenshot shows the 'Event session Nick' record page with the 'Related' dropdown menu open. The menu options are: Related - Common, Audit History, Facility Setup, Session Speaker (highlighted with a red box), and Prices. The background shows the 'Session Options' section with fields for 'Create Transaction' and 'Waitlist Off'.

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

The screenshot shows the 'Event session Nick' record page. The 'Add New Session Speaker' button is highlighted with a red box. A tooltip for 'Add New Session Speaker' is visible, showing the text 'Add a related Session Speaker to this record.' The background shows the 'Session Speaker' section with a table containing the name 'deGrom, Jacob'.

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.

Dashboards	
Meeting Manager	
View Meeting Parti...	
Meeting Waitlist View	
Session Waitlist View	
Bulk Registration Ca...	
Meeting Settings	
Event Setup	
Meeting Setup	
Setup Time	3/17/2020
Start Time	3/17/2020
Duration	1 hour
Evaluation	---
Confirmation Status	---
Evaluation Received	No

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.

Meeting Manager	
View Meeting Parti...	
Meeting Waitlist View	
Session Waitlist View	
Bulk Registration Ca...	
Meeting Settings	
Event Setup	
Meeting Setup	
Location	
Event Badges and Tic...	
Start Time	3/17/2020
Duration	1 hour
Evaluation	Good
Confirmation Status	---
Evaluation Received	No

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

view meeting partic...	
Meeting Waitlist View	
Session Waitlist View	
Bulk Registration Ca...	
Meeting Settings	
Event Setup	
Meeting Setup	
Location	
Event Badges and Tic...	
Duration	1 hour
Evaluation	Good
Confirmation Status	Accepted
Evaluation Received	No
Promotion Packages	

Meeting – Displays the meeting the session is associated with.

SANDBOX	
Meeting	---
Meeting - Unique identifier for Event Meeting Setup	
Speaker Role	---
First Time Speaker	No
Speaker Fee	---

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.

		Meeting	---
		Speaker Role	---
0 AM	🕒	First Time Speaker	No
0 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---

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

		Meeting	---
		Speaker Role	Lecturer
0 AM	🕒	First Time Speaker	No
0 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---
		Travel Expense	---

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

		Meeting	---
		Speaker Role	Lecturer
0 AM	🕒	First Time Speaker	No
0 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---
		Travel Expense	---
		Per Diem	---

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

		Speaker Role	Lecturer
0 AM	🕒	First Time Speaker	No
0 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---
		Travel Expense	---
		Per Diem	---

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

10 AM	🕒	First Time Speaker	No
10 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---
		Travel Expense	---
		Travel Expense	---
		Per Diem	---

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

10 AM	🕒	Speaker Fee	---
	▼	Hotel Expense	---
		Travel Expense	---
		Per Diem	---
		Per Diem	---

Click on the menu item Save to complete the Speaker setup

The screenshot shows the Protech UX 365 Online interface. The top navigation bar includes a 'Save' button, which is highlighted with a red box. Below the navigation bar, the 'Session Speaker: Information' form is visible, showing the 'General' tab selected. The 'Session Setup' section shows the speaker's name as 'deGrom, Jacob'.

5.3. Adding Specialty Information to a Speaker Profile

Click on the item **Contacts**

The screenshot shows the Protech UX 365 Online interface. The left sidebar contains a list of menu items: Activities, Reports, Easy Print Reports, Customers, Accounts, **Contacts**, Sales, Invoices, Invoice Details, and GoTransactions. The 'Contacts' item is highlighted with a red box. The main content area shows a bar chart titled 'CountAll (Customer ID)' with a y-axis ranging from 0 to 50. The chart shows a single bar with a value of approximately 10.

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

The screenshot shows the 'Active Contacts' section of the UX 365 Online interface. A sidebar on the left contains navigation links: Home, Recent, Pinned, My Work, Dashboards, Activities, Reports, and Easy Print Reports. The main area displays a table of contacts with columns for 'Full Name' and 'Company Name'. The contact '1 Testing, 1 Testing' is highlighted with a red box.

Full Name	Company Name
_PD-Two Track Award	---
1 Testing, 1 Testing	---
Altmann, Diego	---
Andryk, Alex	---
Ann Marie Penaranda	---

Click on the item **Related**

The screenshot shows the profile for '1 Testing, 1 Testing'. The 'Related' tab is highlighted with a red box. The profile includes a 'CONTACT INFORMATION' section with fields for 'First Name' and 'Last Name', both containing the text '1 Testing'.

Field	Value
First Name	1 Testing
Last Name	1 Testing

Click on the menu item **Speaker Profile**

The screenshot shows a list of menu items. The 'Speaker Profile' item is highlighted with a red box. Other items include 'Gift Certificates', 'MX Shopping Carts', 'Chapter Officers', 'Region Officer', 'Committee Members', 'History Store', 'Meeting Registrations', 'Related - Sales', and 'Opportunities'.

click into the speaker profile

The screenshot shows the 'Speaker Profile Associated View' table. The row for '1 Testing, 1 Testing' is highlighted with a red box. The table has columns for 'Contact' and 'Speaker Type'.

Contact	Speaker Type
1 Testing, 1 Testing	Technical

Click on the item **Related**

The screenshot shows the '1 Testing, 1 Testing' Speaker Profile page. The 'Related' tab is highlighted with a red box. The page includes a navigation bar with 'Save', 'Save & Close', 'New', 'Deactivate', 'Delete', and 'Refresh' buttons. The 'General' tab is active, showing fields for 'Contact', 'Speaker Type' (Technical), and 'Image URL'.

Click on the menu item **Speaker Specialty**

The screenshot shows the '1 Testing, 1 Testing' Speaker Profile page. The 'Speaker Specialty' menu item is highlighted with a red box. The page includes a navigation bar with 'Save', 'Save & Close', 'New', and 'Deactivate' buttons. The 'General' tab is active, showing fields for 'Contact', 'Speaker Type' (Technical), 'Image URL', and 'Biography'.

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

The screenshot shows the '1 Testing, 1 Testing' Speaker Profile page. The 'Add New Speaker Specialty' button is highlighted with a red box. The page includes a navigation bar with 'Save', 'Save & Close', 'New', and 'Deactivate' buttons. The 'General' tab is active, showing fields for 'Contact', 'Speaker Type' (Technical), 'Image URL', and 'Biography'.

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

The screenshot shows the 'New Speaker Specialty' form. The 'General' tab is highlighted with a red box. The form includes a navigation bar with 'Save', 'Save & Close', 'New', and 'Deactivate' buttons. The 'General' tab is active, showing fields for 'Speaker Profile', 'Speaker Specialty Setup', 'Comments', and 'Approved On'.

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

Created On	---
Modified On	---
Name	---
<input type="text"/>	

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

The screenshot shows the 'New Speaker Specialty' form in the Dynamics CRM interface. The 'Save & Close' button is highlighted with a red box. The form has tabs for 'General' and 'Administration'. The 'Administration' tab is selected, showing a 'Created By' field.

5.4. Bulk Meeting Registration Cancellation

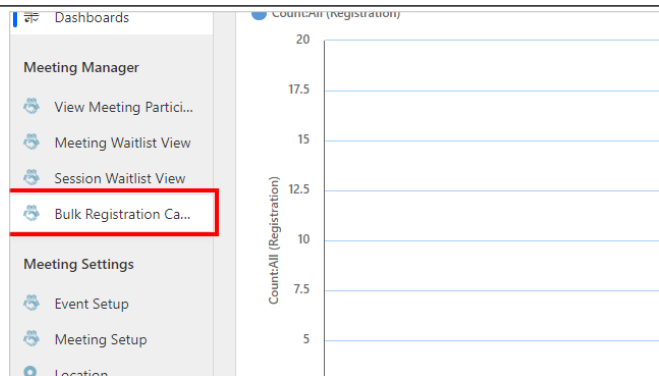
Click on the button **My Work (change area)**

The screenshot shows the Dynamics CRM interface. The 'My Work (change area)' button is highlighted with a red box. The interface includes a sidebar with navigation options like 'Invoice Details', 'GoTransactions', 'Leads', 'Opportunities', 'Marketing', 'Marketing Lists', 'Quick Campaigns', and 'My Work'. The main area displays a bar chart for 2016 and a section for 'Current Members'.

Click on the item **Meetings**

The screenshot shows the Dynamics CRM interface. The 'Meetings' item in the sidebar is highlighted with a red box. The sidebar also shows 'Change area', 'My Work', 'Renewal', 'Member Groups', 'Product Meetings', 'Education', 'Fundraising', and 'Financial Manager'. The main area displays a bar chart for 2016 and a section for 'Current Members'.

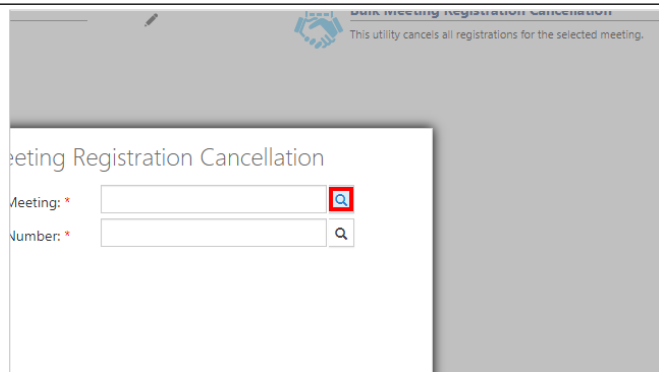
Click on the item **Bulk Registration Cancellation**



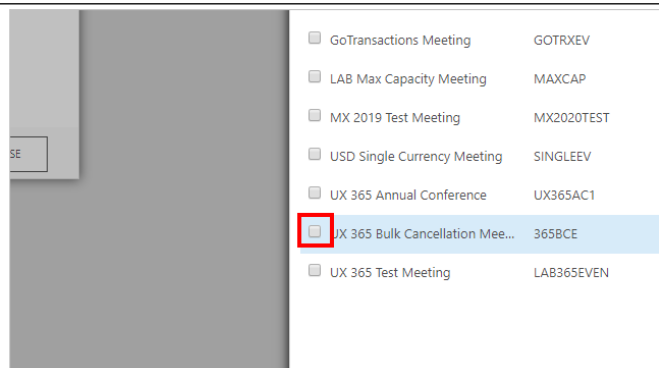
Click on **Bulk Meeting Registration Cancellation**



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**

A screenshot of a web application showing a list of meetings. The list has three rows: 'UX 365 Annual Conference' (UX365AC1, 12/1), 'UX 365 Bulk Cancellation Meeting' (365BCE, 1/31) which is selected with a blue highlight, and 'UX 365 Test Meeting' (LAB365EVEN, 8/1). Below the list, it says 'Showing 1 to 14 of 14 rows'. At the bottom right, there are three buttons: 'ADD' (highlighted with a red box), 'CANCEL', and 'REMOVE VALUE'. The system tray at the bottom shows the time as 10:44 AM on 12/10/2019.

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

A screenshot of a 'Meeting Registration Cancellation' dialog box. It has two input fields: 'Meeting: *' with the value 'UX 365 Bulk Cancellation Meeting' and a search icon, and 'Number: *' with an empty field and a search icon. The search icon in the 'Number' field is highlighted with a red box. The background shows a blurred view of the meeting list.

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

A screenshot of a 'Batch Lookup' dialog box. It has a search criteria section with 'Look For' set to 'Batch Log' and a search input field. Below is a table of batches:

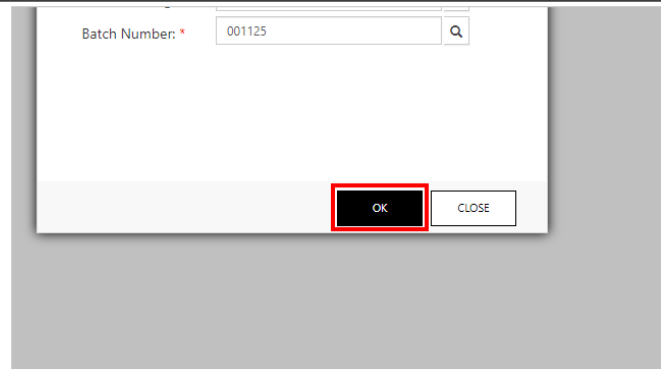
Batch Nu...	Batch Date	Name
<input checked="" type="checkbox"/> 001125	12/10/2019	Batch for Bul...
<input type="checkbox"/> 001124	12/6/2019	Michael Click ...
<input type="checkbox"/> 001118	12/6/2019	test
<input type="checkbox"/> 001122	12/6/2019	Meetings Can...
<input type="checkbox"/> 001117	12/6/2019	arosscoe - Do...

The first row's checkbox is highlighted with a red box. The background shows a blurred view of the meeting list.

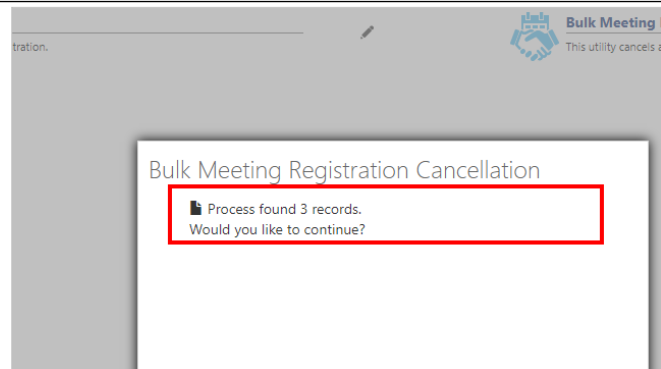
Click on the button **ADD**

A screenshot of a web application showing a list of meetings. The list has four rows: '001098' (10/30/2018, Go-Transaction, 365A - Fabrik...), '001095' (10/23/2018, Go-Transaction, 365A - Fabrik...), '001091' (9/26/2018, sbm, 365A - Fabrik...), and '001086' (8/10/2018, lab batch, 365A - Fabrik...). Below the list, it says 'Showing 1 to 15 of 15 rows'. At the bottom right, there are three buttons: 'ADD' (highlighted with a red box), 'CANCEL', and 'REMOVE VALUE'. The system tray at the bottom shows the time as 10:44 AM on 12/10/2019.

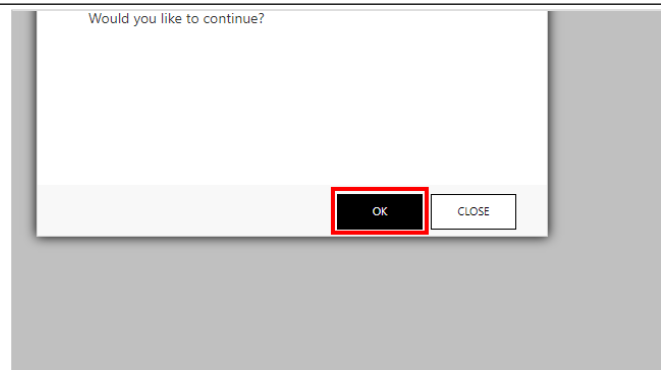
Click on the button **OK**



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

Easy Print Reports

Customers

- Accounts
- Contacts

Sales

- Invoices
- Invoice Details
- GoTransactions
- Leads

Name * Meeting -UX 365 Annual Conferen

Source Code ---

Details

Description	Batch
Full Registration - Bruffey, Matt S.	001112

Click on the button, Cancel Meeting

365 Annual Conference >> Full Registration

Participant + Add Sessions + New Guest **Cancel Meeting** Cancel Session

Cancel
Cancel this Meeting.

Defined Fields Administration Related

Wait List No

Check, Add a Cancellation fee to this invoice

Bruffey, Matt S.

UX 365 Annual Conference

Registration Cancel

This action will cancel entire registration.

☒ Add a Cancellation fee to this invoice

☐ Do not add a Cancellation fee to this invoice

Reason: *

Click "OK" to proceed and cancel entire registration.
Click "CLOSE" to exit and return to registration.

Select a Reason

Registration Cancel

This action will cancel entire registration.

☒ Add a Cancellation fee to this invoice

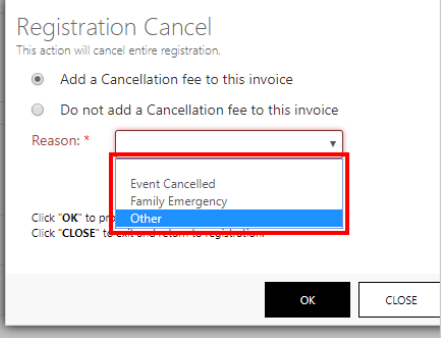
☐ Do not add a Cancellation fee to this invoice

Reason: *

Click "OK" to proceed and cancel entire registration.
Click "CLOSE" to exit and return to registration.

OK CLOSE

Click on an option from the list



Registration Cancel
This action will cancel entire registration.

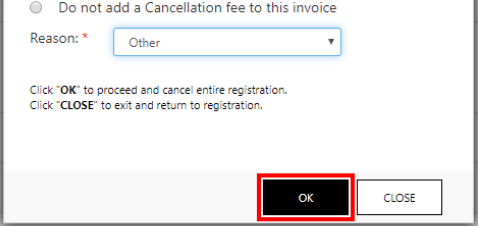
☒ Add a Cancellation fee to this invoice
☐ Do not add a Cancellation fee to this invoice

Reason: * Event Cancelled
Family Emergency
Other

Click "OK" to proceed and cancel entire registration.
Click "CLOSE" to exit and return to registration.

OK CLOSE

Click on the button **OK**



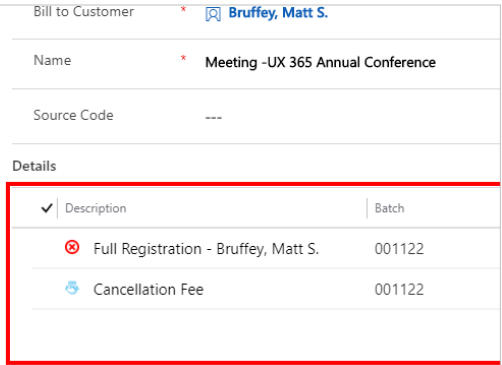
☐ Do not add a Cancellation fee to this invoice

Reason: * Other

Click "OK" to proceed and cancel entire registration.
Click "CLOSE" to exit and return to registration.

OK CLOSE

You have successfully cancelled the registration and added the cancellation fee



Bill to Customer * **Bruffey, Matt S.**

Name * **Meeting -UX 365 Annual Conference**

Source Code ---

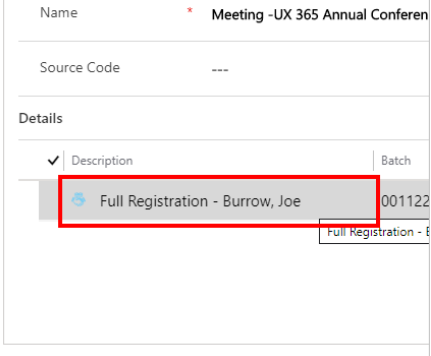
Details

✓	Description	Batch
✗	Full Registration - Bruffey, Matt S.	001122
+	Cancellation Fee	001122

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



Easy Print Reports

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

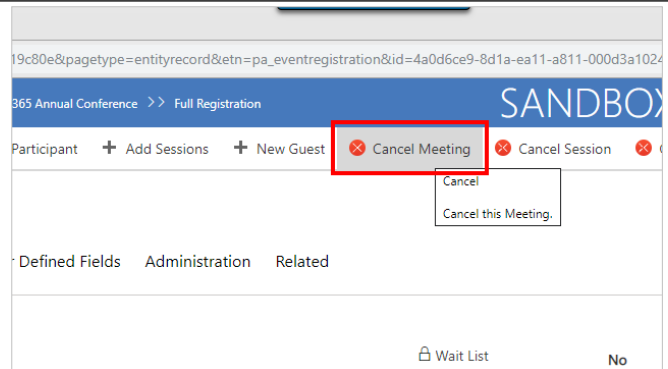
Name * **Meeting -UX 365 Annual Conferen**

Source Code ---

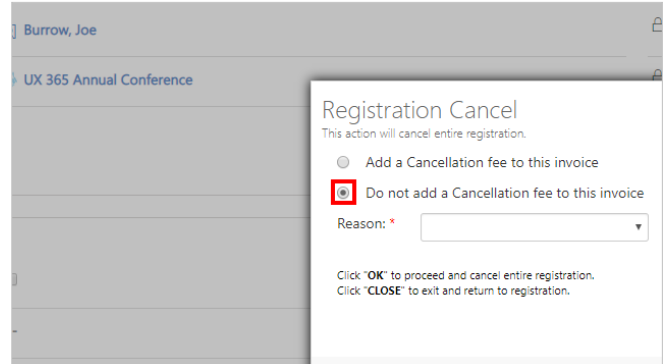
Details

✓	Description	Batch
+	Full Registration - Burrow, Joe	001122

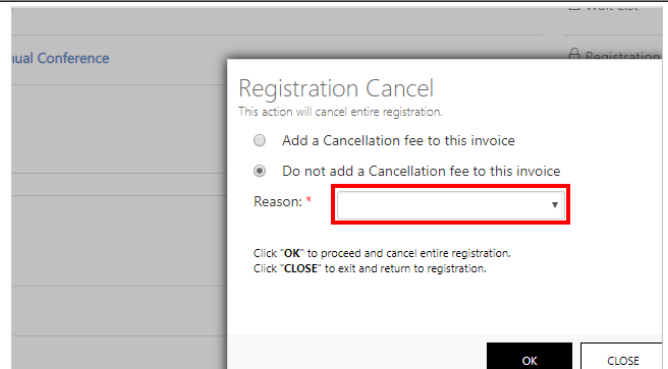
Click on the button Cancel Meeting



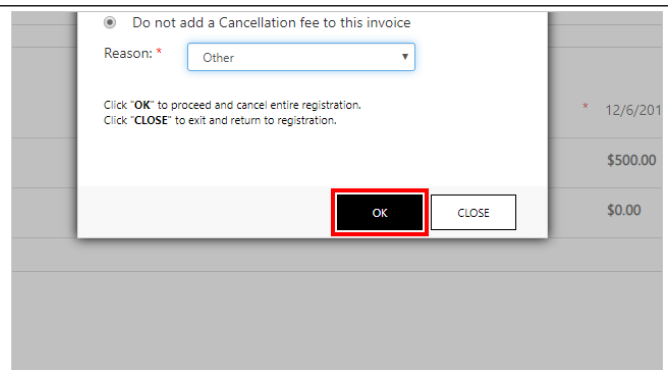
Select, Do not add a Cancellation fee to this invoice



Select, a Reason



Click on the button **OK**



Registration has been removed

Promotion	---				Profor
Batch Date (Batch)	Price Per Unit	Quantity	Discount	Tax	
No data available.					

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

Easy Print Reports	Name * Meeting -UX 365 Annual Conferen
Customers	Source Code ---
Accounts	Details
Contacts	✓ Description Batch
Sales	✓ Full Registration - Burrow, Joe 001122
Invoices	Guest Registration - Bruffey, Frank Full Registration
Invoice Details	
GoTransactions	
Leads	

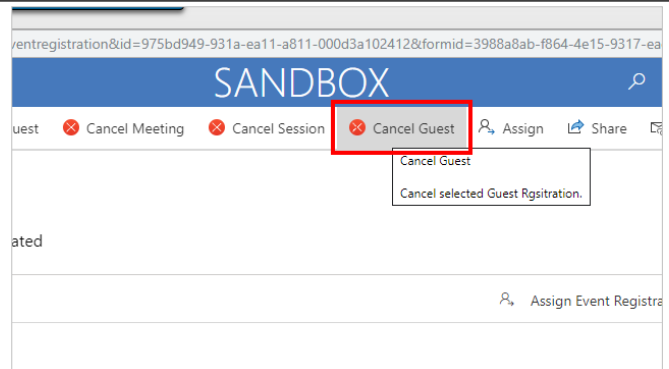
Click on, the Guest tab

ome	UX 365 Hub	My Work > Invoices > Meeting -UX 365 A
cent	Save	Save & Close
nned	Close	Refresh
rk	Transfer Partic	
shboards	Full Registration	
ivities	Event Registration	
	General	Sessions
	Guests	Participant Information
	Information	User Def
	Contact	Burrow, Joe
	Meeting	UX 365 Annual Conference

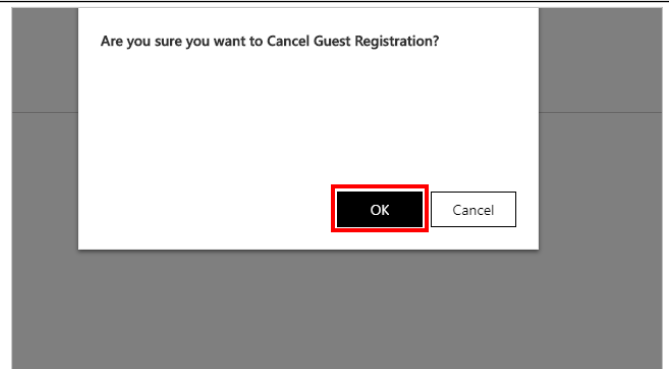
Check mark the Guest you would like to cancel

Full Registration	Event Registration
General	Sessions
Guests	Participant Information
User Defined Fields	Adminis
Guests	
✓ Meeting	Registration
UX 365 Annual Conference	Guest Registration
	Full Registration

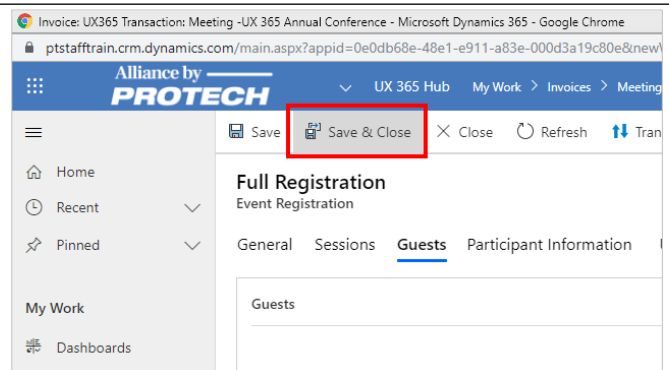
Click on the menu item **Cancel Guest**



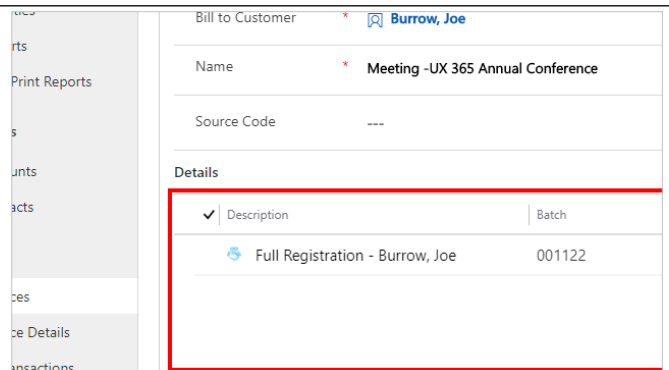
Click on the button **OK**



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

Description	Batch
Full Registration - Burrow, Joe	001122
What's New in UX 365 - Burrow, Joe	001122

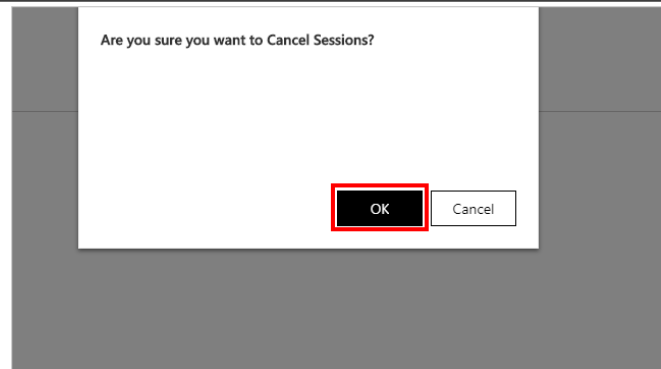
Click on, the Sessions tab

Check mark the Session you would like to Cancel

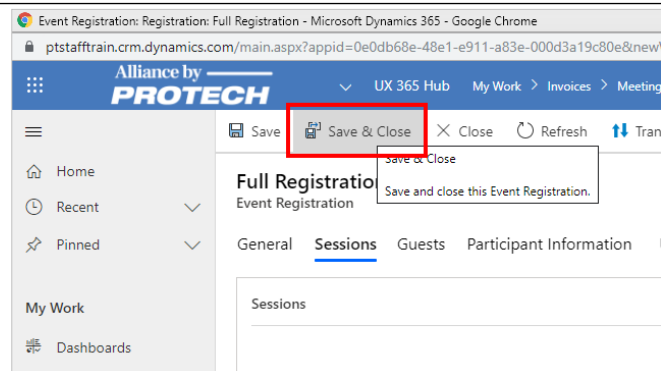
Session	Date Reg
What's New in UX 365	12/6/20

Click on the menu item **Cancel Session**

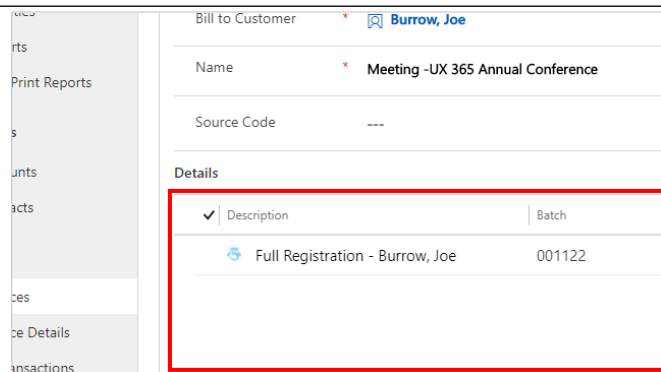
Click on the button **OK**



Click on the menu item Save and Close



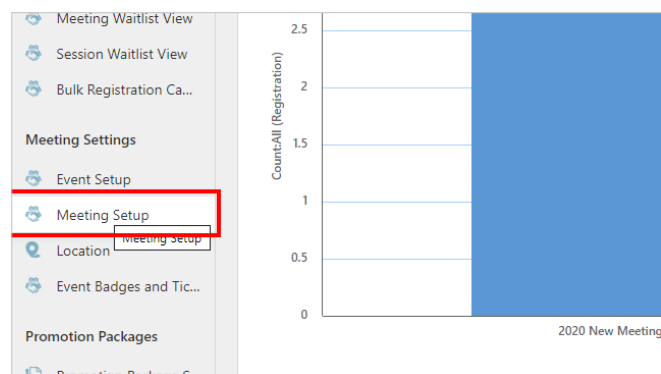
You have successfully removed the Session



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.

1/1/2019 1:00 PM	1/3/2019 1:00 PM	Copy Test Meeting
10/1/2019 12:00...	10/5/2019 12:00...	GoTransactions Meeting
1/1/2019 1:00 PM	1/5/2019 1:00 PM	LAB Max Capacity Meeting
12/18/2019 1:00...	12/20/2019 10:0...	MX 2019 Test Meeting
1/6/2020 11:30 ...	1/6/2020 2:00 PM	New years meeting
1/6/2020 12:00 ...	1/7/2020 12:00 ...	Nick Test Meeting
12/16/2019 12:0...	12/20/2019 12:0...	Test Meeting 1
12/25/2019 12:0...	12/25/2019 2:00...	Test waitlist meeti

Click to select Yes on the Meeting Closed field.

☐ Single Currency

Meeting Type and Status

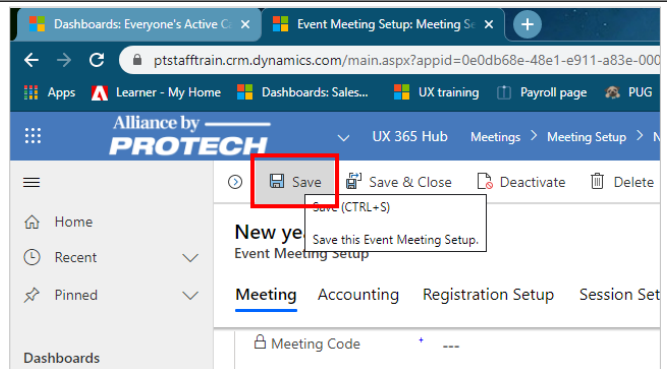
Meeting Type ---

Meeting Closed **No**

Capacity

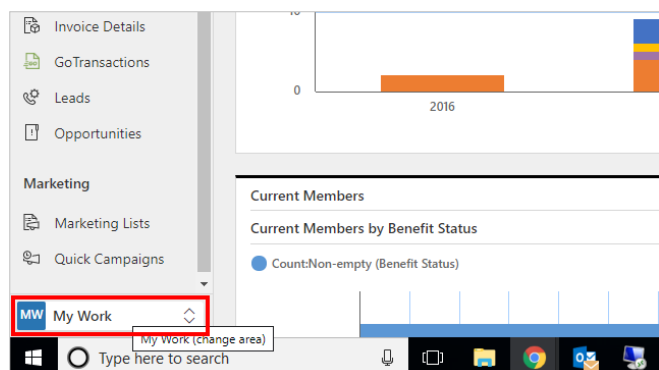
Maximum Capacity ---

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

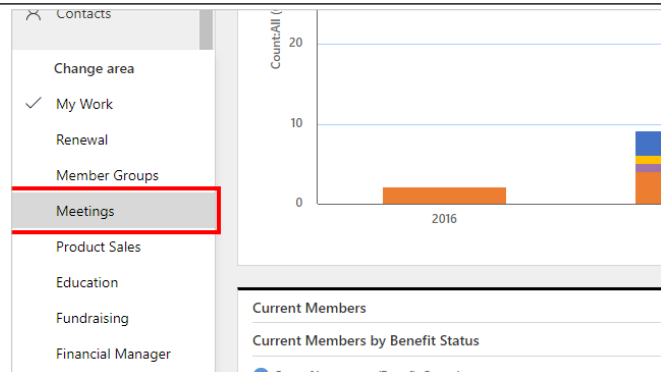


5.7. Copying a Meeting

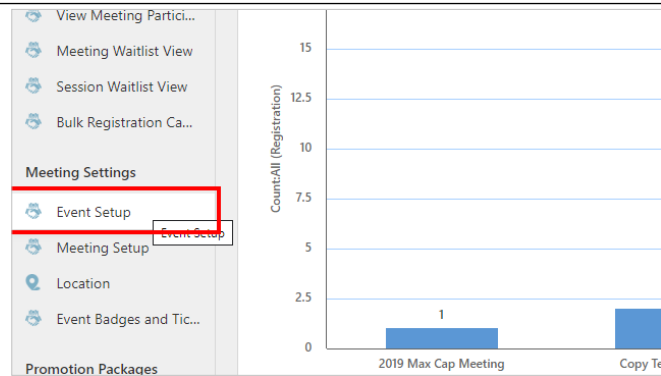
Click on the button **My Work**



Click on the item **Meetings**



Click on the item **Event Setup**

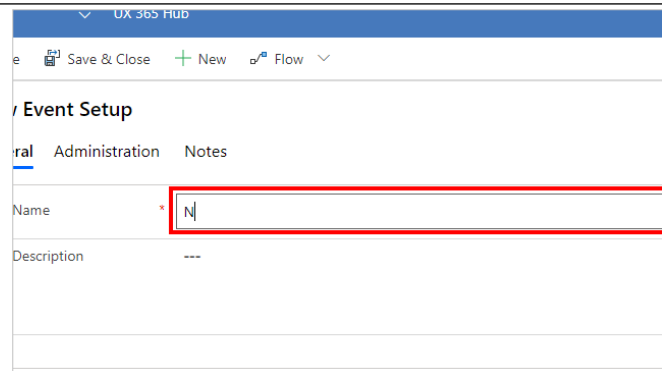


There is a one-to-one relationship between an event and its meeting, and you can create only a single meeting under an event. Therefore, to copy a meeting's details into a new meeting, you must first create the shell—that is, set up the basic information—of the new meeting by creating a new event and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

Click on the menu item **New**

Click on the text field **Name**

Enter **the Event Name**.



UX 365 Hub

Save & Close + New Flow

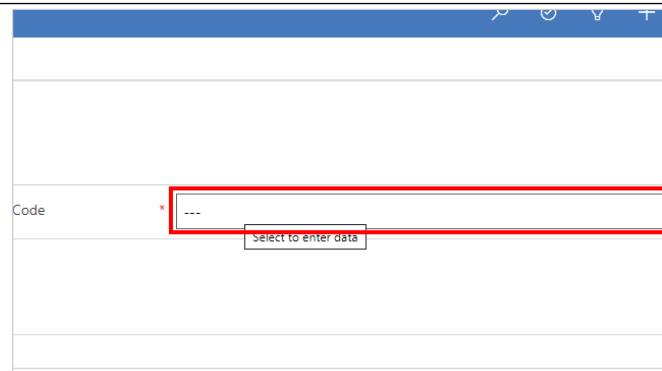
Event Setup

General Administration Notes

Name * N

Description ---

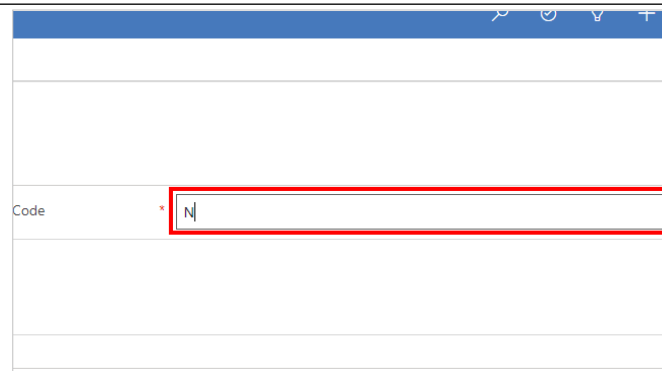
Click on the text field **Code**



Code * ---

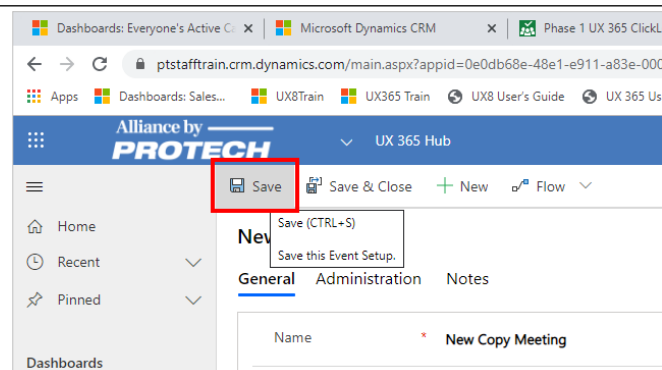
Select to enter data

Enter **the Event Code**.



Code * N

Click on the menu item **Save**



Save Save & Close + New Flow

Save (CTRL+S)

Save this Event Setup.

General Administration Notes

Name * New Copy Meeting

Click on the item **Related**

by **PROTECH** UX 365 Hub Meetings > Event Setup > New Copy Meeting

Save Save & Close + New Deactivate Delete Refresh

New Copy Meeting
Event Setup

General Administration Notes **Related**

Name * New Copy Meeting

Description ---

Click on the menu item **Meeting Setup**

General Administration Notes Related

Name * New Copy

Description ---

Related - Common

- Activities
- Audit History
- Meeting Setup**

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

Save Save & Close + New Deactivate Delete

New Copy Meeting
Event Setup

General Administration Notes **Meeting Setup** Rel

+ New Event Meeting Se... Refresh Run Report

Add New Event Meeting Setup

Add a related Event Meeting Setup to this record.

Event Meet

✓ Name ↑ ↓ Max

Click on the text field **Name**

Save & Close Flow

Event Meeting Setup

ing Accounting Registration Setup Session Setup Web Details Online Descript

eting

Name * ---

Meeting Code + ---

Event * New Copy Meeting

Select to enter data

Enter the **Meeting Name**.

Save & Close Flow

Event Meeting Setup

Accounting Registration Setup Session Setup Web Details Online Description

Meeting Name *

Meeting Code + ---

Event * [New Copy Meeting](#)

Click on the field **Start Date**

Meeting Code ---

Event * [New Copy Meeting](#)

Meeting Date and Time

Start Date * ---

End Date * ---

Time Zone * (GMT-05:00) Eastern Time (US & Canada)

Choose your Meeting Start Date

End Date * December 2019

Time Zone * ---

When Registration Opens

Registration Starts

Registration Ends ---

Click on the field **End Date**

Event * [New Copy Meeting](#)

Meeting Date and Time

Start Date * 1/1/2020

End Date * ---

Time Zone * (GMT-05:00) Eastern Time (US & Canada)

When Registration Opens and Closes

Choose your Meeting End Date

Time Zone	December 2019	2019
	Su Mo Tu We Th Fr Sa	Jan Feb Mar Apr
	1 2 3 4 5 6 7	
When Registration Opens	8 9 10 11 12 13 14	May Jun Jul Aug
Registration Starts	15 16 17 18 19 20 21	Sep Oct Nov Dec
Registration Ends	22 23 24 25 26 27 28	
	29 30 31 1 2 3 4	

Enter the required general and accounting information for this meeting.

Click on the item **Accounting**

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Hub

Save Save & Close Flow

New Event Meeting Setup

Meeting Accounting Registration Setup Session Set

Accounting

Meeting

Name * Copy Meeting

Meeting Code + ---

Click on the link **Primary GL Account**

Web Details Online Description Online Details Online Meeting - Additional Infor...

	Taxable	No
	Secondary GL Account	---

Choose your Primary GL Account

Primary GL Account	Look for Primary GL Account
AR GL Account	Chart of Accounts
	Intl Freight and Handling 000-4720-00
	MD Sales Tax Payable 000-2310-00
	Meeting Revenue 000-4120-00
	Pledge Revenue 000-4010-00
	+ New Chart of Accounts

Click on the link **AR GL Account**

Web Details	Online Description	Online Details	Online Meeting - Additional Infor...
		Taxable	No
		Secondary GL Account	---

Choose your AR GL Account

AR GL Account	Look for AR GL Account
	Chart of Accounts
	Accounts Receivable - Advertising 000-1272-00
	Accounts Receivable - Exhibits 000-1271-00
	Accounts Receivable - Meetings 000-1270-00
	Accounts Receivable - Product Sales 000-1273-00
	+ New Chart of Accounts

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**

Meeting.

Meeting to copy:

Meeting to Copy: *

US Dollar

Status

No

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

2018 Annual Conference 2018ANN

2018 Copy - Deferred By Date 2018ANN

2019 Max Cap Meeting MAXCAP

2019 Meeting - No Guests NOGUEST

2019 Meeting - No Sessions EVENTNOSES

2020 New Meeting 2020NEW

Copy Meeting COPY

Copy Test Meeting LAB365EVEN

GoTransactions Meeting GOTRKEV

LAB Max Capacity Meeting MAXCAP

Click on the button **ADD**

USD Single Currency Meeting	SINGLEEV	9/1/201...	9/7/2...
UX 365 Annual Conference	UX365AC1	12/19/2...	12/2...
UX 365 Bulk Cancellation Mee...	365BCE	1/31/20...	2/2/2...
UX 365 Test Meeting	LAB365EVEN	8/1/201...	8/6/2...

Showing 1 to 15 of 15 rows

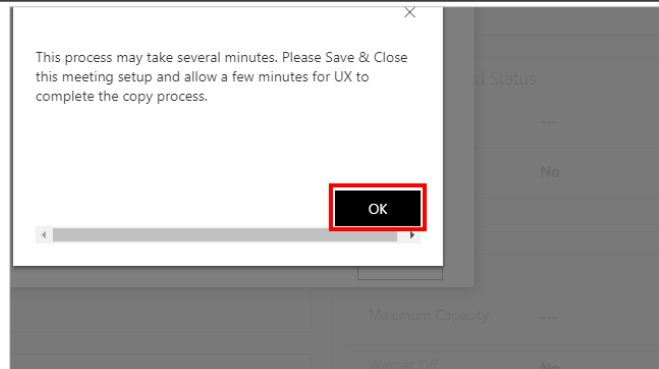
ADD CANCEL REMOVE VALUE

10:05 AM
12/16/2019

Click on the button **OK**

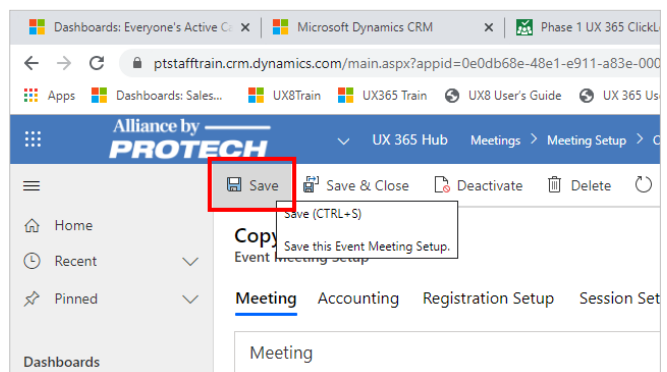
OK CLOSE

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**

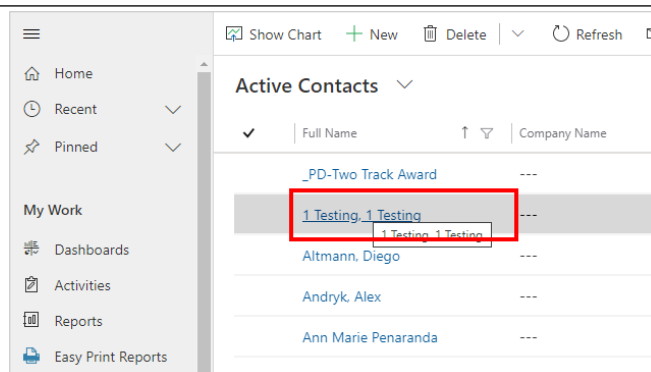


5.8. Creating a Speaker Profile

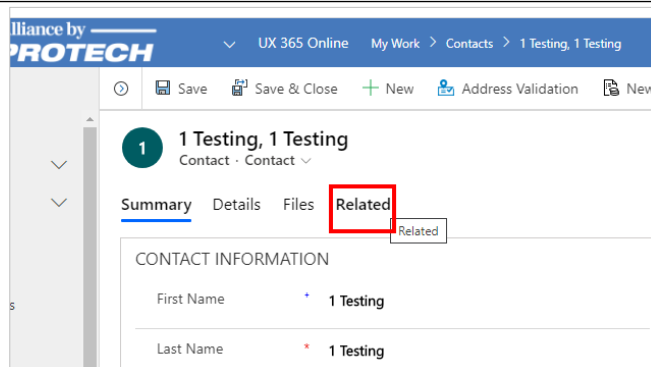
Click on the item **Contacts**



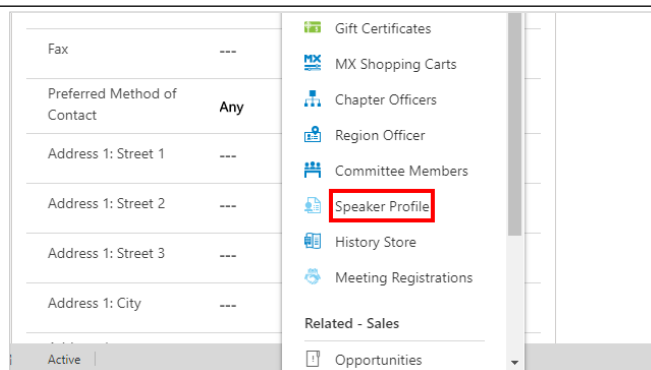
Select the contact you are creating a speaker profile for.



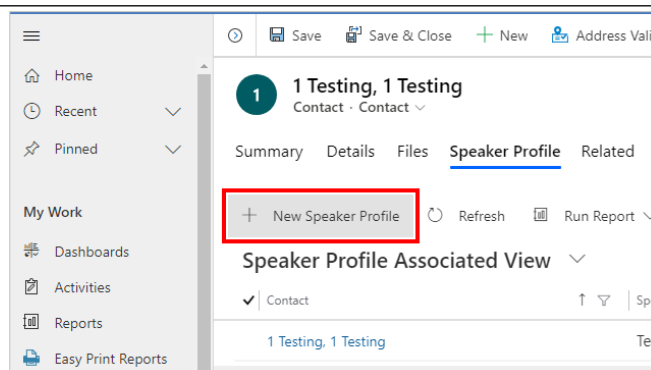
Click on the item **Related**



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.

New Speaker Profile

General Administration Notes

Contact * 1 Testing, 1 Testing

Speaker Type ---

Image URL ---

Biography ---

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.

New Speaker Profile

General Administration Notes

Contact * 1 Testing, 1 Testing

Speaker Type --Select--

Image URL ---

Biography ---

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

1 Testing, 1 Test Speaker Profile

General Administration Notes **Speaker Specialty** Related

+ New Speaker Specialty Refresh Run Report Excel Templates

Speaker Specialty Associated View

Contact	Specialty Status

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

1 Testing, 1 Test Speaker Profile

Contact * 1 Testing, 1 Testing

Speaker Type ---

Image URL ---

Biography ---

Make Checks Payable To ---

Restrictions ---

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.

Evaluation	--Select--
Speaker Fee	---

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

<div> <div>▼</div> <div></div> </div>	
▼ Specialty	▼ Evaluation

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

Image URL	---
Biography	---
Make Checks Payable To	---
Restrictions	---
Language	---
Languages Text	---

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

Biography	---
Make Checks Payable To	---
Restrictions	---
Language	---
Languages Text	---

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

Make Checks Payable To	---
Restrictions	---
Language	--Select--
Languages Text	---

Languages Text – Displays your selections from the Language list.

Make Checks Payable To	---
Restrictions	---
Language	---
Languages Text	---

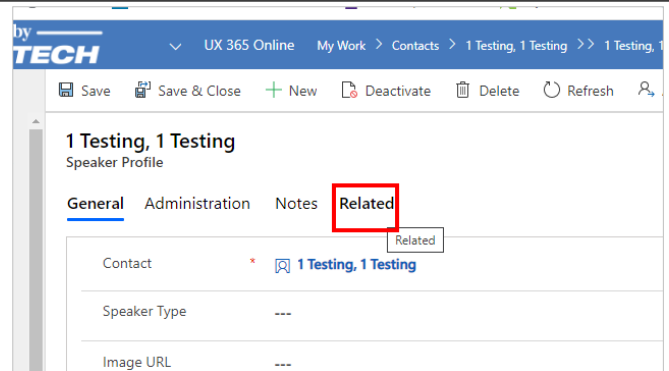
Speaker Status – Select the status from the list. There are no default values. You can create new values in the speaker profile entity.

Speaker Status	--Select--
----------------	------------

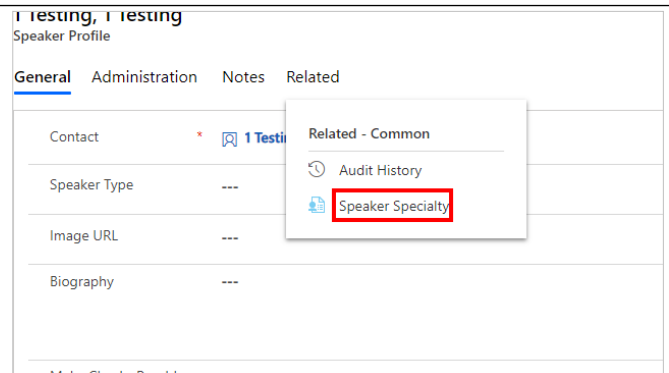
Click on the menu item Save

The screenshot shows a web browser window with the URL ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000. The page title is "Speaker Profile: Information: New". The Protech logo is visible in the top left. A red box highlights the "Save" button in the top right corner of the page. Below the "Save" button, there is a "Save (CTRL+S)" button and a "Save this Speaker Profile" button. The page also shows a "New" button and a "Flow" dropdown menu. The main content area displays "Contact" and "1 Testing, 1 Testing".

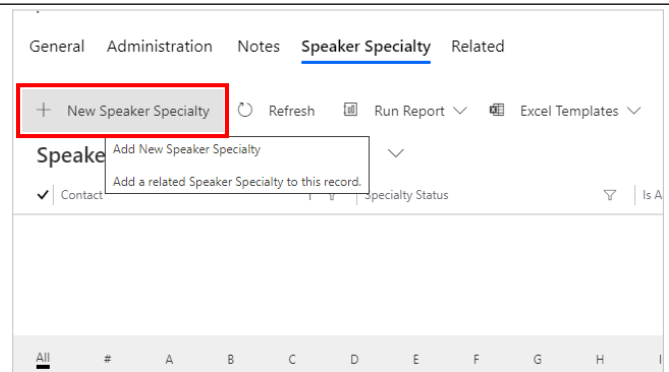
Click on the item **Related**



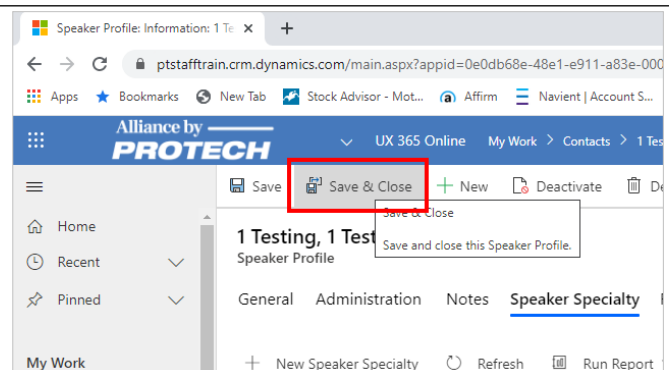
Click on the menu item **Speaker Specialty**



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.



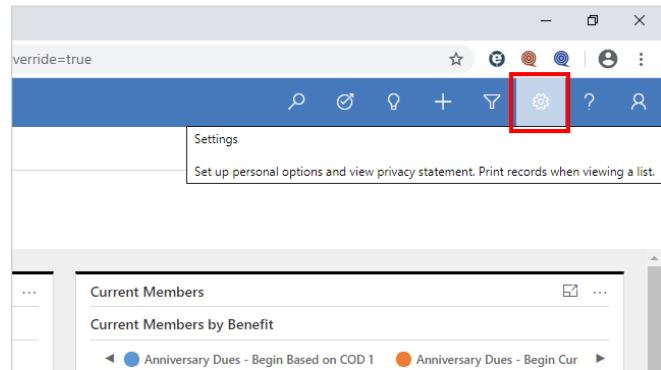
Click on the menu item **Save and Close**



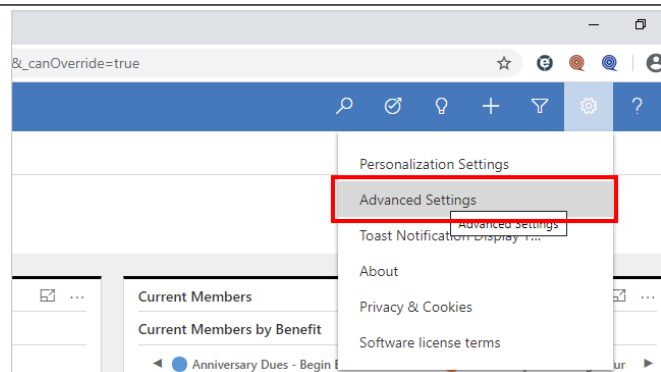
5.9. Creating Location Types

5.9.1. Creating Location Types

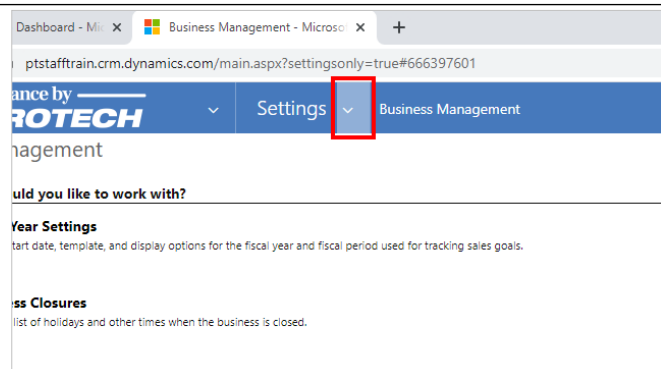
Click on the menu item **Settings**



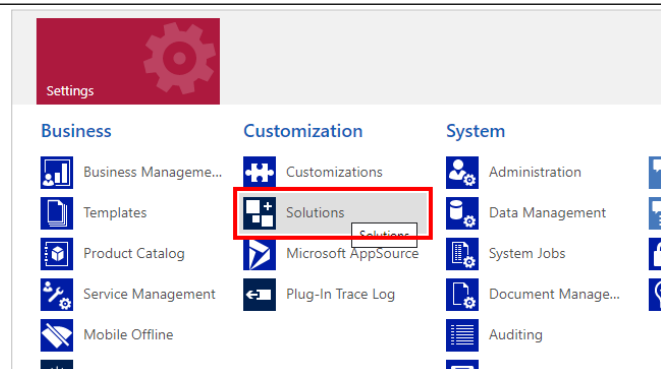
Click on the menu item **Advanced Settings**



Click on the navigation button **Settings**



Click on the link **Solutions**



Select your organization's custom solution

ProtechReports	Alliance by Protech Re...	9.2.0.0	1/25/2019	Managed	Pro
MetadataBrowser	Metadata Browser	3.0.0.5	11/15/2018	Managed	Mi
msdynce_CustomerSe...	Customer Service Hub...	9.0.20.0329	8/25/2018	Managed	Dy
msdynce_Customerser...	Customer Service Hub	9.0.5.56	8/25/2018	Managed	Dy
PluginProfiler	Plug-in Profiler	2.0.0.0	7/2/2018	Managed	CR
<input type="checkbox"/> Cr4f879	Common Data Service...	1.0.0.0	6/27/2018	Unmanag...	CD
CDSManagement	CDS Management	1.0.0.2	6/27/2018	Managed	BA
ProtechCustomization	Alliance by Protech Cu...	9.2.0.4	6/26/2018	Managed	Pro

1 - 22 of 22 (0 selected) | All # A B C D E

Click the expand caret next to Entities

The screenshot shows the Dynamics 365 interface with the 'Entities' menu expanded under the 'Components' section. The 'Entities' menu item is highlighted with a red box. The 'Location' entity is visible in the list on the right.

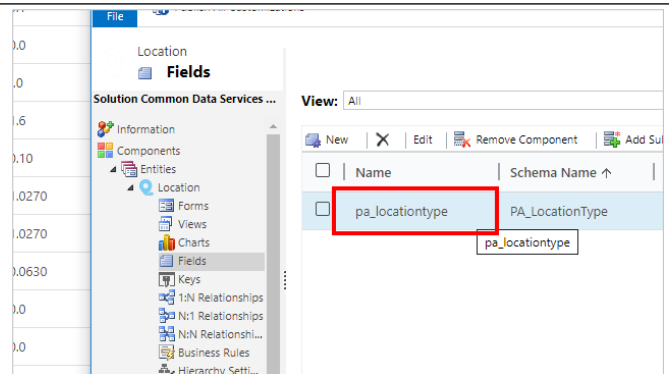
Click the expand caret next to the Location entity to display entity assets

The screenshot shows the Dynamics 365 interface with the 'Location' entity expanded. The 'Location' entity is highlighted with a red box, and a tooltip indicates 'Collapsed, click to expand'. The 'Location' entity is visible in the list on the right.

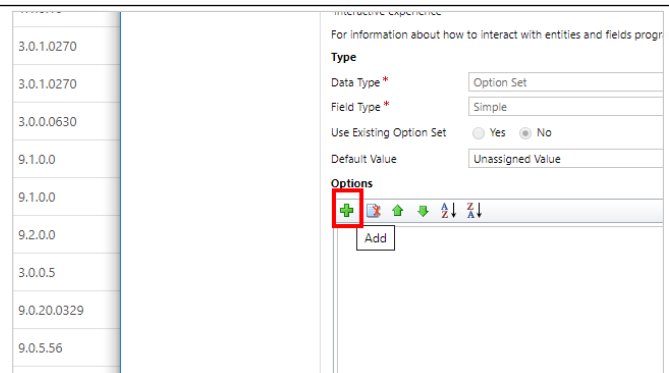
Select Fields to display a list of entity fields.

The screenshot shows the Dynamics 365 interface with the 'Fields' menu expanded under the 'Location' entity. The 'Fields' menu item is highlighted with a red box. The 'Location' entity is visible in the list on the right.

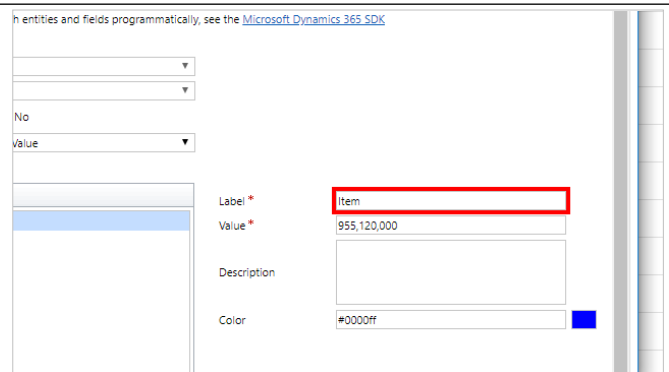
Locate and double-click to open the pa_locationtype field.



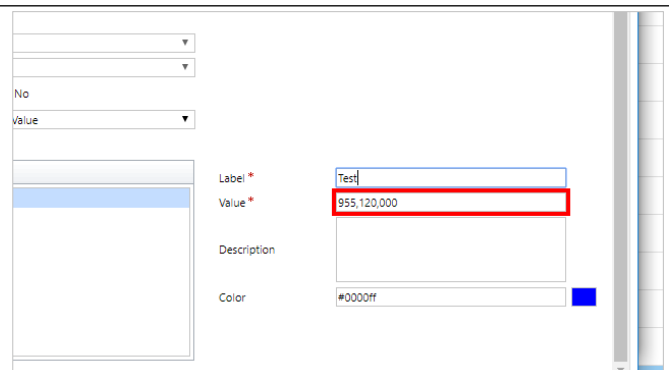
In the Options area at the bottom of the Field: Location Type window, you will see a list of existing items (location types). Click Add to create a new item



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.

Location Type configuration window. The 'Options' section shows a list of location types. The 'Move Up' button is highlighted with a red box.

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.

Location Type configuration window. The 'Options' section shows a list of location types. The 'Sort Descending' button is highlighted with a red box.

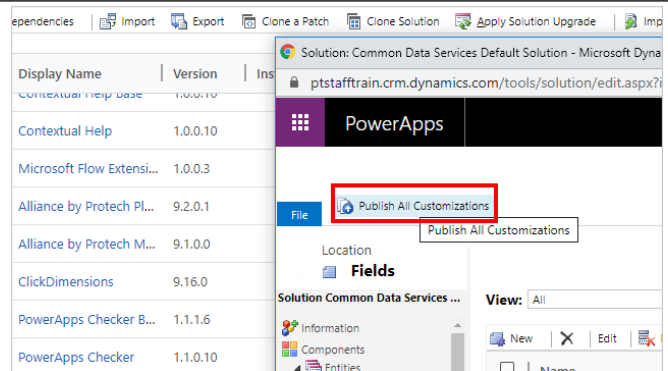
To define a default location type to be used when creating a new location, select the location type in the Default Value field.

Location Type configuration window. The 'Default Value' field is highlighted with a red box.

Click on the link **Save and Close**

PowerApps interface showing the 'Save and Close' button highlighted with a red box.

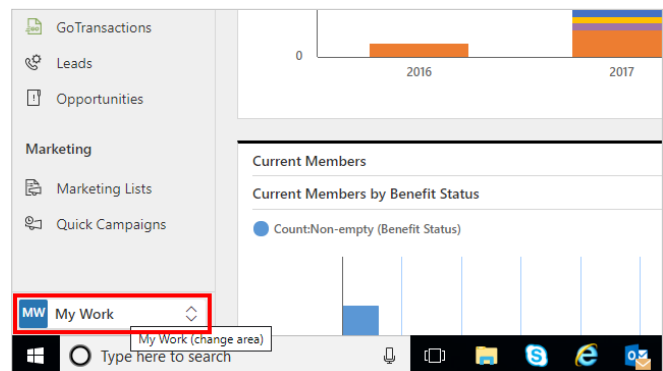
Select Publish All Customizations on the toolbar. This will update the database to include the new location types.



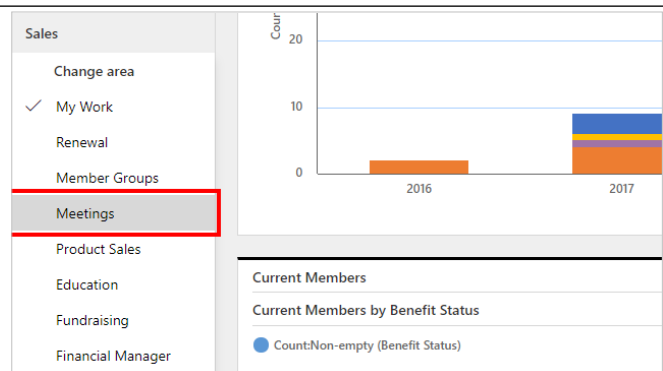
5.10. Creating Locations

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.

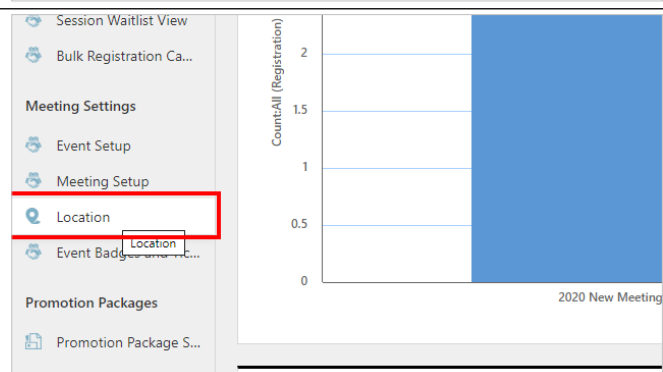
Click on the button **My Work (change area)**



Click on the item **Meetings**



Click on the item **Location**



Click on the menu item **New**

Location Active Location - Micro: x

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Alliance by **PROTECH**

UX 365 Hub Meetings > Location

Show Chart **New** Delete Refresh

Active Location

Name

Bacon's Furniture & Design

Bacon's Furniture & Design

Four Seasons Baltimore

Enter the location name

UX 365 Hub

Save & Close New Flow

New Location

General Notes

Name * --- Location

Account --- Primary

Address Line1 --- Phone

Address Line2 --- Fax

Click on the field **Location Type**

SANDBOX

Location Type --Select--

Primary Contact ---

Phone ---

Fax ---

Click on an option from the list

Location Type --Select--

Primary Contact --Select--

Hotel

Phone ---

Fax ---

Email Address ---

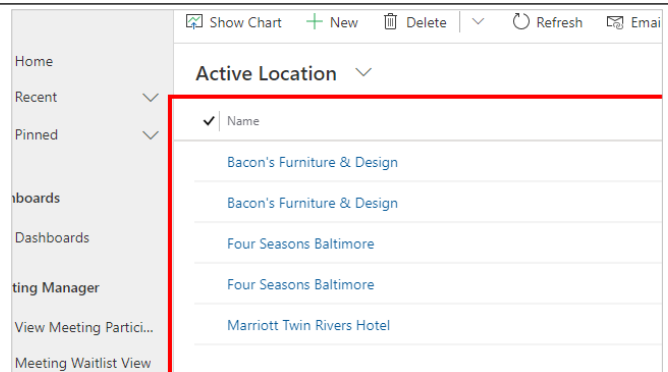
If there is a contact at the location, enter the primary contact here

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

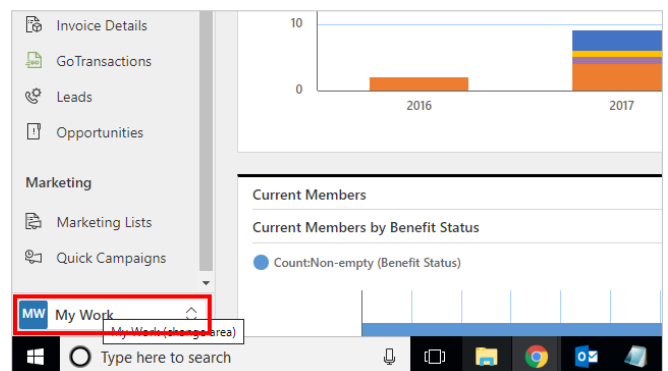
You have completed your location setup. All other active locations are listed here



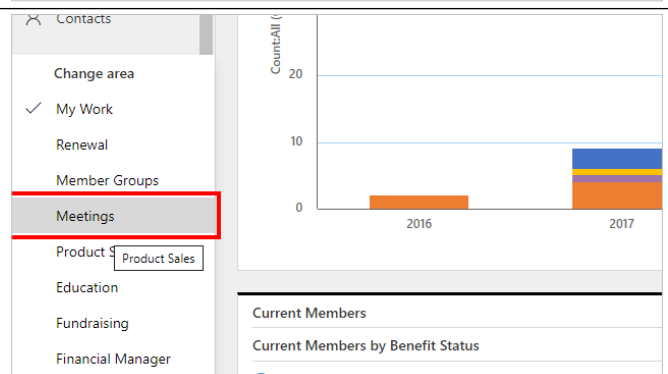
5.11. Event Meeting Waitlist View

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.

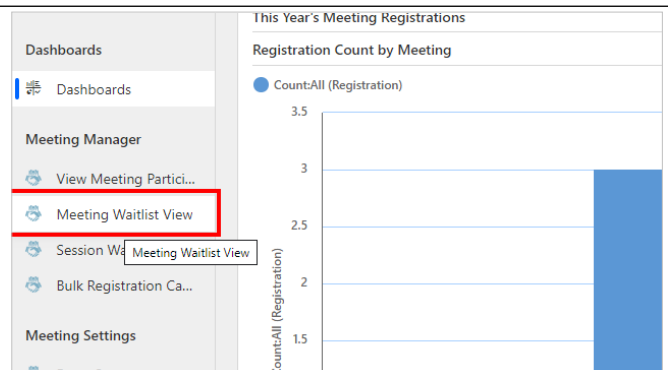
Click on the button **My Work (change area)**



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.

Participant	Registration
Bruffey, Frank S.	12/20/2019

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

Meeting	Participant
2020 New Meeting	Bruffey, Frank S.

Select the participant.

Name	Contact	Meeting	City
<input checked="" type="checkbox"/> Bruffey, Frank S.	C-001014	No	Columbia
<input type="checkbox"/> Bruffey, Laura	C-001013	No	Columbia
<input type="checkbox"/> Bruffey, Matt K	C-001280	No	-
<input type="checkbox"/> Bruffey, Matt S.	C-001109	No	Columbia
<input type="checkbox"/> Bruffey, Shelly A.	C-001083	No	Washington

Click on the button **ADD**

Showing 1 to 5 of 5 rows	<input type="button" value="ADD"/> <input type="button" value="CANCEL"/> <input type="button" value="REMOVE VALUE"/>
--------------------------	--

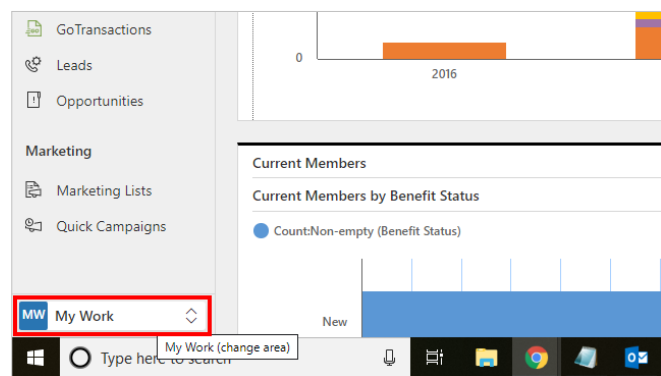
A list of all the meetings this person is waitlisted for will be shown.

I Meeting	I Participant
2020 New Meeting	Bruffey, Frank S.

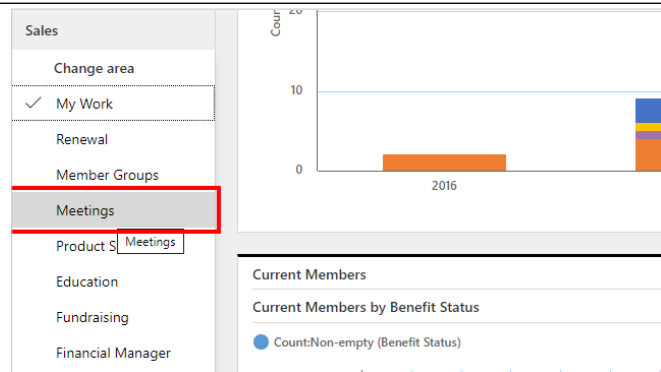
Search Meeting Waitlist Clear fields

5.12. Registering an Individual on the Meeting Waitlist

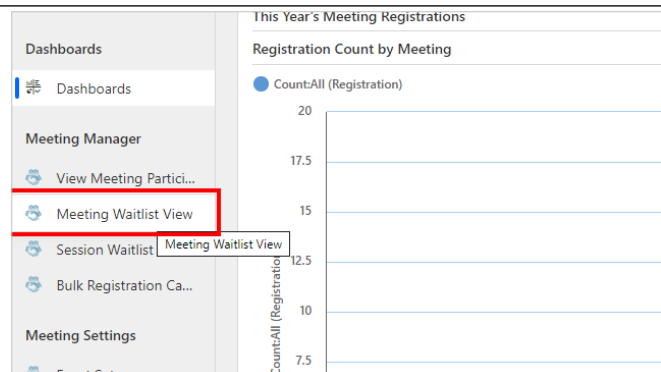
To navigate to the event meeting waitlist view, first click on the button 'my work'



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.

Meeting Waitlist View

Meeting:

Participant:

EXPORT TO EXCEL PRINT

Registration	Meeting
test	Test waitlist

double click on the invoice line item for the meeting registration

Easy Print Reports

Customers

- Accounts
- Contacts
- Sales
- Invoices
- Invoice Details
- GoTransactions
- Leads

Name: * Meeting -Test waitlist meeti

Source Code: ---

Details

Description	Batch
test - 1 Testing, 1 Testing	001130

Click on the menu item 'Register Waitlist'

asp?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=entityrecord&etn=pa_eventregistrat

Hub My Work > Invoices > Meeting -Test waitlist meeti >> test

Close Refresh Cancel Meeting Register Waitlist Cancel Session

Register Waitlist

Register this Waitlist Registration.

ests Participant Information User Defined Fields Administration Related

1 Testing, 1 Testing

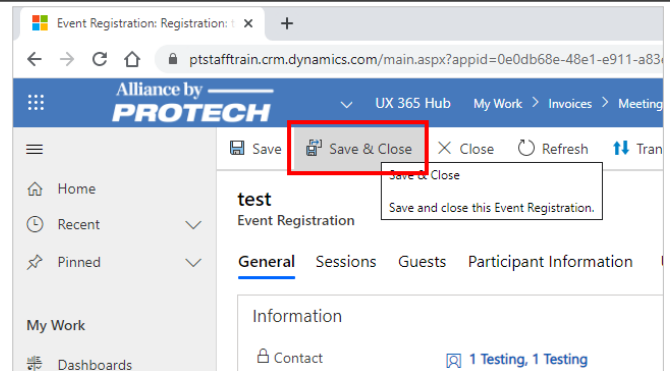
Click on the button **OK**

Waitlist Registration

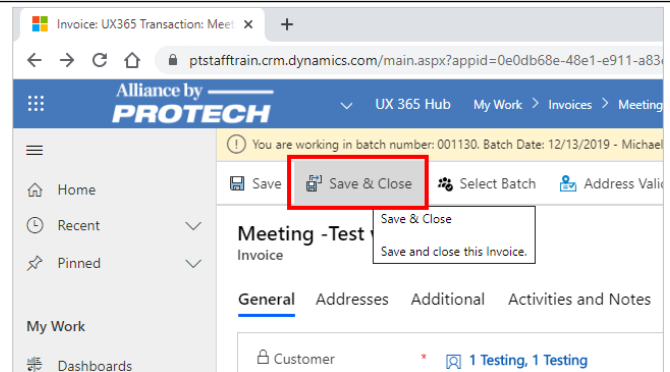
Are you sure you want to register the waitlisted registration?

OK Cancel

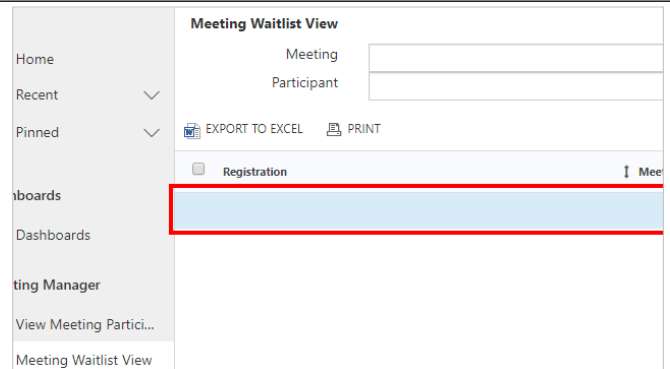
Click on the menu item **Save & Close**



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

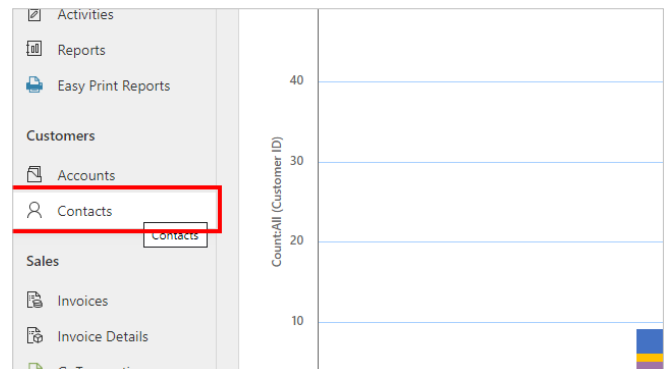


You can see that the contact was taken off the waitlist view because it was registered for the meeting.

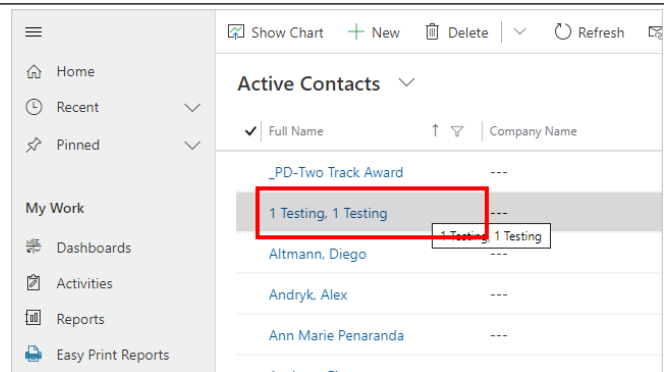


5.13. Registering Individuals for Meetings

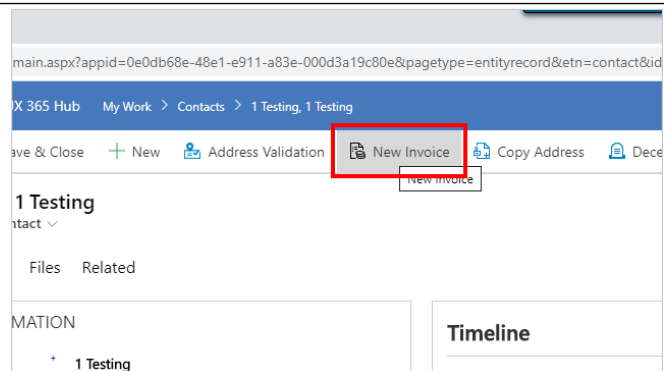
From any of the UX work areas on the Navigation Tile Bar, click **Contacts**



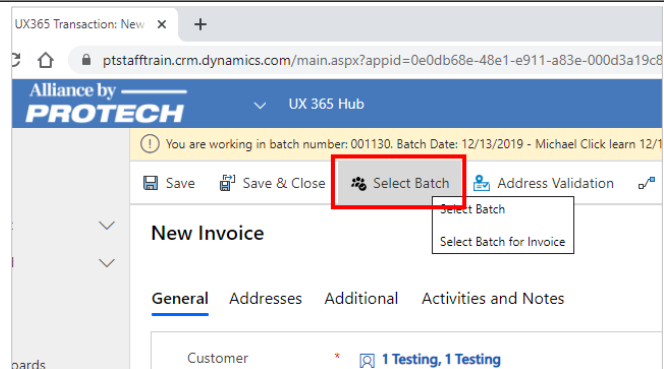
Locate and click into the contact you would like to register for a meeting.



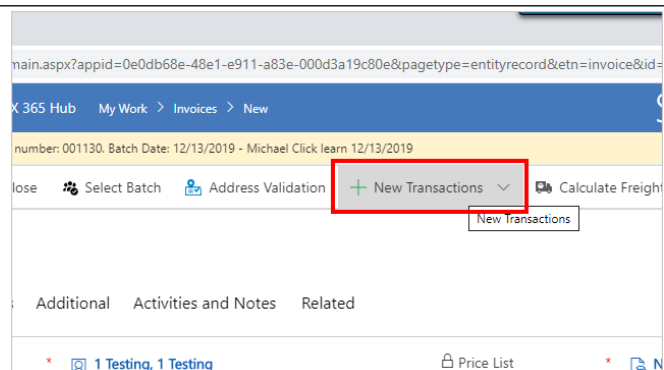
Once in the contact, click the button 'New Invoice' on the toolbar at the top.



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'

The screenshot shows a software interface with a top navigation bar containing 'Close', 'Select Batch', 'Address Validation', 'New Transactions', and 'Calculate Freight'. Below this is a table with columns 'Additional', 'Activities and Notes', and 'Related'. The table contains three rows: '1 Testing, 1 Testing', '1 Testing, 1 Testing', and 'New'. A dropdown menu is open from the 'New Transactions' button, listing options: 'Product Sales', 'Membership', 'Benefit Packages', 'Meetings' (highlighted with a red box), 'Subscription', 'Promotion Package', 'Contributions', and 'Payment & Adjustment'.

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

The screenshot shows a software interface with a top navigation bar containing 'on', 'Participant Information', and 'Administration'. Below this is a table with columns 'Additional', 'Activities and Notes', and 'Related'. The table contains three rows: '1 Testing, 1 Testing', '1 Testing, 1 Testing', and 'New'. A dropdown menu is open from the 'New Transactions' button, listing options: 'Product Sales', 'Membership', 'Benefit Packages', 'Meetings' (highlighted with a red box), 'Subscription', 'Promotion Package', 'Contributions', and 'Payment & Adjustment'. Below the table is a 'Look for Meeting' field with a lookup icon (magnifying glass) highlighted with a red box.

Select the meeting.

The screenshot shows a software interface with a top navigation bar containing 'on', 'Participant Information', and 'Administration'. Below this is a table with columns 'Additional', 'Activities and Notes', and 'Related'. The table contains three rows: '1 Testing, 1 Testing', '1 Testing, 1 Testing', and 'New'. A dropdown menu is open from the 'New Transactions' button, listing options: 'Product Sales', 'Membership', 'Benefit Packages', 'Meetings' (highlighted with a red box), 'Subscription', 'Promotion Package', 'Contributions', and 'Payment & Adjustment'. Below the table is a 'Look for Meeting' field with a lookup icon (magnifying glass) highlighted with a red box. Below the field is a list of meetings to select from: '2019 Meeting - No Sessions', 'Event - No Sessions', '2020 New Meeting', '2020 New Event' (highlighted with a red box), 'Copy Meeting', 'New Copy Meeting', 'Copy Test Meeting', and 'LAB UX 365 Test Event'.

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

The screenshot shows a software interface with a top navigation bar containing 'on', 'Participant Information', and 'Administration'. Below this is a table with columns 'Additional', 'Activities and Notes', and 'Related'. The table contains three rows: '1 Testing, 1 Testing', '1 Testing, 1 Testing', and 'New'. A dropdown menu is open from the 'New Transactions' button, listing options: 'Product Sales', 'Membership', 'Benefit Packages', 'Meetings' (highlighted with a red box), 'Subscription', 'Promotion Package', 'Contributions', and 'Payment & Adjustment'. Below the table is a 'Look for Registration' field with a lookup icon (magnifying glass) highlighted with a red box. Below the field is a red error message: 'Required fields must be filled in.' Below the error message is a checkbox.

Select the registration

Wait List	No
Registration	<div>Look for Registration</div> <div>Registration Setup</div> <div>2020 New Registration 2020NEW</div> <div>+ New Event Registration Setup</div>
Exclude from Max Cap	

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

Reports Print Reports Users Counts Contacts Choices Choice Details Transactions Ads	<div>Pricing</div> <div> Override Price <input type="checkbox"/> </div> <div> Promotion --- </div> <div> Override Discount <input type="checkbox"/> </div>
---	--

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

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pa

Protech UX 365 Hub

Save Save & Close Close Flow

New Event Registration

General Sessions Guests **Participant Information** User Defined Field

Participant Information

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

New Event Registration

General Sessions Guests **Participant Information** User Defined Field

Information

Prefix ---

First Name * 1 Testing

Middle Name ---

Last Name * 1 Testing

Suffix ---

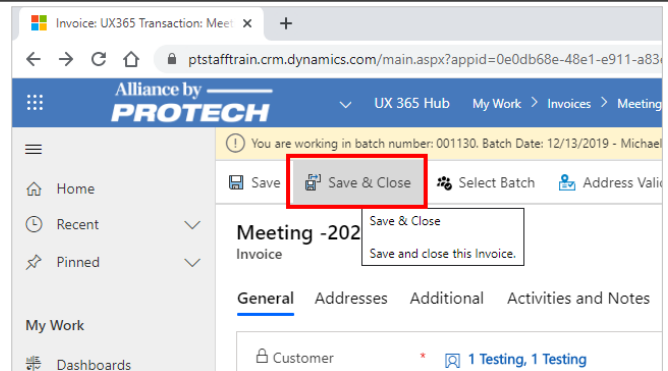
Address information is where you can add more info such as City, State, and Postal code.

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.

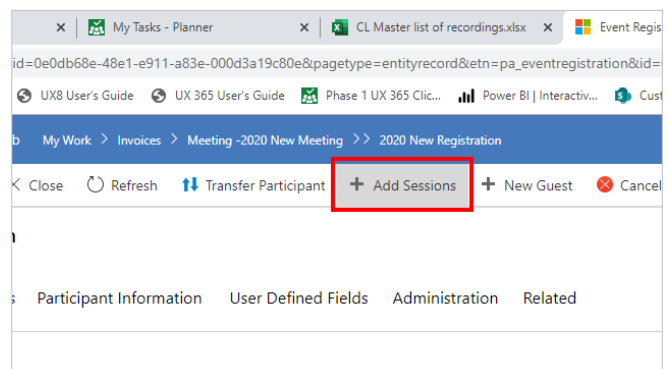
Now you can apply payment and Click Save or Save & Close to finish the process of registering an individual for a meeting.



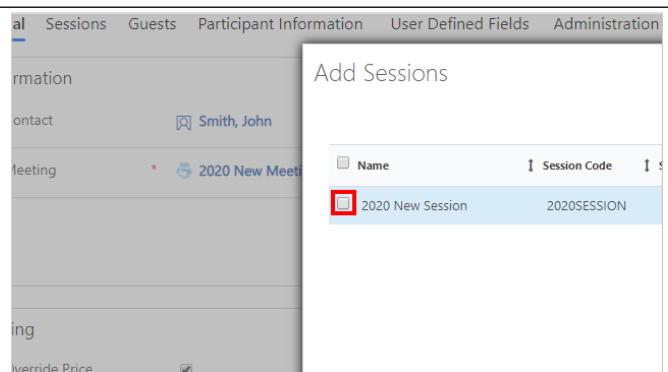
5.14. Registering Individuals for Sessions

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**



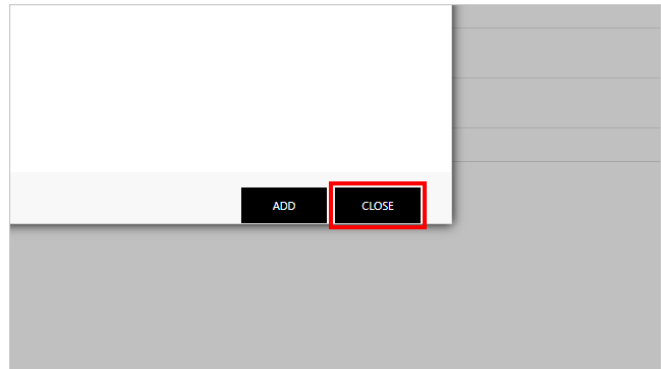
Select the session records you wish to add for this participant.



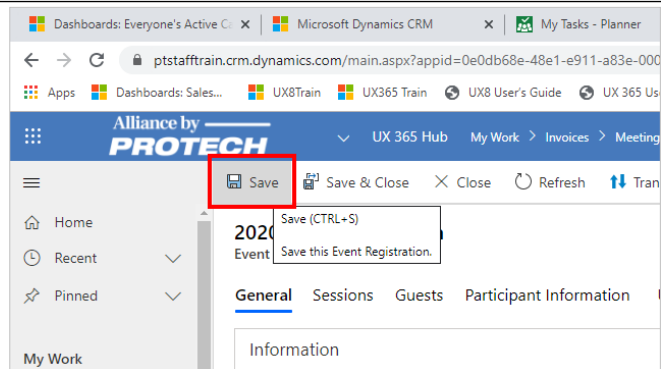
Click on the button **ADD**



Click on the button **CLOSE**

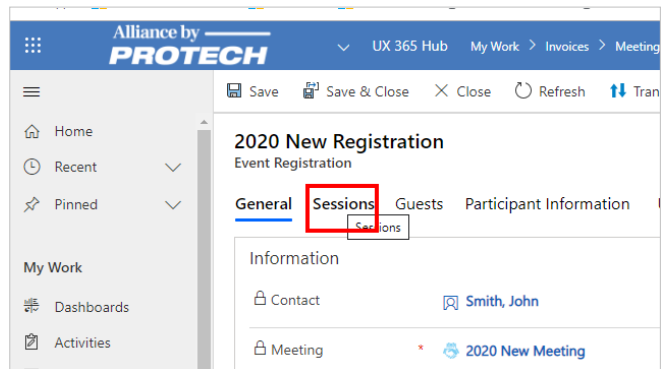


Click on the menu item **Save**

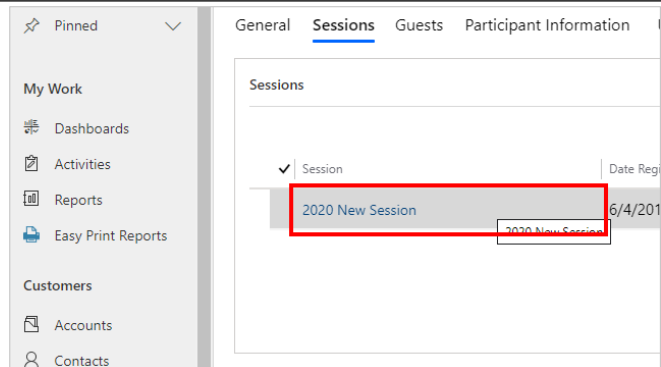


After saving the registration record, you can view detailed information about a session, by double-clicking it in the sub-grid list of sessions. The session registration record will open.

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

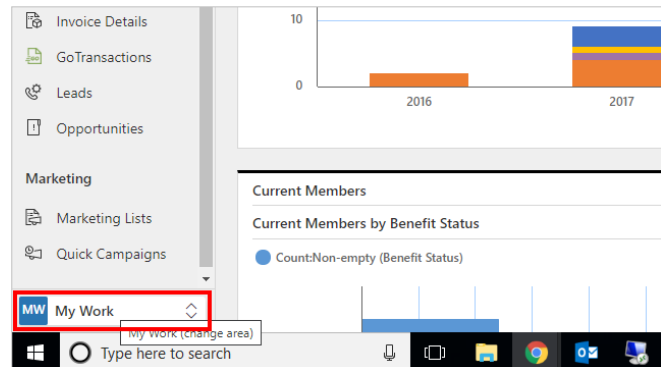


In this menu, you can view and edit this participant's sessions

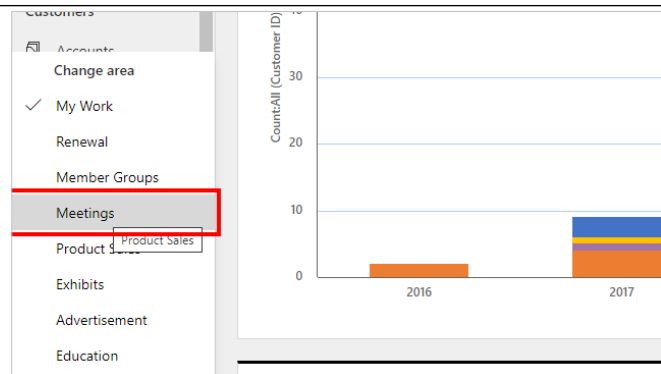


5.15. Setting up a Facility for Meetings

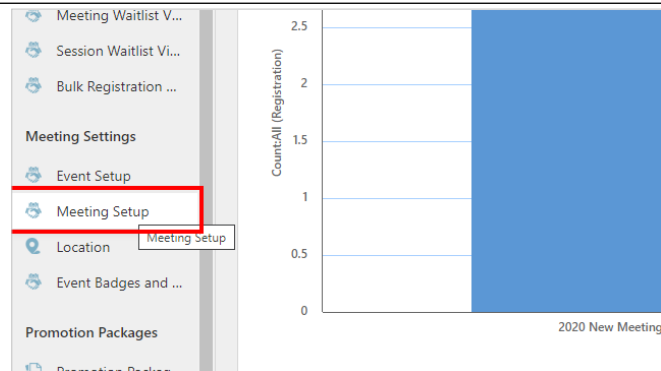
Click on the button My Work



Click on the item **Meetings**



Click on the item **Meeting Setup**



Select the Meeting

1/31/2020 8:00 ...	2/1/2020 8:00 AM	Test Meeting with course
12/25/2019 12:00...	12/25/2019 2:00...	Test waitlist meeti
9/1/2018 12:00 ...	9/7/2018 12:00 ...	USD Single Currency Meeting
12/19/2019 12:00...	12/21/2019 11:3...	UX 365 Annual Conference
1/31/2020 12:00...	2/2/2020 12:00 ...	UX 365 Bulk Cancellation Meeting
8/1/2018 12:00 ...	8/6/2018 12:00 ...	UX 365 Test Meeting

1 - 22 of 22 (0 selected)

Click on the elipses

The screenshot shows a software interface with a blue header bar containing icons for search, share, help, add, filter, settings, and user. Below the header, there are tabs for 'mail a Link', 'Flow', 'Word Templates', and 'Run Report'. The main content area shows a list of items, including 'Online Meeting - Contact Us' and 'User Defined Fields'. A red box highlights a three-dot menu icon next to 'User Defined Fields'.

Click on the menu item **Facility Setup**

The screenshot shows a software interface with a table of data. A dropdown menu is open, showing options: 'Registration Setup', 'Session Setup', 'Related - Activities', 'Activities', 'Audit History', and 'Facility Setup'. The 'Facility Setup' option is highlighted with a red box.

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

The screenshot shows a software interface with a sidebar on the left containing navigation items like 'Home', 'Recent', 'Pinned', 'Dashboards', and 'Meeting Manager'. The main content area shows a form for 'UX 365 Test Meeting' with tabs for 'Meeting', 'Accounting', 'Registration Setup', and 'Session Set'. A dropdown menu is open, showing options: 'New Session Facility', 'Add Existing Session F...', and 'Add New Session Facility'. The 'Add New Session Facility' option is highlighted with a red box.

Click on the text field **Name**

The screenshot shows a software interface with a form for 'Session Facility'. The form has tabs for 'General', 'Administration', and 'Notes'. The 'Name' text field is highlighted with a red box. Below the 'Name' field, there are fields for 'Start date', 'Estimated attendance', and 'Location'.

Enter **Enter the Facility Name**.

UX 365 Online

Save & Close + New Flow

New Session Facility

General Administration Notes

Name *

Start date ---

Estimated attendance ---

Location ---

Click on the menu item **Save**

Dashboards: Everyone's Active C x Microsoft Dynamics CRM x My Tasks - Planner

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Online

Save Save & Close + New Flow

Save (CTRL+S)

New S Save this Session Facility.

General Administration Notes

Name * Facility

Dashboards

Click on the item **Related**

by **PROTECH** UX 365 Online Meetings > Meeting Setup > UX 365 Test Meeting >> Fac

Save Save & Close + New Deactivate Delete Refresh

Facility
Session Facility

General Administration Notes **Related**

Name * Facility

Start date ---

Estimated attendance ---

Click on the menu item **Facility Detail**

General Administration Notes Related

Name * Facility

Start date ---

Estimated attendance ---

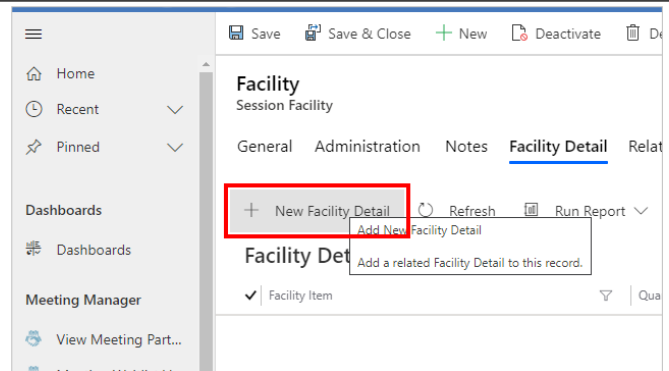
Location ---

Description ---

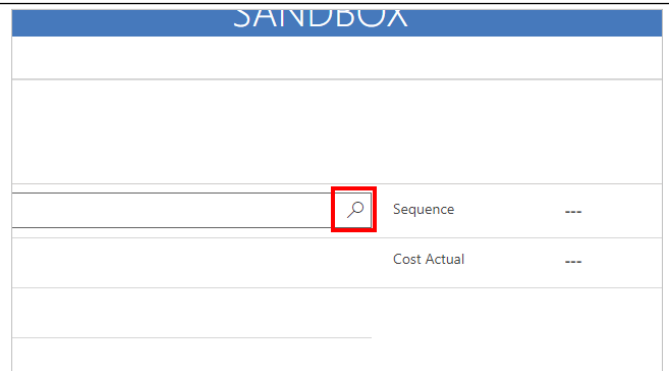
Related - Common

- Activities
- Audit History
- Facility Detail**
- Session Speaker

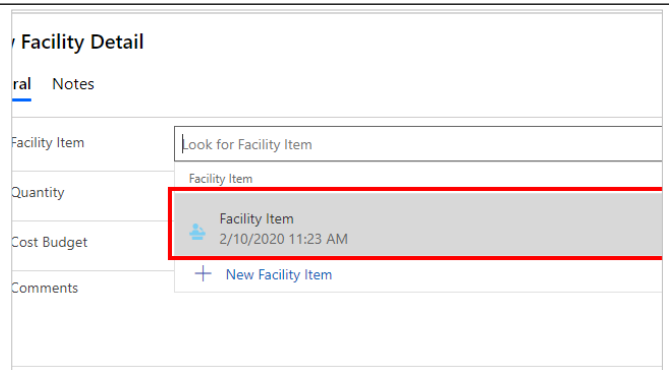
Click on the menu item **Add New Facility Detail**



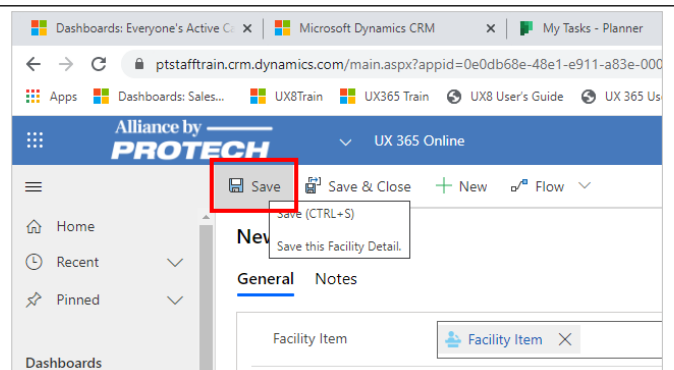
Click on the link **Facility Item**



Select the Facility Item



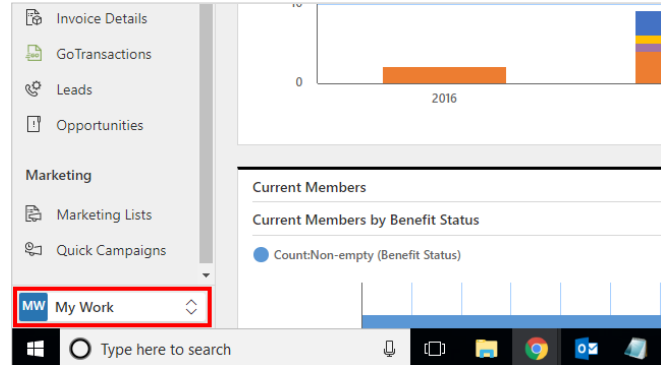
Click on the menu item **Save**



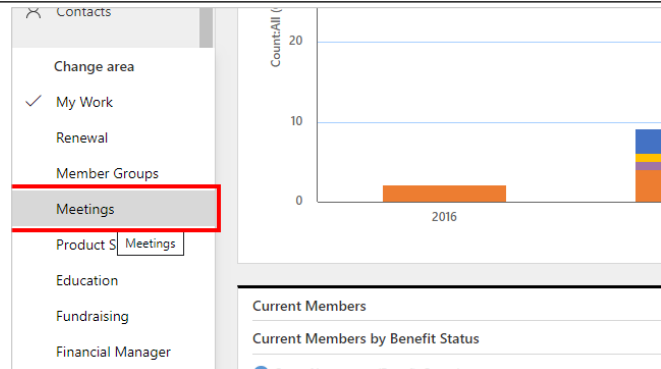
5.16. Setting up Complimentary Registrations and Sessions

5.16.1.1. Complimentary Registration

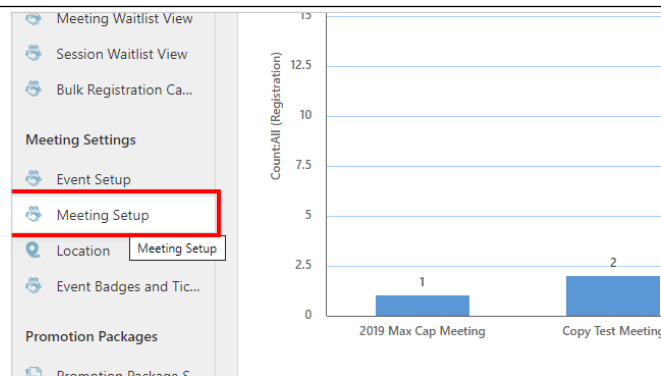
Click on the button **My Work (change area)**



Click on the item **Meetings**



Click on the item **Meeting Setup**



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

The screenshot shows the Protech UX interface. At the top, there is a header bar with 'CH' and 'UX 365 Hub'. Below the header, there is a navigation bar with 'Meetings > Meeting Setup'. The main content area shows a table of meetings. The first row is highlighted with a red box.

Start Date	End Date	Name
9/2/2018 12:00 ...	9/5/2018 12:00 ...	2018 Annual Conference
1/1/2018 1:00 PM	1/5/2018 1:00 PM	2018 Copy - Defa
5/1/2019 12:00 ...	5/2/2019 12:00 ...	2019 Max Cap Meeting
3/1/2019 1:00 PM	3/6/2019 1:00 PM	2019 Meeting - No Guests
2/1/2019 1:00 PM	2/5/2019 1:00 PM	2019 Meeting - No Guests

Click on the item **Registration Setup**

UX 365 Hub Meetings > Meeting Setup > 2018 Annual Conference

2018 Annual Conference
Event Meeting Setup

Meeting Accounting **Registration Setup** Session Setup Web C

Meeting

Name * 2018 Annual Conference

Meeting Code * 2018ANN

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

Meeting - Additional Infor... Online Meeting - Contact Us User Defined Fields ...

+ New Event Registration... Refresh

Add New Event Registration Setup

Add a related Event Registration Setup to this reco

Association Fee	Members Only	Price Level C...	Group Pricing	Is Registration Cl...	Publ
No	No	No	No	No	No
No	No	No	No	No	No

Enter a Name for the Registration.

Save & Close Flow

Event Registration Setup

General Description Details Administration

Registration Information

Name * ---

Code * ---

Meeting * 2018 Annual Conference

Enter a Code for the Registration.

Event Registration Setup

General Description Details Administration

Registration Information

Name * complimentary test

Code * ---

Meeting * 2018 Annual Conference

Location ---

Click on the text field **Price**

The screenshot shows a form titled 'Price'. It contains several fields: 'Price' (with a red box around it), 'Default Price Level' (with a dropdown menu and a 'Select to enter data' button), 'Price Level Controlled' (set to 'No'), and 'Badge or Ticket' (with a dropdown menu). The 'Price' field is currently empty and has a red box around it.

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.

The screenshot shows the same 'Price' form as before, but now the 'Price' field contains the value '0' and is highlighted by a red box.

Select a price level.

The screenshot shows the 'Price' form with the 'Default Price Level' dropdown menu open. The text 'Look for Default Price Level' is visible in the dropdown. A red box highlights a search icon in the bottom right corner of the dropdown menu.

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

The screenshot shows the 'New Event Registration Setup' form. The 'Save' button is highlighted by a red box. The form has tabs for 'General', 'Description', 'Details', and 'Administration'. The 'General' tab is selected, showing 'Registration Information' with fields for 'Name' (set to 'complimentary test') and 'Code' (set to 'comptest').

5.16.1.2. Complimentary Session

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

UX 365 Hub Meetings > Meeting Setup > 2018 Annual Conference

Save Save & Close Deactivate Delete Refresh Copy Meeting

2018 Annual Conference
Event Meeting Setup

Meeting Accounting Registration Setup **Session Setup** Web Details Online Description

Registration Setup

Is Main Registrati... Name Code Is Package

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

Assign Share Email a Link Flow Word Templates Run R

Online Meeting - Additional Infor... Online Meeting - Contact Us User Defined Fields

+ New Event Session Set... Refresh

Add New Event Session Setup
Add a related Event Session Setup to the...

Price Publish To Web Meeting ID

2:00 PM \$5.00 No 2018 Annual Conference

Enter a Name for the Session.

Save & Close Flow

Event Session Setup

General Description Prices Web Additional Details Administration

Session Information

Name * **...** Select to enter data

Code * ...

Session Type ...

Meeting ID * 2018 Annual Conference

Enter a Code for the Session.

Save & Close Flow

Event Session Setup

General Description Prices Web Additional Details Administration

Session Information

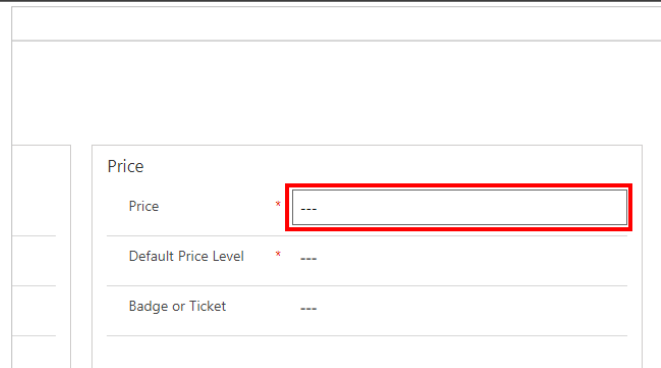
Name * complimentary session

Code * **...**

Session Type ...

Meeting ID * 2018 Annual Conference

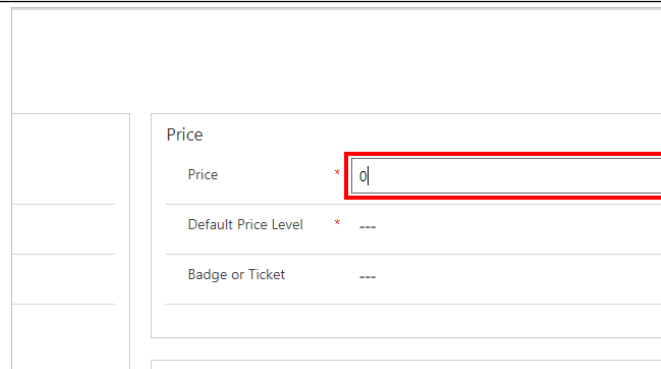
Click on the text field **Price**



The screenshot shows a form titled 'Price' with three fields: 'Price', 'Default Price Level', and 'Badge or Ticket'. The 'Price' field is highlighted with a red rectangular box. The other fields contain dashes ('---').

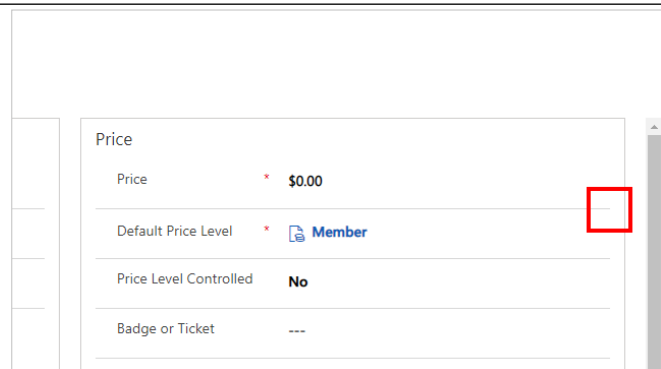
Enter **Price**.

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.



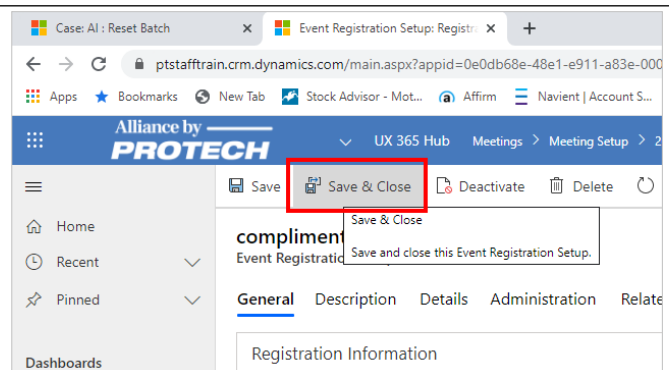
The screenshot shows the 'Price' form with the 'Price' field now containing the value '0'. The field is highlighted with a red rectangular box. The other fields remain unchanged.

Select a price level.



The screenshot shows the 'Price' form with the 'Price' field containing '\$0.00' and the 'Default Price Level' field showing a document icon and the word 'Member'. A red rectangular box highlights the 'Member' selection. The 'Price Level Controlled' field is set to 'No'.

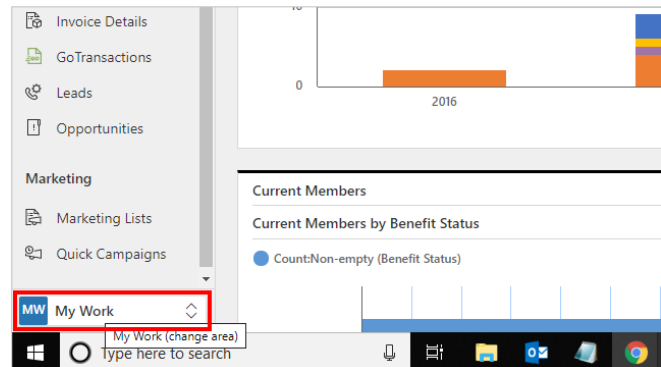
Click on the menu item **Save & Close**



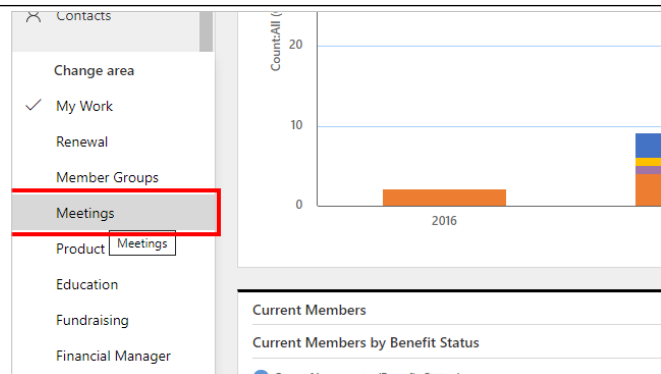
The screenshot shows the web application interface. At the top, there's a navigation bar with 'Alliance by PROTECH' and 'UX 365 Hub'. Below it, a menu bar contains 'Save', 'Save & Close', 'Deactivate', and 'Delete'. The 'Save & Close' button is highlighted with a red rectangular box. A tooltip is visible over the button, showing the text 'Save & Close' and 'Save and close this Event Registration Setup.'.

5.17. Setting up Event Badges and Tickets

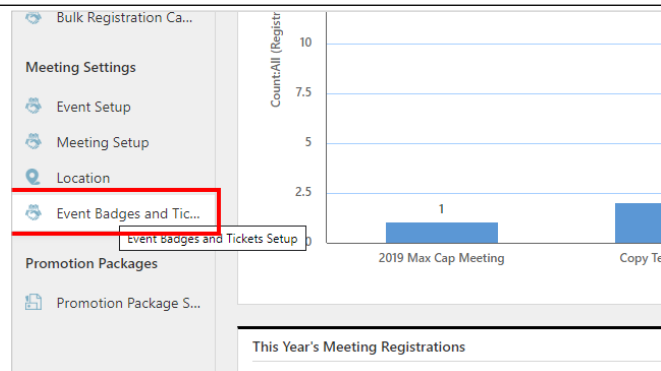
Click on the button **My Work (change area)**



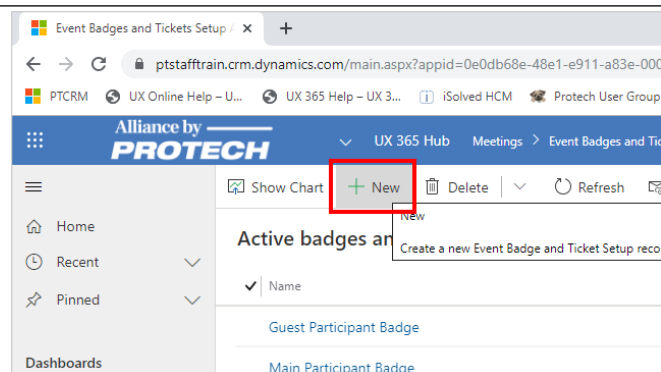
Click on the item **Meetings**



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



Click on the menu item **New**



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

UX 365 Hub

Save & Close + New Flow

Event Badge and Ticket Setup

General

Badge/Ticket Type * Regular Badge

Name * ---

Badge/Ticket Text ---

Select the badge or ticket type for this record.

UX 365 Hub

Save & Close + New Flow

Event Badge and Ticket Setup

General

Badge/Ticket Type * Regular Badge

Name * Regular Badge

Rep Badge

Rep Ticket

VIP Badge

VIP Ticket

Badge/Ticket Text ---

Click on the text field **Name**

Save & Close + New Flow

Event Badge and Ticket Setup

General

Badge/Ticket Type * Regular Badge

Name * ---

Badge/Ticket Text ---

Enter a name for this badge or ticket record.

Save & Close + New Flow

Event Badge and Ticket Setup

General

Badge/Ticket Type * Regular Badge

Name * U

Badge/Ticket Text ---

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.

Event badge and ticket Setup

Badge/Ticket Type * Regular Badge

Name * UX 365 Badge

Badge/Ticket Text

Badge or Ticket

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

Owner * Goldman, Bryan

Badge or Ticket

Click on the menu item Save

Event Badge and Ticket Setup: In...

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

PTCRM UX Online Help - U... UX 365 Help - UX 3... iSolved HCM Protech User Group

Alliance by PROTECH UX 365 Hub

Save Save & Close + New Flow

Save (CTRL+S)

Save this Event Badge and Ticket Setup.

Setup

General

Badge/Ticket Type * Regular Badge

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)**

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

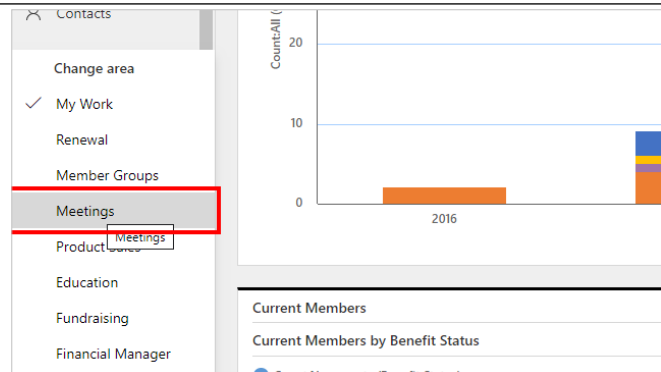
MW My Work

Current Members

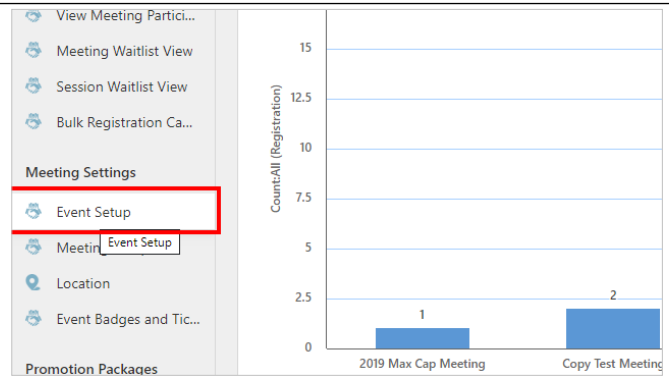
Current Members by Benefit Status

Count:Non-empty (Benefit Status)

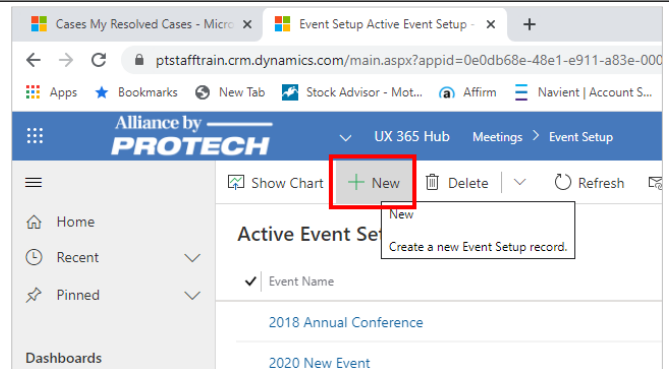
Click on the item **Meetings**



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

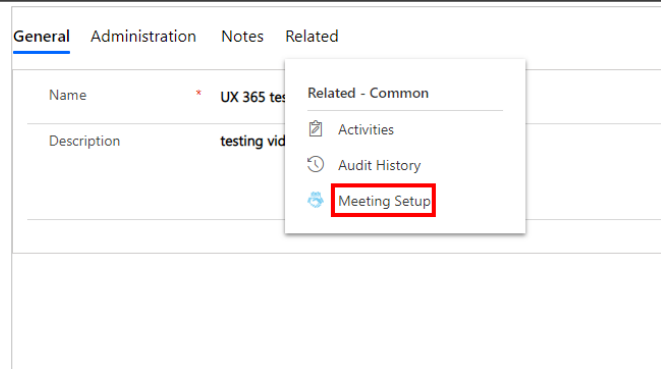
If desired, enter a description of the event. This text can be used for reporting.

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

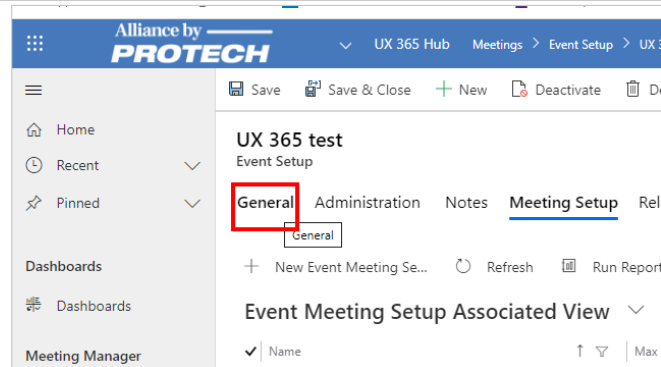
Click on the item **Related**

Click on the menu item **Meeting Setup**

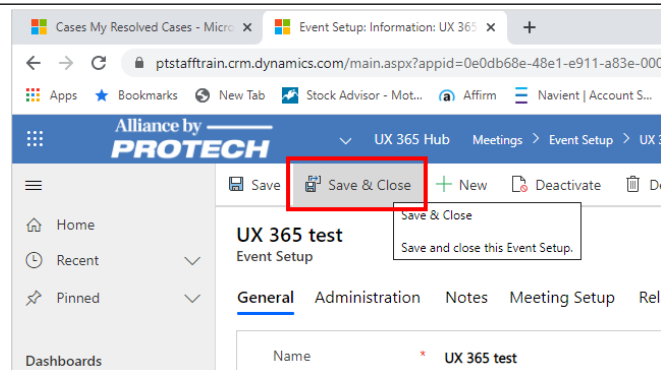
This displays the meeting associated with this event. If one has not been created yet, you can begin that process here. For more information, see Setting up meetings.



Click on the item **General**



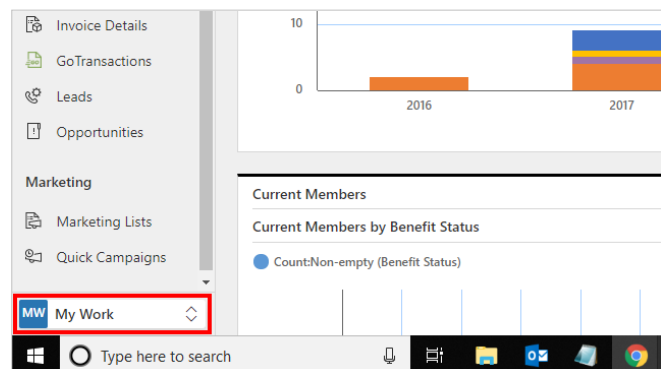
Click on the menu item **Save & Close**



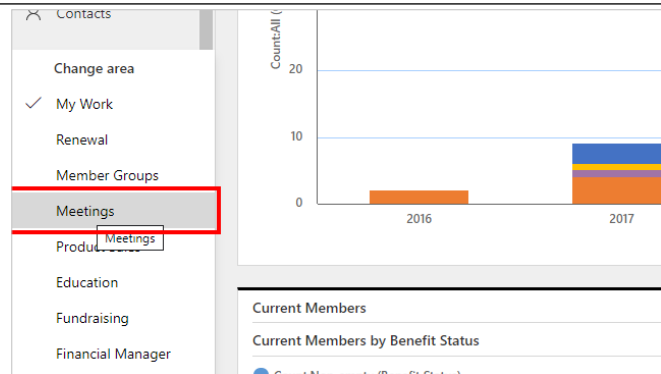
5.19. Setting up Location Detail

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.

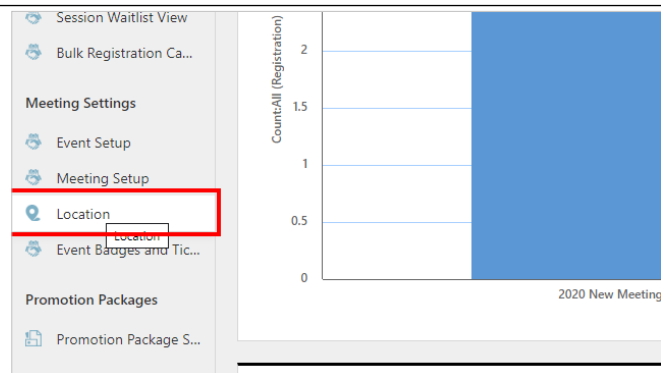
Click on the button **My Work (change area)**



Click on the item **Meetings**



Click on the item **Location**



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

<ul style="list-style-type: none"> ▼ ▼ 	<ul style="list-style-type: none"> ✓ Name Bacon's Furniture & Design Bacon's Furniture & Design Four Seasons Baltimore Four Seasons Baltimore (highlighted with a red box) Marriott Twin Rivers Hotel
--	---

Click on the item **Related**

The screenshot shows the 'Four Seasons Baltimore' location form. The top bar includes the Protech logo and navigation links: UX 365 Hub, Meetings > Location > Four Seasons B. The form has tabs for General, Notes, and Related (highlighted with a red box). The form fields are: Name (Four Seasons Baltimore), Account (---), and Address Line1 (200 International Drive).

Click on the menu item **Location Detail**

The screenshot shows a web application interface. On the left is a sidebar with various menu items. The main area displays a form for 'Four Seasons Baltimore' with tabs for 'General', 'Notes', and 'Related'. A dropdown menu is open over the 'Related' tab, showing options: 'Activities', 'Audit History', and 'Location Detail'. The 'Location Detail' option is highlighted with a red rectangle.

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

The screenshot shows the 'Location Detail' tab selected in the 'Four Seasons Baltimore' form. A button labeled '+ New Location Detail' is highlighted with a red rectangle. A tooltip is visible over this button, stating 'Add a related Location Detail to this record.'

Click on the text field **Name**

The screenshot shows a 'Quick Create: Location Detail' form. It has a single text input field labeled 'Name' with a red asterisk indicating it is required. The field is highlighted with a red rectangle.

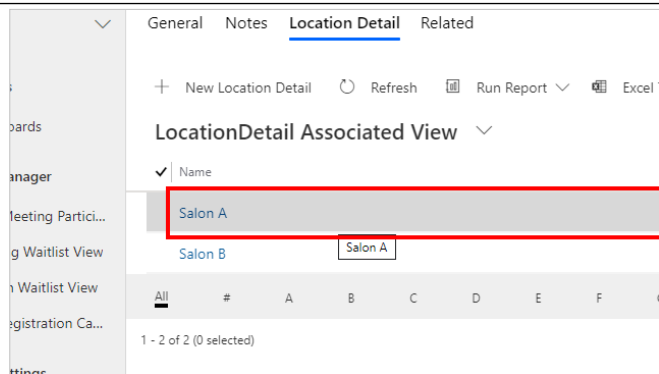
Enter **Name**.

The screenshot shows the same 'Quick Create: Location Detail' form. The letter 'S' has been entered into the 'Name' field, which is still highlighted with a red rectangle.

Click on the button **Save and Close**



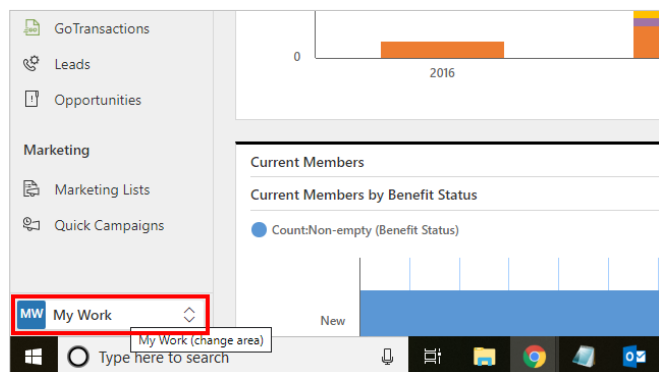
The new location detail will now appear in the Location Detail associated view and be available when setting up meetings and sessions.



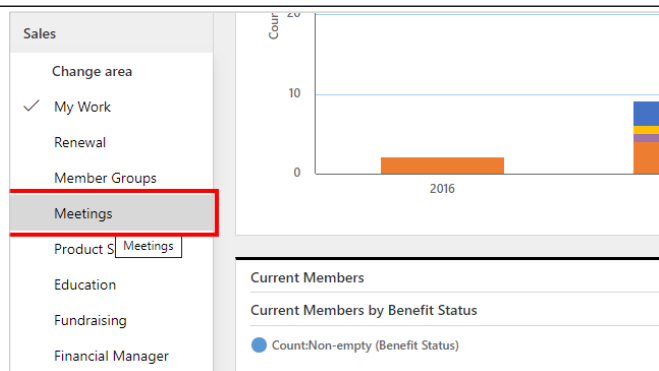
5.20. Setting up Meetings

5.20.1. Setting Up A Meeting

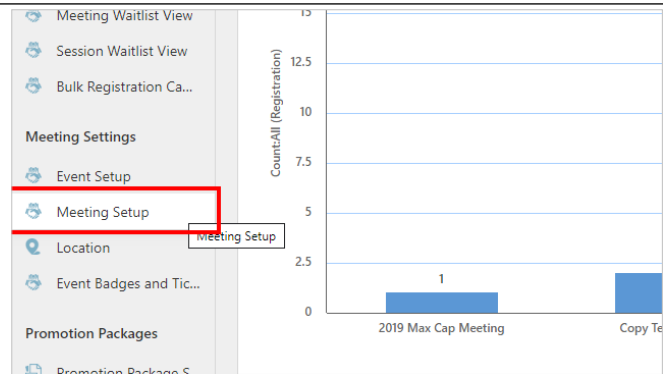
To set up a meeting... First click the button 'my work' to change area



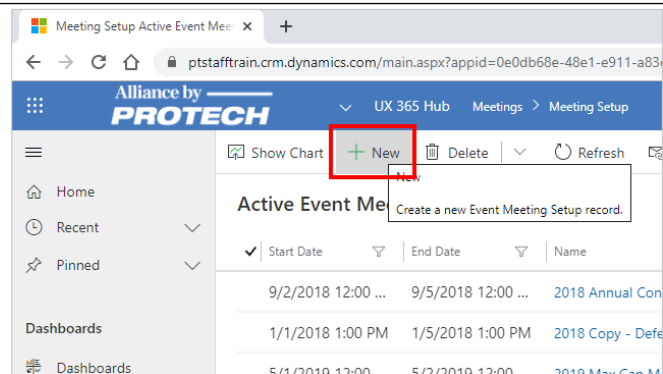
Click on the item **Meetings**



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.

The screenshot shows the 'Event Meeting Setup' form. The 'Name' field is highlighted with a red box.




Field	Value
Name	---
Meeting Code	---
Event	---

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

The screenshot shows the 'Event Meeting Setup' form. The 'Meeting Code' field is highlighted with a red box.

Field	Value
Name	Test Meeting 1
Meeting Code	
Event	---

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

Web Details	Online Description	Online Details	Online Meeting - Additional Infor...
<input type="text"/> <input type="text"/> <input type="text"/>			<p>Currency</p> <p> Currency  US</p> <p> Single Currency <input type="checkbox"/></p>
<input type="text"/>			<p>Meeting Type and Status</p> <p>Meeting Type ---</p> <p>Meeting Closed No</p>

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

Meeting Code

TM1

Event

2020 New Event

Meeting Date and Time

Start Date

End Date

Time Zone

(GMT-05:00) Eastern Time (US & Canada)

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

Meeting Participants

Waitlist View

Waitlist View

Registration Calendar

Meetings

Setup

Setup

Badges and Tickets

Event

2020 New Event

Meeting Date and Time

Start Date

12/16/2019

End Date

Time Zone

(GMT-05:00) Eastern Time (US & Canada)

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.

1701

2020 New Event

e

12/16/2019 12:00 AM

12/20/2019 12:00 AM

(GMT-05:00) Eastern Time (US & Canada)

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

Event Date and Time	
Start Date	* 12/16/2019 12:00 AM
End Date	* 12/20/2019 12:00 AM
Time Zone	* (GMT-05:00) Eastern Time (US & Canada)
When Registration Opens and Closes	
Registration Starts	---

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

Event Meeting Setup	
Accounting	Registration Setup Session Setup Web Details Online Description
Name	* (GMT-10:00) Hawaii (GMT-09:00) Alaska (GMT-08:00) Pacific Time (US & Canada) (GMT-08:00) Baja California (GMT-11:00) Coordinated Universal Time-11 (GMT-10:00) Aleutian Islands (GMT-09:30) Marquesas Islands (GMT-09:00) Coordinated Universal Time-09 (GMT-07:00) Mountain Time (US & Canada) (GMT-08:00) Coordinated Universal Time-08 (GMT-07:00) Chihuahua, La Paz, Mazatlan (GMT-07:00) Arizona (GMT-06:00) Central Time (US & Canada)
Meeting Code	+
Event	*

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

End Date	* 12/20/2019 12:00 AM
Time Zone	* (GMT-05:00) Eastern Time (US & Canada)
When Registration Opens and Closes	
Registration Starts	---
Registration Ends	---

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.

Currency	US Dollar
Single Currency	<input type="checkbox"/>
Meeting Type and Status	
Meeting Type	--Select--
Meeting Closed	No
Capacity	

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

Single Currency	<input type="checkbox"/>
Meeting Type and Status	
Meeting Type	Conference
Meeting Closed	No
Capacity	
Maximum Capacity	---

Add a maximum capacity in this field if you would like

Meeting Type	Conference
Meeting Closed	Yes
Capacity	
Maximum Capacity	---
Waitlist Off	No
Meeting Location	

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

Meeting Closed	Yes
Capacity	
Maximum Capacity	100
Waitlist Off	No
Meeting Location	
Location	---

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

Location	---
Look for Location	
<input type="text"/> <input type="button" value="Lookup"/>	

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.

A screenshot of a web form for meeting setup. It features a search bar with 'Four Seasons Baltimore' entered. Below it is a field labeled 'Lookup for Location Detail' with a red box highlighting a magnifying glass icon (lookup button) to its right. At the bottom, there is a status bar showing 'unsaved changes', a 'Save' button, and a timestamp of '10:32 AM 12/16/2019'.

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.

A screenshot of the 'New Event Meeting Setup' form in a Dynamics CRM interface. The left sidebar shows navigation options like 'Home', 'Recent', and 'Dashboards'. The main area has tabs for 'Meeting', 'Accounting', 'Registration Setup', and 'Session Setup'. The 'Accounting' tab is selected and highlighted with a red box. Below the tabs, fields for 'Name' (Test Meeting 1), 'Meeting Code' (TM1), and 'Event' (2020 New Event) are visible. The top of the form shows 'Alliance by PROTECH' and 'UX 365 Hub'.

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.

A screenshot of the 'Accounting' section of the meeting setup form. It shows a table with columns for 'Taxable' and 'Secondary GL Account'. The 'Taxable' field has a value of 'No'. A red box highlights a magnifying glass icon (lookup button) to the right of the 'Taxable' field. The 'Secondary GL Account' field is currently empty and has a '---' value.

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.

A screenshot of the 'Accounting' section of the meeting setup form, focusing on the 'Secondary GL Account' field. A red box highlights a magnifying glass icon (lookup button) to the right of the 'Secondary GL Account' field. The 'Taxable' field still shows 'No'.

Select the primary GL account from the dropdown.





Chart of Accounts
100-2176-00
Deferred Exhibit Revenue by Date 100-2135-00
Deferred Exhibit Revenue by Event 100-2130-00
Deferred Meeting Revenue by Date - Assn Inc. 100-2185-00
Deferred Meeting Revenue by Event - Assn Inc.

[+ New Chart of Accounts](#)

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.

View Details	Online Description	Online Details	Online Meeting - Additional Information
		Taxable	No
<input type="text"/>	<input type="text"/>	Secondary GL Account	---

Select the AR account from the dropdown.



AR GL Account	Look for AR GL Account
	Chart of Accounts
	 Accounts Receivable - Advertising - Assn Inc. 100-1272-00
	 Accounts Receivable - Exhibits - Assn Inc. 100-1271-00
	 Accounts Receivable - Meetings - Assn Inc. 100-1270-00
	 Accounts Receivable - Product Sales - Assn Inc. 100-1273-00
	+ New Chart of Accounts

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.


[/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=entityrecord&etn=pa_eventm](#)


JX 365 Hub

Close  Flow 

ting Setup

[ing](#)
[Registration Setup](#)
[Session Setup](#)
[Web Details](#)
[Online Description](#)
[Online D](#)

*  365B - Assn Inc.

unt *  Meeting Revenue

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

Event Meeting Setup

Accounting Registration Setup Session Setup **Web Details** Online Description

Publish To Web **No**

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.

83e-000d3a19c80e8&pagetype=entityrecord&etn=pa_eventmeetingsetup

SANDBOX

Setup **Web Details** Online Description **Online Details** Online Meeting - Additional

Online Details

Simple Meeting **N**

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

Online Meeting Detail

Default Registration ---

Chapter ---

Committee ---

Region ---

Show Registrants **No**

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.'

al Infor... Online Meeting - Contact Us **User Defined Fields** ...

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.”

New Event Meeting Setup				
Meeting	Accounting	Registration Setup	Session Setup	Waitlist
Logical fields (Yes/No)				
Bit Field 1 Required	No			
Bit Field #1	---			
Bit Field 3 Required	No			
Bit Field #3	---			

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.

Bit Field #3	---
Numeric (currency) fields	
Currency Field 1 Required	No
Currency Field #1	---
Currency Field 3 Required	No
Currency Field #3	---

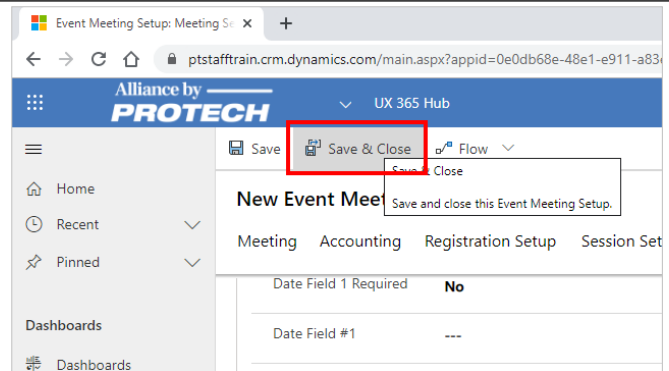
Date fields – To set up fields to track date information, type labels in the Date fields section. For example, you can use these fields to track a registrant’s certification or graduation date.

Currency Field #3	---
Date fields	
Date Field 1 Required	No
Date Field #1	---
Date Field 3 Required	No
Date Field #3	---

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.

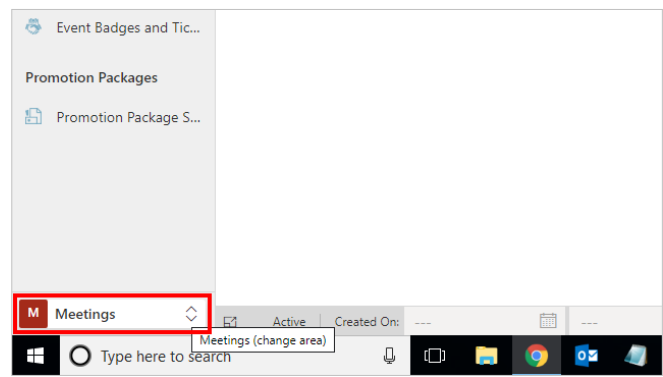
Text (alphanumeric) fields	
Text Field 1 Required	No
Text Field #1	---
Text Field 3 Required	No
Text Field #3	---
Text Field 5 Required	No

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

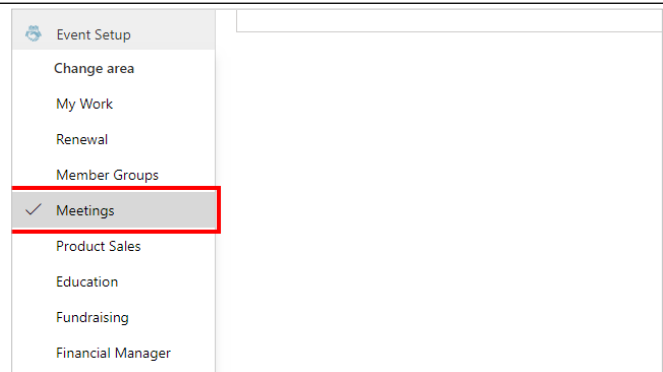


5.21. Setting up Registration Cancellation Fees

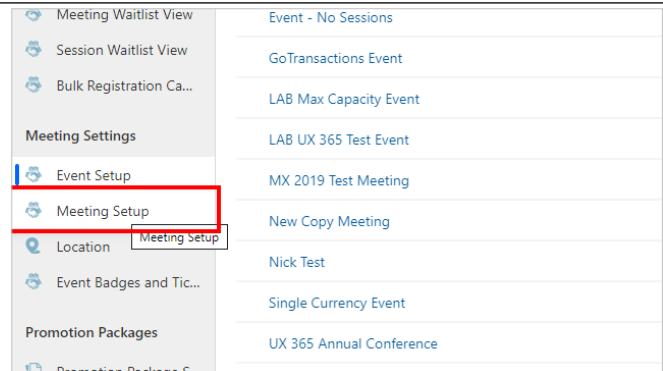
Click on the button **Meetings (change area)**



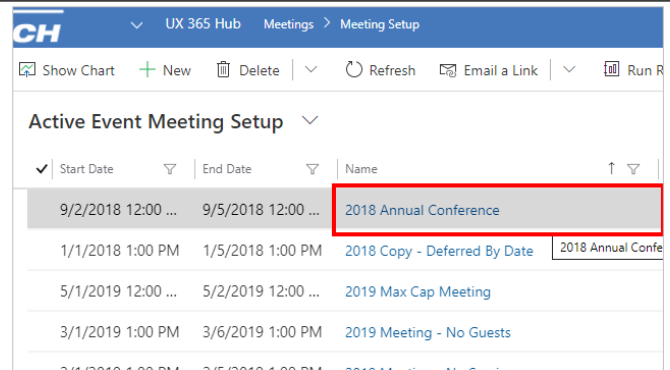
Click on the item **Meetings**



Click on the item **Meeting Setup**

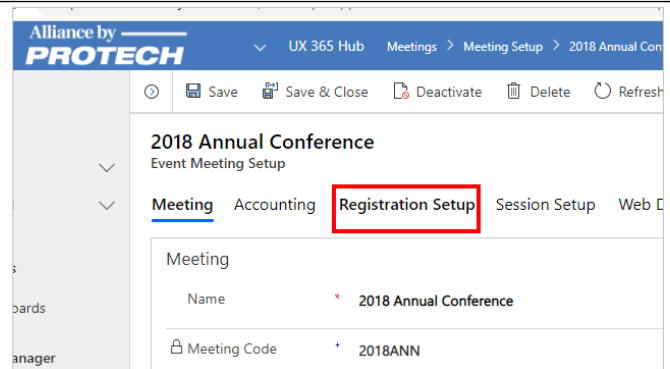


Open the Meeting record



Start Date	End Date	Name
9/2/2018 12:00 ...	9/5/2018 12:00 ...	2018 Annual Conference
1/1/2018 1:00 PM	1/5/2018 1:00 PM	2018 Copy - Deferred By Date
5/1/2019 12:00 ...	5/2/2019 12:00 ...	2019 Max Cap Meeting
3/1/2019 1:00 PM	3/6/2019 1:00 PM	2019 Meeting - No Guests

Click on the Registration Setup tab



2018 Annual Conference
Event Meeting Setup

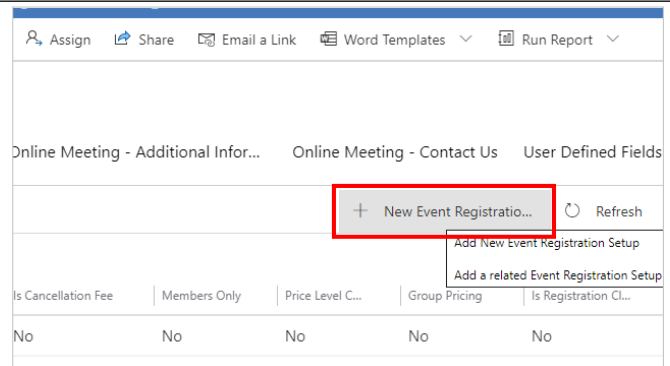
Meeting Accounting **Registration Setup** Session Setup Web D

Meeting

Name * 2018 Annual Conference

Meeting Code * 2018ANN

Click on New Registration



Assign Share Email a Link Word Templates Run Report

Online Meeting - Additional Infor... Online Meeting - Contact Us User Defined Fields

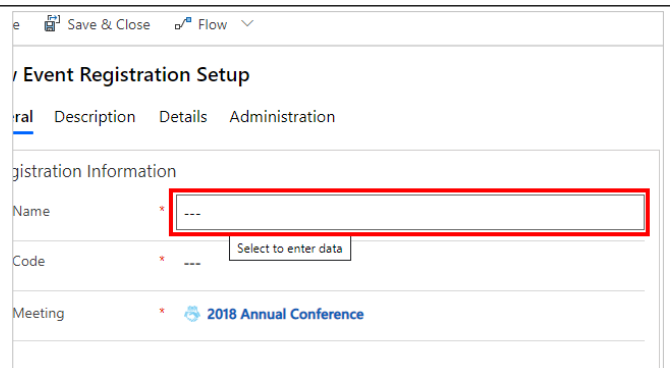
+ New Event Registratio... Refresh

Add New Event Registration Setup

Add a related Event Registration Setup

Is Cancellation Fee	Members Only	Price Level C...	Group Pricing	Is Registration CL...
No	No	No	No	No

Click on the text field **Name**



Save & Close Flow

Event Registration Setup

ral Description Details Administration

Registration Information

Name * ---

Code * --- Select to enter data

Meeting * 2018 Annual Conference

Enter **Name**.

Save & Close Flow

Event Registration Setup

General Description Details Administration

Registration Information

Name * c|

Code * ---

Meeting * 2018 Annual Conference

Click on the text field **Code**

Event Registration Setup

General Description Details Administration

Registration Information

Name * Cancellation Fee

Code * ---

Meeting * 2018 Annual Conference

Location ---

Enter **Code**.

Event Registration Setup

General Description Details Administration

Registration Information

Name * Cancellation Fee

Code * CF

Meeting * 2018 Annual Conference

Location ---

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

	Registration Options	Price
Is Main Registration?	Yes	Price
Is Package	No	Default
Is Cancellation Fee	No	Price
		Badg

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

	Registration Options Is Main Registration? * No Is Package No Is Cancellation Fee No Restricted Sessions No Group Pricing No	Price Price Default Price Badge Account
--	---	---

Click on the text field **Price**

	Price Price * --- Default Price Level * --- Price Level Controlled No Badge or Ticket ---
--	---

Enter **Price**.

	Price Price * 5 Default Price Level * --- Price Level Controlled No Badge or Ticket ---
--	---

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

	Price Price * 50.00 Default Price Level * Look for Default Price Level Price Level Controlled No Badge or Ticket ---
--	--

Click on an option from the list

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

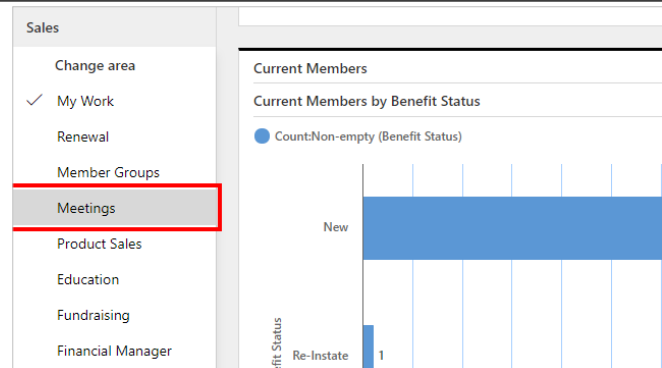
Cancellation Fee has been added

5.22. Setting up Registrations

5.22.1. Setting Up Registrations

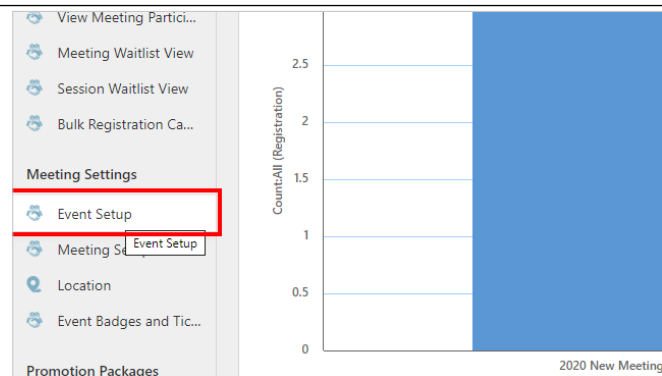
Click on the button My Work

Click on the item **Meetings**



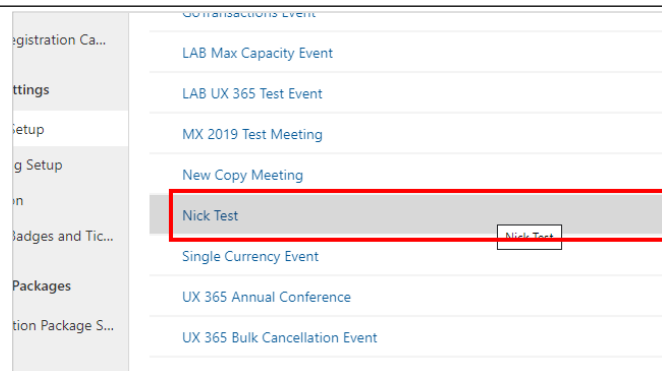
The screenshot shows a sidebar menu with the following items: Sales, Change area, My Work (checked), Renewal, Member Groups, **Meetings** (highlighted with a red box), Product Sales, Education, Fundraising, and Financial Manager. The main content area displays 'Current Members' and a bar chart titled 'Current Members by Benefit Status' showing a count of 1 for 'Re-Instate'.

Click on the item **Event Setup**



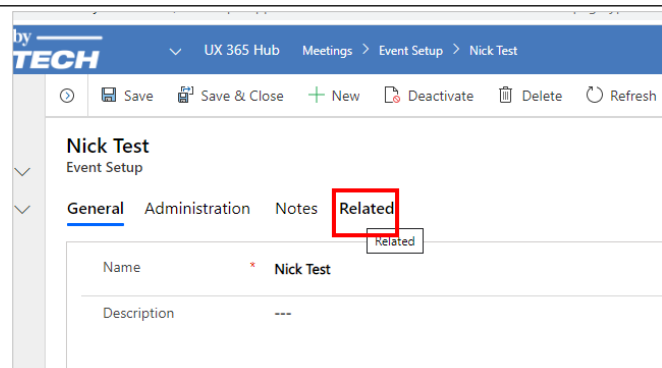
The screenshot shows a sidebar menu with the following items: View Meeting Parti..., Meeting Waitlist View, Session Waitlist View, Bulk Registration Ca..., Meeting Settings, **Event Setup** (highlighted with a red box), Meeting S..., Location, and Event Badges and Tic... The main content area displays a bar chart titled 'Count:All (Registration)' showing a count of 2.5 for '2020 New Meeting'.

Locate and open the event



The screenshot shows a list of events under the 'Meetings' section. The events listed are: LAB Max Capacity Event, LAB UX 365 Test Event, MX 2019 Test Meeting, New Copy Meeting, **Nick Test** (highlighted with a red box), Single Currency Event, UX 365 Annual Conference, and UX 365 Bulk Cancellation Event.

Click on the item **Related**



The screenshot shows the 'Nick Test' event setup page. The tabs are: General, Administration, Notes, and **Related** (highlighted with a red box). The 'Related' tab is active, showing a form with fields for Name (Nick Test) and Description (---).

Click on the menu item **Meeting Setup**

The screenshot shows the 'Related' dropdown menu for the 'Nick Test' record. The menu includes options: 'Related - Common', 'Activities', 'Audit History', and 'Meeting Setup'. The 'Meeting Setup' option is highlighted with a red box.

Click and open the meeting setup

The screenshot shows the 'Event Meeting Setup Associated View' table. The table has columns: Name, Max Capacity. The row 'Nick Test Meeting' is highlighted with a red box. Below the table, it says '1 - 1 of 1 (0 selected)'.

Click on the item **Registration Setup**

The screenshot shows the 'Nick Test Meeting' record. The 'Registration Setup' tab is highlighted with a red box. The 'Meeting' section shows 'Name: Nick Test Meeting' and 'Meeting Code: 123'.

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

The screenshot shows the 'Add New Event Registration Setup' button. The button is highlighted with a red box. Below the button, there are links: 'Add New Event Registration Setup' and 'Add a related Event Registration Setup'.

Enter the name of the registration.

The screenshot shows the 'Event Registration Setup' form with tabs for 'General', 'Description', 'Details', and 'Administration'. Under 'Registration Information', the 'Name' field is highlighted with a red box and contains '---'. A 'Select to enter data' button is next to it. The 'Code' field also contains '---'. The 'Meeting' field is set to 'Nick Test Meeting'.

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.

The screenshot shows the 'Event Registration Setup' form. The 'Name' field now contains 'Nick Test Meeting'. The 'Code' field is highlighted with a red box and contains '---'. The 'Meeting' field is still 'Nick Test Meeting'. The 'Location' field at the bottom is set to 'Four Seasons Baltimore'.

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

The screenshot shows the 'Event Registration Setup' form. The 'Name' field contains 'Nick Test Meeting', the 'Code' field contains '123', and the 'Meeting' field is highlighted with a red box and contains 'Nick Test Meeting'. The 'Location' field is 'Four Seasons Baltimore' and the 'Location Detail' is 'Salon B'.

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

The screenshot shows the 'Event Registration Setup' form. The 'Name' field contains 'Nick Test Meeting', the 'Code' field contains '123', the 'Meeting' field contains 'Nick Test Meeting', and the 'Location' field is highlighted with a red box and contains 'Four Seasons Baltimore'. The 'Location Detail' is 'Salon B'.

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

Meeting Manager View Meeting Parti... Meeting Waitlist View Session Waitlist View Bulk Registration Ca... Meeting Settings Event Setup Meeting Setup Location Event Release and Tie...	Meeting * Nick Test Meeting
	Location Four Seasons Baltimore
	Location Detail Salon B
	Location Detail- Unique identifier for Location Detail ass

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

	Registration Options Is Main Registration? * Yes <small>Is Main Registration?</small> Is Package No Is Cancellation Fee No

If this registration will include packaged sessions, select Yes.

	Registration Options Is Main Registration? * Yes Is Package No <small>Is Package- Identifies if the Registration contain</small> Is Cancellation Fee No Restricted Sessions No

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.

	Registration Options Is Main Registration? * Yes Is Package No Is Cancellation Fee No <small>Is Cancellation Fee</small> Restricted Sessions No Group Pricing 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.

Is Package	No
Is Cancellation Fee	No
Restricted Sessions	No
<small>Restricted Sessions- Identifies if the Registration</small>	
Group Pricing	No
Members Only	No

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

Is Cancellation Fee	No
Restricted Sessions	No
Group Pricing	No
<small>Group Pricing</small>	
Members Only	No
Publish To Web	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.

Restricted Sessions	No
Group Pricing	No
Members Only	No
<small>Members Only- Identifies if the Registration is</small>	
Publish To Web	No
Registration Closed	No

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

Group Pricing	No
Members Only	No
Publish To Web	No
<small>Publish To Web- Indicates if the record should</small>	
Registration Closed	No

Registration Closed identifies if the registration is opened or closed.

Members Only	No
Publish To Web	No
Registration Closed	No

Enter the default price based on the default price list.

Price	
Price	<input type="text" value="Select to enter data"/>
Default Price Level	---
Price Level Controlled	No

Required fields must be filled in.

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.

Price	
Price	\$50.00
Default Price Level	Look for Default Price Level <input type="button" value="Lookup"/>
Price Level Controlled	No
Badge or Ticket	---

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

Price	
Price	\$50.00
Default Price Level	Member
Price Level Controlled	No
Badge or Ticket	---
Accounting	

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

Yes	Price	Price	\$50.00
No	Default Price Level	Member	X
No	Price Level Controlled	No	
No	Badge or Ticket	---	
No	Badge or Ticket- Unique identifier for EventBadgeTicketXref as		
No	Accounting		
No	Company	365A - Fabrikam	

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

No	Badge or Ticket	---
No	Accounting	
No	Company	365A - Fabrikam
No	Company- Unique identifier for Company associated w	
No	Primary GL Account	Deferred Meeting R
No	Secondary GL Account	Exhibit Revenue
No	AR GL Account	Accounts Receivable

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.

No	Accounting	
No	Company	365A - Fabrikam
No	Primary GL Account	Deferred Meeting R
No	Primary GL Account- Unique identifier for Chart of Accounts ass	
No	Secondary GL Account	Exhibit Revenue
No	AR GL Account	Accounts Receivable
	Taxable	

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.

No	Accounting	
No	Company	365A - Fabrikam
No	Primary GL Account	Deferred Meeting R
No	Secondary GL Account	Exhibit Revenue
No	Secondary GL Account- Unique identifier for Chart of Accounts ass	
No	AR GL Account	Accounts Receivable
	Taxable	
	Currency	US Dollar

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.

No	Company * 365A - Fabrikam
No	Primary GL Account * Deferred Meeting Revenue
No	Secondary GL Account * Exhibit Revenue
	AR GL Account * Accounts Receivable
	AR GL Account- Unique identifier for Chart of Accounts associated with this registration
	Taxable <input type="checkbox"/>
	Currency US Dollar

If this registration is taxable, mark this option.

No	Primary GL Account * Deferred Meeting Revenue
No	Secondary GL Account * Exhibit Revenue
	AR GL Account * Accounts Receivable
	Taxable <input type="checkbox"/>
	Taxable- Is this registration taxable?
	Currency US Dollar

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

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=...

Alliance by PROTECH UX 365 Hub

Save Save & Close Flow

New Event Registration Setup

General **Description** Details Administration

Registration Information

Name * Nick Test Meeting

Code * 123

Click on the item **Administration**

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=...

Alliance by PROTECH UX 365 Hub

Save Save & Close Flow

New Event Registration Setup

General Description Details **Administration**

Description

Displays the related registration setup record.

The screenshot shows the 'New Event Registration Setup' form with the 'Administration' tab selected. The 'Information' section contains a 'Product' field, which is highlighted with a red box. The left sidebar shows navigation options like Home, Recent, Pinned, Dashboards, and Meeting Manager.

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

This screenshot shows the same form as the previous one, but the 'Save & Close' button in the top right corner is highlighted with a red box. A tooltip is visible over the button, stating 'Save and close this Event Registration Setup.' The left sidebar remains the same.

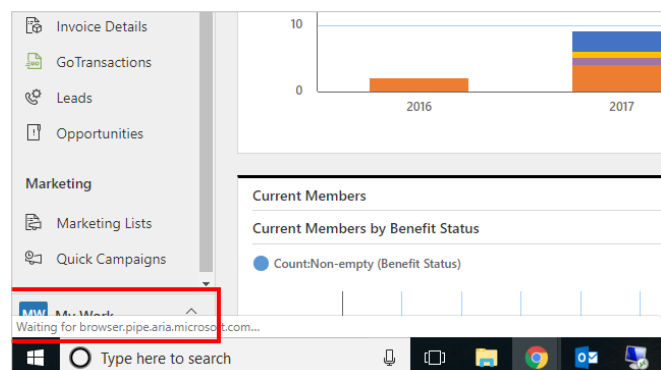
Once all info is Saved and Closed, the registration will show up in this view.

The screenshot displays the 'Registration Setup' table. It has columns for 'Is Main Registrati...', 'Name', and 'Code'. A single record is shown with 'Yes' for 'Is Main Registrati...', 'Nick Test Meeting' for 'Name', and '123' for 'Code'. The table is highlighted with a red border.

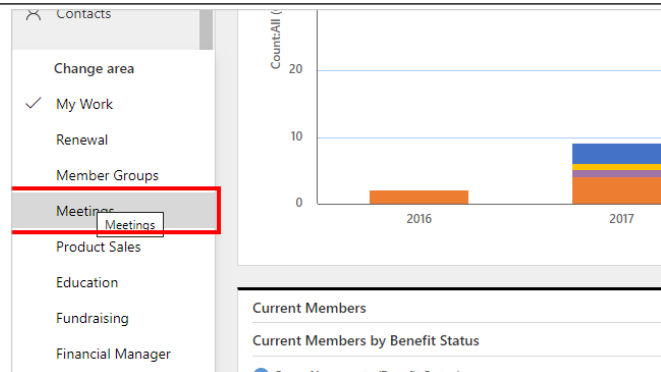
Is Main Registrati...	Name	Code
Yes	Nick Test Meeting	123

5.23. Setting up Registrations with Packaged Sessions

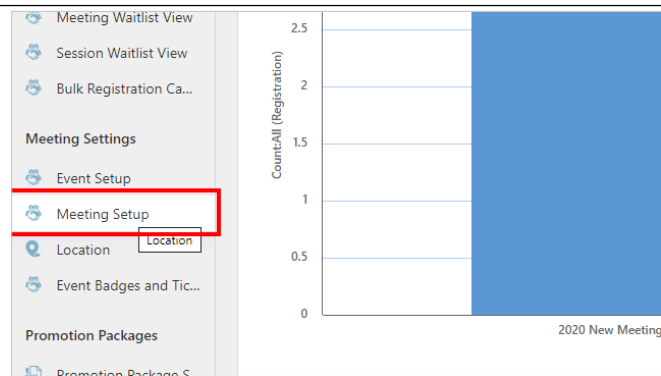
Click on **MW My Work**



Click on the item **Meetings**



Click on the item **Meeting Setup**



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

1/1/2018 1:00 PM	1/5/2018 1:00 PM	2018 Copy - Deferred By Date
5/1/2019 12:00 ...	5/2/2019 12:00 ...	2019 Max Cap Meeting
3/1/2019 1:00 PM	3/6/2019 1:00 PM	2019 Meeting - No Guests
2/1/2019 1:00 PM	2/5/2019 1:00 PM	2019 Meeting - No Sessions
1/1/2020 12:00 ...	1/3/2020 12:00 ...	2020 New Meeting
1/1/2020 12:00 ...	1/3/2020 12:00 ...	Copy Meeting
8/1/2018 12:00 ...	8/11/2018 12:00...	Copy Meeting
1/1/2019 1:00 PM	1/3/2019 1:00 PM	Copy Test Meeting
10/1/2019 12:00 ...	10/5/2019 12:00 ...	Copy Test Meeting

Click on the item **Registration Setup**

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

Online Meeting - Additional Infor...	Online Meeting - Contact Us	User Defined Fields		
+	New Event Registration...	Refresh		
Add a related Event Registration Set				
Is Cancellation Fee	Members Only	Price Level C...	Group Pricing	Is Registration Cl...
No	No	No	No	No

Enter the name of the package

Event Registration Setup

General Description Details Administration

Registration Information

Name * ---

Code * ---

Meeting * 2020 New Meeting

Enter **name**.

Event Registration Setup

General Description Details Administration

Registration Information

Name * M

Code * Test Protech

Meeting * Manage...

Click on the text field **Code**

Event Registration Setup

General Description Details Administration

Registration Information

Name * Meal Package

Code * ---

Meeting * 2020 New Meeting

Location ---

Enter **code for registration**.

Event Registration Setup

ral Description Details Administration

Registration Information

Name * Meal Package

Code *

Meeting * 2020 New Meeting

Location ---

Mark is package as yes

Registration Options

Is Main Registration? * Yes

Is Package *

Is Cancellation Fee No

Restricted Sessions No

Price

Price

Default

Price L

Badge

Click on the text field **Price**

Price

Price *

Default Price Level *

Price Level Controlled No

Badge or Ticket ---

Select to enter data

Enter price for package

Price

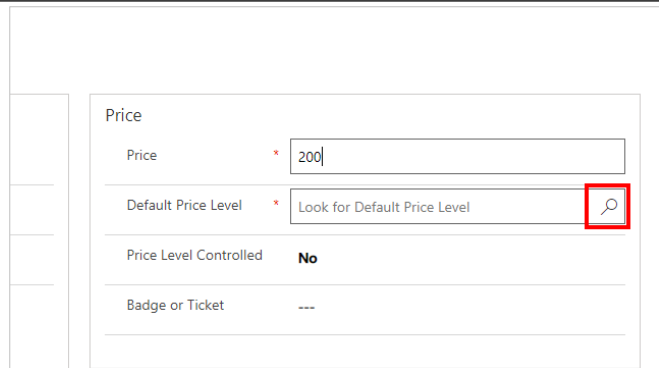
Price *

Default Price Level * ---

Price Level Controlled No

Badge or Ticket ---

Click on the link **Default Price Level**



Price

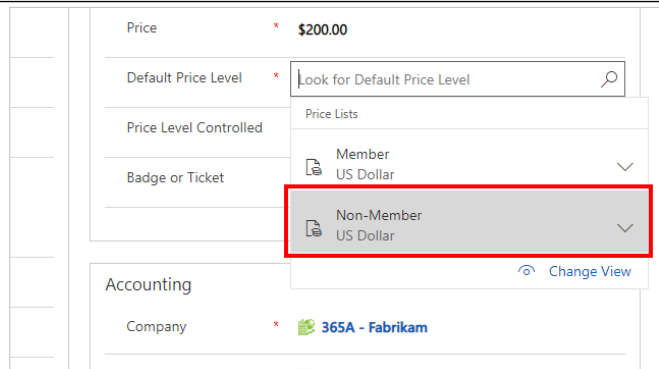
Price * 200

Default Price Level * Look for Default Price Level

Price Level Controlled No

Badge or Ticket ---

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



Price * \$200.00

Default Price Level * Look for Default Price Level

Price Level Controlled

Badge or Ticket

Price Lists

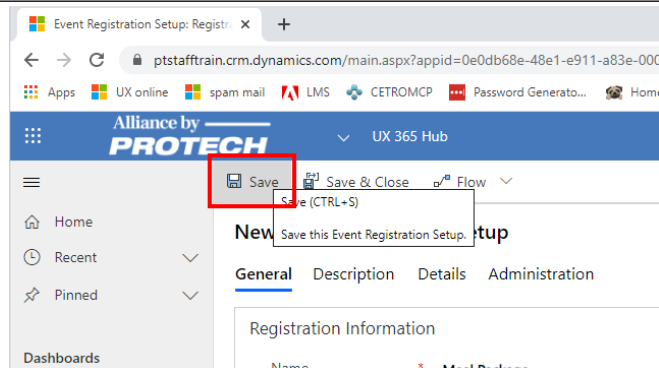
- Member US Dollar
- Non-Member US Dollar**

Accounting

Company * 365A - Fabrikam

Change View

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



Event Registration Setup: Registr...

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000...

Apps UX online spam mail LMS CETROMCP Password Generato... Home

Alliance by PROTECH UX 365 Hub

Save Save & Close Flow

Save (CTRL+S)

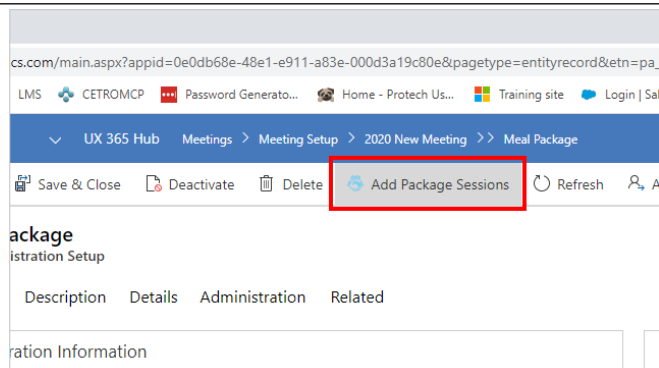
New Save this Event Registration Setup

General Description Details Administration

Registration Information

Name * Meal Package

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



cs.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=entityrecord&etn=pa...

LMS CETROMCP Password Generato... Home - Protech Us... Training site Login | Sal

UX 365 Hub Meetings Meeting Setup 2020 New Meeting Meal Package

Save & Close Deactivate Delete Add Package Sessions Refresh A

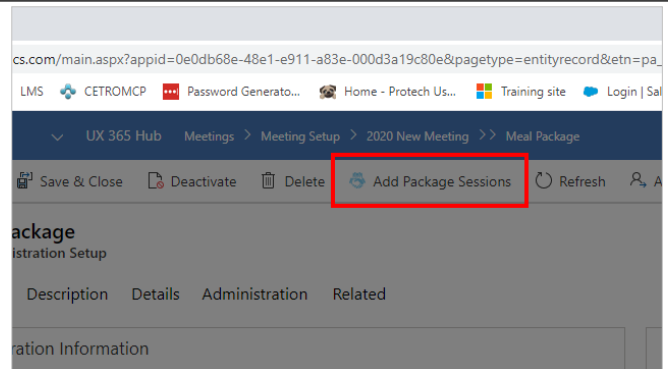
Package

istration Setup

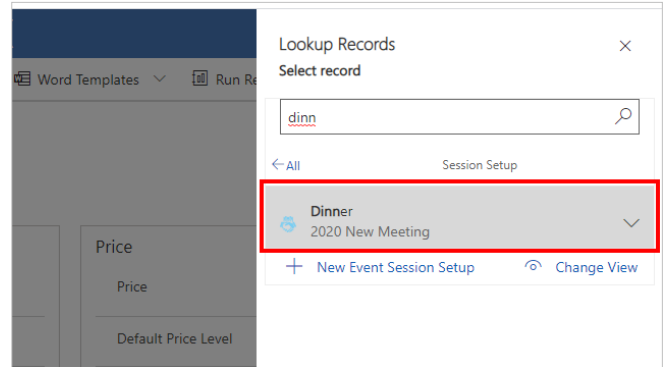
Description Details Administration Related

ration Information

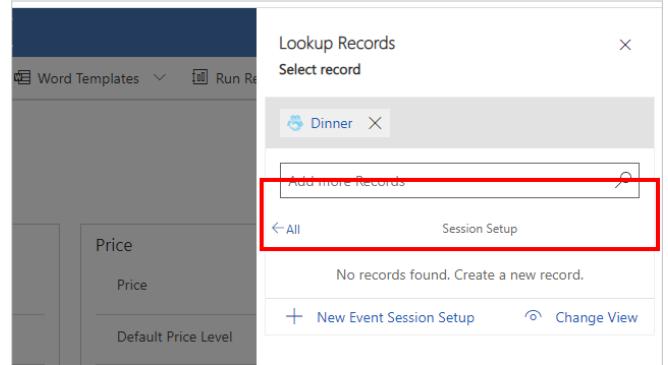
Enter name of sessions you would like to add or create them if they have not yet been created



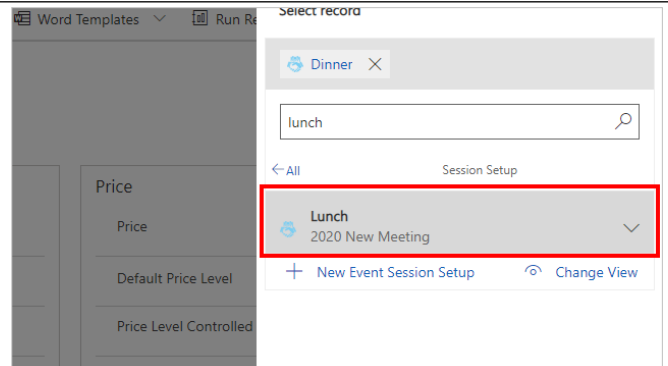
Click on session you would like to add



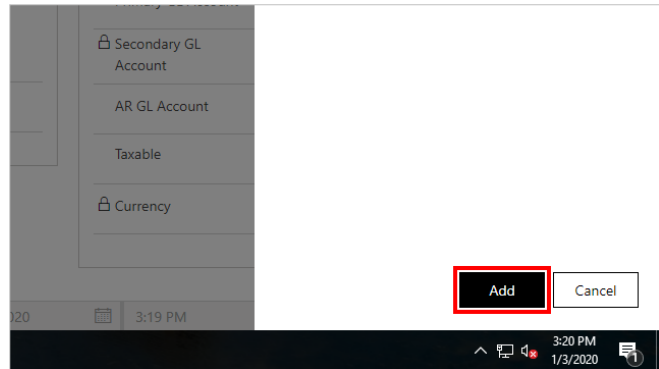
Enter name of sessions you would like to add or create them if they have not yet been created



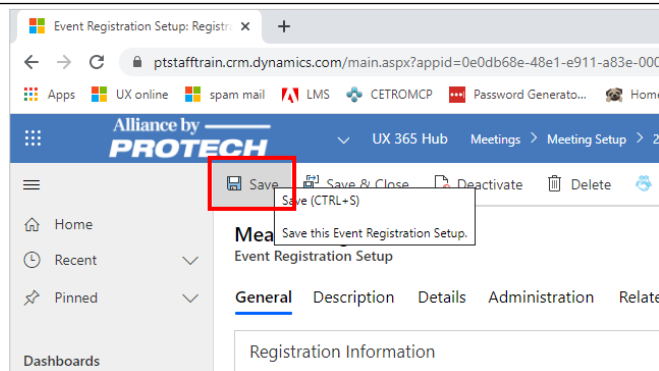
Click on session you would like to add



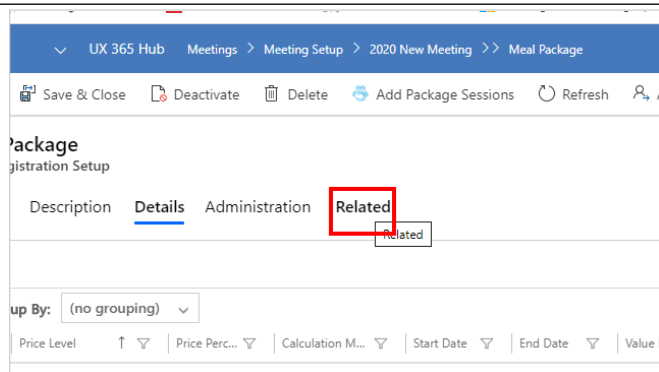
Click on the button **Add**



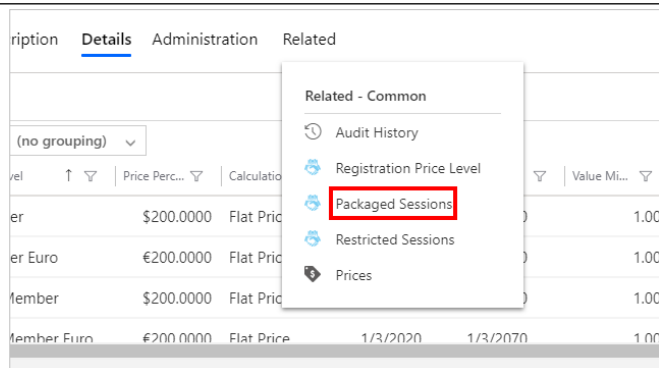
Click on the menu item **Save (CTRL+S)**



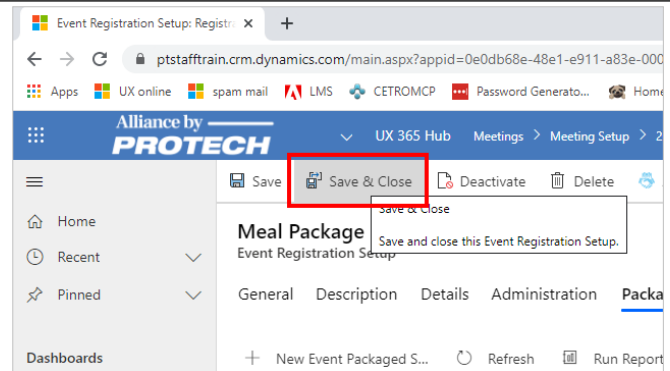
Click on the item **Related**



Click on the menu item **Packaged Sessions**



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

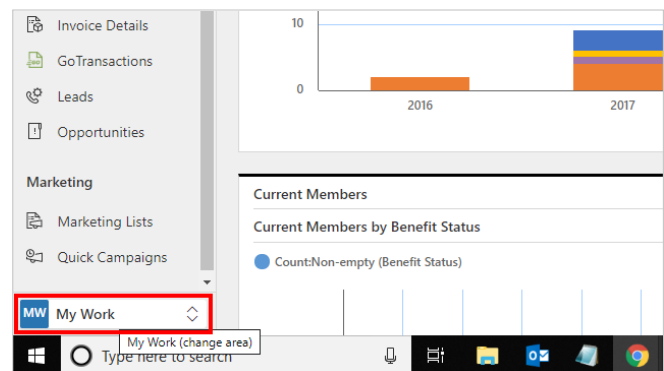


5.24. Setting up Session and Registration Prices

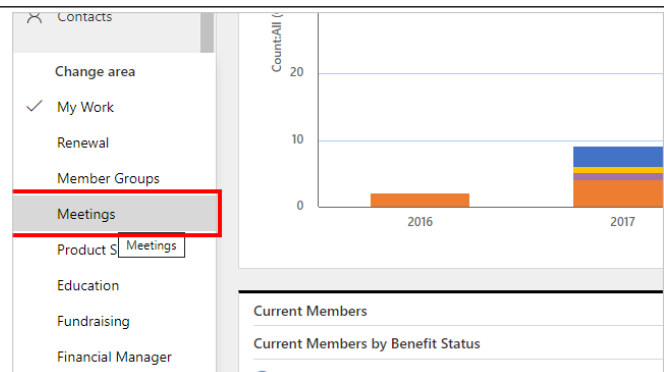
5.24.1. Setting up registration prices

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.

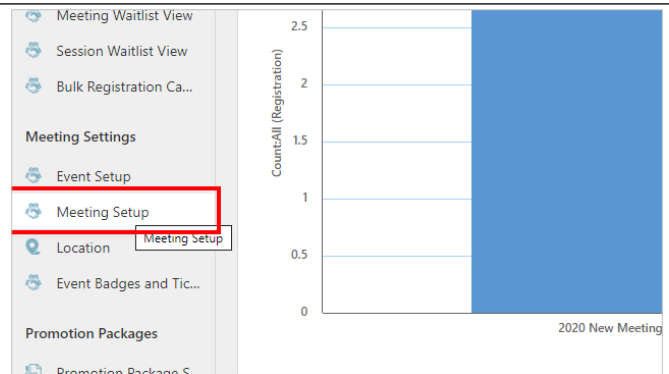
Click on the button **My Work (change area)**



Click on the item **Meetings**



Click on the item **Meeting Setup**



Click on the cell **Name**

1/1/2018 1:00 PM	1/5/2018 1:00 PM	2018 Copy - Deferred By Date
5/1/2019 12:00 ...	5/2/2019 12:00 ...	2019 Max Cap Meeting
3/1/2019 1:00 PM	3/6/2019 1:00 PM	2019 Meeting - No Guests
2/1/2019 1:00 PM	2/5/2019 1:00 PM	2019 Meeting - No Sessions
1/1/2020 12:00 ...	1/3/2020 12:00 ...	2020 New Meeting
1/1/2020 12:00 ...	1/3/2020 12:00 ...	Copy Meeting
8/1/2018 12:00 ...	8/11/2018 12:00...	Copy Meeting
1/1/2019 1:00 PM	1/3/2019 1:00 PM	Copy Test Meeting
10/1/2019 12:00 ...	10/5/2019 12:00 ...	Copy Meeting

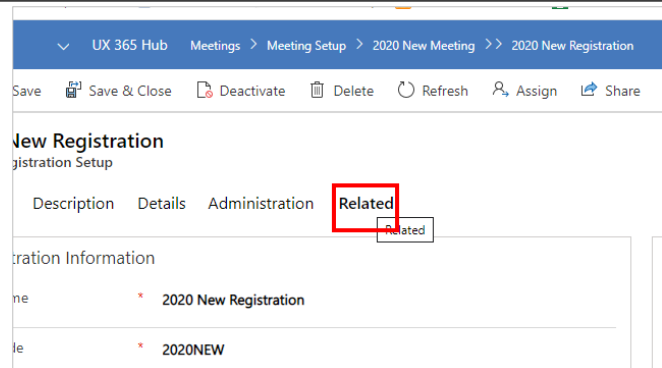
Click on the item **Registration Setup**

The screenshot shows the '2020 New Meeting' setup page. The 'Registration Setup' tab is selected and highlighted with a red box. Below the tabs, the 'Meeting' section is visible with the following fields: Name (2020 New Meeting) and Meeting Code (2020NEW).

Click on the cell **Name**

Is Main Registrati...	Name	Code
Yes	2020 New Registration	2020NEW
Yes	Meal Package	2020 New Registration
Yes	Price level Controlled	PLC

Click on the item **Related**



UX 365 Hub Meetings > Meeting Setup > 2020 New Meeting >> 2020 New Registration

Save Save & Close Deactivate Delete Refresh Assign Share

New Registration
Registration Setup

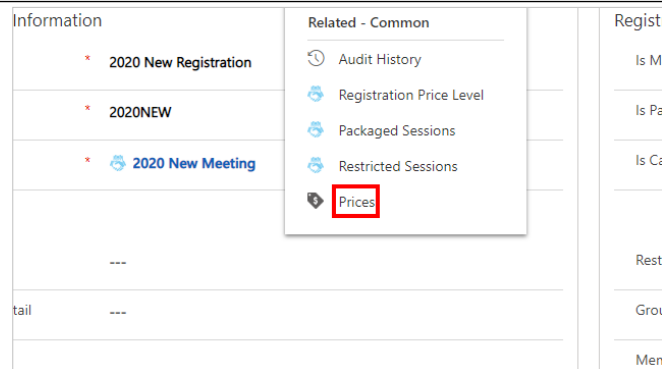
Description Details Administration **Related**

Registration Information

Name * 2020 New Registration

File * 2020NEW

Click on the menu item **Prices**



Information

* 2020 New Registration

* 2020NEW

* 2020 New Meeting

tail ---

Related - Common

Audit History

Registration Price Level

Packaged Sessions

Restricted Sessions

Prices

Registr...

Is M...

Is Pa...

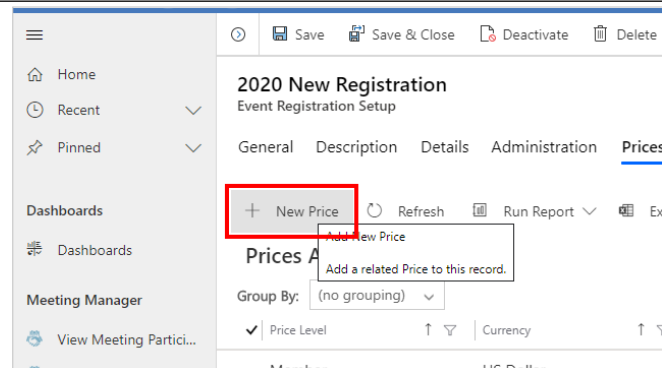
Is Ca...

Rest...

Grou...

Men...

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



Home Recent Pinned Dashboards Meeting Manager View Meeting Partici...

Save Save & Close Deactivate Delete

2020 New Registration
Event Registration Setup

General Description Details Administration **Prices**

+ New Price Refresh Run Report Ex

Prices A
Add a related Price to this record.

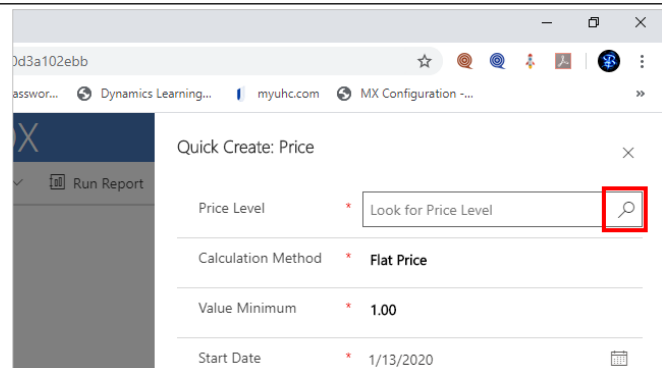
Group By: (no grouping)

Price Level ↑ ↓ Currency ↑ ↓

Member US Dollar

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.



Quick Create: Price

Price Level * Look for Price Level

Calculation Method * Flat Price

Value Minimum * 1.00

Start Date * 1/13/2020

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

The screenshot shows the 'Quick Create: Price' form. The 'Price Level' dropdown is open, showing a list of options. 'Member US Dollar' is highlighted with a red box. Other options visible include 'Non-Member US Dollar'.

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.

The screenshot shows the 'Quick Create: Price' form. The 'Calculation Method' dropdown is open, showing 'Flat Price' selected and highlighted with a red box. Other options visible include 'Percentage'.

Value Minimum

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

The screenshot shows the 'Quick Create: Price' form. The 'Value Minimum' input field is highlighted with a red box and contains the value '1.00'. A small '1.00' tooltip is visible next to the input field.

Click on the input field **Start Date**

The screenshot shows the 'Quick Create: Price' form. The 'Start Date' input field is highlighted with a red box and contains the value '1/13/2020'. A calendar icon is visible next to the input field.

Enter start date.

✓ Run Report	Price Level * Member
	Calculation Method * Flat Price
	Value Minimum * 1.00
	Start Date * <input type="text" value="1"/>
	Name Member
	Factor ---
	Value Maximum * 999,999.00

Name
Defaults from the Price Level selected.

	Price Level * Member
	Calculation Method * Flat Price
	Value Minimum * 1.00
	Start Date * 12/1/2019
	Name <input type="text" value="Member"/> Member
	Factor ---
	Value Maximum * 999,999.00
	End Date * 1/13/2070

Factor
Does not apply.

	Calculation Method * Flat Price
	Value Minimum * 1.00
	Start Date * 12/1/2019
	Name Member
	Factor <input type="text" value="---"/>
	Value Maximum * 999,999.00
	End Date * 1/13/2070
	Currency US Dollar

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.

	Value Minimum * 1.00
	Start Date * 12/1/2019
	Name Member
	Factor ---
	Value Maximum * <input type="text" value="999,999.00"/> 999,999.00
	End Date * 1/13/2070
	Currency US Dollar
	Price Percent * ---

Click on the input field **End Date**

End Date: 1/13/2070

Enter end date.

End Date: 1/13/2070

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

Currency: US Dollar

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.

Price Percent: ---

Enter **Price Percent**.

Factor

Value Maximum * 999,999.00

End Date * 12/31/2019

Currency US Dollar

Price Percent * 75

Rate *

Click on the button **Save and Close**

Save and Close

Cancel

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.

Method	Price Percent	Start Date	End Date
	\$75.0000	12/1/2019	12/31/2019
	\$100.0000	12/16/2019	12/16/2069
	€100.0000	12/16/2019	12/16/2069
	\$100.0000	12/16/2019	12/16/2069
	€100.0000	12/16/2019	12/16/2069

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

Price Percent	Start Date	End Date	Value Minimum
\$75.0000	12/1/2019	12/31/2019	
\$100.0000 *	12/16/2019	12/16/2069 *	
€100.0000	12/16/2019	12/16/2069	
\$100.0000	12/16/2019	12/16/2069	
€100.0000	12/16/2019	12/16/2069	

Click on the button **Next Month**

	Start Date	End Date	Value Minimum	Value
0.0000	12/1/2019	12/31/2019		1.00
0.0000 *	12/16/2019 ▾	* 12/16/2069	*	1.00 *
0.0000	December, 2019 ▼	◀ • ▶		1.00
0.0000	Sun Mon Tue Wed Thu Fri Sat			1.00
0.0000	1 2 3 4 5 6 7			1.00
0.0000	8 9 10 11 12 13 14			
	15 16 17 18 19 20 21			
	22 23 24 25 26 27 28			

Click on **1**

Price Percent	Start Date	End Date	Value Minimum																																										
\$75.0000	12/1/2019	12/31/2019																																											
\$100.0000 *	12/16/2019	* 12/16/2069 *																																											
€100.0000	January, 2020 ▼ <div> ◀ ● ▶ </div> <table border="1"> <thead> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> </tr> </tbody> </table>			Sun	Mon	Tue	Wed	Thu	Fri	Sat	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																							
29	30	31	1	2	3	4																																							
5	6	7	8	9	10	11																																							
12	13	14	15	16	17	18																																							
19	20	21	22	23	24	25																																							
26	27	28	29	30	31	1																																							
\$100.0000																																													
€100.0000																																													
J	K	L	R S																																										

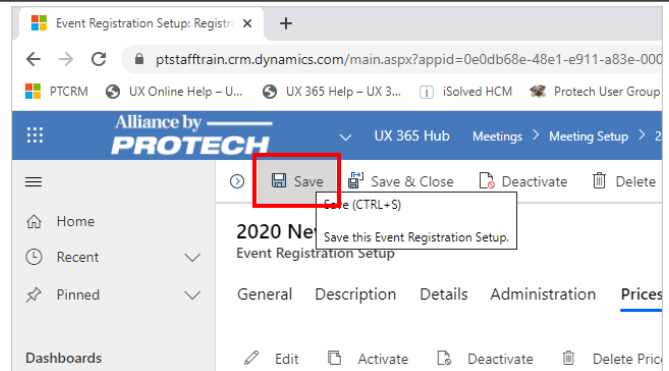
Click on **End Date**

Amount	Start Date	End Date	Value Minimum
\$75.0000	12/1/2019	12/31/2019	
\$100.0000 *	1/1/2020	12/16/2069	
€100.0000	12/16/2019	12/16/2069	
\$100.0000	12/16/2019	12/16/2069	
€100.0000	12/16/2019	12/16/2069	

Edit end date.

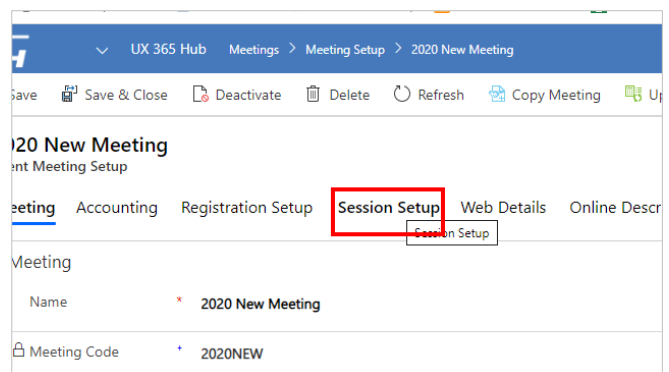
Amount	Start Date	End Date	Value Minimum
\$75.0000	12/1/2019	12/31/2019	
\$100.0000 *	1/1/2020	12/16/2069	
€100.0000	12/16/2019	12/16/2069	
\$100.0000	12/16/2019	12/16/2069	
€100.0000	12/16/2019	12/16/2069	

Click on the menu item **Save**

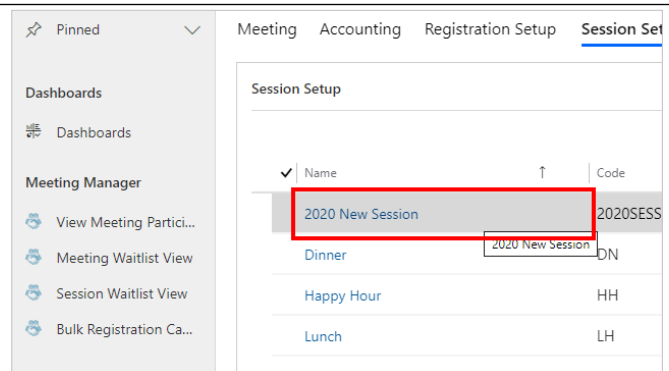


5.24.2. Setting up session prices

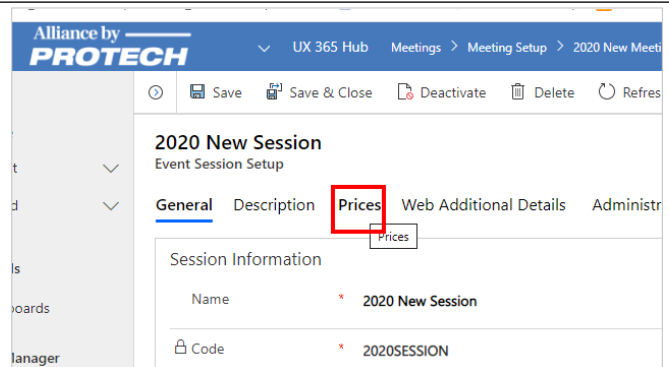
From the meeting setup record click on the item **Session Setup**.



Click on the cell **Name**



Click on the item **Prices**



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

The screenshot shows a software interface with a top navigation bar containing 'Word Templates' and 'Run Report'. Below this is a table with columns for 'Minimum', 'Value Maximum', 'Calculation Method', and 'Price Percent'. A red box highlights the '+ New Price' button in the top right corner of the table. A tooltip is visible over the button, showing 'Add New Price' and 'Add a related Price to this record.'.

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.

The screenshot shows a 'Quick Create: Price' form. The 'Price Level' field is a dropdown menu that is open, showing 'Look for Price Level' as the selected option. Other fields include 'Calculation Method' (Flat Price), 'Value Minimum' (1.00), and 'Start Date' (1/13/2020). A red box highlights the 'Look for Price Level' option in the dropdown.

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

The screenshot shows the 'Quick Create: Price' form with the 'Price Level' dropdown menu open. The 'Member US Dollar' option is selected and highlighted with a red box. Other fields include 'Calculation Method' (Flat Price), 'Value Minimum' (1.00), and 'Start Date' (1/13/2020).

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.

The screenshot shows the 'Quick Create: Price' form with the 'Calculation Method' dropdown menu open. The 'Flat Price' option is selected and highlighted with a red box. Other fields include 'Price Level' (Member), 'Value Minimum' (1.00), and 'Start Date' (1/13/2020).

Value Minimum
Quantity pricing is not applicable to Sessions.

Quick Create: Price

Price Level * Member

Calculation Method * Flat Price

Value Minimum * 1.00

Start Date * 1/13/2020

Name Member

Factor ---

Click on the input field **Start Date**

Quick Create: Price

Price Level * Member

Calculation Method * Flat Price

Value Minimum * 1.00

Start Date * 1/13/2020

Name

Factor

Value Maximum * 999,999.00

Enter start date.

Quick Create: Price

Price Level * Member

Calculation Method * Flat Price

Value Minimum * 1.00

Start Date * 1

Name Member

Factor ---

Value Maximum * 999,999.00

Name
Defaults from the Price Level selected.

Quick Create: Price

Price Level * member

Calculation Method * Flat Price

Value Minimum * 1.00

Start Date * 12/1/2019

Name Member

Factor ---

Value Maximum * 999,999.00

End Date * 1/13/2070

Factor
Does not apply.

Calculation Method	Rat Price
Value Minimum	* 1.00
Start Date	* 12/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/13/2070
Currency	US Dollar

Value Maximum
Quantity pricing is not applicable to Sessions.

Calculation Method	Rat Price
Value Minimum	* 1.00
Start Date	* 12/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/13/2070
Currency	US Dollar
Price Percent	* ---

Click on the input field **End Date**

Calculation Method	Rat Price
Value Minimum	* 1.00
Start Date	* 12/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/13/2070
Currency	US Dollar
Price Percent	* ---
Rate	* ---

Enter end date.

Calculation Method	Rat Price
Value Minimum	* 1.00
Start Date	* 12/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/1/2070
Currency	US Dollar
Price Percent	* ---
Rate	* ---

Currency

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

Value Maximum	Factor	Member
999,999.00	Value Maximum	* 999,999.00
999,999.00	End Date	* 12/31/2019
999,999.00	Currency	US Dollar
999,999.00	Price Percent	* ---
999,999.00	Rate	* ---

Click on the text field **Price Percent**

Value Maximum	Factor	Member
999,999.00	Value Maximum	* 999,999.00
999,999.00	End Date	* 12/31/2019
999,999.00	Currency	US Dollar
999,999.00	Price Percent	* ---
999,999.00	Rate	* ---

Enter **Price Percent**.

Value Maximum	Factor	Member
999,999.00	Value Maximum	* 999,999.00
999,999.00	End Date	* 12/31/2019
999,999.00	Currency	US Dollar
999,999.00	Price Percent	* 2
999,999.00	Rate	* ---

Click on the button **Save and Close**

Value Maximum	Factor	Member
999,999.00	Value Maximum	* 999,999.00
999,999.00	End Date	* 12/31/2019
999,999.00	Currency	US Dollar
999,999.00	Price Percent	* 2
999,999.00	Rate	* ---

Save and Close
Cancel

Using inline editing edit the price record that was created upon initial 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.

Price Level	Currency	Start Date	End Date	Value
Member	US Dollar	12/1/2019	12/31/2019	
Member	US Dollar	12/16/2019	12/16/2069	
Member Euro	Euro	12/16/2019	12/16/2069	
Non-Member	US Dollar	12/16/2019	12/16/2069	
Non-Member Euro	Euro	12/16/2019	12/16/2069	

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

Currency	Start Date	End Date	Value Minimum
US Dollar	12/1/2019	12/31/2019	
* US Dollar	12/16/2019	* 12/16/2069	*
Euro	12/16/2019	12/16/2069	
US Dollar	12/16/2019	12/16/2069	
Euro	12/16/2019	12/16/2069	

Click on the button **Next Month**

Start Date	End Date	Value Minimum	Value Maximum
12/1/2019	12/31/2019	1.00	999,999.00
12/16/2019	* 12/16/2069	1.00	999,999.00
December, 2019		1.00	999,999.00
Sun Mon Tue Wed Thu Fri Sat		1.00	999,999.00
1 2 3 4 5 6 7		1.00	999,999.00
8 9 10 11 12 13 14		1.00	999,999.00
15 16 17 18 19 20 21		1.00	999,999.00
22 23 24 25 26 27 28			

Click on **1**

Currency	Start Date	End Date	Value Minimum
US Dollar	12/1/2019	12/31/2019	1.00
US Dollar	1/1/2020	* 1/16/2069	1.00
Euro			1.00
US Dollar			1.00
Euro			1.00

Click on the cell **End Date**

Currency	Start Date	End Date	Value Minimum
US Dollar	12/1/2019	12/31/2019	1.00
US Dollar	1/1/2020	12/16/2069 *	1.00 *
Euro	12/16/2019	12/16/2069	1.00
US Dollar	12/16/2019	12/16/2069	1.00
Euro	12/16/2019	12/16/2069	1.00

Edit end date.

Currency	Start Date	End Date	Value Minimum
US Dollar	12/1/2019	12/31/2019	1.00
US Dollar	1/1/2020	1/16/2069 *	1.00 *
Euro	12/16/2019	12/16/2069	1.00
US Dollar	12/16/2019	12/16/2069	1.00
Euro	12/16/2019	12/16/2069	1.00

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.

1/1/2019 1:00 PM	1/3/2019 1:00 PM	Copy Test Meeting
10/1/2019 12:00...	10/5/2019 12:00...	GoTransactions Meeting
1/1/2019 1:00 PM	1/5/2019 1:00 PM	LAB Max Capacity Meeting
12/18/2019 1:00...	12/20/2019 10:0...	MX 2019 Test Meeting
1/6/2020 11:30 ...	1/6/2020 2:00 PM	New years meeting
12/16/2019 12:0...	12/20/2019 12:0...	Test Meeting 1
12/25/2019 12:0...	12/25/2019 2:00...	Test waitlist meeti
9/1/2018 12:00 ...	9/7/2018 12:00 ...	USD Single Currency Meeting

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.

UX 365 Hub Meetings > Meeting Setup > New years meeting

Save Save & Close Deactivate Delete Refresh Copy Meeting

New years meeting

Meeting Setup

Meeting Accounting Registration Setup **Session Setup** Web Details Online Descr

Meeting

Name * New years meeting

Meeting Code * ---

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

Assign Share Email a Link Flow Word Templates Run R

Online Meeting - Additional Infor... Online Meeting - Contact Us User Defined Fields

+ New Event Session Set... Refresh

Add New Event Session Setup

Add a related Event Session Setup to this Meeting ID

Price Publish To Web Meeting ID

Name – Enter the name of the session.

Save & Close Flow

Event Session Setup

General Description Prices Web Additional Details Administration

Session Information

Name * --- Select to enter date

Code * ---

Session Type ---

Meeting ID * New years meeting

Enter **Name**.

The screenshot shows the 'Event Session Setup' form with tabs for 'General', 'Description', 'Prices', 'Web Additional Details', and 'Administration'. The 'General' tab is active. Under 'Session Information', the 'Name' field is highlighted with a red box. Other fields include 'Code' (with a dropdown menu showing 'Test Tester' and 'Columbia'), 'Session Type', and 'Meeting ID' (with a 'New years meeting' button).

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.

The screenshot shows the 'Event Session Setup' form. The 'Name' field now contains 'AR Test Session'. The 'Code' field is highlighted with a red box and contains '---'. A 'Select to enter data' button is visible next to the code field. The 'Session Type' field also contains '---'.

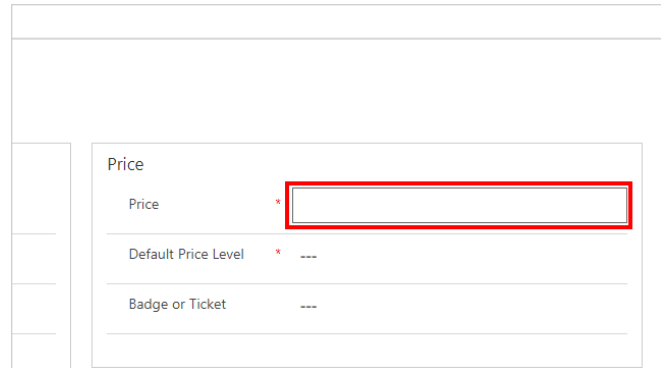
Enter **Code**.

The screenshot shows the 'Event Session Setup' form. The 'Name' field contains 'AR Test Session'. The 'Code' field is highlighted with a red box and contains 'TJ'. The 'Session Type' field contains '---'.

Enter the price of the session

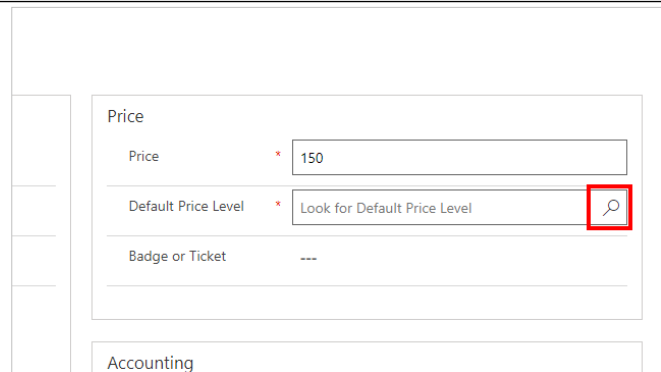
The screenshot shows the 'Event Session Setup' form with the 'Prices' tab active. The 'Price' field is highlighted with a red box and contains '---'. Other fields include 'Default Price Level' (with a 'Select to enter data' button) and 'Badge or Ticket'.

Enter **Price**.



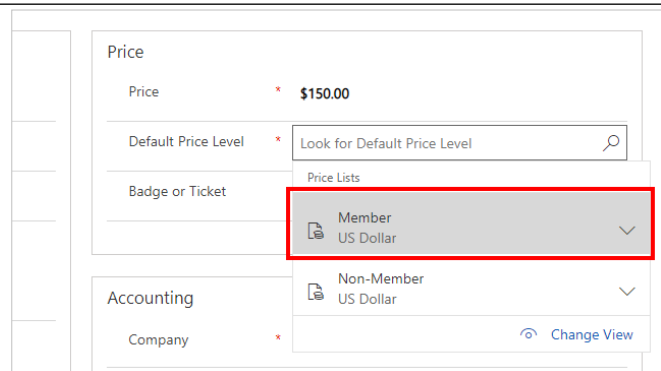
The screenshot shows a form titled 'Price' with three input fields: 'Price', 'Default Price Level', and 'Badge or Ticket'. The 'Price' field is highlighted with a red rectangular box.

Click on the link **Default Price Level**



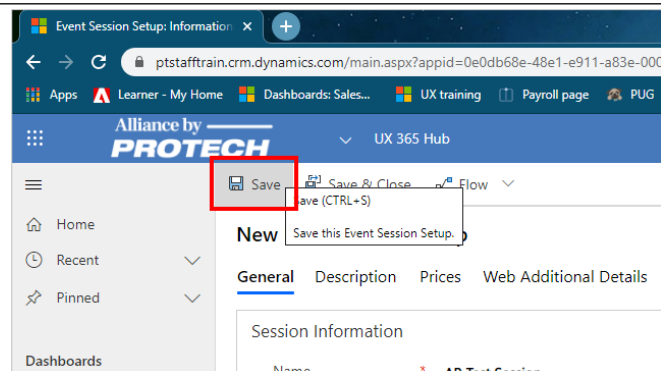
The screenshot shows the 'Price' form with the 'Price' field containing the value '150'. The 'Default Price Level' field is highlighted with a red rectangular box and contains the text 'Look for Default Price Level'.

Choose the default price level for the session.



The screenshot shows the 'Price' form with the 'Default Price Level' dropdown menu open. The 'Member US Dollar' option is highlighted with a red rectangular box. Other options visible include 'Non-Member US Dollar'.

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



The screenshot shows the 'Event Session Setup: Information' page. The 'Save' button is highlighted with a red rectangular box. The page includes a sidebar with navigation links like 'Home', 'Recent', and 'Pinned', and a main content area with tabs for 'General', 'Description', 'Prices', and 'Web Additional Details'.

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)**

The screenshot shows the Dynamics CRM interface. In the left navigation pane, the 'My Work' button is highlighted with a red box. Below it, a tooltip displays 'My Work (change area)'. The main area shows a bar chart for 2016 and 2017, and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **Meetings**

The screenshot shows the Dynamics CRM interface. In the left navigation pane, the 'Meetings' item is highlighted with a red box. The main area shows a bar chart for 2016 and 2017, and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **Speaker Specialty Setup**

The screenshot shows the Dynamics CRM interface. In the left navigation pane, the 'Speaker Specialty Setup' item is highlighted with a red box. The main area shows a bar chart for 2020 New Meeting, and a section titled 'This Year's Meeting Registrations' with a sub-section 'Total Registration Fees by Meeting'.

Click on the menu item **New**

The screenshot shows the Dynamics CRM interface. In the top navigation bar, the 'New' button is highlighted with a red box. The main area shows a section titled 'Active Speaker S' with a sub-section 'Create a new Speaker Specialty Setup record.'

Click on the text field **Name**

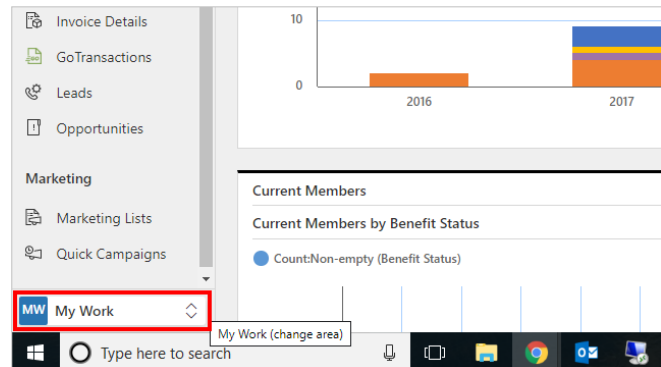
Enter Name, for example, Motivational Speaker

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

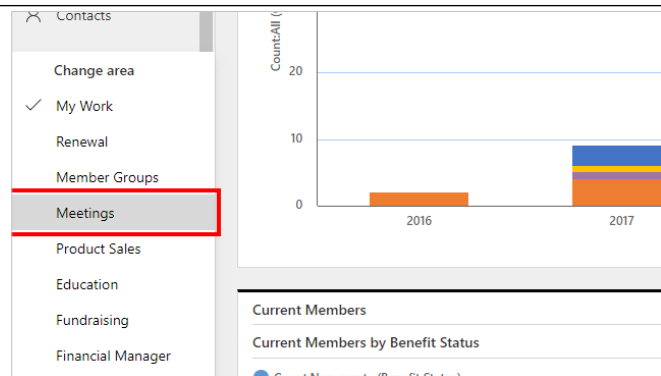
Click on the menu item **Save & Close**

5.27. Substituting a Registrant

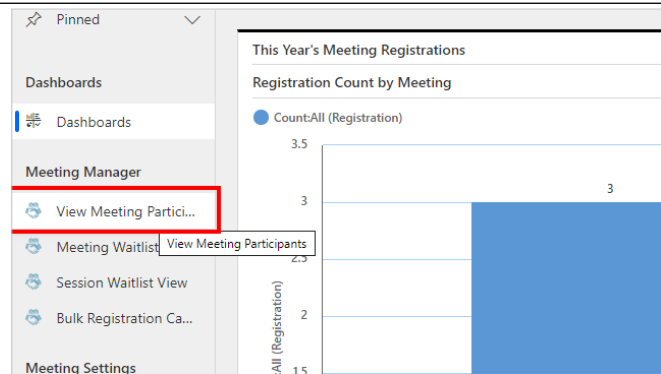
Click on the button **My Work (change area)**



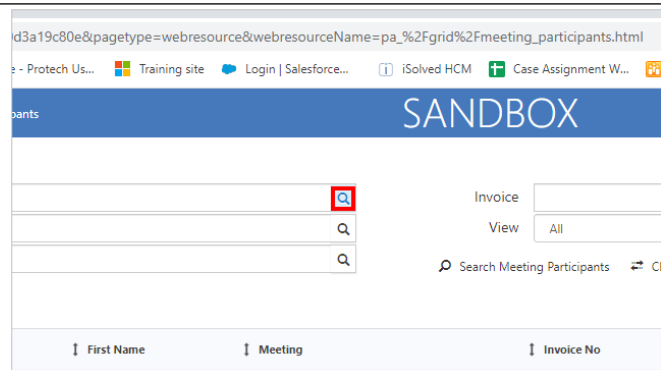
Click on the item **Meetings**



Click on the item **View Meeting Participants**



Search for the meeting the participant is registered for



Select meeting

Invoice No	Invoice Customer
INV-01407-C5M0X4	1 Testing, 1 Testing
INV-01150-V5K5R1	Malfoy, Draco
INV-01151-F3B5X3	Lovegood, Luna
INV-01150-V5K5R1	Malfoy, Draco
INV-01352-J3Y5B0	Timberland, Ben
INV-01149-R3J6Z6	Pettigrew, Peter
INV-01151-F3B5X3	Lovegood, Luna
INV-01342-J1H0Z0	Potter, Lily

Add meeting

Person	Meeting Name	Meeting ID	Meeting Date
Jones, Darrel	<input type="checkbox"/> MX 2019 Test Meeting	MX2020TEST	12/1
Lincoln, Thomas	<input type="checkbox"/> New years meeting	1224	1/6/
Bacon, Chris P.	<input type="checkbox"/> Nick Test Meeting	123	1/6/
Gibbs, Leroy J.	<input type="checkbox"/> Test Meeting 1	2020NEW	12/1
Mayberry, Tom S.	<input type="checkbox"/> Test waitlist meeti	2020NEW	12/2
Mayberry, Tom S.	<input type="checkbox"/> USD Single Currency Meeting	SINGLEEV	9/1/

Showing 1 to 20 of 20 rows

ADD CANCEL REMOVE VALUE

Click on **Search Meeting Participants**

Select participant that will be transferring out of the registration

	TRANSFER PARTICIPANT	EXPORT TO EXCEL	PRINT
Dashboards			
Dashboards			
Meeting Manager			
View Meeting Participants			
Meeting Waitlist View			
Session Waitlist View			
Bulk Registration Calculator			
Meeting Settings			

Registration	Last Name
2020 New Registration	1 Testing
2020 New Registration	Bruffey
2020 New Registration	testblank

Click on **TRANSFER PARTICIPANT**

The screenshot shows the 'Event Participants View' page in the PROTECH system. On the left is a navigation menu with options like Home, Recent, Pinned, Dashboards, and Meeting Manager. The main area displays a table of participants. A red box highlights the 'TRANSFER PARTICIPANT' button, which is located above the participant list. Other buttons like 'EXPORT TO EXCEL' and 'PRINT' are also visible.

Search for the contact that will be transferred into the meeting

The screenshot shows a 'Transfer Participant' dialog box. It has a search field labeled 'Contact *' with a magnifying glass icon. The search field is highlighted with a red box. The background shows a list of participants with columns for First Name, Meeting, Invoice No, and Invoice Customer.

Enter participant name

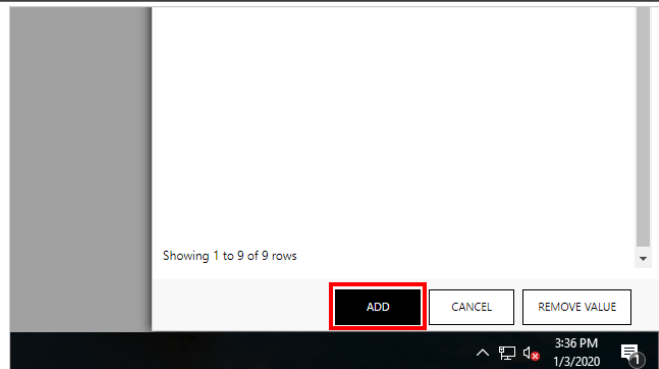
This screenshot is identical to the previous one, showing the 'Transfer Participant' dialog box with the search field highlighted by a red box.

Select participant

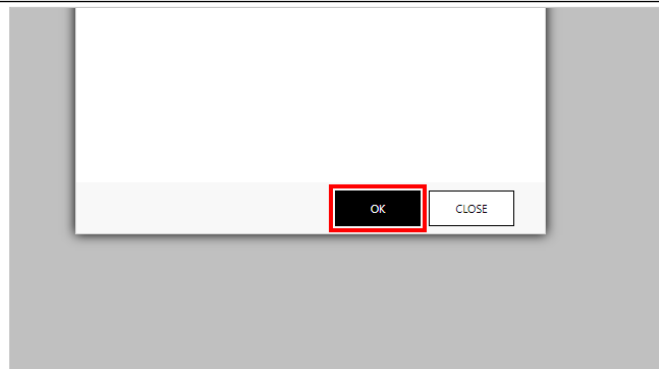
The screenshot shows the 'Transfer Participant' dialog box with a list of participants. The entry 'Test, 1 Protech' is highlighted with a red box. The list includes columns for Name, Contact No, and Member.

Name	Contact No	Member
1 Testing, 1 Testing	C-001278	No
Echane Test, Hamid	C-001115	Yes
RClem, Test	C-001110	No
Test Contact Web Rol...	C-001102	No
Test, 1 Protech	C-001275	No
Test, AROSS	C-001277	No
Test, RClem	C-001111	No
testblank	C-001117	No
Testingrejoin, Test	C-001276	No

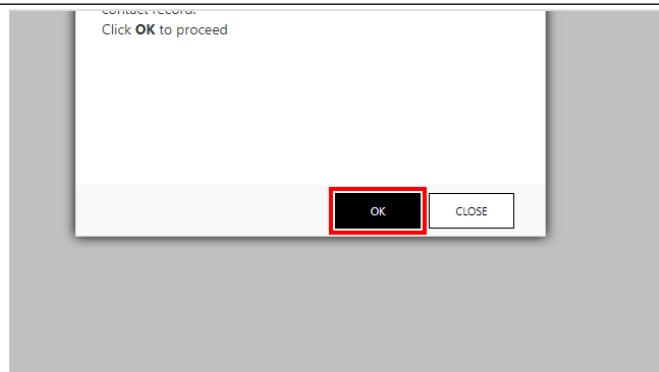
Click on the button **ADD**



Click on the button **OK**

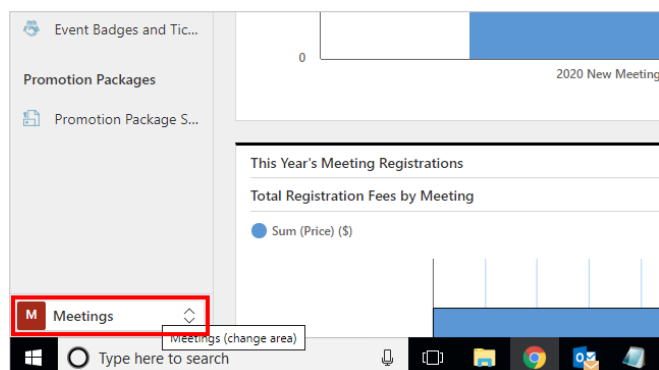


Click on the button **OK**



5.28. Transferring Registration From One Contact To Another

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



Click on the item **Meetings**

The screenshot shows the Protech software interface. On the left, a sidebar menu lists various options: Event Setup, Change area, My Work, Renewal, Member Groups, **Meetings** (highlighted with a red box), Product Sales, Education, Fundraising, and Financial Manager. On the right, there is a chart titled '2020 New Meeting' and a section titled 'This Year's Meeting Registrations' with a sub-section 'Total Registration Fees by Meeting'.

Click on the item **View Meeting Participants**

The screenshot shows the Protech software interface. On the left, a sidebar menu lists various options: Pinned, Dashboards, Meeting Manager, **View Meeting Participants** (highlighted with a red box), Meeting Waitlist, Session Waitlist View, Bulk Registration Ca..., and Meeting Settings. On the right, there is a chart titled 'This Year's Meeting Registrations' with a sub-section 'Registration Count by Meeting'.

Check mark the registration record to be transferred

The screenshot shows the Protech software interface. On the left, a sidebar menu lists various options: Home, Recent, Pinned, Dashboards, Meeting Manager, **View Meeting Participants** (highlighted with a red box), Meeting Waitlist View, and Session Waitlist View. On the right, there is a table titled 'Registration' with columns 'Registration' and 'Last Name'. The first row is highlighted in blue and has a red box around the 'test' entry. Below the table, there are checkboxes for 'Restricted Registration' and 'Restricted Guest'.

Click on **TRANSFER PARTICIPANT**

The screenshot shows the Protech software interface. On the left, a sidebar menu lists various options: Home, Recent, Pinned, Dashboards, Meeting Manager, **View Meeting Participants** (highlighted with a red box), Meeting Waitlist View, and Session Waitlist View. On the right, there is a table titled 'Registration' with columns 'Registration' and 'Last Name'. The first row is highlighted in blue and has a red box around the 'test' entry. Below the table, there are checkboxes for 'Restricted Registration' and 'Restricted Guest'.

Click on, the Contact Look up

Transfer Participant

Contact *

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

First Name	Meeting	Invoice No	Invoice Cu
Testing	Test waitlist meeti	INV-01407-CSM0X4	1 Testing
1150-V5K5R1	Malfoy, D		
1151-F3B5X3	Lovegood		
1150-V5K5R1	Malfoy, D		
1352-J3Y5B0	Timberlar		
1149-R3J6Z6	Pettigrew		
1151-F3B5X3	Lovegood		
1342-J1H0Z0	Potter, Lil		
1149-R3J6Z6	Pettigrew, Peter		
1151-F3B5X3	Lovegood, Luna		
1342-J1H0Z0	Potter, Lily		
1342-J1H0Z0	Potter, Lily		
1252-K6H0N9	Jones, Darrel		
INV-01253-VOC4R3	Lincoln, Thomas		
INV-01034-H2L9Y4	Bacon, Chris P.		
INV-01334-L8S8Z2	Gibbs, Leroy J.		
INV-01337-H1Q4F1	Mayberry, Tom S.		
INV-01338-7370P6	Mayberry, Tom S.		

Click on the button **ADD**

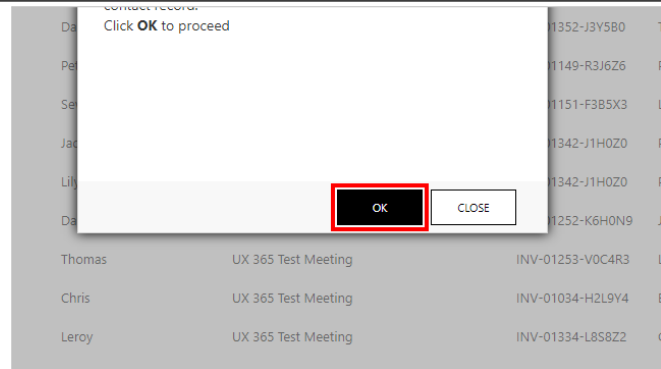
Showing 1 to 50 of 275 rows

ADD CANCEL REMOVE VALUE

Click on the button **OK**

OK CLOSE

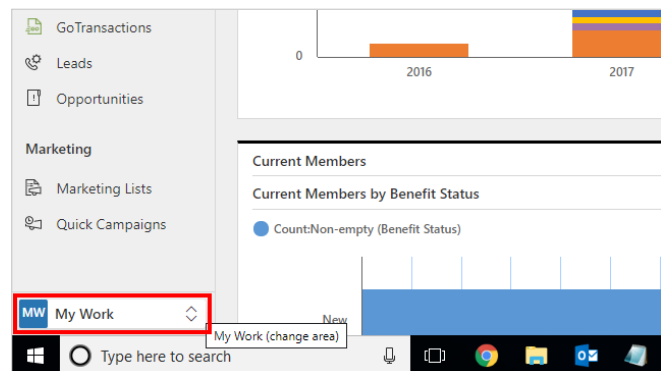
Confirm you would like to run the process and click, Ok



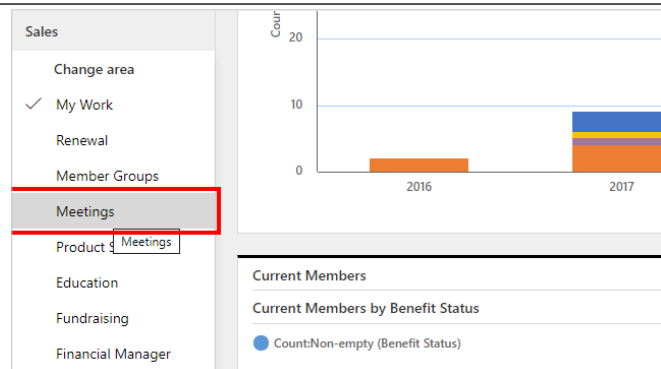
If the registration is eligible for transfer, UX 365 will make the following changes: Update the Contact field, as well as the Contact Information, Address Information, and Communication Information sections on the meeting registration detail record. Update any session registrations with the new contact's 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

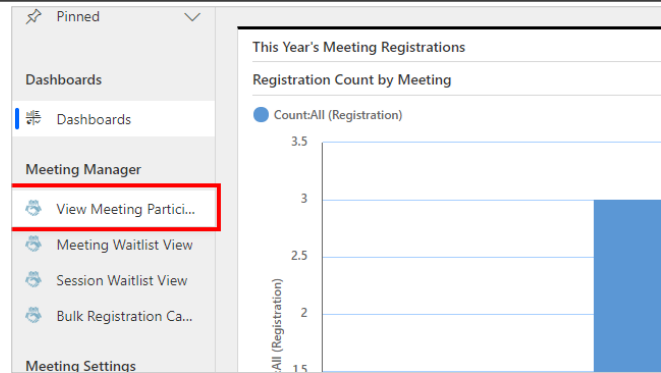
Click on the button My Work



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

The screenshot shows the 'View Meeting Participants' page with the 'Meeting' text box highlighted. Below it are input fields for 'Company' and 'Participant'. At the bottom, there are buttons for 'TRANSFER PARTICIPANT', 'EXPORT TO EXCEL', and 'PRINT'. The page also shows a table with columns for 'Last Name' and 'First Name'.

Select the Meeting you would like to view

Invoice No	Invoice Customer		
INV-01407-C5M0X4	1 Testing, 1 Testing	<input type="checkbox"/> 2018 Annual Conference	2018ANN
INV-01150-V5K5R1	Malfoy, Draco	<input type="checkbox"/> 2018 Copy - Deferred By Date	2018ANN
INV-01151-F3B5X3	Lovegood, Luna	<input type="checkbox"/> 2019 Max Cap Meeting	MAXCAP
INV-01150-V5K5R1	Malfoy, Draco	<input type="checkbox"/> 2019 Meeting - No Guests	NOGUEST
INV-01352-J3Y5B0	Timberland, Ben	<input type="checkbox"/> 2019 Meeting - No Sessions	EVENTNOSES
INV-01149-R3J6Z6	Pettigrew, Peter	<input type="checkbox"/> 2020 New Meeting	2020NEW
INV-01151-F3B5X3	Lovegood, Luna	<input type="checkbox"/> Copy Meeting	2020 New Meeting
INV-01342-J1H0Z0	Potter, Lily	<input type="checkbox"/> Copy Meeting	CM
		<input type="checkbox"/> Copy Meeting	COPY
		<input type="checkbox"/> Copy Test Meeting	LAB365EVEN
		<input type="checkbox"/> GoTransactions Meeting	GOTRKEV

Click Add to add the selection to your search

Lincoln, Thomas	<input type="checkbox"/> New years meeting	1224	1/6/
Bacon, Chris P.	<input type="checkbox"/> Test Meeting 1	2020NEW	12/1
Gibbs, Leroy J.	<input type="checkbox"/> Test waitlist meeti	2020NEW	12/2
Mayberry, Tom S.	<input type="checkbox"/> USD Single Currency Meeting	SINGLEEV	9/1/
Mayberry, Tom S.	<input type="checkbox"/> UX 365 Annual Conference	UX365AC1	12/1
Bull, Jason R.	<input type="checkbox"/> UX 365 Bulk Cancellation Mee...	365BCE	1/31
Black, Sirius D.			

Showing 1 to 19 of 19 rows

ADD CANCEL REMOVE VALUE

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.

agetype=webresource&webresourceName=pa_%zfgrn%zfmeeting_participants.html

SANDBOX

Invoice [] View [All]

Search Meeting Participants Clear fields

Registration	Meeting	Invoice No	Invoice Customer
Testing	Test waitlist meeti	INV-01407-C5M0X4	1 Testing, 1
aco	UX 365 Test Meeting	INV-01150-V5K5R1	Malfoy, Dra

This shows all the meeting registrants based on the search criteria

Participant []

TRANSFER PARTICIPANT EXPORT TO EXCEL PRINT

Registration	Last Name
2020 New Registration	1 Testing
2020 New Registration	Bruffey
2020 New Registration	Smith

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

PROTECH

Event Participants View

Meeting [2020 New Meeting]

Company []

Participant []

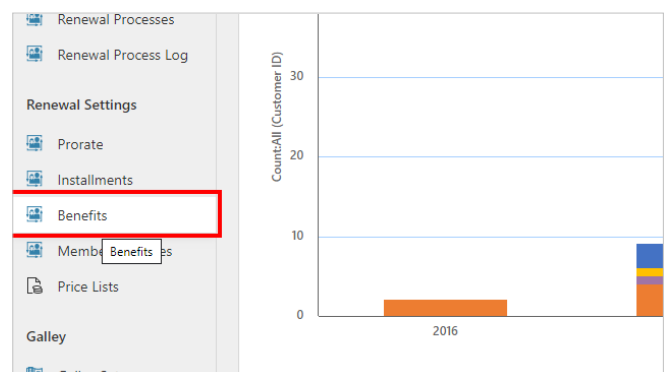
TRANSFER PARTICIPANT **EXPORT TO EXCEL** PRINT

Registration	Last Name
2020 New Registration	1 Testing
2020 New Registration	Bruffey
2020 New Registration	Smith

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.

Is Primary Benefit	Chapter Benefit
Yes	No
Yes	No
Yes	No

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

The screenshot shows the 'Rates' tab in the Protech UX interface. On the left is a sidebar with navigation options: Dashboards, Renewal Manager, Renewal Billing, Renewal Processes, Renewal Process Log, and Renewal Settings. The main content area has tabs for General, Rates, Web, Online Description, Notes, and Administration. The 'Rates' tab is active, displaying a table with columns: Name, Price Level, Price Percent, and Calculation. A red box highlights the 'Test Rate' link in the 'Name' column. Below the table, it says '1 - 1 of 1 (0 selected)'.

Click on the item **Prices**

The screenshot shows the 'Test Rate' details page. The left sidebar is the same as the previous screenshot. The main content area has tabs for General, Prices, Rate Level X-ref, Web, and Administration. The 'Prices' tab is active and highlighted with a red box. It shows a table with columns: Name, Price Level, Price Percent, and Calculation. The table contains three rows: 'Member' with a price of \$50.0000, 'Member Euro' with a price of €50.0000, and 'Non-Member' with a price of \$50.0000.

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

The screenshot shows the 'Prices' tab in the Protech UX interface. The left sidebar is the same as the previous screenshots. The main content area has tabs for General, Prices, Rate Level X-ref, Web, and Administration. The 'Prices' tab is active, displaying a table with columns: Name, Price Level, Price Percent, and Calculation. The table contains three rows: 'Member' with a price of \$50.0000, 'Member Euro' with a price of €50.0000, and 'Non-Member' with a price of \$50.0000. A red box highlights the entire table.

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

The screenshot shows the 'Add New Price' button in the Protech UX interface. The left sidebar is the same as the previous screenshots. The main content area has tabs for General, Prices, Rate Level X-ref, Web, and Administration. The 'Prices' tab is active. At the bottom of the page, there is a button labeled '+ New Price' which is highlighted with a red box. A tooltip is visible over the button, stating 'Add a related Price to this record.'

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.)

Quick Create: Price

Price Level *

Calculation Method *

Value Minimum *

Start Date *

Name *

Change View

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

Quick Create: Price

Price Level *

Calculation Method *

Value Minimum *

Start Date *

Name *

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.

Quick Create: Price

Price Level *

Calculation Method *

Value Minimum *

Start Date *

Name *

Factor *

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.

Quick Create: Price

Price Level *

Calculation Method *

Value Minimum *

Start Date *

Name *

Factor *

Value Maximum *

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

Price Level	Member
Calculation Method	* Flat Price
Value Minimum	* 1.00
Start Date	* 1/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 12/31/2019

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

Calculation Method	Flat Price
Value Minimum	* 1.00
Start Date	* 1/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 12/31/2019
Currency	US Dollar





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.

Value Minimum	1.00
Start Date	* 1/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 12/31/2019
Currency	US Dollar
Price Percent	* ---





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.

Start Date	1/1/2019
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 12/31/2019
Currency	US Dollar
Price Percent	* ---
Rate	* Test Rate




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.

Factor	Value	Unit
Value Maximum	999,999.00	
End Date	12/31/2019	
Currency	 US Dollar	
Price Percent	---	
Rate	 Test Rate	

Enter the desired price

1.00	9%	Factor	---
1.00	9%	Value Maximum	* 999,999.00
1.00	9%	End Date	* 12/31/2019 
1.00	9%	Currency	 US Dollar
		Price Percent	* 5 <input type="text"/>
		 Rate	*  Test Rate

Rate: Displays the name of the rate.

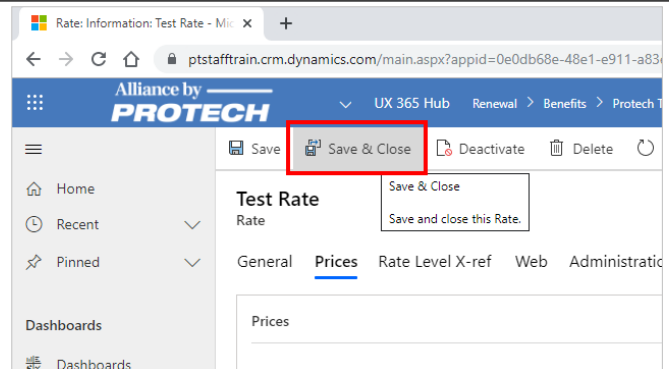
End Date	* 12/31/2019	
Currency	 US Dollar	
Price Percent	* \$50.0000	
Rate	*  Test Rate	<div>Test Rate</div>

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



A screenshot of the 'New' menu in a software application. The 'New' menu is open, showing a list of file types. The 'Save and Close' option is highlighted with a red rectangular box. Below the list, there are three buttons: 'Save and Close', 'Cancel', and 'OK'. The 'Save and Close' button is also highlighted with a red rectangular box. The 'OK' button is disabled, indicated by a greyed-out appearance. The background of the application window is dark grey.

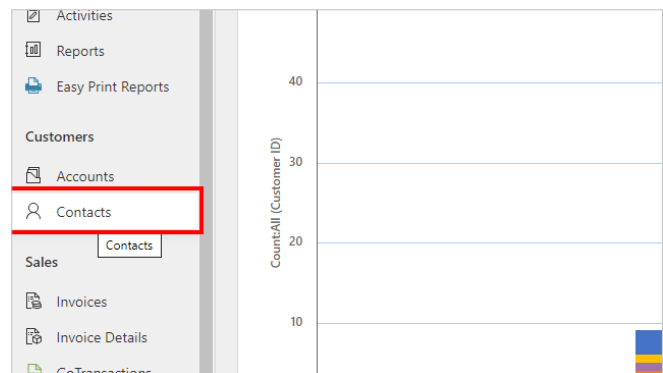
Click Save and Close to return to the benefit record



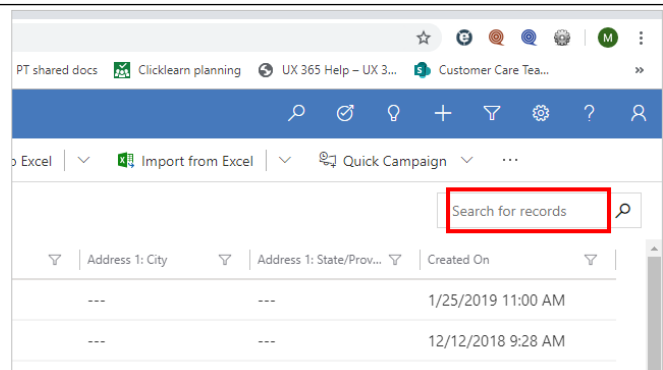
6.2. Cancelling a Renewal Invoice

6.2.1. Cancelling an renewal invoice in an open batch

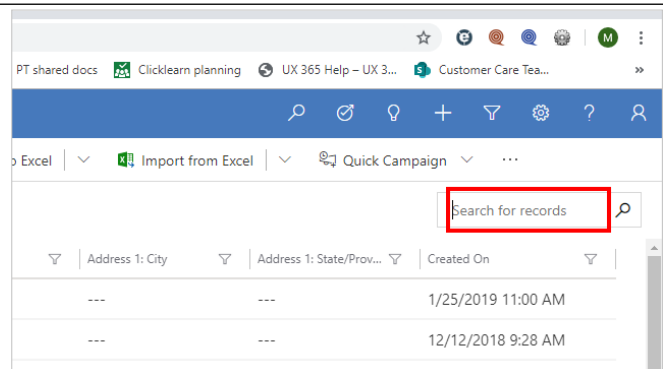
Click on the item **Contacts**



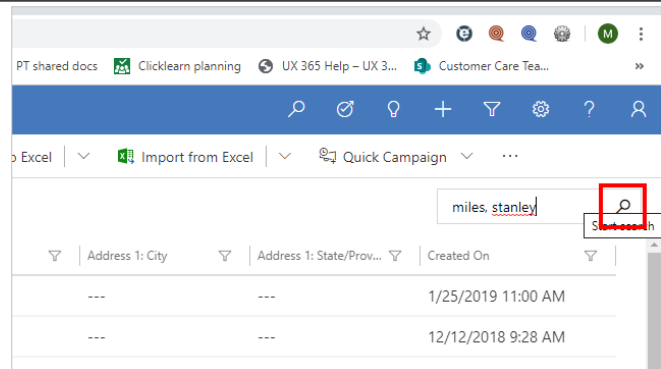
Click on the input field **Search for records**



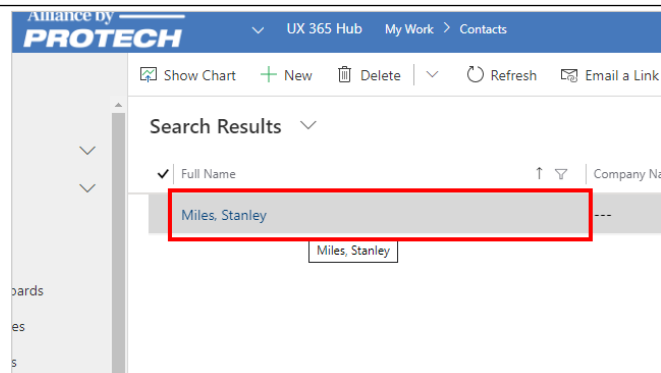
Enter contact or account that the renewal is associated with



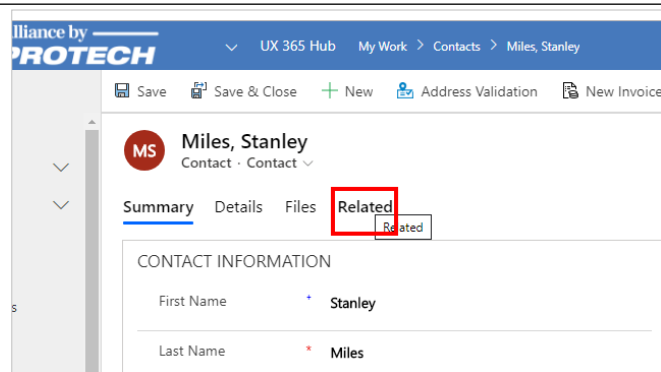
Click on the button **Start search**



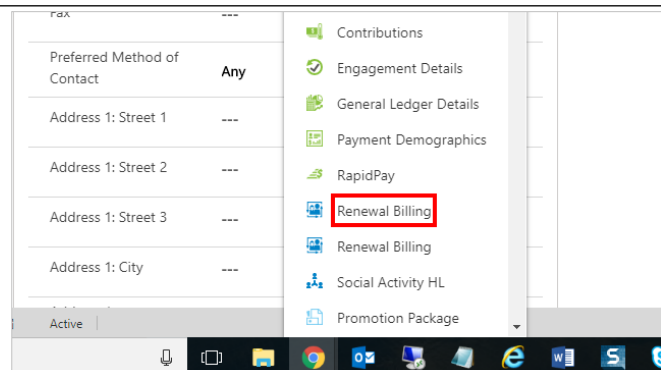
Double click on the cell **Full Name**



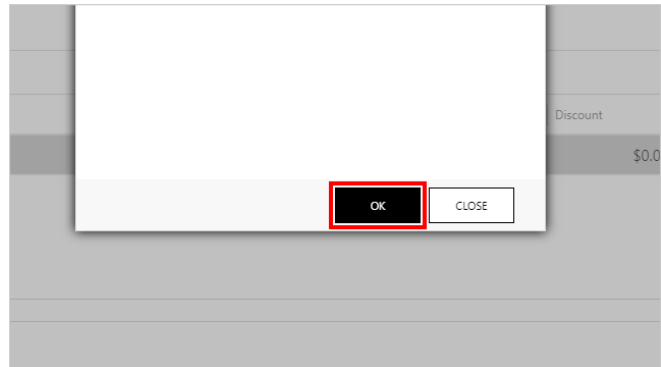
Click on the item **Related**



Click on the menu item **Renewal Billing**

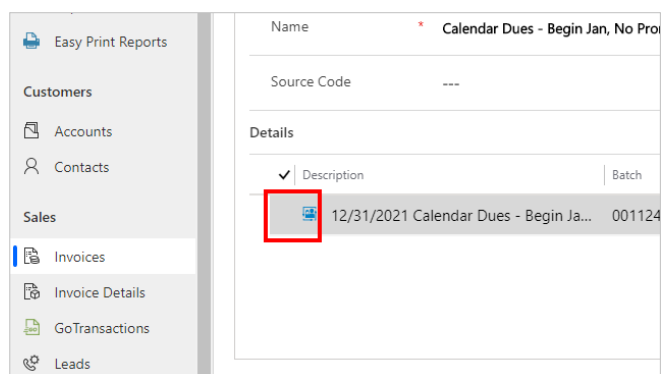


Click on the button **OK**

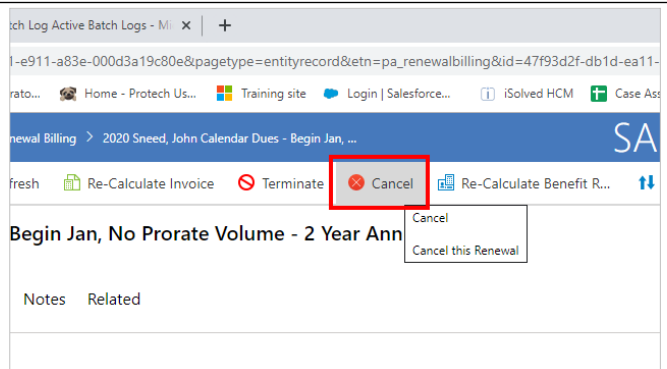


6.2.2. Cancelling a renewal invoice in a closed batch

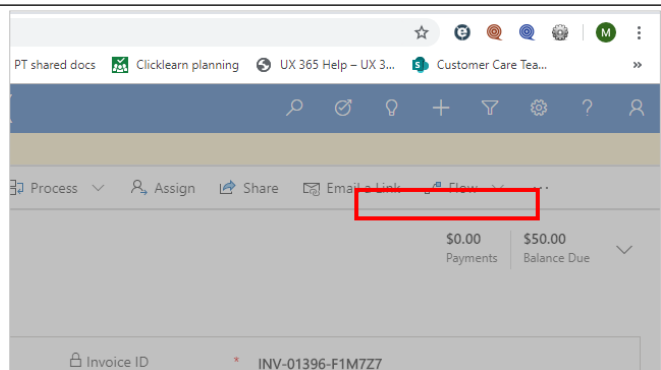
Double click on the row selector where **Description = 12/31/2021 Calendar Dues - Begin Jan, No Prorate, Volume - 2 Year Annual, Batch = 001124, Batch Date (Batch) = 12/6/2019**



Click on the menu item **Cancel**



Move the mouse to the label **Partial Cancellation**



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

PT shared docs Clicklearn planning UX 365 Help - UX 3... Customer Care Tea...

Renewal Billing Cancel

This process will delete/cancel the invoice details for this benefit entry and terminate the renewal billing record. The renewal billing record will be deleted if there is no status. Do you want to continue?

☒ Full Cancellation
 ☐ Partial Cancellation

Reason: *

- No Payment
- Retired
- Other
- No Reason
- Cancelled
- Deceased

Click on the reason for cancellation

Renewal Billing Cancel

This process will delete/cancel the invoice details for this benefit entry and terminate the renewal billing record. The renewal billing record will be deleted if there is no status. Do you want to continue?

☒ Full Cancellation
 ☐ Partial Cancellation

Reason: *

- No Payment
- Retired
- Other
- No Reason
- Cancelled
- Deceased

Click on the button **OK**

Override Price Temporary

Discount Amount

Do Not Renew

Installment Amount

Bill Frequency

2019 2:03

OK CLOSE

2:40 PM 12/13/2019

6.3. Creating a Benefit

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

Invoice Details

Go Transactions

Leads

Opportunities

Marketing

Marketing Lists

Quick Campaigns

MW My Work

My Work (change area)

type here to search

2016

Current Members

Current Members by Benefit Status

Count: Non-empty (Benefit Status)

The screenshot shows the Power BI interface. On the left, the 'Customers' pane is open, and the 'Renewal' filter is selected, highlighted with a red box. The main view displays a bar chart titled 'Count(All (Customer ID))' on the y-axis, ranging from 0 to 30. The x-axis shows the year '2016'. The chart has a single bar for 2016, which is stacked with multiple colors (orange, blue, yellow, green, red, purple, brown), indicating a breakdown of the data by the 'Renewal' filter.

The screenshot shows the 'Renewal Process' menu on the left and a bar chart on the right. The menu includes 'Renewal Processes', 'Renewal Process L...', 'Renewal Settings', 'Prorate', 'Installments', 'Benefits', 'Memberships', 'Price Lists', and 'Galley'. The 'Benefits' option is highlighted with a red box. The bar chart, titled 'Count-All (Customer ID)', shows the count for the year 2016. The y-axis ranges from 0 to 30. The bar for 2016 is orange and reaches a value of approximately 2. A legend on the right shows a stacked bar with orange, blue, and green segments.

Year	Count-All (Customer ID)
2016	2

The screenshot shows the Protech CRM Dynamics web application. The top navigation bar includes links for 'PTCRM', 'UX Online Help', 'UX 365 Help', 'iSolved HCM', and 'Protech User Group'. The main header features the 'Alliance by PROTECH' logo and navigation links for 'UX 365 Hub', 'Renewal', and 'Benefits'. On the left, a sidebar menu contains 'Home', 'Recent', 'Pinned', and 'Dashboards'. The main content area is titled 'Active Benefit' and includes a '+ New' button (highlighted with a red box and a tooltip that says 'Create a new Benefit record.'), a 'Show Chart' button, and 'Delete' and 'Refresh' buttons. Below the header, a table lists active benefits, with the first entry being 'Anniversary Dues - Begin Based on COD 1'.

tribution		
		Default Product ---
		Is Primary Benefit No
		Chapter Benefit No
		Group Invoices No

Click on the item Membership

General	Rates	Web	Online Description	Notes	Administration
Information					
Module	*	Look for Module			
Name	*	Modules			
Renewal Method	*	<div> <div>UX</div> <div>10</div> <div>Membership</div> </div>			
Sequence		<div> <div>UX</div> <div>40</div> <div>Subscriptions</div> </div>			
Prorate					

Click on the link **Default Product**

Look for Default Product	
<div> <div>UX</div> <div>10</div> <div>Membership</div> </div>	
<div> <div>UX</div> <div>40</div> <div>Subscriptions</div> </div>	

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

Default Product	Look for Default Product
Primary Benefit	Products
Chapter Benefit	<div> <div>Chapter Billing</div> <div>CHAPDEFAULT</div> </div>
Group Invoices	<div> <div>Dues Billing</div> <div>DUESDEFAULT</div> </div>
Prorate Cycle	<div> <div>Dues Billing - No Cash Basis</div> <div>DUESNOCASH</div> </div>
Cut Off Day (COD)	<div> <div>Dues Product - No Cash Basis Deferred</div> <div>DUESNOCASHBASIS</div> </div>

Click on the text field **Name**

Benefit					
General	Rates	Web	Online Description	Notes	Administration
Information					
Module	*	UX Membership			
Name	*	---			
Renewal Method	*	Anniversary			
Sequence		---			
Prorate		---			

Enter **Enter Benefit Name.**

Benefit	
ral	Rates Web Online Description Notes Administration
ormation	
Module	* UX Membership
Name	* <input type="text" value="U"/>
Renewal Method	* Anniversary
Sequence	---
Prorate	---

Click on **Is Primary Benefit**

Default Product	Dues Billing
Is Primary Benefit	<input type="text" value="No"/>
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---

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

Renewal Method

Benefit	
ral	Rates Web Online Description Notes Administration
ormation	
Module	* UX Membership
Name	* UX 365 Membership Benefit
Renewal Method	* <input type="text" value="Anniversary"/>
Sequence	---
Prorate	---
Default Start Date	---


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

Default Product	Dues Billing
Is Primary Benefit	Yes
Chapter Benefit	<input type="text" value="No"/>
Group Invoices	No
Prorate Cycle	---
Cut Off Day (COD)	* 1


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

Module	*  Membership
Name	* UX 365 Membership Benefit
Renewal Method	* Anniversary
Sequence	---
Prorate	---
Default Start Date	---
Allow Renewal on Unpaid	No


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

Default Product	 Dues Billing
Is Primary Benefit	Yes
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---
Cut Off Day (COD)	* 1

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

Module	 membership
Name	* UX 365 Membership Benefit
Renewal Method	* Anniversary
Sequence	---
Prorate	---
Default Start Date	---
Allow Renewal on Unpaid	No

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

Default Product	Dues Billing
Is Primary Benefit	Yes
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---
Cut Off Day (COD)	* 1

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**

Renewal Method	* Anniversary
Sequence	---
Prorate	---
Default Start Date	--Select--
Allow Renewal on Unpaid	No

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

Prorate	---
Default Start Date	--Select--
Allow Renewal on Unpaid	--Select-- January February March April May June July August September October November December

Allow Renewal on Unpaid

Sequence	---
Prorate	---
Default Start Date	Beginning of Current Month
Allow Renewal on Unpaid	No

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**

Beginning of Current Month	
Allow Renewal on Unpaid	No
cing	
Start Date	---

Enter **Start Date**.

Beginning of Current Month	
Allow Renewal on Unpaid	No
cing	
Start Date	1

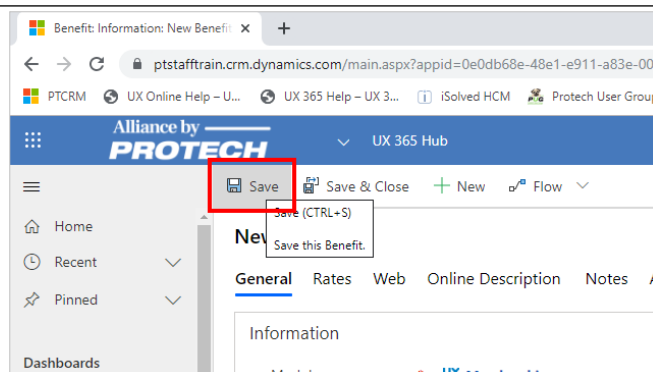
Click on the field **End Date**

End Date	---

Enter **End Date**.

End Date	---

Click on the menu item **Save**

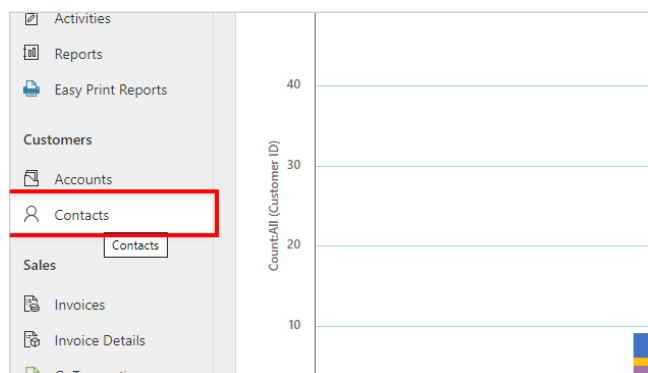


6.4. Creating a New Member Invoice

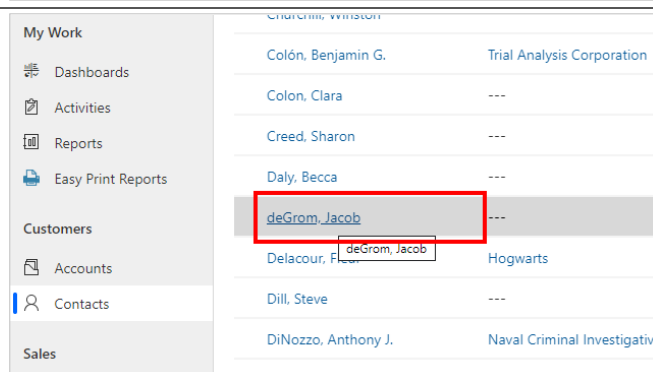
6.4.1. Creating a new member invoice using a renewal benefit

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

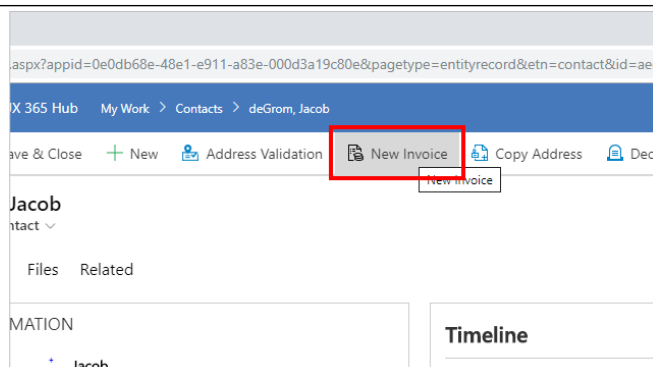
Click on the item **Contacts**



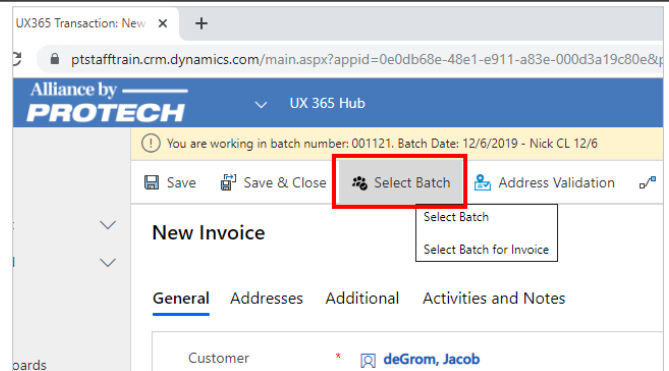
Click on the link in cell **Full Name**



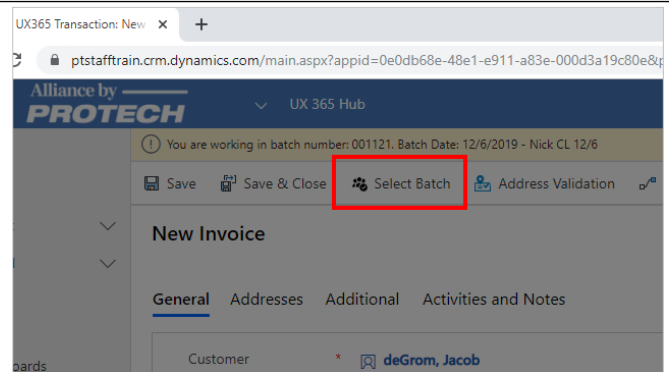
Click on the menu item **New Invoice**



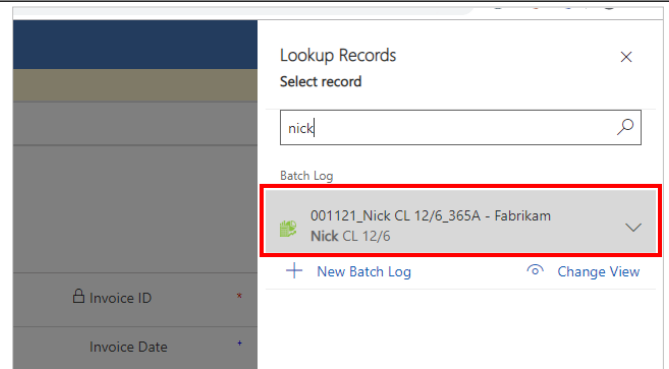
Click on the menu item **Select Batch**



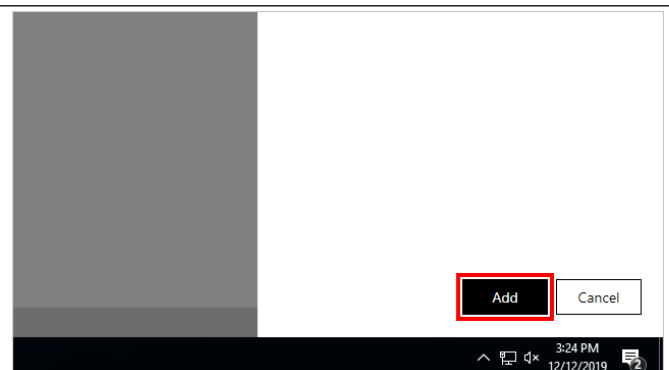
Enter the name of the batch you would like to use



Select the correct batch



Click on the button **Add**



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

The screenshot shows the 'New Invoice' form in the Protech system. The 'Save' button is highlighted with a red box. The form includes a navigation menu on the left with options like Home, Recent, Pinned, My Work, and Dashboards. The main content area shows the 'New Invoice' form with tabs for General, Addresses, Additional, and Activities and Notes. The 'General' tab is active, showing the Customer field with the value 'deGrom, Jacob'.

Click on the menu item **New Transactions**

The screenshot shows the 'New Transactions' dropdown menu in the Protech system. The 'New Transactions' option is highlighted with a red box. The menu includes options like Product Sales, Membership, Benefit Packages, Meetings, Subscription, and Promotion Package. The 'Membership' option is highlighted with a red box.

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

The screenshot shows the 'Membership' dropdown menu in the Protech system. The 'Membership' option is highlighted with a red box. The menu includes options like Product Sales, Membership, Benefit Packages, Meetings, Subscription, and Promotion Package. The 'Membership' option is highlighted with a red box.

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

The screenshot shows the 'Lookup' button in the Protech system. The 'Lookup' button is highlighted with a red box. The button is located next to the 'Volume' field. The form includes fields for Volume, Quantity, Cycle Start Date, and # of Benefit Recipients.

Select the benefit you would like to use

Benefit	* Look for Benefit
Rate	* Benefits
Current Join Date	MX Basic Primary Benefit Calendar
Rate Next	* MX Basic Secondary Benefit Calendar
Primary Benefit	Protech Test Benefit Anniversary
Invoice	Secondary Benefit - Anniversary - Begin Current Month Anniversary
	+ New Benefit

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.

Volume	* ---
Quantity	* ---
Cycle Start Date	* ---
# of Benefit Recipients	---
Paid Through Date	---

Select the Rate you would like to use

Benefit Information	
Benefit	* Protech Test Benefit
Rate	* Look for Rate
Current Join Date	Test Rate 12/12/2019 9:46 AM
Rate Next	* + New Rate
Primary Benefit	Yes

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 Note The 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

Benefit Information	
Benefit	* Protech Test Benefit
Rate	* Test Rate X
Current Join Date	12/12/2019
Rate Next	* Test Rate X
Primary Benefit	Yes
Invoice	New

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.

Benefit	
Rate	* Test Rate X
Current Join Date	12/12/2019
Rate Next	* Test Rate
Primary Benefit	Yes
Invoice	New
Financial	

This is the name of the created invoice

Rate	
Current Join Date	12/12/2019
Rate Next	* Test Rate
Primary Benefit	Yes
Invoice	New
Financial	
Override Price	<input type="checkbox"/> Price Per Unit



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

Volume		* 1.00
Quantity		* 1
Cycle Start Date		* 12/1/2019
# of Benefit		1



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

Volume		* 1.00
Quantity		* 1
Cycle Start Date		* 12/1/2019
# of Benefit		1
Recipients		1
Paid Through Date		---



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

	Volume	* 1.00
	Quantity	* 1
	Cycle Start Date	* 12/1/2019
	# of Benefit Recipients	1
	Paid Through Date	---
	Expiration Date	---



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

	Volume	* 1.00
	Quantity	* 1
	Cycle Start Date	* 12/1/2019
	# of Benefit Recipients	1
	Paid Through Date	---
	Expiration Date	---

This field is blank until payment is applied on the invoice. When it 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.

	Volume	* 1.00
	Quantity	* 1
	Cycle Start Date	* 12/1/2019
	# of Benefit Recipients	1
	Paid Through Date	---
	Expiration Date	---

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

	Quantity	1
	Cycle Start Date	* 12/1/2019
	# of Benefit Recipients	1
	Paid Through Date	---
	Expiration Date	---
\$50.0000		Override Price <input type="checkbox"/>

Click on **Current Join Date**

General	Deferral Dates	Administration	Notes
Benefit Information			
Benefit	*	Protech Test Benefit	
Rate	*	Test Rate X	
Current Join Date		12/12/2019	
Rate Next	*	Test Rate	
Primary Benefit		Yes	
Invoice		New	

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.

Rate	*	Test Rate																																																							
Current Join Date		12/12/2019																																																							
Rate Next	*	December 2019 ↑ ↓ 2019																																																							
Primary Benefit		<table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Jan</th> <th>Feb</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>May</td> <td>Jun</td> </tr> <tr> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td></td> <td></td> </tr> <tr> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>Sep</td> <td>Oct</td> </tr> <tr> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td></td> <td></td> </tr> </tbody> </table>		Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	1	2	3	4	5	6	7			8	9	10	11	12	13	14	May	Jun	15	16	17	18	19	20	21			22	23	24	25	26	27	28	Sep	Oct	29	30	31	1	2	3	4		
Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb																																																	
1	2	3	4	5	6	7																																																			
8	9	10	11	12	13	14	May	Jun																																																	
15	16	17	18	19	20	21																																																			
22	23	24	25	26	27	28	Sep	Oct																																																	
29	30	31	1	2	3	4																																																			
Invoice																																																									
Financial																																																									

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

Primary Benefit	Yes
Invoice	New
Financial	
Override Price	<input type="checkbox"/>
Promotion	---
Override Prorate Amount	<input type="checkbox"/>
Mbrship Length	12

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

Invoice	New
Financial	
Override Price	<input type="checkbox"/>
Promotion	---
Override Prorate Amount	<input type="checkbox"/>
Mbrship Length (Months)	12
Prorate Cycle	---

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.

Process Log	
ings	Financial
nts	Override Price <input type="checkbox"/>
Packages	Promotion ---
s	<input type="checkbox"/> Override Prorate Amount <input type="checkbox"/>
Setup	<input type="checkbox"/> Mbrship Length (Months) 12
	<input type="checkbox"/> Prorate Cycle ---
	<input type="checkbox"/> Number of

This field shows the length of the membership in months

ings	Financial
nts	Override Price <input type="checkbox"/>
Packages	Promotion ---
s	<input type="checkbox"/> Override Prorate Amount <input type="checkbox"/>
Setup	<input type="checkbox"/> Mbrship Length (Months) 12
ility	<input type="checkbox"/> Prorate Cycle ---
	<input type="checkbox"/> Number of Installments 1
	<input type="checkbox"/> Product Dues Billing

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

lements	Promotion ---
fits	<input type="checkbox"/> Override Prorate Amount <input type="checkbox"/>
ber Packages	<input type="checkbox"/> Mbrship Length (Months) 12
Lists	<input type="checkbox"/> Prorate Cycle ---
y Setup	<input type="checkbox"/> Number of Installments 1
y Utility	<input type="checkbox"/> Product Dues Billing
y	
y Run Log	

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

Packages	<input type="checkbox"/> Override Prorate Amount <input type="checkbox"/>
s	<input type="checkbox"/> Mbrship Length (Months) 12
Setup	<input type="checkbox"/> Prorate Cycle ---
ility	<input type="checkbox"/> Number of Installments 1
in Log	<input type="checkbox"/> Product Dues Billing

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.

		🔒 Paid Through Date	---
		🔒 Expiration Date	---
🔒 Price Per Unit	\$50.0000		
Override Discount	<input type="checkbox"/>		
🔒 Prorate Amount	\$0.00		
🔒 Installment Price	\$50.00		

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.

		🔒 Expiration Date	---
🔒 Price Per Unit	\$50.0000		
Override Discount	<input type="checkbox"/>		
🔒 Prorate Amount	\$0.00		
🔒 Installment Price	\$50.00		
🔒 Prorate # of Months	0		

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

🔒 Price Per Unit	\$50.0000		
Override Discount	<input type="checkbox"/>		
🔒 Prorate Amount	\$0.00		
🔒 Installment Price	\$50.00		
🔒 Prorate # of Months	0		
🔒 Base Amount	\$50.00		

Installment Price displays the amount of each installment.

🔒 Price Per Unit	\$50.0000		
Override Discount	<input type="checkbox"/>		
🔒 Prorate Amount	\$0.00		
🔒 Installment Price	\$50.00		
🔒 Prorate # of Months	0		
🔒 Base Amount	\$50.00		
🔒 Total Charge	\$50.00		

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

<input type="checkbox"/> Price Per Unit	\$50.0000
Override Discount	<input type="checkbox"/>
<input type="lock"/> Prorate Amount	\$0.00
<input type="lock"/> Installment Price	\$50.00
<input type="lock"/> Prorate # of Months	0
<input type="lock"/> Base Amount	\$50.00
<input type="lock"/> Total Charge	\$50.00

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

Override Discount	<input type="checkbox"/>
<input type="lock"/> Prorate Amount	\$0.00
<input type="lock"/> Installment Price	\$50.00
<input type="lock"/> Prorate # of Months	0
<input type="lock"/> Base Amount	\$50.00
<input type="lock"/> Total Charge	\$50.00

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

<input type="checkbox"/> Prorate Amount	\$0.00
<input type="lock"/> Installment Price	\$50.00
<input type="lock"/> Prorate # of Months	0
<input type="lock"/> Base Amount	\$50.00
<input type="lock"/> Total Charge	\$50.00

Created By: --- Modified On: --

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.

Date	---
te	---
Override Price Temporary	<input type="checkbox"/>
<input type="lock"/> Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
<input type="lock"/> Installment Amount	\$50.00


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

Override Price Temporary	<input type="checkbox"/>
Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual


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

Override Price Temporary	<input type="checkbox"/>
Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual
Rounding	\$0.00

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.

Override Price Temporary	<input type="checkbox"/>
Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual
Rounding Adjustment	\$0.00
Currency	 US Dollar

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

Temporary	<input type="checkbox"/>
Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual
Rounding Adjustment	\$0.00
Currency	 US Dollar

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.

Discount Amount	\$0.00
Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual
Rounding Adjustment	\$0.00
Currency	US Dollar

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

Do Not Renew	<input type="checkbox"/>
Installment Amount	\$50.00
Bill Frequency	Annual
Rounding Adjustment	\$0.00
Currency	US Dollar

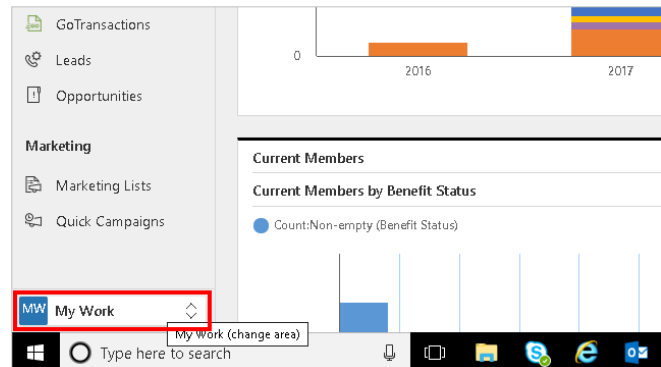
Click **Save & Close** to save this invoice detail line item and return to the invoice.

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

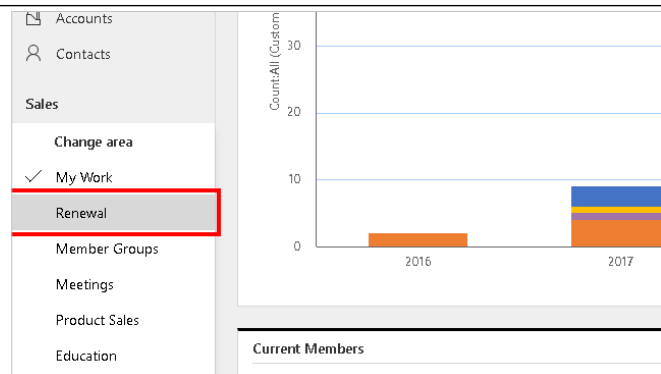
Bill to Customer	deGrom, Jacob	
Name	Protech Test Benefit	
Source Code	---	
Details		
<input checked="" type="checkbox"/>	Description	Batch
<input type="checkbox"/>	11/30/2020 Protech Test Benefit, Test...	001121

6.5. Creating a New Member Renewal Package

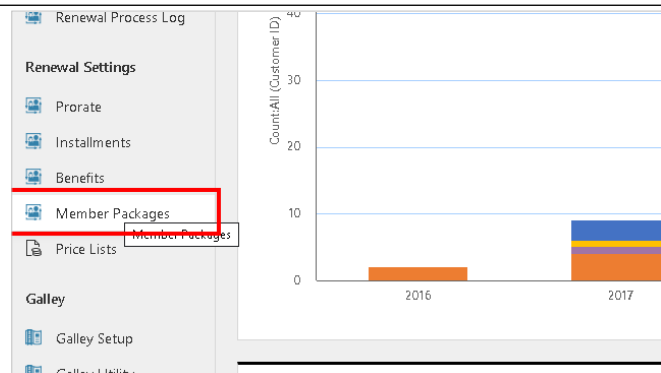
Click on the button **My Work (change area)**



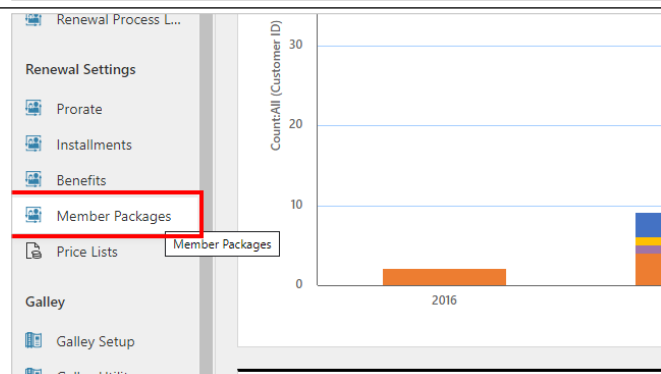
Click on the item **Renewal**



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**

Member Package

General Web Online Description Administration Notes

Name * ---

Prompt for Chapter No

Account or Contact --Select--

Prompt for Volume No

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.

Member Package

General Web Online Description Administration Notes

Name * ---

Prompt for Chapter No

Account or Contact --Select--

Prompt for Volume

--Select--
Account
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.

Member Package

Name * AROSS Test Package

Prompt for Chapter No

Account or Contact Contact

Prompt for Volume No

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

Member Package: Information: N x

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Learner - My Home Dashboards: Sales... UX training Payroll page PUG

Alliance by PROTECH UX 365 Hub

Save Save & Close New Flow

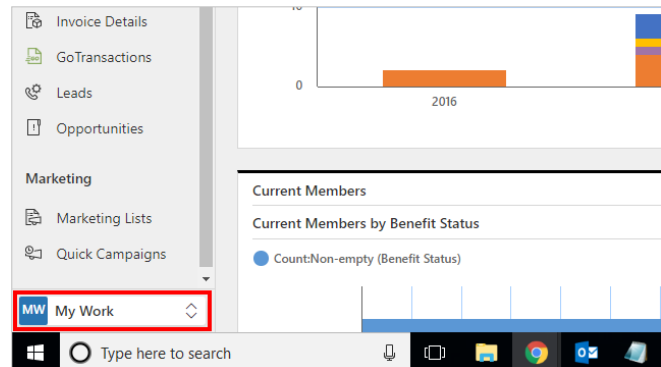
Save (CTRL+S)
Save this Member Package.

General Web Online Description Administration

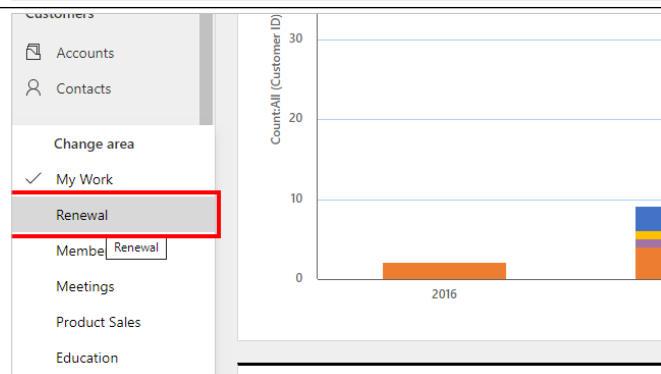
Name * AROSS Test Package

6.6. Creating a Rate

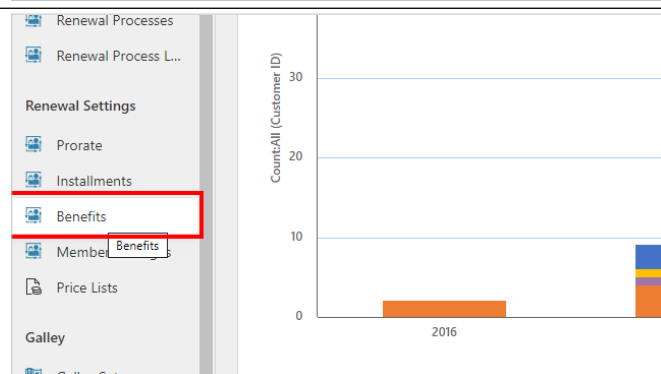
Click on the button **My Work (change area)**



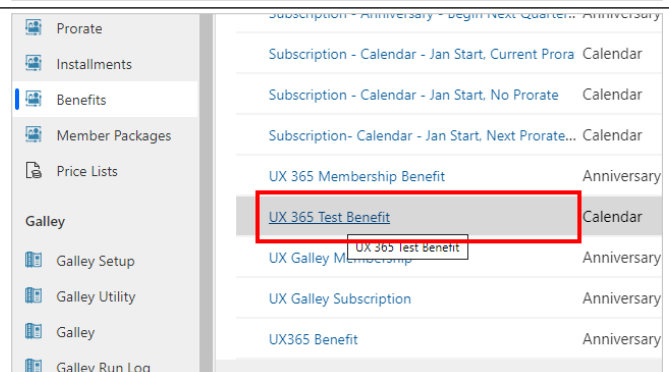
Click on the item **Renewal**



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**

The screenshot shows the 'UX 365 Test Benefit' page in the Alliance by PROTECH system. The 'Rates' tab is highlighted with a red box. The page includes a sidebar with navigation options like Home, Recent, Pinned, Dashboards, and Renewal Manager. The main content area shows the 'General' tab selected, with a 'Rates' sub-tab also highlighted. The 'Information' section displays the 'Module' as 'UX Membership' and the 'Name' as 'UX 365 Test Benefit'.

Click on the menu item New Rate

The screenshot shows the 'New Rate' button highlighted with a red box in the 'Rates' tab. The button is located in the top right corner of the 'Rates' section. Below the button, there is a dropdown menu with options: 'Add New Rate', 'Add a related Rate to this record.', and 'No of Benefit Recipients'.

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 screenshot shows the 'New Rate' form. The 'Name' field is highlighted with a red box. The form includes fields for 'Rate Type' (set to 'Quantity'), 'Installment' (set to '---'), and 'Default Price Level' (set to 'Non-Member'). The 'General' tab is selected, and the 'Information' section is visible.

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

The screenshot shows the 'New Rate' form. The 'Benefit' field is highlighted with a red box, displaying 'UX 365 Test Benefit'. The form also includes fields for 'Chapter' (set to '---'), '# of Benefit Recipients' (set to '1'), and 'Default Price' (set to '---'). The 'General' tab is selected, and the 'Information' section is visible.

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.

General	Prices	Rate Level X-ref	Web	Administration	Notes
Information					
Name	*	UX 365 Test Rate			
Rate Type	*	Quantity			
Installment	*	Quantity			
Default Price Level	*	Non-Member			
Volume Field_Contact		---			
Product	*	---			

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.

Benefit	*	UX 365 Test Benefit
Chapter		Look for Chapter
# of Benefit Recipients	*	1
Default Price	*	---
Volume Field_Account		---
Recipient Product		---

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.

UX 365 Test Rate	
Quantity	
Look for Installment	Look for Chapter
Non-Member	

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.

Benefit	* UX 365 Test Benefit
Chapter	---
# of Benefit Recipients	1
Default Price	1
Volume Field_Account	---
Recipient Product	---
Late Fee Product	---

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.

Name	* UX 365 Test Rate
Rate Type	* Quantity
Installment	* 1 Year Annual
Default Price Level	* Non-Member
Volume Field_Contact	---
Product	* ---
Rate Next	* ---

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.

Benefit	* UX 365 Test Benefit
Chapter	---
# of Benefit Recipients	1
Default Price	---
Volume Field_Account	---
Recipient Product	---
Late Fee Product	---

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.

Name	* UX 365 Test Rate
Rate Type	* Quantity
Installment	* 1 Year Annual
Default Price Level	* Non-Member
Volume Field_Contact	---
Product	* ---
Rate Next	* ---
Airmail	<input type="checkbox"/>

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.

Benefit	*	UX 365 Test Benefit
Chapter	---	
# of Benefit Recipients	*	1
Default Price	*	1.00
Volume Field_Account		---
Recipient Product	---	
Late Fee Product	---	

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

Quantity	
	1 Year Annual
	Non-Member

Look for 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.

Chapter	---
# of Benefit Recipients	* 1
Default Price	* \$1.0000
Volume Field_Account	---
Recipient Product	Look for Recipient Product
Late Fee Product	---

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.

Installment	*	1 Year Annual
Default Price Level	*	Non-Member
Volume Field_Contact	---	
Product	*	Dues Billing
Rate Next	* ---	
Airmail		

Late Fee Product

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

# of Benefit Recipients	1
Default Price	\$1.0000
Volume Field_Account	---
Recipient Product	---
Late Fee Product	Look for Late Fee Product

Airmail

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

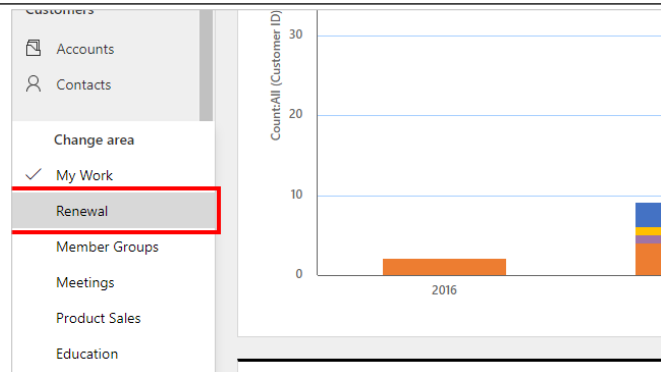
Default Price Level	Non-Member
Volume Field_Contact	---
Product	Dues Billing
Rate Next	---
Airmail	<input type="checkbox"/>

Click on the menu item Save.

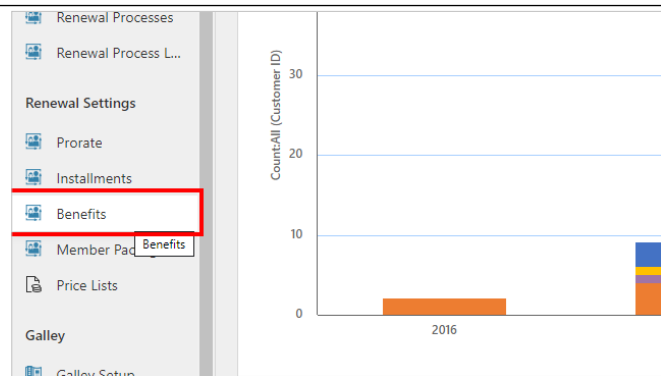
6.7. Creating Price Level X Ref Records

Click on the button **My Work**

Click on the item **Renewal**



Click on the item **Benefits**



Click on the desired Benefit

Member Packages	Subscription - Calendar - Jan Start, No Prorate	Calendar
Price Lists	Subscription- Calendar - Jan Start, Next Prorate...	Calendar
Galley	UX 365 Membership Benefit	Anniversary
Galley Setup	UX Galley Membership	Anniversary
Galley Utility	UX Galley Subscription	Anniversary
Galley	UX365 Benefit	Anniversary
Galley Run Log		

Click on the related item Rates

Alliance by **PROTECH**

UX 365 Hub Renewal > Benefits > UX365 Benefit

Save Save & Close + New Price Progress

UX365 Benefit

Benefit

General **Rates** Web Online Description Notes A

Information

Module * UX Membership

Name * UX365 Benefit

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**

Quick Create: Rate Price Level X-ref

Currency *

Price Level Active *

Price Level Terminated *

Price Level Terminated +

Price Level Terminated

Currencies

- Canadian Dollar CAD
- Euro EUR
- US Dollar USD**

+ New Currency Change View

Click on the search icon for Price Level Active

Quick Create: Rate Price Level X-ref

Currency *

Price Level Active *

Price Level Terminated *

Price Level Terminated +

Price Level Terminated

Click on the item **Member**

Quick Create: Rate Price Level X-ref

Currency *

Price Level Active *

Price Level Terminated *

Price Level Terminated +

Price Level Terminated

Price Lists

- Member US Dollar**
- Non-Member US Dollar

Change View

Click on the search icon for Price Level Terminated

Quick Create: Rate Price Level X-ref

Currency *

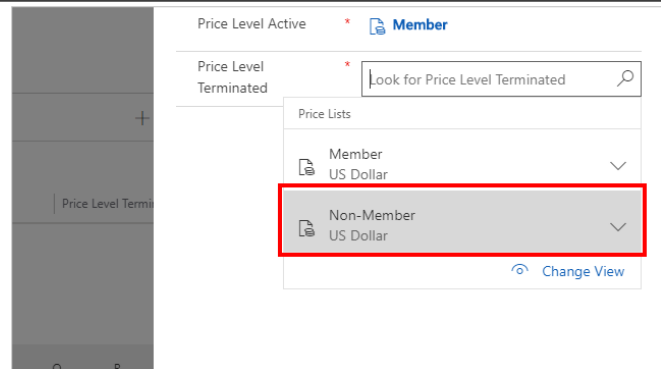
Price Level Active *

Price Level Terminated *

Price Level Terminated +

Price Level Terminated

Click on the item **Non-Member**



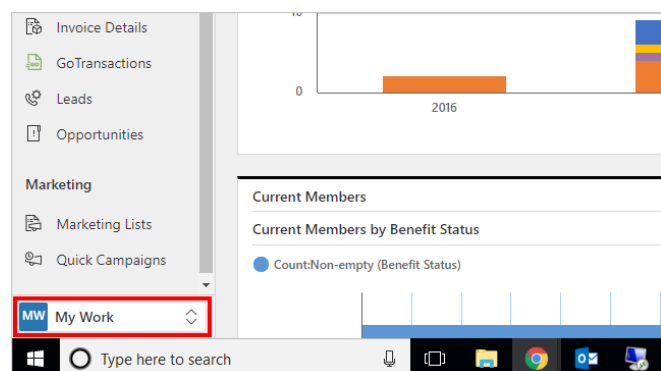
If this rate setup is for a primary benefit (that is, a benefit that controls membership status), you must have a Rate Price Level X-ref record that controls the price level of a record when membership is active and when membership is terminated. If you are working in a multi-currency environment, you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

Click on the button **Save and Close**

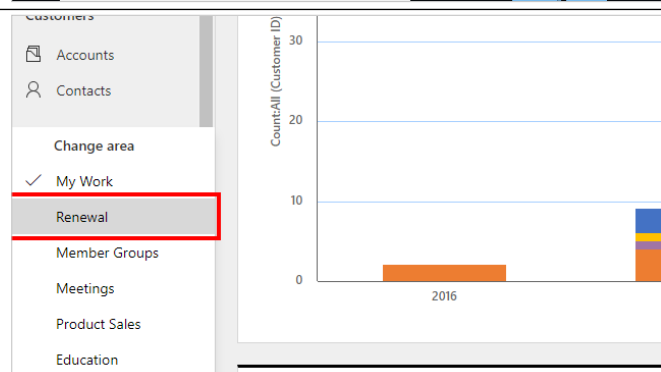


6.8. Generating Membership Renewal Billing Invoices

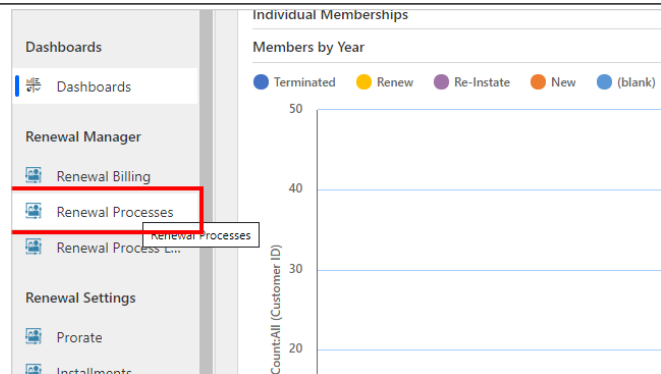
Click on the button **My Work**



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

Renewal Billing Invoices

11/30/2020

Lookup

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

Batch Log

Search for records

Batch Nu...	Batch Date	Name
<input checked="" type="checkbox"/> 001128	12/11/2019	Test Batch 2
<input type="checkbox"/> 001125	12/10/2019	Batch for Bul...
<input type="checkbox"/> 001124	12/6/2019	Michael Click ...
<input type="checkbox"/> 001118	12/6/2019	test
<input type="checkbox"/> 001122	12/6/2019	Meetings Can...

Click on the button **ADD**

<input type="checkbox"/> 001108	6/4/2019	New Batch Log	365A - Fabrik...
<input type="checkbox"/> 001098	10/30/2018	Go-Transaction	365A - Fabrik...
<input type="checkbox"/> 001095	10/23/2018	Go-Transaction	365A - Fabrik...
<input type="checkbox"/> 001091	9/26/2018	sbm	365A - Fabrik...
<input type="checkbox"/> 001086	8/10/2018	lab batch	365A - Fabrik...

Showing 1 to 16 of 16 rows

ADD CANCEL REMOVE VALUE

Click on **Lookup** button for Module

Renewal Billing Invoices

11/30/2020

001128

Lookup

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

Name	Code
<input checked="" type="checkbox"/> Membership	10
<input type="checkbox"/> Subscriptions	40

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**

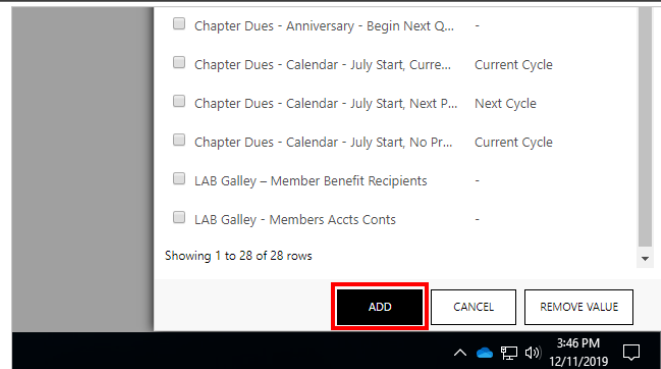
Click on **Lookup** button for Benefit

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

Name	Prora
<input type="checkbox"/> Anniversary Dues - Begin Based on COD 1	-
<input checked="" type="checkbox"/> Anniversary Dues - Begin Current Month	-
<input type="checkbox"/> Anniversary Dues - Begin Next Quarter	-
<input type="checkbox"/> Anniversary Dues - Benefit Recipient Testin...	-
<input type="checkbox"/> Calendar - Begin Jan	Cur
<input type="checkbox"/> Calendar Dues - Begin Jan - Late Fee Test	Cur

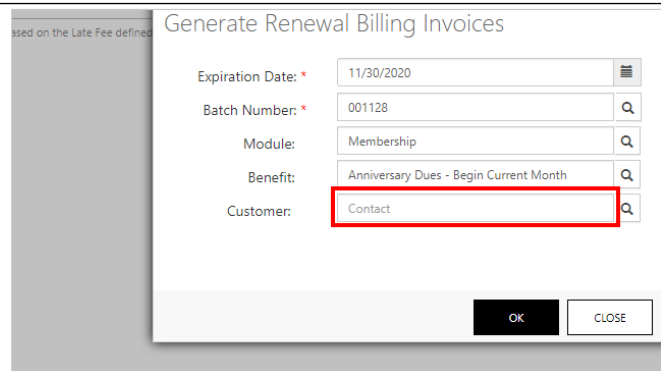
If you do not select a benefit, the system will run the renewal process on all renewal benefits within the selected module. If no module was selected, the system will run the renewal process on all eligible membership and subscription renewal billing records for the selected Expiration Date.

Click on the button **ADD**



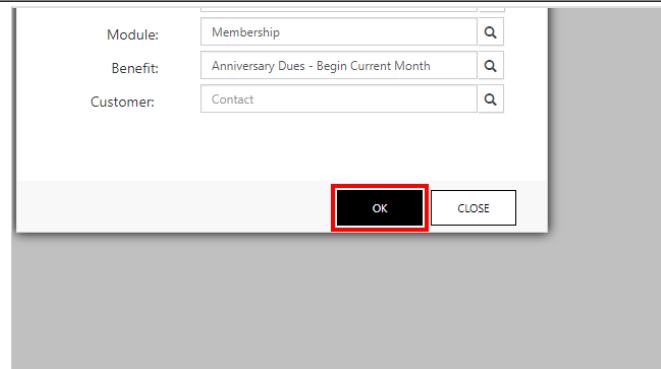
The screenshot shows a list of items in a software application. The list includes items like 'Chapter Dues - Anniversary - Begin Next Q...', 'Chapter Dues - Calendar - July Start, Curre...', 'Chapter Dues - Calendar - July Start, Next P...', 'Chapter Dues - Calendar - July Start, No Pr...', 'LAB Galley - Member Benefit Recipients', and 'LAB Galley - Members Accts Conts'. At the bottom of the list, there is a red box highlighting the 'ADD' button, along with 'CANCEL' and 'REMOVE VALUE' buttons. The status bar at the bottom shows the time as 3:46 PM on 12/11/2019.

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.



The screenshot shows the 'Generate Renewal Billing Invoices' dialog box. It contains several fields: 'Expiration Date' (11/30/2020), 'Batch Number' (001128), 'Module' (Membership), 'Benefit' (Anniversary Dues - Begin Current Month), and 'Customer' (Contact). The 'Customer' field is highlighted with a red box. At the bottom right, there are 'OK' and 'CLOSE' buttons.

Click on the button **OK**

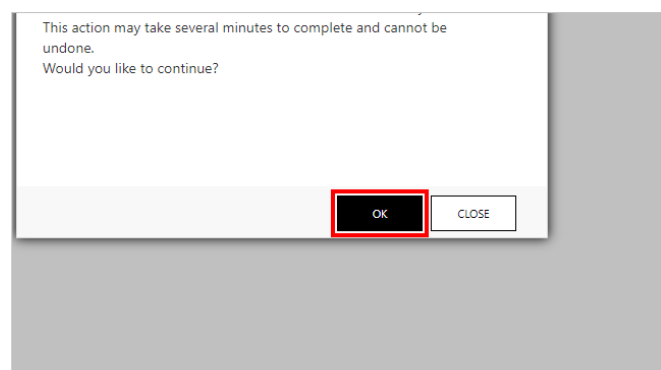


The screenshot shows the 'Generate Renewal Billing Invoices' dialog box. It contains several fields: 'Module' (Membership), 'Benefit' (Anniversary Dues - Begin Current Month), and 'Customer' (Contact). At the bottom right, there is a red box highlighting the 'OK' button, along with a 'CLOSE' button.

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



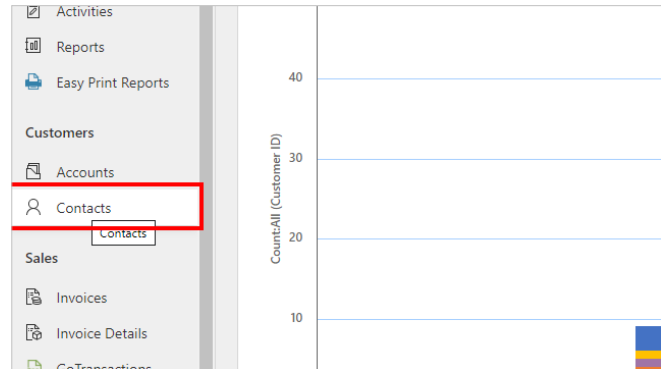
The screenshot shows a confirmation dialog box with the text: 'This action may take several minutes to complete and cannot be undone. Would you like to continue?'. At the bottom right, there is a red box highlighting the 'OK' button, along with a 'CLOSE' button.

6.9. Recalculating a Membership Renewal Invoice

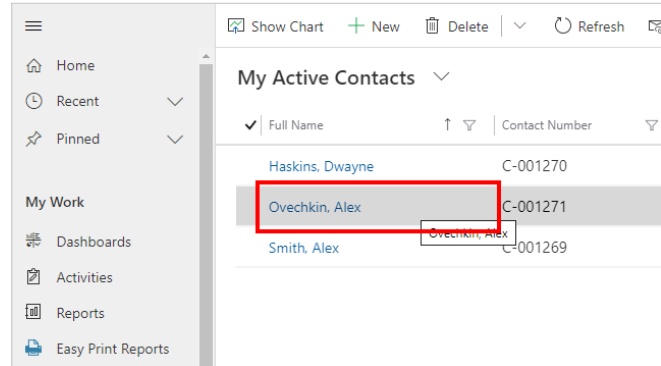
You may recalculate a renewal billing invoice if you need to change the join date, the rate, the quantity, or the volume if the rate selected is a volume-based rate. You cannot recalculate a membership invoice if you need to change the benefit selected.

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

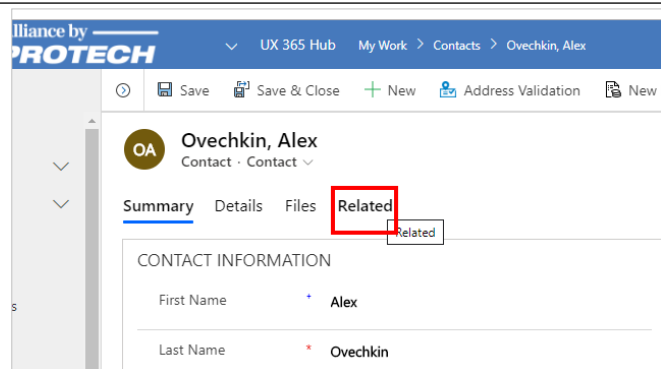
Click on the item **Contacts**



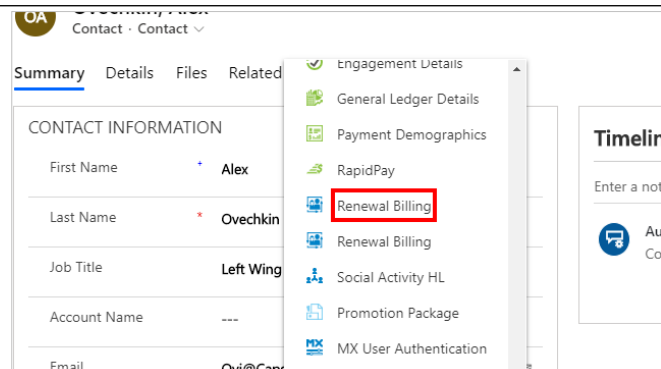
Click on the cell **Full Name**



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


Export Renewal Billing									
Primary Benefit	Benefit Status	Invoice	Chapter						
Yes	New	UX 365 Membership	---						
E	F	G	H	I	J	K	L	M	N
UX 365 Membership Benefit									

Double click on the renewal billing invoice line item.


 Easy Print Reports


Customers


 Accounts


 Contacts

Sales

 Invoices

 Invoice Details



 GoTransactions

 Leads

Name* UX 365 Membership Benefit

Source Code---

Details

✓	Description	Batch
	11/30/2020 UX 365 Membership Ben...	001113
	Visa Credit Card Payment - Authorized	001113

Click on the Rate Look Up

Administration	Notes	Related
UX 365 Membership Benefit		
Premium	X	
12/5/2019		
Premium		
Yes		

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

Benefit Information	
Benefit	UX 365 Membership Benefit
Rate	Premium X
Current Join Date	Rate
Rate Next	Premium PLUS 12/5/2019 11:54 AM
Primary Benefit	+ New Rate
Invoice	UX 365 Membership Benefit

Volume

Volume	*	1.00
Quantity	*	1
Cycle Start Date	*	12/1/2019
# of Benefit Recipients		1

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

Volume	*	1.00
Quantity	*	1
Cycle Start Date	*	12/1/2019
# of Benefit Recipients		1
Paid Through Date		11/30/2020

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

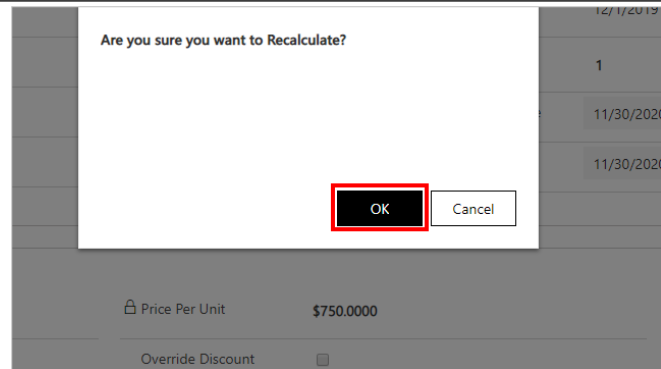
The screenshot shows the 'Alliance by PROTECH' web interface. The 'Save' button is highlighted with a red box. The interface includes a navigation menu on the left with options like Home, Recent, and Pinned. The main content area shows a 'Renewal Billing' transaction for '2019 Ovechkin, Alex UX 365 Membership Benefit'. The 'Save' button is located in the top right corner of the transaction details.

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**

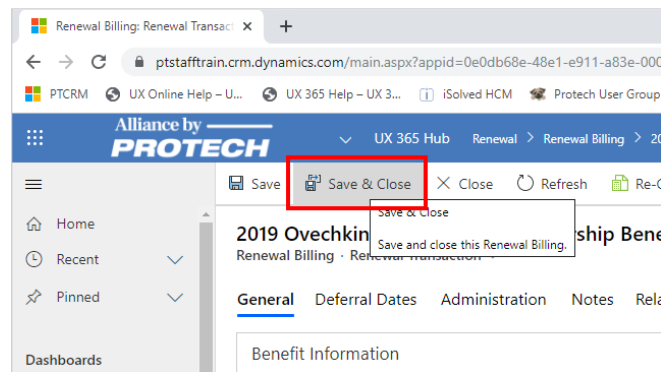
The screenshot shows the 'Alliance by PROTECH' web interface. The 'Re-Calculate Invoice' button is highlighted with a red box. The interface includes a navigation menu on the left with options like Home, Recent, and Pinned. The main content area shows a 'Renewal Billing' transaction for '2019 Ovechkin, Alex UX 365 Membership Benefit'. The 'Re-Calculate Invoice' button is located in the top right corner of the transaction details.

Click on the button **OK**

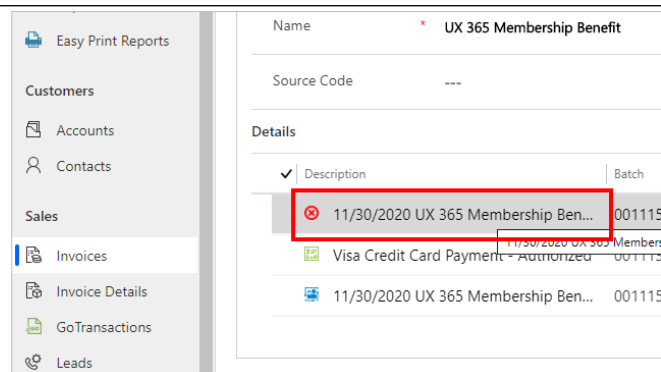


The system will recalculate the invoice amount and totals based on the new rate, join date, or volume, etc. For example, if the recalculation is based on a new rate, you will see the new rate and amounts due based on the new rate selected. If the recalculation was based on a change to the volume or the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

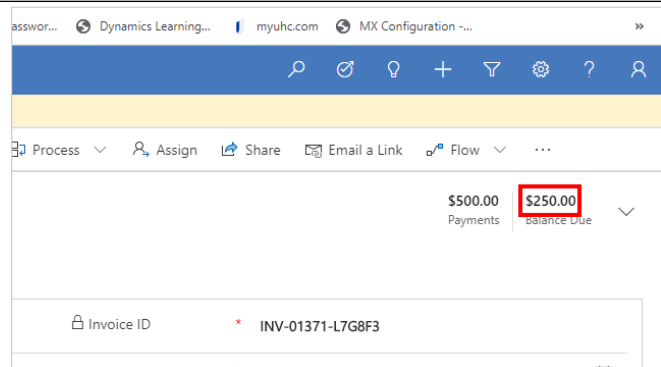
Click on the menu item **Save & Close**



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

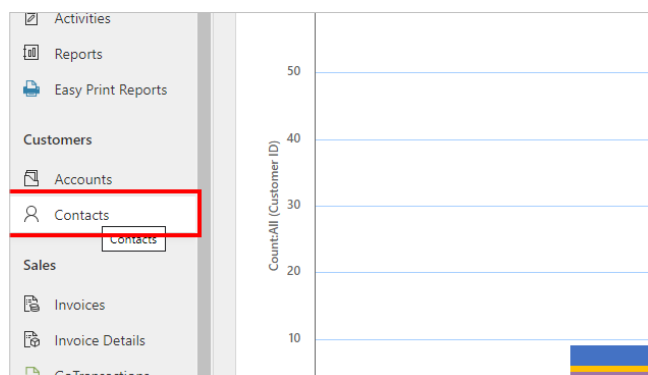
account/contact default price level field and member flag if the renewal billing record flag is primary. If the renewal benefit status is Renew and the renewal cycle state = Current, the system will update the renewal billing record. There are no changes to the account/contact default price level field 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

Pinned	
My Work	
Dashboards	
Activities	
Reports	
Easy Print Reports	
Customers	
Accounts	
Contacts	

Haskins, Dwayne	C-001270
Ovechkin, Alex	C-001271
Smith, Alex	C-001269
Test, Bryan	C-001283
Wall, John	C-001282

Click on the Related tab

SANDBOX

Copy Address Deceased Deactivate GoTransactions Connect

C-001282
Contact Nu

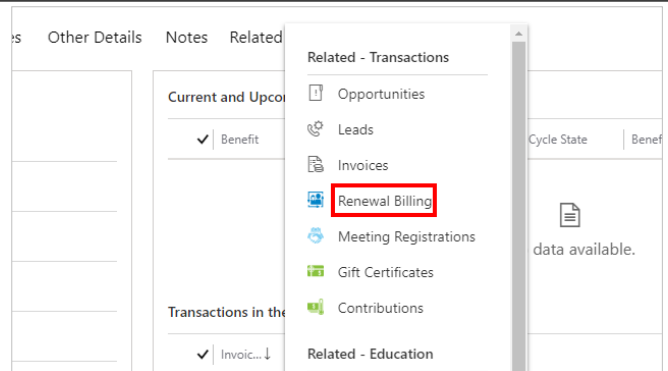
tion Preferences Other Details Notes **Related**

C-001282

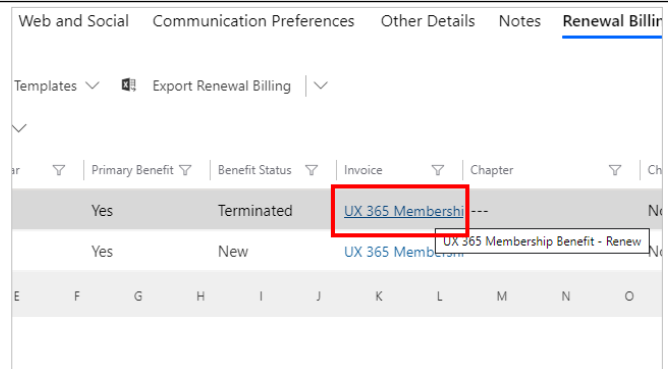
Current and Upcoming Renewal Billing

✓	Benefit	↑	Rate	Cycle
---	---------	---	------	-------

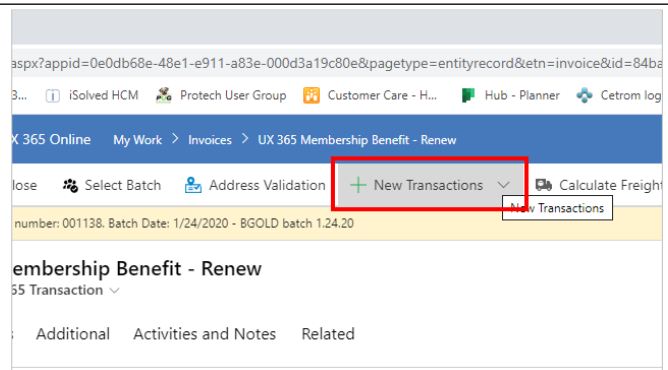
Click on the menu item **Renewal Billing**



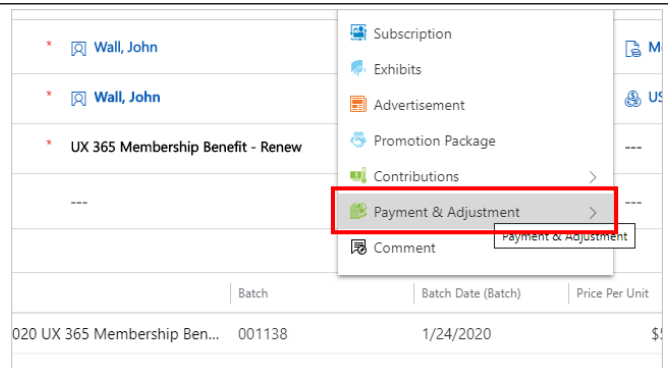
Click on the Invoice that is associated with the renewal billing record that was terminated due to no payment.



Click on the menu item **New Transactions**



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



Select payment type. In this example choose Credit Card.

UX 365 Online My Work > Invoices > UX 365 Membership Benefit - Renew

Close Select Batch Address Validation New Transactions Calculate Freight

number: 001138. Batch Date: 1/24/2020 - BGOLD batch 1.24

Membership Benefit - Renew

55 Transaction

Additional Activities and Notes Relat

* Wall, John

* Wall, John

Back

Credit Card

All Others Credit Card

Adjustment

Gift Certificate

Click on the link **Product**

Description * ---

Payment * \$500.00

Security Code(CVV2) ---

Transaction Date * 1/24/2020

Click on the item Visa Credit Card Payment

Product * Look for Product

Credit Card Number * Products

Expiration [MMYY] * AmEx Credit Card Payment AMEX

Batch * MC Credit Card Payment MC

Customer * Visa Credit Card Payment VS

Cardholder Billing Information

Name on Card John Wall

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

Product * Visa Credit Card Payment X

Credit Card Number * ---

Expiration [MMYY] * ---

Batch 001138

Customer * Wall, John

Enter **Credit Card Number**.

Detail · Credit Card

ral Credit Card Log Administration

oice Detail

Product * Visa Credit Card Payment

Credit Card Number * 4

Expiration [MMYY] * Show cards from your Google Account

Batch 001138

Customer + Wall, John

Click on the text field Expiration

ral Credit Card Log Administration

oice Detail

Product * Visa Credit Card Payment

Credit Card Number * 4111111111111111

Expiration [MMYY] * Show cards from your Google Account

Batch 001138

Customer + Wall, John

Enter Expiration Date

ral Credit Card Log Administration

oice Detail

Product * Visa Credit Card Payment

Credit Card Number * 4111111111111111

Expiration [MMYY] * 01

Batch 01/23 Test

Customer + Show cards from your Google Account

Manage payment methods...

Click on the text field Security Code

Description * Visa Credit Card Payment

Payment * \$500.00

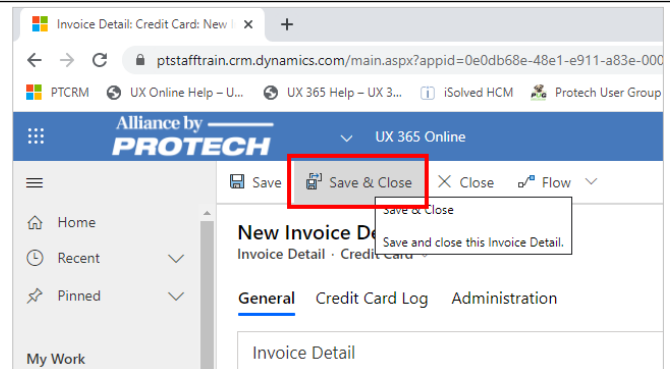
Security Code(CVV2) * ---

Transaction Date * 1/24/2020

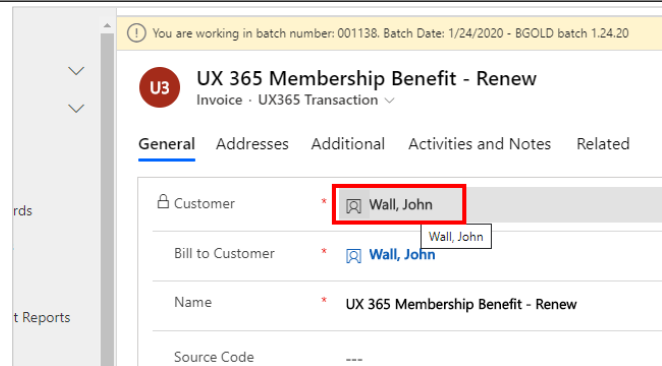
Enter **Security Code(CVV2)**.

Description	* Visa Credit Card Payment
Payment	* \$500.00
Security Code(CVV2)	2
Transaction Date	* 1/24/2020

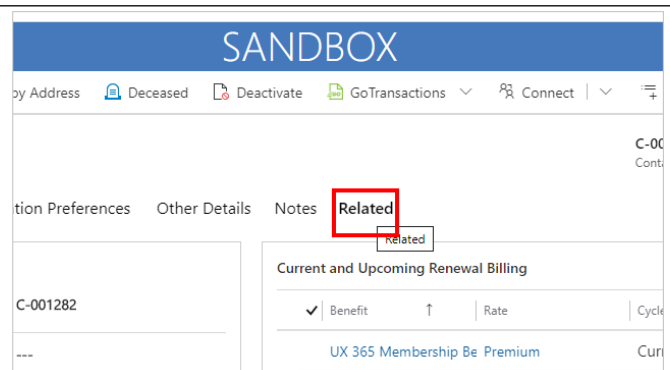
Click on the menu item **Save & Close**



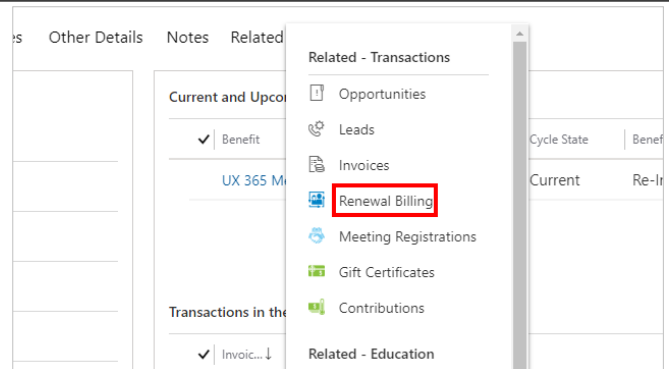
Verify that the membership has been reinstated by navigating back to the contact record.



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.

Default Billing Web and Social Communication Preferences Other Details Note									
Excel Templates Export Renewal Billing									
Associated View									
ite	Cycle Year	Primary Benefit	Benefit Status	Invoice	Chapter				
UX 365 Membership	2020	Yes	Re-Instate	UX 365 Membership	---				
UX 365 Membership	2019	Yes	New	UX 365 Membership	---				
C	D	E	F	G	H	I	J	K	L

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**

Activities	Benefit	Cycle State	Cycle Year
Reports	UX 365 Membership Benefi	Current	2020
Easy Print Reports	UX 365 Membership Benefi	Past	2019
Customers	All	#	A B C D E
Accounts	1 - 2 of 2 (0 selected)		
Contacts			
Sales			
Invoices			
Invoice Details			
GoTransactions			

Open the Contact that is to be reinstated

My Active Contacts	
Full Name	Contact Number
Haskins, Dwayne	C-001270
Ovechkin, Alex	C-001271
Smith, Alex	C-001269
Test, Bryan	C-001283
Wall, John	C-001282

Click on the Related tab

SANDBOX

Copy Address Deceased Deactivate GoTransactions Connect

C-001269
Contact Nu

tion Preferences Other Details Notes **Related**

C-001269

Current and Upcoming Renewal Billing

Benefit Rate Cycle

Click on the menu item **Renewal Billing**

Other Details Notes Related

Current and Upco

Benefit

Transactions in the

Invoic...

Related - Transactions

- Opportunities
- Leads
- Invoices
- Renewal Billing**
- Meeting Registrations
- Gift Certificates
- Contributions

Related - Education

Cycle State | Benef

data available.

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

Web and Social Communication Preferences Other Details Notes **Renewal Billin**

Templates Export Renewal Billing

Primary Benefit	Benefit Status	Invoice	Chapter
Yes	Terminated	UX 365 Membershi	---
No	---	UX 365 Membership Benefit - Renew	---
Yes	New	UX 365 Membershi	---

E F G H I J K L M N O

Double click on the membership line item.

Easy Print Reports

Customers

- Accounts
- Contacts
- Sales
- Invoices**
- Invoice Details
- GoTransactions
- Leads

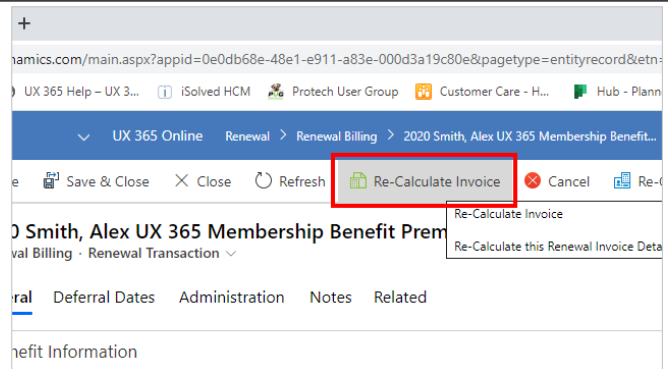
Name * UX 365 Membership Benefit - Renew

Source Code ---

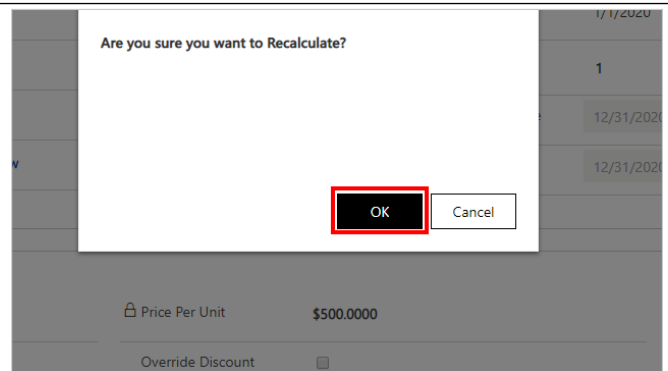
Details

Description	Batch
12/31/2020 UX 365 Membership Ben...	001138
Check Payment	001138

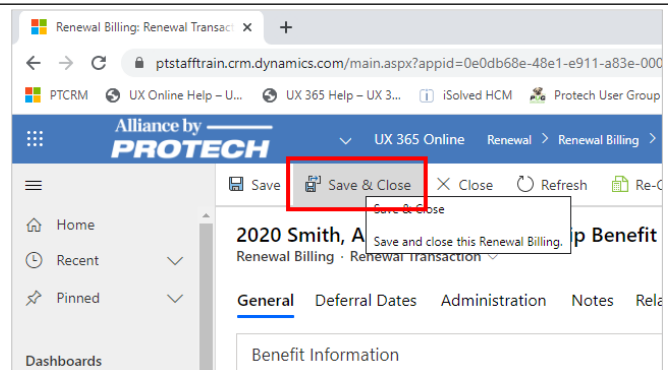
Click on the menu item **Re-Calculate Invoice**



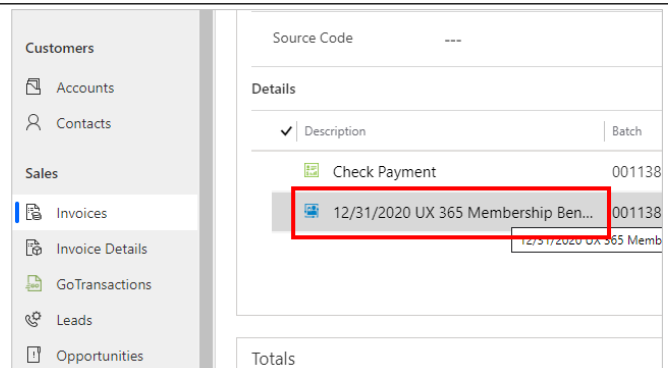
Click on the button **OK**



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.

You are working in batch number: 001138. Batch Date: 1/24/2020 - BIGOLD batch 1.24.20

UX 365 Membership Benefit - Renew
Invoice - UX365 Transaction

General | Addresses | Additional | Activities and Notes | Related

Customer * **Smith, Alex**

Bill to Customer * **Smith, Alex**

Name * **UX 365 Membership Benefit - Renew**

Source Code ---

Click on the item **Related**

SANDBOX

by Address | Deceased | Deactivate | GoTransactions | Connect

tion Preferences | Other Details | Notes | **Related**

C-001269

Current and Upcoming Renewal Billing

✓ Benefit | ↑ Rate | Cycle

UX 365 Membership Be Premium

Click on the menu item **Renewal Billing**

Other Details | Notes | Related

Current and Upcoming Renewal Billing

✓ Benefit | ↑ Rate | Cycle

UX 365 Membership Benefit - Premium

Transactions in the

✓ Invoice...

Renewal Billing

Related - Transactions

Opportunities

Leads

Invoices

Meeting Registrations

Gift Certificates

Contributions

Related - Education

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

Default Billing | Web and Social | Communication Preferences | Other Details | Note

ort | Excel Templates | Export Renewal Billing

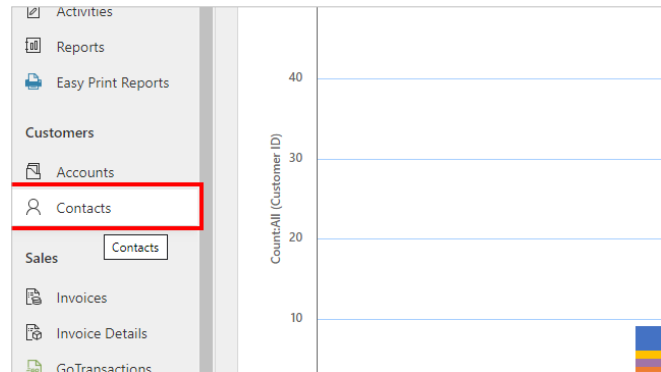
ciated View

ite	Cycle Year	Primary Benefit	Benefit Status	Invoice	Chapter
t	2020	Yes	Re-Instate	UX 365 Membershi	---
t	2020	No	---	Subscription - Anni	---
	2019	Yes	New	UX 365 Membershi	---

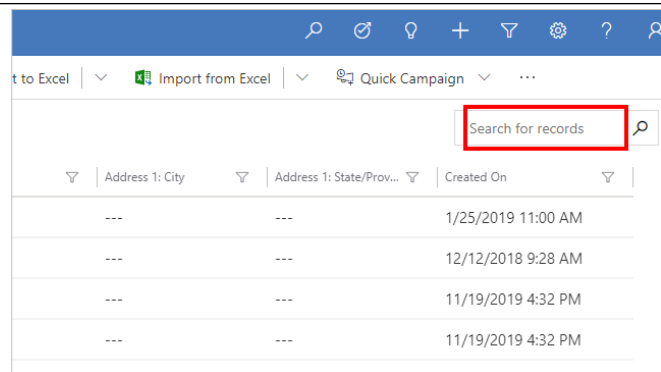
C D E F G H I J K L M

6.11. Rejoining a Membership

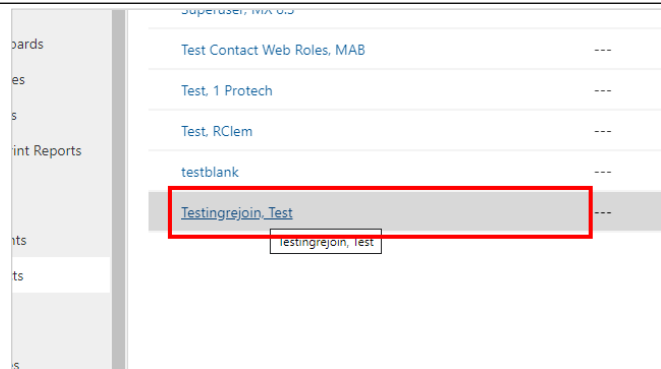
Click on the menu item Contacts.



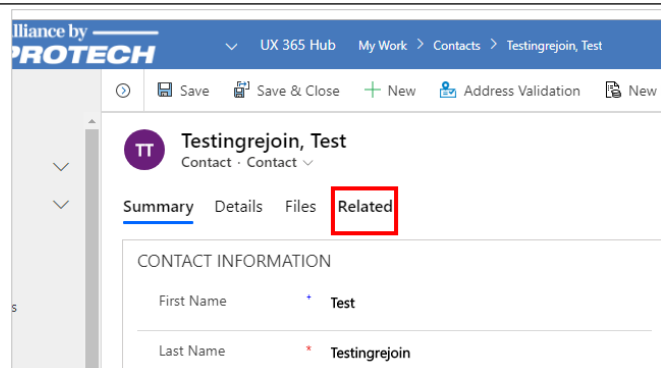
Search for the contact you would like to rejoin.



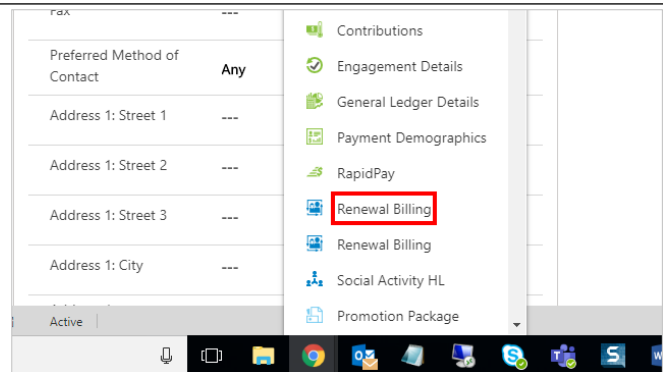
Open the contact record by clicking on the contact's name.



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

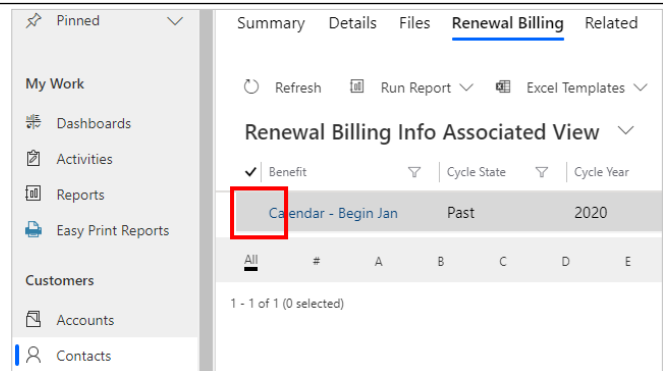


Click on the menu item **Renewal Billing**

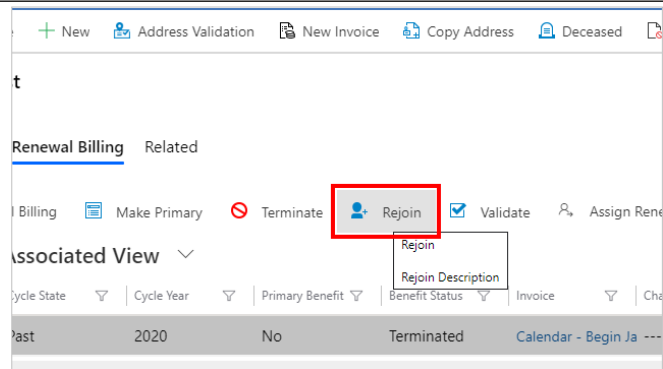


Select the renewal billing record.

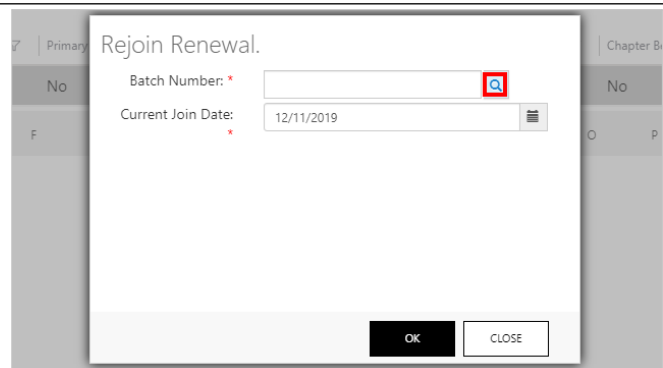
Rejoining an existing renewal billing record is available only for renewal billing records where the cycle state = Past and the benefit status = Terminated and there is no renewal billing record for the same benefit with a cycle state = Current.



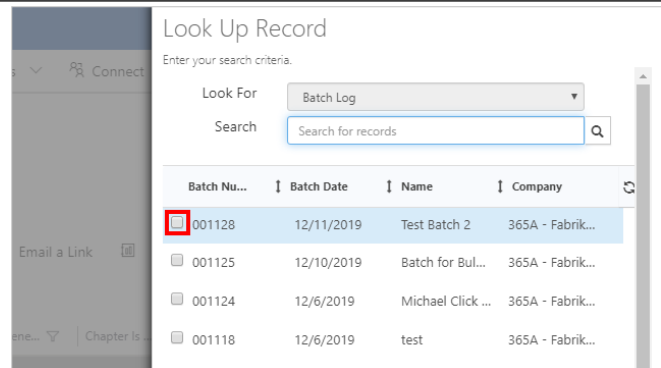
Click on the menu item **Rejoin**



Use the lookup to search for batches.



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



Look Up Record

Enter your search criteria.

Look For: Batch Log

Search: Search for records

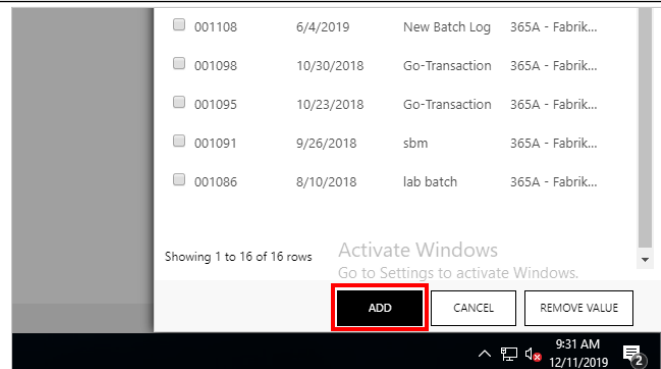
Batch Nu...	Batch Date	Name	Company
001128	12/11/2019	Test Batch 2	365A - Fabrik...
001125	12/10/2019	Batch for Bul...	365A - Fabrik...
001124	12/6/2019	Michael Click ...	365A - Fabrik...
001118	12/6/2019	test	365A - Fabrik...

Showing 1 to 16 of 16 rows

Activate Windows
Go to Settings to activate Windows.

ADD CANCEL REMOVE VALUE

Click on the button **ADD**



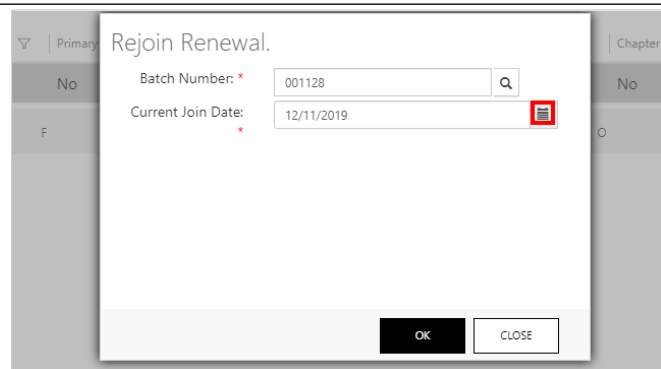
Rejoin Renewal.

Batch Number: * 001128

Current Join Date: * 12/11/2019

OK CLOSE

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



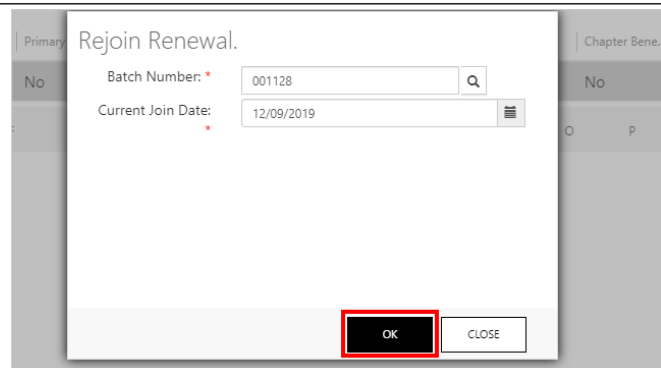
Rejoin Renewal.

Batch Number: * 001128

Current Join Date: * 12/09/2019

OK CLOSE

Click on the button **OK**



Rejoin Renewal.

Batch Number: * 001128

Current Join Date: * 12/09/2019

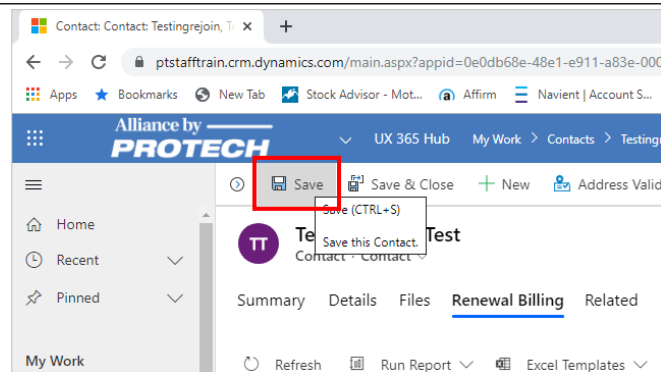
OK CLOSE

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.

Refresh Run Report Excel Templates Export Renewal Billing									
newal Billing Info Associated View									
Benefit	Cycle State	Cycle Year	Primary Benefit	Benefit Status					
Calendar - Begin Jan	Past	2020	No	Terminated					
Calendar - Begin Jan	Current	2020	No	---					
#	A	B	C	D	E	F	G	H	I
f 2 (0 selected)									

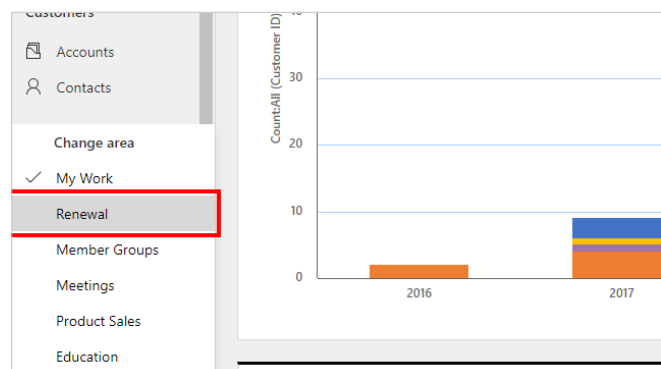
Click on the menu item Save



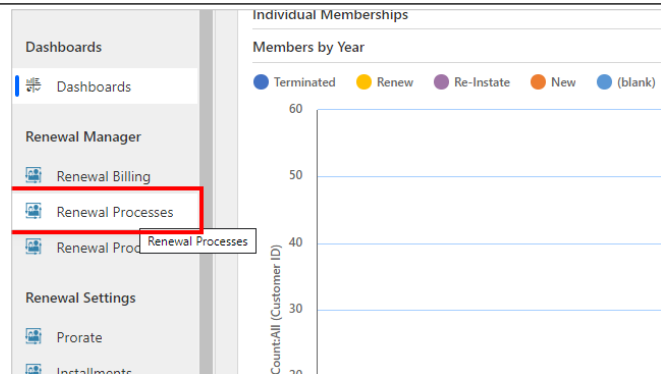
6.12. Renewal Process Rollback Utility

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**

The screenshot shows the Protech UX 365 Hub interface. The 'Renewal Processes' section is active, and the 'Renewal Process Rollback' option is highlighted with a red box. The interface includes three main sections: 'Generate Renewal Billing Invoices' (described as creating renewal billing records and related invoices), 'Renewal Process Rollback' (described as deleting renewal billing records and related invoices), and 'Renewal Billing Generate Late Fee' (described as generating late fees for defined renewal billing).

Search for the batch the renewals were created in

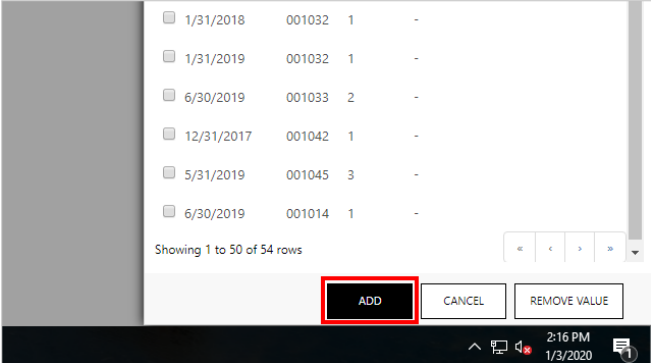
The screenshot shows the 'Renewal Process Rollback' dialog box. It contains a search field for the process name, a 'Process: *' label, and a search icon. The dialog also includes 'OK' and 'CLOSE' buttons. The text in the dialog states: 'delete system-created invoices and related renewal for the selected renewal process log record, invoices where a payment or adjustment transaction ed. This will allow you to re-run the Generate y Invoices process. NOTE: Only a System Administrator can run this backup your database before running this process. Process: * [Search Icon] OK CLOSE'.

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

The screenshot shows the 'Renewal Billing Termination Process' dialog box. It contains a table with the following columns: Expire Date, Ba..., Cou..., and Selected Benef. The row for 11/30/2020 is highlighted in red. The table data is as follows:

Expire Date	Ba...	Cou...	Selected Benef
12/31/2019	001124	6	-
11/30/2020	001128	1	Anniversary t
11/30/2020	001108	1	UX365 Benef
4/30/2019	001090	2	LAB Galley M
12/31/2018	001099	1	-
6/30/2019	001013	2	-
12/31/2018	001013	1	-

Click on the button **ADD**

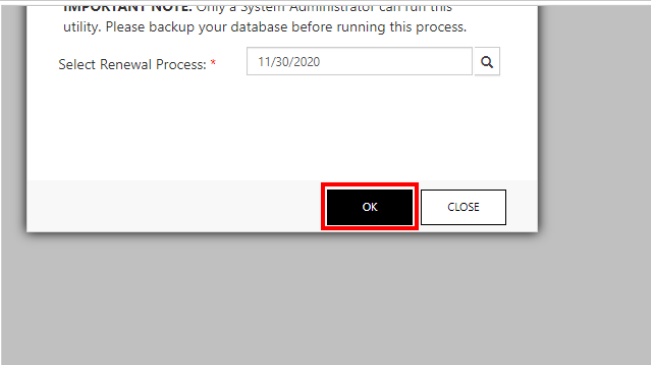


<input type="checkbox"/>	1/31/2018	001032	1	-
<input type="checkbox"/>	1/31/2019	001032	1	-
<input type="checkbox"/>	6/30/2019	001033	2	-
<input type="checkbox"/>	12/31/2017	001042	1	-
<input type="checkbox"/>	5/31/2019	001045	3	-
<input type="checkbox"/>	6/30/2019	001014	1	-

Showing 1 to 50 of 54 rows

ADD CANCEL REMOVE VALUE

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



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

Select Renewal Process:

OK CLOSE

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

SANDBOX

Address Deceased Deactivate GoTransactions Connect

C-0011
Contact

tion Preferences Other Details Notes **Related**

C-001109
Protech Associates, Inc.

Current and Upcoming Renewal Billing

Benefit	Rate	Cycle
Calendar - Begin Jan	1 Year Anniversary	Current

Click on the menu item **Renewal Billing**

Other Details Notes Related

Current and Upcoming Renewal Billing

Benefit Rate Cycle

Calendar - Begin Jan 1 Year Anniversary Current

Related - Transactions

- Opportunities
- Leads
- Invoices
- Renewal Billing**
- Meeting Registrations
- Gift Certificates

Related - Education

- Eligibility View

Check mark the Benefit to be Terminated

Pinned

My Work

- Dashboards
- Activities
- Reports
- Easy Print Reports

Customers

- Accounts
- Contacts

Summary Address Information Default Billing Web

Refresh Run Report Excel Templates

Renewal Billing Info Associated View

Benefit Cycle State Cycle Year

Calendar - Begin Jan Current 2020

All	#	A	B	C	D	E
1 - 1 of 1 (0 selected)						

Click on the menu item **Terminate**

Save & Close New Address Validation New Invoice Copy Address Deceased

ffey, Matt S.
Contact - UX 365

Address Information Default Billing Web and Social Communication Preferences

Delete Renewal Billing Make Primary **Terminate** Rejoin Validate

Billing Info Associated View

Cycle State Cycle Year Primary Benefit Benefit Status Invoice

- Begin Jan	Current	2020	No	New	Cal

Click the Termination Reason drop down

Select a value from the list

Click on the button **OK**

The benefit status is now Terminated

Default Billing Web and Social Communication Preferences Other Details Notes

Excel Templates Export Renewal Billing

Filtered View

Cycle Year

Primary Benefit

Benefit Status

Invoice

Chapter

2020

No

Terminated

Calendar - Begin Ja ---

C

D

E

F

G

H

I

J

K

L

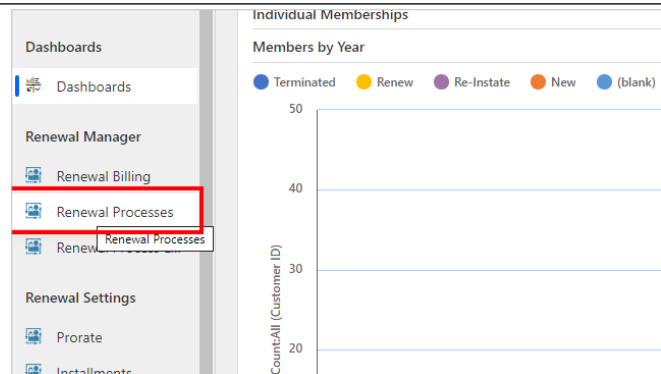
M

Terminated

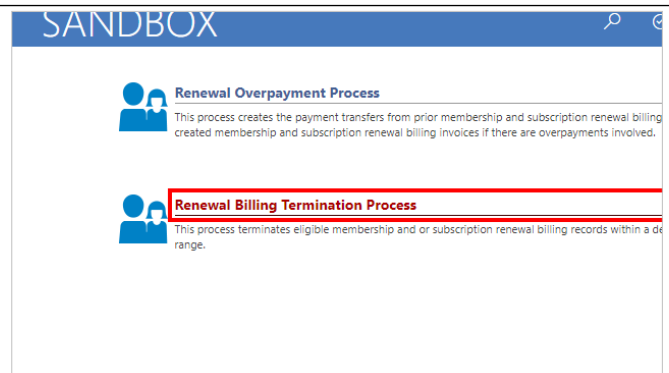
6.14. Terminating Expired Memberships

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

Enter your search criteria.

Look For: **Module**

Search:

Name	Code
<input checked="" type="checkbox"/> Membership	10
<input type="checkbox"/> Subscriptions	40

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**

Showing 1 to 2 of 2 rows

ADD CANCEL REMOVE VALUE

12/18/2019

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

Renewal Billing Termination Process

This process terminates Membership and/or Subscription renewal billing records for a defined paid through date.

Paid Thru Date: * 12/18/2019

Module: Membership

Benefit:

Reason: *

Customer: Contact

Select the benefit

Enter your search criteria.

Look For: **Benefit**

Search:

Name	Renewal
<input checked="" type="checkbox"/> Anniversary Dues - Begin Based on COD 1	Ann
<input type="checkbox"/> Anniversary Dues - Begin Current Month	Ann
<input type="checkbox"/> Anniversary Dues - Begin Next Quarter	Ann
<input type="checkbox"/> Anniversary Dues - Benefit Recipient Testin...	Ann
<input type="checkbox"/> Calendar - Begin Jan	Cale

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**

<input type="checkbox"/>	Chapter Dues - Anniversary - Begin Next Q...	Anniversary
<input type="checkbox"/>	Chapter Dues - Calendar - July Start, Curre...	Calendar
<input type="checkbox"/>	Chapter Dues - Calendar - July Start, Next P...	Calendar
<input type="checkbox"/>	Chapter Dues - Calendar - July Start, No Pr...	Calendar
<input type="checkbox"/>	LAB Galley - Member Benefit Recipients	Anniversary
<input type="checkbox"/>	LAB Galley - Members Accts Conts	Anniversary

Showing 1 to 29 of 29 rows

ADD CANCEL REMOVE VALUE

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

Click on the combo box

Renewal Billing Termination Process

This process terminates Membership and/or Subscription renewal billing records for a defined paid through date.

Paid Thru Date: * 12/18/2019

Module: Membership

Benefit: Anniversary Dues - Begin Based on COD 1

Reason: * ▼

Customer: Contact

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.

This process terminates Membership and/or Subscription renewal billing records for a defined paid through date.

Paid Thru Date: * 12/18/2019

Module: Membership

Benefit: Anniversary Dues - Begin Based on COD 1

Reason: * ▼

Customer: Contact

- No Payment
- Retired
- Other
- No Reason
- Cancelled**
- Deceased

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**

Customer: Contact

OK CLOSE

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 benefit based on the setup of 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.

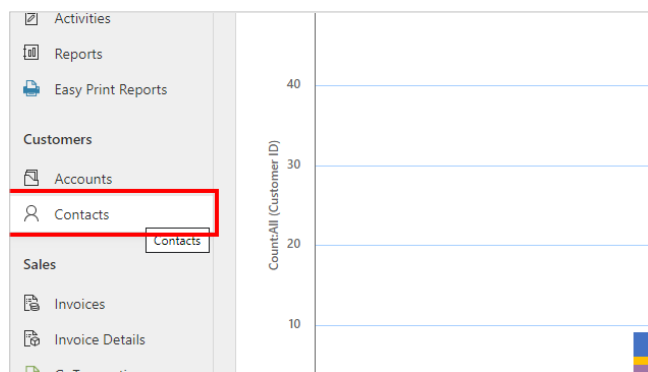
This process accommodates full year benefit changes when a member wants to change their membership for the entire renewal cycle. In this scenario, charges for the original benefit should be fully discounted, so that the member is not charged for the unused membership. The member is charged for the new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

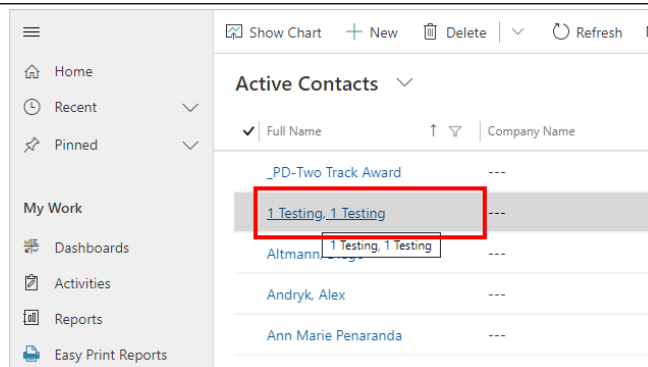
Important

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'

The screenshot shows the Protech UX 365 Hub interface. The breadcrumb trail is "UX 365 Hub > My Work > Contacts > 1 Testing, 1 Testing". The contact record for "1 Testing, 1 Testing" is displayed. The "Related" tab is selected and highlighted with a red box. Below the tabs, the "CONTACT INFORMATION" section shows the First Name and Last Name, both set to "1 Testing".

When the dropdown menu appears, select 'Renewal Billing'

The screenshot shows the Protech UX 365 Hub interface. The "Related" dropdown menu is open, displaying various options. The "Renewal Billing" option is selected and highlighted with a red box. The options in the dropdown include Contributions, Engagement Details, General Ledger Details, Payment Demographics, RapidPay, Renewal Billing, Social Activity HL, Promotion Package, and MX User Authentication.

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

The screenshot shows the Protech UX 365 Hub interface. The "Renewal Billing Info Associated View" is displayed. The "Benefit" column is selected, and the "UX Galley Membership" row is highlighted with a red box. The table shows the following data:

Benefit	Cycle State	Cycle Year
UX Galley Membership	Current	2019

Once found, click into that benefit's invoice

The screenshot shows the Protech UX 365 Hub interface. The "Renewal Billing Info Associated View" is displayed. The "Benefit" column is selected, and the "UX Galley Membership" row is highlighted with a red box. The table shows the following data:

Benefit	Cycle State	Cycle Year
UX Galley Membership	Current	2019

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.

Upgrade/Downgrade Membership
Select the Benefit and Rate to which membership should be changed. Enter the effective date for the changed membership as the Current Join Date (usually the current date)

Benefit: * UX Galley Membership [lookup icon]
Rate: * Galley Rate 1 [lookup icon]
Chapter: * [empty] [lookup icon]
Current Join Date: * 12/17/2019 [calendar icon]

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.

Upgrade/Downgrade Membership
Select the Benefit and Rate to which membership should be changed. Enter the effective date for the changed membership as the Current Join Date (usually the current date)

Benefit: * UX Galley Membership [lookup icon]
Rate: * Galley Rate 1 [lookup icon]
Chapter: * [empty] [lookup icon]
Current Join Date: * 12/17/2019 [calendar icon]

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.

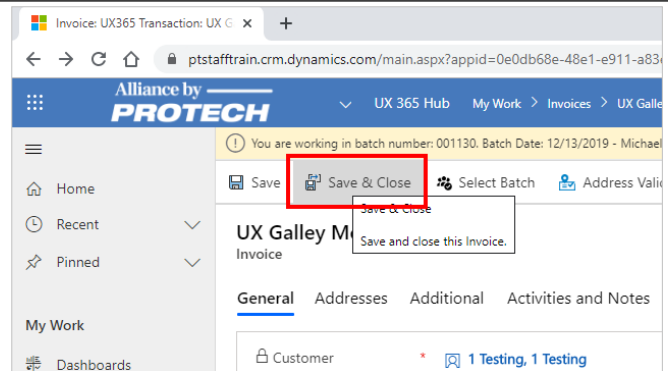
OK [highlighted] CLOSE

11:08 AM 12/17/2019

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

Bill to Customer * 1 Testing, 1 Testing	
Name *	UX Galley Membership
Source Code	---
Details	
✓ Description	Batch
11/30/2020 UX Galley Membership, ...	001130
Check Payment	001130
11/30/2020 UX Galley Membership, ...	001130

Click Save or Save & Close to save the record.

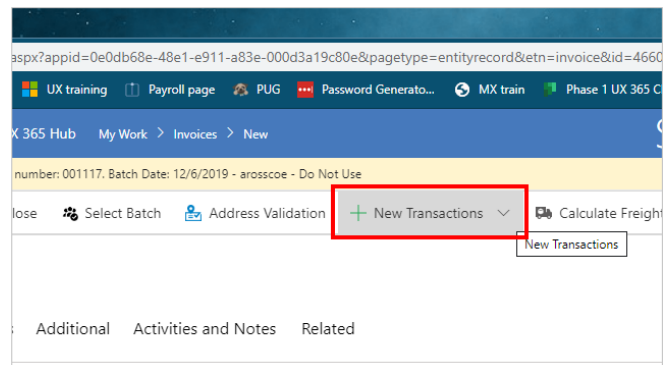


7. Product Sales

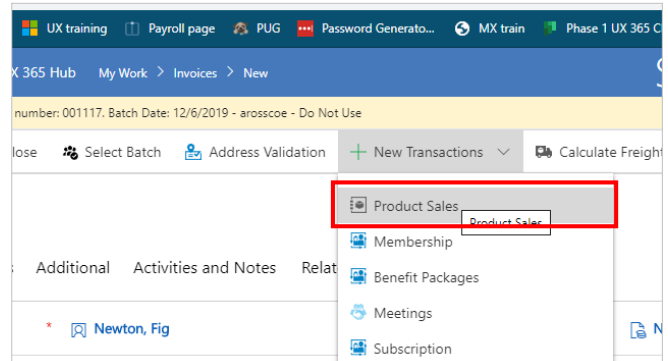
7.1. Back Orders on Product Sales Invoices

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**

		Description * ---
		Batch 001117
		Quantity Shipped ---



Select the desired product.

Product *	Look for Product
Warehouse	Products 365 USD Single Currency Non-Inventory 365USDSINGLE
Transaction Date *	Baseball Jersey 721
Quantity Ordered *	Black Pants BLAPANT
Back Ordered	
Overridden Pricing	Component 1 comp1
Promotion	

Click on the text field **Quantity Ordered**

oice Detail	
Product *	 Black Pants X
Warehouse *	 Internal Warehouse
Transaction Date *	12/6/2019
Quantity Ordered *	--- Select to enter data
⊗ Required fields must be filled in.	
Back Ordered	---
Overridden Pricing	<input type="checkbox"/>

Enter **Quantity Ordered**.

oice Detail	
Product *	 Black Pants
Warehouse *	 Internal Warehouse
Transaction Date *	12/6/2019
Quantity Ordered *	 ⊗ Required fields must be filled in.
Back Ordered	---
Overridden Pricing	<input type="checkbox"/>

Click off the quantity ordered box.

Invoice Detail	
Product	* Black Pants
Warehouse	* Internal Warehouse
Transaction Date	* 12/6/2019
Quantity Ordered	* 5
Required fields must be filled in.	
Back Ordered	---
Overridden Pricing	<input type="checkbox"/>

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**

Inventory Confirmation	
Quantity on hand is Zero. This product will be back ordered. Click OK to proceed. Otherwise, click Cancel and choose another product.	
OK	Cancel

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.

Product	* Black Pants
Warehouse	* Internal Warehouse
Transaction Date	* 12/6/2019
Quantity Ordered	* 5
Back Ordered	5.00000
Overridden Pricing	<input type="checkbox"/>
Promotion	---
Overridden Discount	<input type="checkbox"/>

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.

Description	* Black Pants
Batch	001117
Quantity Shipped	0.00000
Price	\$25.00
Discount	\$0.00
Amount	---

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.

Quantity Shipped	0.00000
Price	\$25.00
Discount	\$0.00
Amount	---
Tax	---
Charges	---

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.

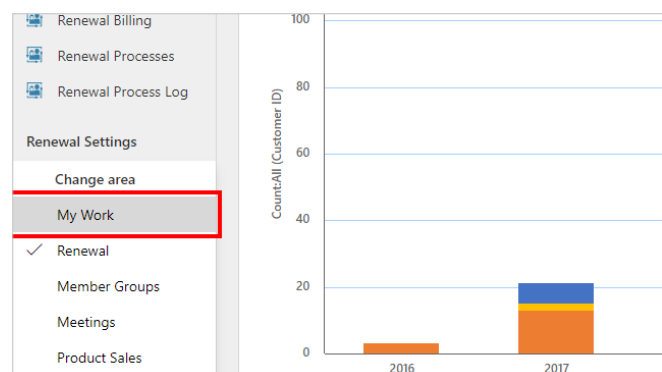
Quantity Shipped	0.00000
Price	\$25.00
Discount	\$0.00
Amount	---
Tax	---
Charges	---

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.

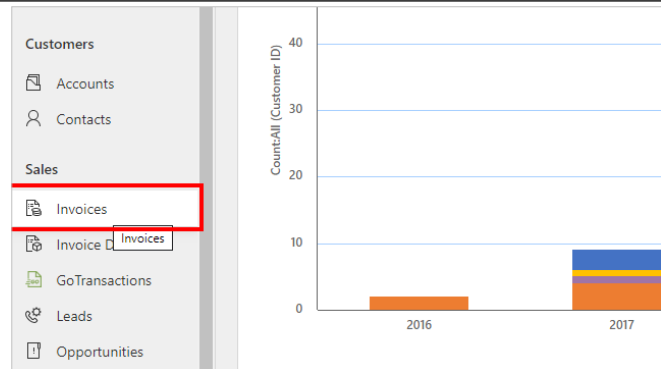
Price	\$25.00
Discount	\$0.00
Amount	---
Tax	---
Charges	---
Tracking Number	---

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

The screenshot shows the 'My Invoices' section of the Protech system. A table lists invoices with columns for 'Invoice Date', 'Invoice ID', and 'Customer'. The first row, dated 12/13/2019, is highlighted with a red rectangle.

Invoice Date	Invoice ID	Customer
12/13/2019	INV-01438-W0H3Y6	Burr
12/6/2019	INV-01379-T5M2D1	Balti

Click on the menu item **Calculate Freight**

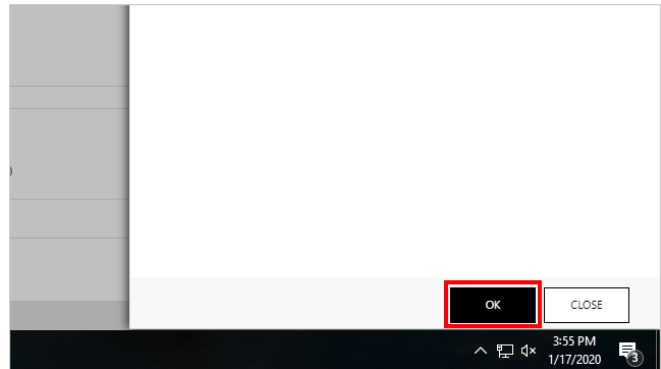
The screenshot shows the 'Calculate Freight' button highlighted with a red rectangle. A dropdown menu is open, showing options like 'Calculate Freight' and 'Calculate this Invoice Freight'.

Select the type of freight you would like to apply

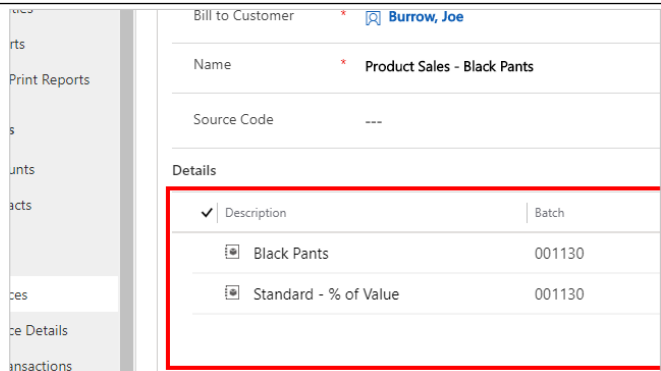
The screenshot shows the 'Available Shipping Methods' dropdown menu. The 'Standard Freight - Weight Based - \$20.00' option is highlighted with a red rectangle.

Shipping Method	Cost
Standard - % of Value - \$1.25	\$1.25
Standard - % of Value - \$1.25	\$25.00
Standard - Flat Rate - \$10.00	\$10.00
Standard Freight - Weight Based - \$20.00	\$20.00
Total	\$26.25

Click on the button **OK**



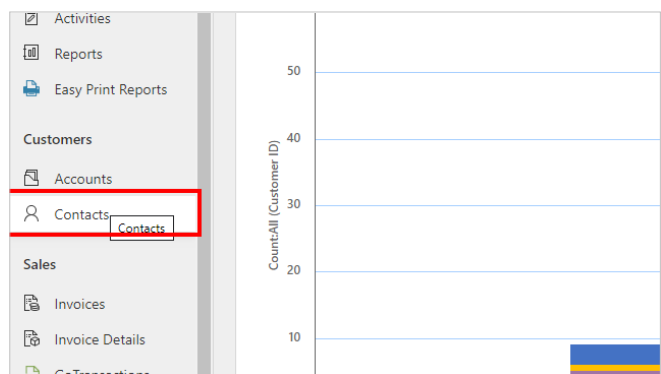
A new line item should be created and display the amount charged for freight



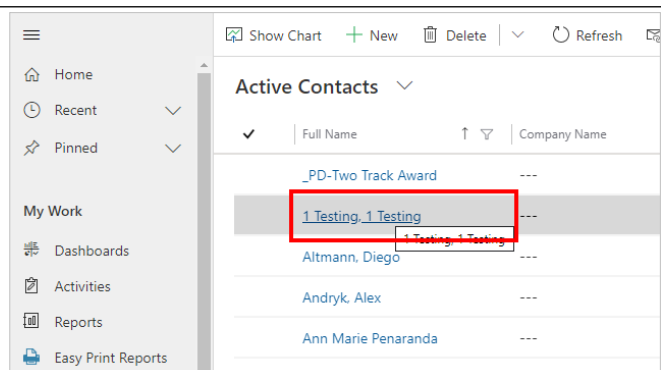
7.3. Canceling or Deleting a Product Sales Transaction

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.

Business Phone	---	Page Views
Mobile Phone	---	Posted Fields
Fax	---	Posted Forms
Preferred Method of Contact	Any	Social Clicks
Address 1: Street 1	---	Visits
Address 1: Street 2	---	Import Logs
Address 1: Street 3	---	Award Renewals
		Education Activities
		General Ledger Details
		Invoices

Select the invoice that contains the product sales transaction.

Meeting - 2020 New Meeting	1 Testing, 1 Testing
Meeting - Test waitlist meeti	1 Testing, 1 Testing
MX Basic Subscription Benefit	1 Testing, 1 Testing
New	1 Testing, 1 Testing
New	1 Testing, 1 Testing
product sales, Product Sales - 365 Sales Inventory Kit	1 Testing, 1 Testing
UX Galley Membership	1 Testing, 1 Testing
UX Galley Membership	1 Testing, 1 Testing

Select the appropriate batch.

Transaction: prod: x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetyp...

UX 365 Hub My Work > Invoices > product sales, Product Sales - 365

You are working in batch number: 001131. Batch Date: 12/20/2019 - Practice Batch

Save Save & Close **Select Batch** Address Validation

product sales, Product Sales - 365 Sales Inventory Kit

Invoice

General Addresses Additional Activities and Notes Related

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

Easy Print Reports	Name	* product sales, Product Sales - 365
Customers	Source Code	---
Accounts	Details	
Contacts	Description	Batch
Sales	365 Sales Inventory Kit	001131
Invoices	Component 1	001131
Invoice Details	Component 2	001131
Go Transactions		
Leads		

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).

The screenshot shows an invoice form with fields for Invoice Date (12/20/2019), Exclude from Web Pmt, and Proforma. A table below contains line items with columns for Quantity, Discount, Tax, and Payment. The 'Cancel' button is highlighted with a red box.

Click on the button **OK**

The screenshot shows a modal dialog box with a red border. It contains two buttons: 'OK' and 'CLOSE'. The 'OK' button is highlighted with a red box.

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.

The screenshot shows a table with columns: Name, Source Code, Details, and Batch. The 'Details' column contains a red X next to the line item 'Component 1'. The 'Batch' column shows '001131' and '12/20/2019'.

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**

The screenshot shows the invoice interface with a sidebar on the left. The 'Save & Close' button is highlighted with a red box. A tooltip is visible over the button, showing the text 'Save & Close' and 'Save and close this Invoice.'.

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)**

The screenshot shows the UX 365 interface. On the left, there is a sidebar with various navigation options. The 'My Work' button is highlighted with a red box. The main area displays a bar chart for the years 2016 and 2017, and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **Product Sales**

The screenshot shows the UX 365 interface. On the left, there is a sidebar with various navigation options. The 'Product Sales' item is highlighted with a red box. The main area displays a bar chart for the years 2016 and 2017, and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **Products**

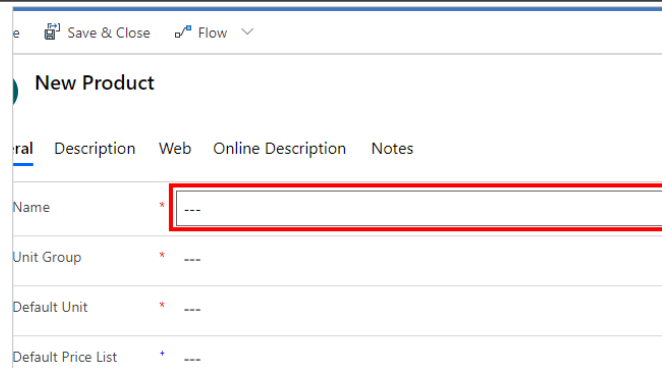
The screenshot shows the UX 365 interface. On the left, there is a sidebar with various navigation options. The 'Products' item is highlighted with a red box. The main area displays a large blue funnel chart.

Click on the menu item **Add Product**

The screenshot shows the UX 365 interface. At the top, there is a navigation bar with various menu items. The 'Add Product' menu item is highlighted with a red box. Below the navigation bar, there is a section titled 'All Products' with a table of product records.

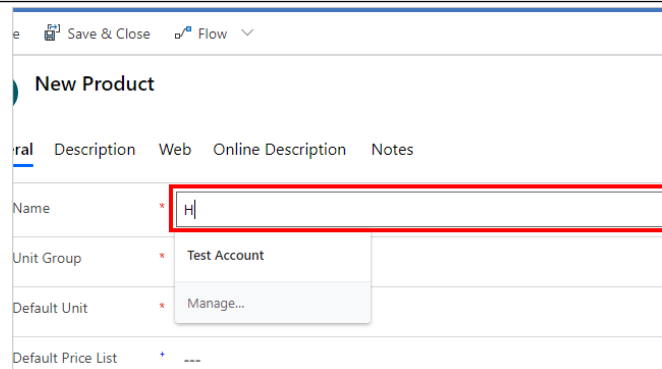
Name	Product ID
2020 New Registration	2020NEW-
2020 New Registration	2020NEW-

Click on the text field **Name**



The screenshot shows the 'New Product' form with tabs for 'General', 'Description', 'Web', 'Online Description', and 'Notes'. The 'Name' field is highlighted with a red rectangle. Below it are fields for 'Unit Group', 'Default Unit', and 'Default Price List', all with dropdown arrows. The top bar includes 'Save & Close' and 'Flow' options.

Enter name of KIT product



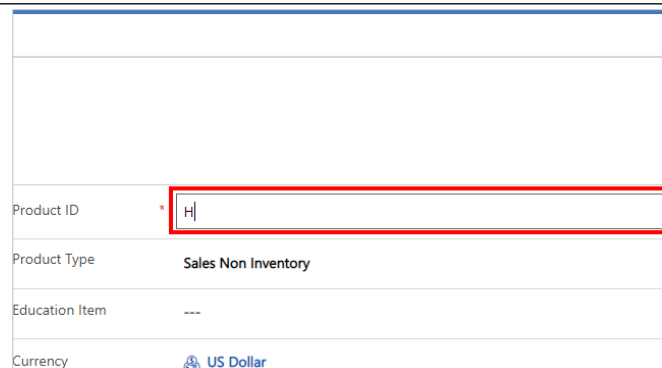
The screenshot shows the 'New Product' form with 'H' entered in the 'Name' field. The 'Unit Group' dropdown menu is open, showing 'Test Account' and 'Manage...'. The 'Product ID' field is empty. The top bar includes 'Save & Close' and 'Flow' options.

Click on the text field **Product ID**



The screenshot shows the 'New Product' form with the 'Product ID' field highlighted by a red rectangle. The 'Product Type' is set to 'Sales Non Inventory'. The 'Education Item' field is empty. The 'Currency' is set to 'US Dollar'. The top bar includes 'Save & Close' and 'Flow' options.

Enter the Product ID



The screenshot shows the 'New Product' form with 'H' entered in the 'Product ID' field. The 'Product Type' is set to 'Sales Non Inventory'. The 'Education Item' field is empty. The 'Currency' is set to 'US Dollar'. The top bar includes 'Save & Close' and 'Flow' options.

Click on the link **Unit Group**

Product ID	* HK
Product Type	Sales Non Ir
Education Item	---
Currency	US Dola
Single Currency	

Click on the item **Each**

Name	* Hockey KIT
Unit Group	* Look for Unit Group
Default Unit	* Unit Groups
Default Price List	* Default Unit
Kit Product?	+ New Unit Group

Click on the link **Default Unit**

Product ID	* HK
Product Type	Sales Non Ir
Education Item	---
Currency	US Dola
Single Currency	

Click on the item **Each**

Name	* Hockey KIT
Unit Group	* Each
Default Unit	* Look for Default Unit
Default Price List	* Units
Kit Product?	+ New Unit

Click on the checkbox **Kit Product?**

Unit Group	* Each
Default Unit	* Each
Default Price List	+ ---
Kit Product?	<input checked="" type="checkbox"/>
Accounting	
Company	* 365A - Fabrikam

Click on the field **Product Type**

Product ID	* HK
Product Type	Sales Non Inventory
Education Item	---
Currency	US Dollar
Single Currency	<input type="checkbox"/>

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

Product ID	* HK
Product Type	Sales Non Inventory
Education Item	--Select--
Currency	Services
Single Currency	Additional Benefit Recipients
	Award
	Chapter Billing
	Comment
	Custom Client Transaction
	Dues Billing
	Flat Fees
	Freight
	Miscellaneous Charges
	Online Assessments
	Payments & Adjustments

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**

Cash Basis	<input type="checkbox"/>
Ctrl Accrual via AR Utility	<input type="checkbox"/>
Secondary GL Account	---
AP GL Account	---

Click on the item Product Sales Revenue

Unit Group	* Each
Default Unit	* Each
Default Price List	+ Chart of Accounts
Kit Product?	Pledge Revenue 000-4010-00
	Product Sales Revenue 000-4110-01
Accounting	Promotion Package Revenue 000-4151-00
Company	* Renewal Late Fees 000-4105-00

Click on the link **AR GL Account**

	Cash Basis	<input type="checkbox"/>
	Ctrl Accrual via AR	<input type="checkbox"/>
	Utility	<input type="checkbox"/>
	Secondary GL	---
	Account	---
	AP GL Account	---
	Is Bill Recipient?	<input type="checkbox"/>

Click on the item Accounts Receivable

Default Price List	+ ---
Kit Product?	Chart of Accounts 000-1271-00
	Accounts Receivable - Meetings 000-1270-00
Accounting	Accounts Receivable - Product Sales 000-1273-00
Company	* Accounts Receivable - Professional Development 000-1274-00
Reimbursable	Accounts Receivable - Promo Packages
Primary GL Account	* + New Chart of Accounts


Click on the text field **List Price**

AR GL Account	* Accounts Receivable - Product Sales X
Units	
List Price	---
Decimals Supported	* 2
Product Info	




Enter price for KIT product

AR GL Account	* Accounts Receivable - Product Sales
sts	
List Price	1
Decimals Supported	* 2
Product Info	

Click on the link **Warehouse**

Tax Rate-Tax Product ONLY ---	
	Allow Backorder? <input checked="" type="checkbox"/>
Allow Partial Backorder? <input checked="" type="checkbox"/>	

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

ral	Description	Web	Online Description	Notes
sts				
List Price	\$150.00			
Decimals Supported	* Warehouses			
<div>  Company 4A-Warehouse 6/27/2018 4:13 PM </div>				
Product Info	<div>  Company 4A-Warehouse 100 6/27/2018 4:13 PM </div>			
Taxable	<div>  Company 4B-ASSOC2B 6/27/2018 4:13 PM </div>			

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.

Tax Rate-Tax Product ONLY ---	
Allow Backorder?	<input checked="" type="checkbox"/>
Allow Partial Backorder?	<input type="checkbox"/>

Allow Partial Backorder

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

A screenshot of a web form with a search bar and two rows of checkboxes. The first row is labeled 'Allow Backorder?' and has a checked checkbox. The second row is labeled 'Allow Partial Backorder?' and has a checked checkbox, which is highlighted with a red square.

Click on the menu item Save

A screenshot of the Protech UX 365 Hub interface. The 'Save' button in the top navigation bar is highlighted with a red square. A dropdown menu is visible, showing options like 'Save (CTRL+S)' and 'Save this Product'.

7.4.2. Adding KIT Components

Click on the item **Related**

A screenshot of the 'Hockey KIT' product page in the UX 365 Hub. The 'Related' button in the top navigation bar is highlighted with a red square. A dropdown menu is visible, showing options like 'Related' and 'Related'.

Click on the menu item **Kit Components**

A screenshot of the 'Hockey KIT' product page. A dropdown menu is open, showing various options. The 'Kit Components' option is highlighted with a red square.

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

The screenshot displays the NetSuite interface for the 'Hockey KIT' product. The 'Kit Components' tab is active. A red rectangular box highlights the '+ New Kit Components' button. A tooltip is shown over this button, indicating the action 'Add New Kit Components' and providing a sub-action: 'Add a related Kit Components to this record.' The left-hand navigation menu includes options for Home, Recent, Pinned, Dashboards, and Product Sales Manager. The top of the page shows standard NetSuite action buttons like Save, Save & Close, Revise, Retire, and Invert.


Click on the link **Component**

[illegible]

Select the product you wish to be part of the KIT

General	Look for Component Product
Component	Products
	comp1
Name	Component 2 COMP2
	Hockey Jersey HJ
Administration	
Created On	Hockey KIT HK
Created By	Hockey Desk

Click on the text field **Quantity**

Quantity	---
Product	 Hockey KIT

Enter the quantity that will be included in the KIT product

Quantity	*	1
Product	*	Hockey KIT

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

Repeat this process for all products that you would like to be included in the KIT Product.

The screenshot shows the 'New Kit Comp' form in the Dynamics CRM interface. The 'Save & Close' button is highlighted with a red box. A tooltip is visible over the button, stating 'Save and close this Kit Components.'

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

The screenshot shows the 'Hockey KIT' product page. The 'New Kit Components' button is highlighted with a red box. A tooltip is visible over the button, stating 'Add a related Kit Components to this record.'

Click on the link **Component**

The screenshot shows the 'Kit Components' table. The 'Component' link is highlighted with a red box. The table has columns for 'Excel Templates', 'Export Kit Components', and 'Quantity'.

Select the product you wish to be part of the KIT

Component	* Look for Component Product
Name	* Products
	Hockey Jersey HJ
	Hockey KIT HK
Administration	Hockey Puck HP
Created On	Hockey Stick HS
Created By	
Owner	Goldman Sachs

Click on the text field **Quantity**

Quantity	
Product	Hockey KIT

Enter the quantity that will be included in the KIT product

Quantity	*	
Product	*	Hockey KIT

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

Product: UX365 Product: Hockey

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

PTCRM UX Online Help - U... UX 365 Help - UX 3... iSolved HCM Protech User Group

Alliance by **PROTECH** UX 365 Hub Product Sales > Products > Hockey

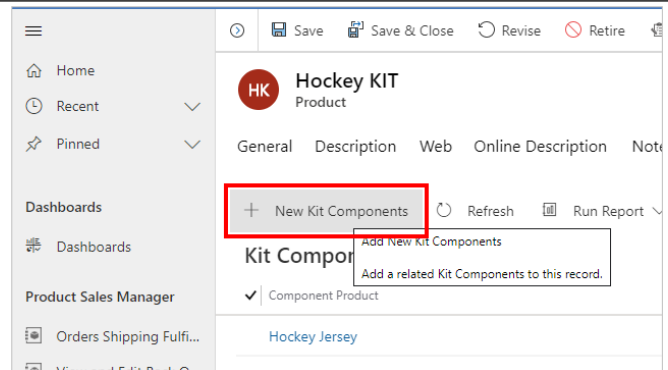
Save Save & Close Revise Retire Invert

HK Hockey KIT Product

General Description Web Online Description Note

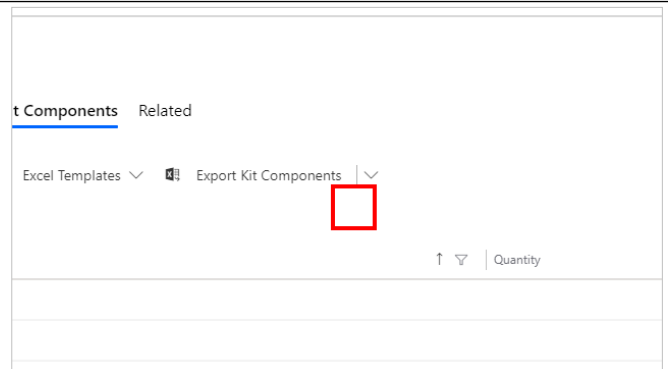
+ New Kit Components Refresh Run Report

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



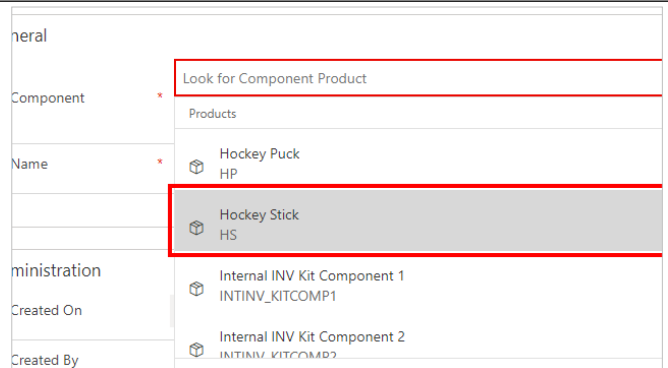
The screenshot shows the 'Hockey KIT' product page. The left sidebar contains navigation links: Home, Recent, Pinned, Dashboards, Product Sales Manager, and Orders Shipping Fulfi... The main content area has tabs for General, Description, Web, Online Description, and Notes. The 'General' tab is active, showing a '+ New Kit Components' button highlighted with a red box. Below this button is a 'Kit Component' section with a 'Component Product' dropdown menu. A tooltip is visible over the dropdown menu, showing 'Add New Kit Components' and 'Add a related Kit Components to this record.' The 'Hockey Jersey' product is listed below the dropdown.

Click on the link **Component**



The screenshot shows the 'Kit Components' table. The table has a header row with 'Component' and 'Related' links. Below the header, there is a table with columns for 'Excel Templates', 'Export Kit Components', and 'Quantity'. The 'Export Kit Components' link is highlighted with a red box. The table is currently empty.

Select the product you wish to be part of the KIT



The screenshot shows the 'Look for Component Product' search results. The search bar contains 'Look for Component Product'. Below the search bar, there is a list of products. The 'Hockey Stick HS' product is highlighted with a red box. The list also includes 'Hockey Puck HP', 'Internal INV Kit Component 1 INTINV_KITCOMP1', and 'Internal INV Kit Component 2 INTINV_KITCOMP2'.

Click on the text field **Quantity**

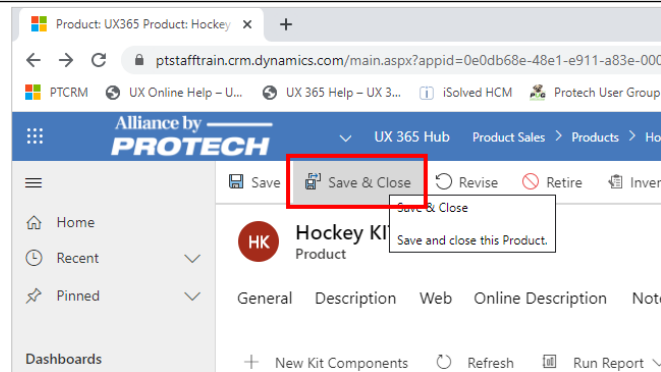


The screenshot shows the 'Quantity' text field. The field is highlighted with a red box. The field is currently empty. Below the field, there is a table with columns for 'Quantity' and 'Quantity'.

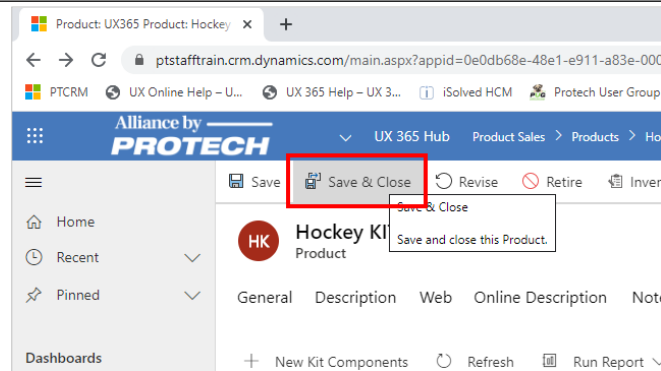
Enter the quantity that will be included in the KIT product

Quantity	<input type="text"/>
Product	Hockey KIT

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



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

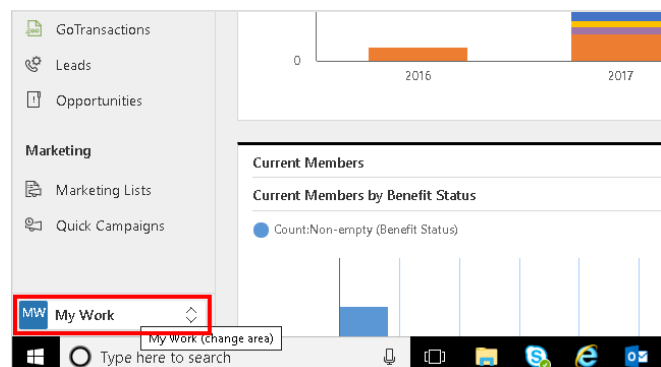


7.5. Creating a New Product Sales Order Product

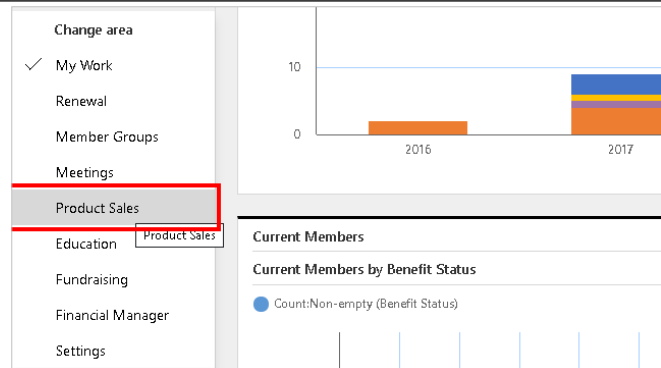
7.5.1. Sales Non Inventory Product Setup

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)**

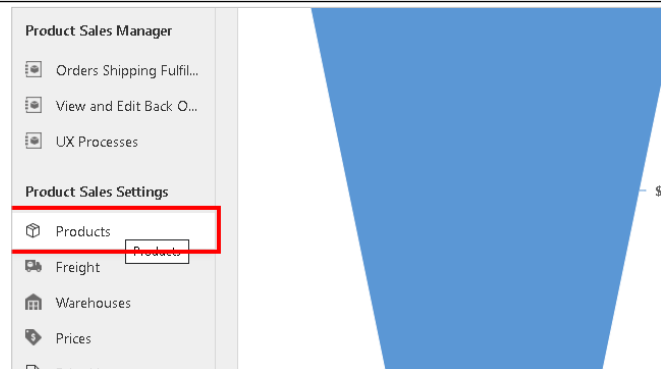


Click on the item **Product Sales**



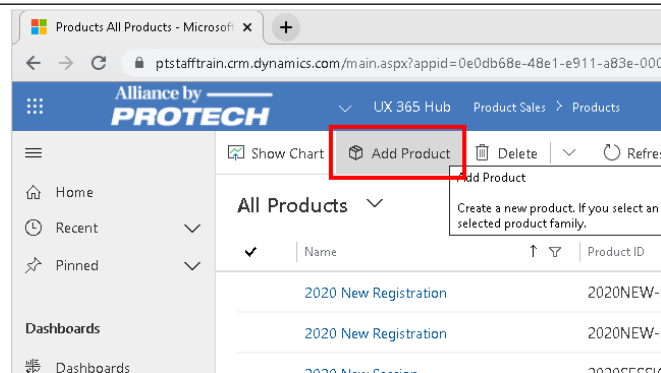
The screenshot shows a sidebar menu on the left with the following items: Change area, My Work (checked), Renewal, Member Groups, Meetings, **Product Sales** (highlighted with a red box), Education, Fundraising, Financial Manager, and Settings. To the right of the menu is a bar chart showing data for 2016 and 2017. Below the chart, there are sections for 'Current Members' and 'Current Members by Benefit Status'.

Click on the item **Products**



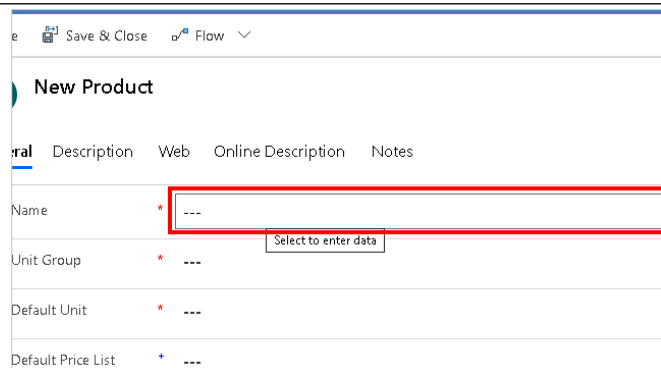
The screenshot shows a sidebar menu on the left with the following items: Product Sales Manager, Orders Shipping Fulfillment, View and Edit Back Order, UX Processes, Product Sales Settings, **Products** (highlighted with a red box), Freight, Warehouses, Prices, and Product Lists. To the right of the menu is a large blue area, likely a placeholder for a chart or data visualization.

Click on the menu item **Add Product**



The screenshot shows a web browser window displaying the Protech UX interface. The breadcrumb trail at the top reads: Alliance by PROTECH > UX 365 Hub > Product Sales > Products. In the 'All Products' section, the 'Add Product' button is highlighted with a red box. A tooltip is visible over the button, stating: 'Add Product. Create a new product. If you select an selected product family.'

Click on the text field **Name**



The screenshot shows the 'New Product' form in the Protech UX interface. The form has tabs for 'General', 'Description', 'Web', 'Online Description', and 'Notes'. The 'Name' field is highlighted with a red box. Below the 'Name' field, there are fields for 'Unit Group', 'Default Unit', and 'Default Price List'. A tooltip is visible over the 'Name' field, stating: 'Select to enter data'.

Enter the name of the product

The screenshot shows the 'New Product' form with tabs for 'General', 'Description', 'Web', 'Online Description', and 'Notes'. The 'Name' field is highlighted with a red border and contains the text 'N'. Other fields include 'Unit Group', 'Default Unit', and 'Default Price List', all with dropdown arrows.

Click on the lookup field **Unit Group**

The screenshot shows the 'New Product' form. The 'Name' field now contains 'New Book'. The 'Unit Group' field is highlighted with a red border and shows a lookup interface with the text 'Look for Unit Group' and a 'Select to enter data' button. Other fields remain the same.

Click on the item **Each**

The screenshot shows the 'Unit Group' dropdown list open. The 'Each' option is highlighted with a red border. Other options include 'Unit Groups', 'Default Unit', and a '+ New Unit Group' button. The 'Name' field still contains 'New Book'.

Click on the lookup field **Default Unit**

The screenshot shows the 'New Product' form. The 'Unit Group' field now displays 'Each' with a dropdown arrow. The 'Default Unit' field is highlighted with a red border and shows a lookup interface with the text 'Look for Default Unit'. The 'Name' field still contains 'New Book'.

Click on the item **Each**

Name	* New Book
Unit Group	* Each
Default Unit	* Look for Default Unit
Default Price List	+ Units
Kit Product?	<input type="checkbox"/> Each + New Unit
Counting	

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

Name	* New Book
Unit Group	* Each
Default Unit	* Each
Default Price List	+ ---
Kit Product?	<input type="checkbox"/> Select to enter data
Counting	

Click on the field Kit Product?
 Leave this field unchecked

Name	* New Book
Unit Group	* Each
Default Unit	* Each
Default Price List	+ ---
Kit Product?	<input type="checkbox"/>
Counting	
Company	* 365A - Fabrikam

Click on the text field **Product ID**

Product ID	* ---
Product Type	Select to enter data Sales Non Inventory
Education Item	---
Currency	US Dollar

Enter Product ID. Please note, this must be unique

Product ID	*	
Product Type		Sales Non Inventory
Education Item		---
Currency		US Dollar

Click on the field **Product Type**

Product ID	*	NB001
Product Type		Sales Non Inventory
Education Item		---
Currency		US Dollar
Single Currency		<input type="checkbox"/>

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.

Product ID	*	NB001
Product Type		Sales Non Inventory
Education Item		---
Currency		US Dollar
Single Currency		<input type="checkbox"/>

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.

Default Price List		---
Kit Product?		<input type="checkbox"/>
Accounting		
Company	*	365A - Fabrikam
Reimbursable		Not Reimbursable
Primary GL Account	*	---
AR GL Account	*	---

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

Kit Product?	
Accounting	
Company	* 365A - Fabrikam X
Reimbursable	Not Reimbursable
Primary GL Account	* --- Not Reimbursable
AR GL Account	* ---

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

	Cash Basis	<input type="checkbox"/>
	Ctrl Accrual via AR Utility	<input type="checkbox"/>
	Secondary GL Account	---
	AP GL Account	---

Click on an option from the list

Default Unit	* Each
Default Price List	+ Chart of Accounts
Kit Product?	000-4141-00
	Exhibit Revenue 000-4130-00
	FL Sales Tax Payable 000-2340-00
	Freight and Handling 000-4710-00
	+ New Chart of Accounts

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

Accounting	
Company	* 365A - Fabrikam
Reimbursable	Not Reimbursable
Primary GL Account	* FL Sales Tax Payable X
AR GL Account	* Look for AR GL Account Select to
sts	
List Price	---

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

Currency	US Dollar
Single Currency	<input type="checkbox"/>
Cash Basis	<input type="checkbox"/>
Ctrl Accrual via AR	<input type="checkbox"/>
Secondary GL Account	---
P GL Account	---

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.

AR GL Account	* ---
Units	---
List Price	---
Decimals Supported	* 2
Product Info	

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.

Unit Price	
Decimals Supported	* 2
Product Info	
Taxable	<input type="checkbox"/>
Inventory and Backorder Info	
Warehouse	---

Click on the menu item Save to complete the setup

7.5.2. Sales Inventory Product Setup

Click on the field **Product Type**

Product ID	* UX0002
Product Type	Sales Non Inventory
Education Item	---
Currency	US Dollar
Single Currency	<input type="checkbox"/>

Set product type to Sales Inventory

Product Type	Sales Non Inventory
Education Item	--Select--
Currency	US Dollar
Single Currency	<input type="checkbox"/>
Cash Basis	<input type="checkbox"/>

- Services
- Additional Benefit Recipients
- Award
- Chapter Billing
- Comment
- Custom Client Transaction
- Dues Billing
- Flat Fees
- Freight
- Miscellaneous Charges
- Online Assessments
- Payments & Adjustments
- Renewal Late Fee
- Sales Inventory**
- Sales Non 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.

Product Info	
Taxable	<input type="checkbox"/>
Inventory and Backorder Info	
Warehouse	* Look for Warehouse ID
Quantity on Hand	---
Current Cost	---

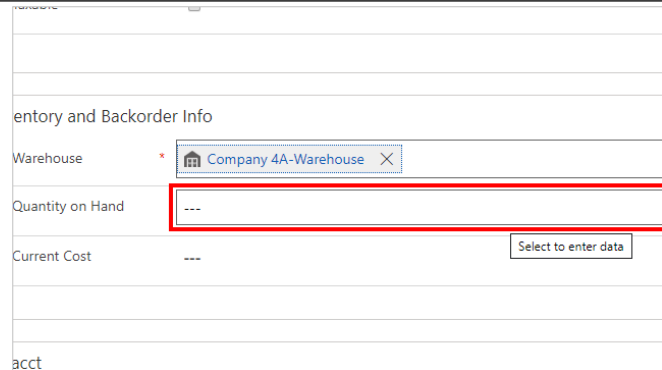
Click on an option from the list

Warehouse	* Look for Warehouse ID
Quantity on Hand	---
Current Cost	---
Account	
Contract Project	
Contract Class	

- Warehouses
- Company 4A-Warehouse 6/27/2018 4:13 PM
- Company 4A-Warehouse 100 6/27/2018 4:13 PM
- Company 4B-ASSOC2B 6/27/2018 4:13 PM
- Company 4B-AWARE 6/27/2018 4:13 PM
- + New Warehouse

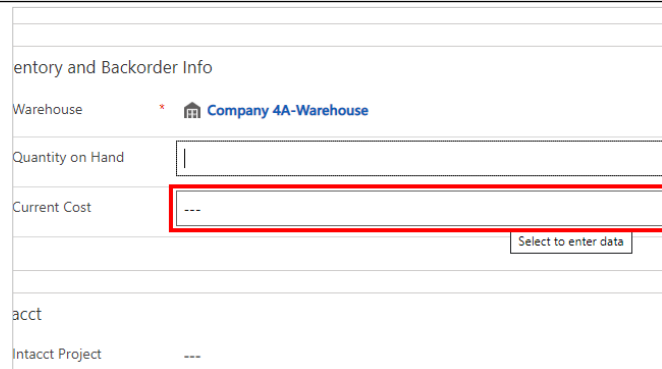
Click on the text field **Quantity on Hand**

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.



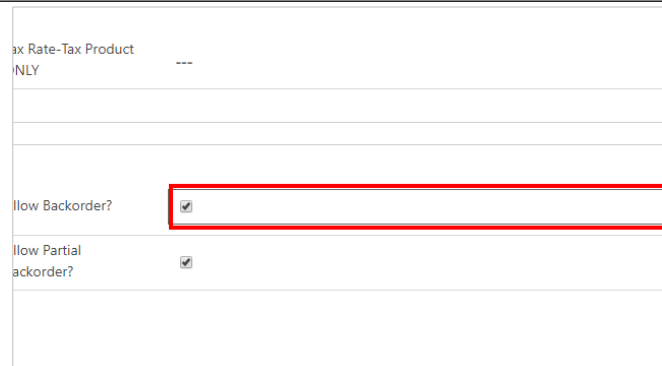
Click on the text field **Current Cost**

Leave this field blank



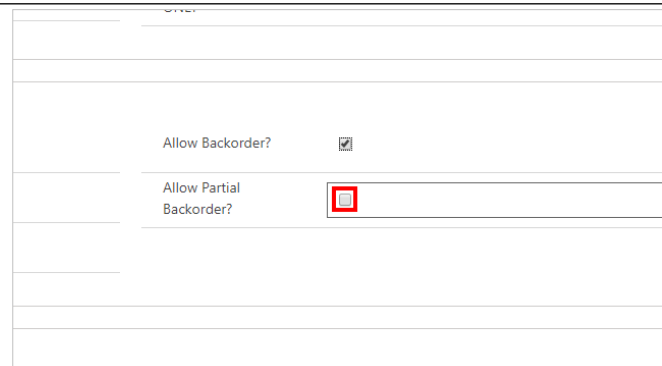
Click on the field **Allow Backorder?**

Mark this checkbox if the product type = Sales Inventory and you want to allow back order processing with this product in the back office

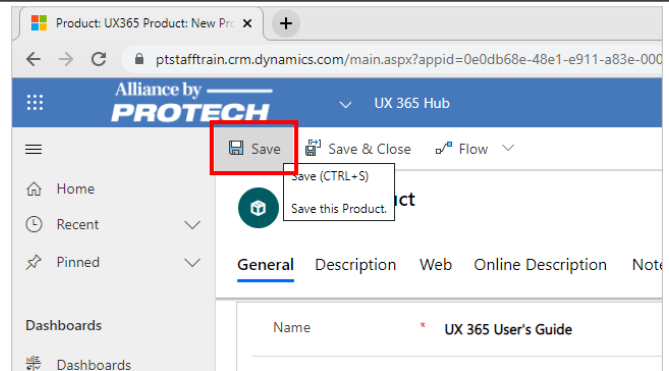


Click on the checkbox **Allow Partial Backorder?**

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.

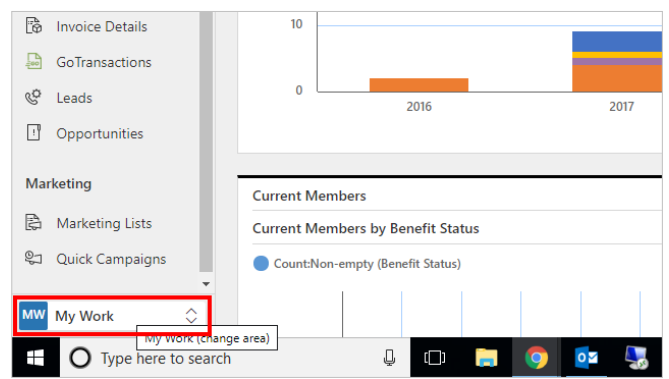


Click on the menu item Save to complete the setup

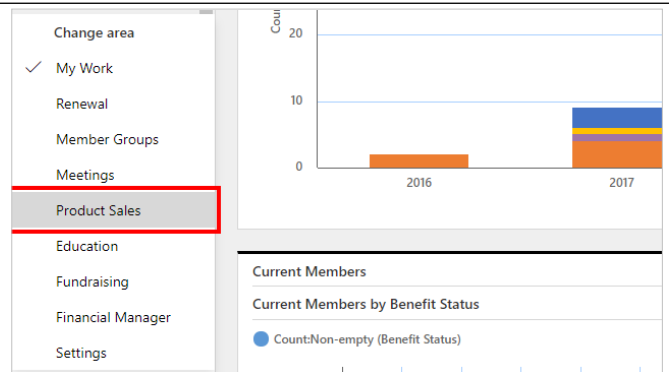


7.6. Creating a Standard Freight Product

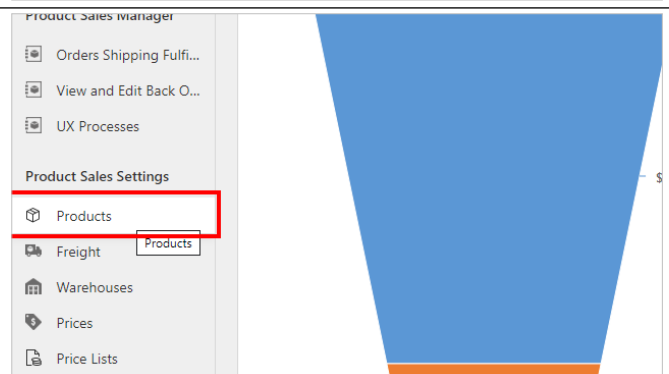
Click on the button **My Work**



Click on the item **Product Sales**



Click on the item **Products**



Click on the menu item **Add Product**

The screenshot shows the Protech CRM interface. The top navigation bar includes 'All Products', 'UX 365 Hub', 'Product Sales', and 'Products'. The left sidebar contains 'Home', 'Recent', 'Pinned', and 'Dashboards'. The main content area displays 'All Products' with a table listing products like '2020 New Registration'. The 'Add Product' button is highlighted in a red box, and a tooltip is visible next to it.

Click on the text field **Name**

The screenshot shows the 'New Freight Product' form. The 'Name' field is highlighted in a red box and contains the text 'New Freight Product'. Other fields include 'Unit Group' (Each), 'Default Unit' (Each), and 'Default Price List' (Non-Member).

Enter **Name**.

The screenshot shows the 'New Product' form. The 'Name' field is highlighted in a red box and is empty. Other fields include 'Unit Group', 'Default Unit', and 'Default Price List'.

Click on the text field **Product ID**

The screenshot shows the 'New Product' form. The 'Product ID' field is highlighted in a red box and contains the text '---'. Other fields include 'Product Type' (Sales Non Inventory), 'Education Item' (---), and 'Currency' (US Dollar).

Enter **Product ID**.

Product ID	<input type="text"/>
Product Type	Sales Non Inventory
Education Item	---
Currency	US Dollar

Click on the link **Unit Group**

	Product ID * NFPID
<input type="text"/>	Product Type Sales Non Ir
	Education Item ---
	Currency US Dolla
	Single Currency <input type="checkbox"/>

Click on the item **Each**

Name * New Freight Product	
Unit Group *	Look for Unit Group
Default Unit *	Unit Groups
Default Price List *	Default Unit
Kit Product?	Each
	+ New Unit Group
counting	

Click on the link **Default Unit**

	Product ID * NFPID
<input type="text"/>	Product Type Sales Non Ir
<input type="text"/>	Education Item ---
	Currency US Dolla
	Single Currency <input type="checkbox"/>

Click on the item **Each**

Name	* New Freight Product
Unit Group	* Each
Default Unit	* Look for Default Unit Units
Default Price List	+ Each
Kit Product?	+ New Unit

Click on the field **Product Type**

Product ID	* NFPID
Product Type	Sales Non Inventory
Education Item	---
Currency	US Dollar
Single Currency	<input type="checkbox"/>

Select the option, Freight

Accounting
Client Transaction
Billing
es
Freight
Incidental Charges
Assessments
ments & Adjustments
al Late Fee
Inventory
Non Inventory
orship
ription

Click on the link **Primary GL Account**

	Cash Basis	<input type="checkbox"/>
	Ctrl Accrual via AR	<input type="checkbox"/>
	Utility	<input type="checkbox"/>
	Secondary GL	---
	Account	---
	AP GL Account	---

Select your Primary GL Account

Name	* New Freight Product
Unit Group	* Each
Default Unit	* Chart of Accounts 000-2340-00
Default Price List	+ Freight and Handling 000-4710-00
	Intl Freight and Handling 000-4720-00
Accounting	MD Sales Tax Payable 000-2310-00
Company	* 000-2310-00

Click on the link **AR GL Account**

Cash Basis	<input type="checkbox"/>
Ctrl Accrual via AR Utility	<input type="checkbox"/>
Secondary GL Account	---
AP GL Account	---
Is Bill Recipient?	<input type="checkbox"/>

Select your AR GL Account

Default Price List	+ Chart of Accounts 000-1272-00
	Accounts Receivable - Exhibits 000-1271-00
Accounting	Accounts Receivable - Meetings 000-1270-00
Company	* Accounts Receivable - Product Sales 000-1273-00
Reimbursable	
Primary GL Account	* + New Chart of Accounts
AR GL Account	* Look for 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.

IS PRICE	---
Decimals Supported	* 2
Product Info	
Taxable	<input type="checkbox"/>
Inventory and Backorder Info	
Warehouse	---

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.

Bill Recipient? <input type="checkbox"/>
Apply Freight? <input type="checkbox"/>

Click on the text field **List Price**

General	Description	Web	Online Description	Notes
Units				
List Price				
Decimals Supported * 2				
Product Info				

Enter **the List Price amount.**

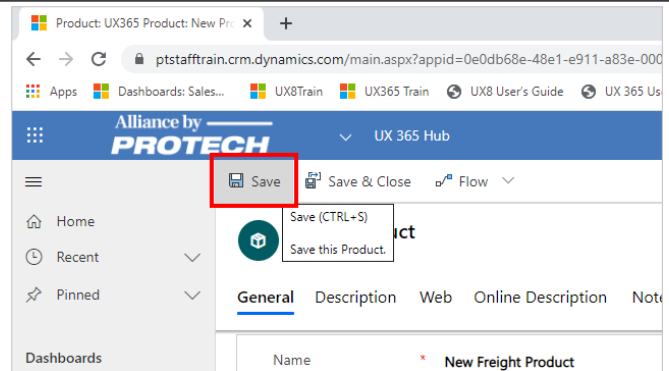
General	Description	Web	Online Description	Notes
Units				
List Price				
Decimals Supported * 2				
Product Info				

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**

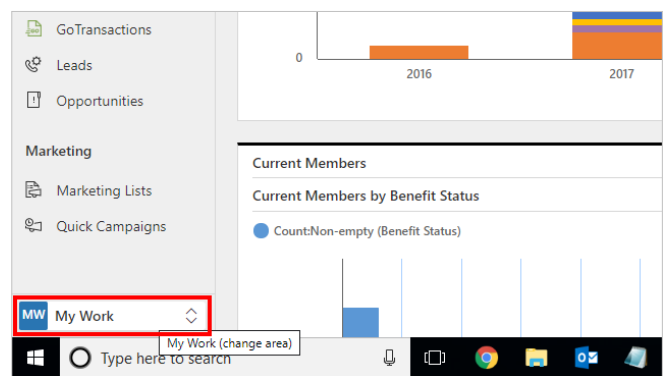
Units
List Price
Decimals Supported * 2
Product Info
Taxable <input type="checkbox"/>

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

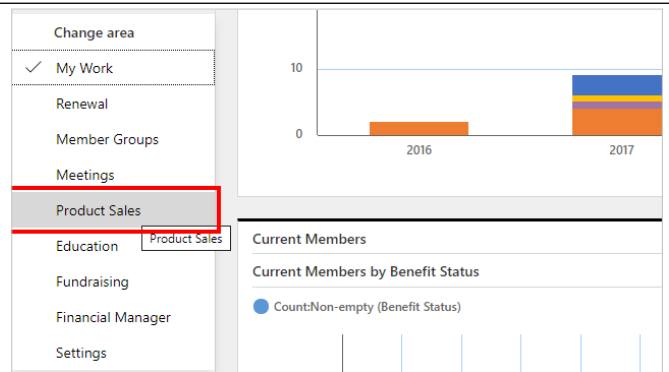


7.7. Creating Product Prices

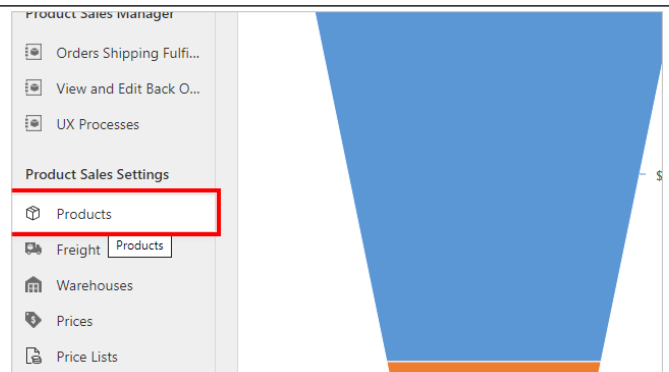
Click on the button **My Work**



Click on the item **Product Sales**



Click on the item **Products**



Double click on the Product your would like to create a price for.

Product Sales Manager	
Orders Shipping Fulfi...	
View and Edit Back O...	
UX Processes	
Product Sales Settings	
Products	
Freight	
Warehouses	
Prices	
Price Lists	

365 Sales Inventory Kit	SALESINKIT
365 Sales Inventory Product	365SALESIN
365 Sales Non-Inventory_Member and Non-	365NONIN
365 USD Single Currency Non-Inventory	365USDSIN
A Nick Test Product	1234
Add'l Benefit Recipient-Membership	A Nick Test Pro
Add'l Benefit Recipient-Membership_EURO..	ADDLBENM
Add'l Benefit Recipient-Subscription	ADDLBENS
Add'l Benefit Recipient-Subscription_EURO..	ADDLBENS

Click on the item **Related**

UX 365 Hub Product Sales > Products > A Nick Test Product	
Save & Close	Revise
Retire	Delete
Refresh	Process
Email	

A Nick Test Product	
Web	Online Description
Notes	Related
<ul style="list-style-type: none"> * A Nick Test Product * Default Unit * Primary Unit 	

Click on the menu item **Prices**

Web	Online Description	Notes	Related
<ul style="list-style-type: none"> A Nick Test Product Default Unit Primary Unit Non-Member 			
<ul style="list-style-type: none"> Related - Common Audit History Price List Items Prices Connections Product Relationships 			

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

Home	Recent	Pinned	Dashboards	Dashboards	Product Sales Manager	Orders Shipping Fulfi...	View and Edit Back O...
<ul style="list-style-type: none"> Save Save & Close Revise Retire 							
A Nick Test Product Product							
General Description Web Online Description Note							
<ul style="list-style-type: none"> + New Price Refresh Run Report Ex 							
Prices A Add New Price Add a related Price to this record. Group By: (no grouping)							
<input checked="" type="checkbox"/> Price Level ↑ Currency ↑							
Non-Member US Dollar							

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.

Quick Create: Price

Price Level	* Member
Calculation Method	* Flat Price
Value Minimum	* 1.00
Start Date	* 1/10/2020
Name	Member
Factor	---

Start Date – Enter the starting date for which this price record applies. During transaction processing, this date is compared to the transaction date.

Quick Create: Price

Price Level	* Member
Calculation Method	* Flat Price
Value Minimum	* 1.00
Start Date	* 1/10/2020
Name	Member
Factor	---
Value Maximum	* 999,999.00

Click on the field **Start Date**

Quick Create: Price

Price Level	* Member
Calculation Method	* Flat Price
Value Minimum	* 1.00
Start Date	1/10/2020
Name	Member
Factor	---
Value Maximum	* 999,999.00

Select your preferred start date

Start Date * 1/10/2020

Name

Factor

Value Maximum * 999,999.00

End Date * 1/10/2020

Currency

Price Percent * ---


January 2020

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1


Name – Defaults to the name of the selected Price Level record.

Calculation Method	* Flat Price
Value Minimum	* 1.00
Start Date	* 1/13/2020
Name	Member
	<small>Name- The name of the custom entity.</small>
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/10/2070


Factor – Leave this field blank. It does not apply to product sales price records.

Value Minimum	* 1.00
Start Date	* 1/13/2020
Name	Member
Factor	---
	<small>Factor</small>
Value Maximum	* 999,999.00
End Date	* 1/10/2070
Currency	 US Dollar

Value Maximum – Enter the highest quantity for which this price record applies.

Start Date	* 1/13/2020
Name	Member
Factor	---
Value Maximum	* 999,999.00
	<small>Value Maximum</small>
End Date	* 1/10/2070
Currency	 US Dollar
Price Percent	* ---

End Date – Enter the ending date for which this Prices record applies. During transaction processing, this date is compared to the transaction date.

Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/10/2070
	<small>End Date</small>
Currency	 US Dollar
Price Percent	* ---
Rate	* ---

Click on the field **End Date**

Start Date	1/15/2020
Name	Member
Factor	---
Value Maximum	* 999,999.00
End Date	* 1/10/2070
Currency	US Dollar
Price Percent	* ---
Rate	* ---

Select your preferred end date.

End Date	* 1/10/2070
Currency	
Price Percent	* ---
Rate	* ---

January 2070

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Currency – Defaults from the product setup currency.

Factor	---
Value Maximum	* 999,999.00
End Date	* 1/15/2070
Currency	US Dollar
Price Percent	* ---
Rate	* ---

Price and Percent of List Price – Enter the price or the percentage to multiply by the list price for this item.

Value Maximum	* 999,999.00
End Date	* 1/15/2070
Currency	US Dollar
Price Percent	* ---
Rate	* ---

- 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**

The screenshot shows a mobile application interface for entering a 'Rate'. The form includes fields for 'Value Maximum' (999,999.00), 'End Date' (1/15/2070), 'Currency' (US Dollar), 'Price Percent', and 'Rate'. The 'Price Percent' field is highlighted with a red rectangle. A red error message 'Required fields must be filled in.' is displayed below the 'Price Percent' field.

Enter the price or percent

The screenshot shows the same 'Rate' form as the previous one, but now the 'Price Percent' field contains the value '2'. The red error message 'Required fields must be filled in.' is still present.

Rate – Leave this field blank. It is not used for sales order products.

The screenshot shows the 'Rate' form with '25' entered in the 'Price Percent' field. The 'Rate' field is now highlighted with a red rectangle. The red error message 'Required fields must be filled in.' is still present.

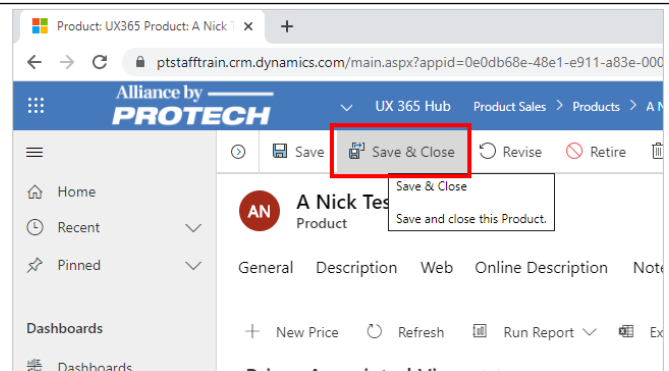
Click on the button **Save and Close**

The screenshot shows the bottom of the 'Rate' form. The 'Save and Close' button is highlighted with a red rectangle. The 'Cancel' button is also visible. The status bar at the bottom shows the time as 10:51 AM on 1/10/2020.

Verify that the price records you create do not conflict with one another.

Currency	Calculation Method	Price Percent
US Dollar	Flat Price	
US Dollar	Flat Price	Flat Price

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

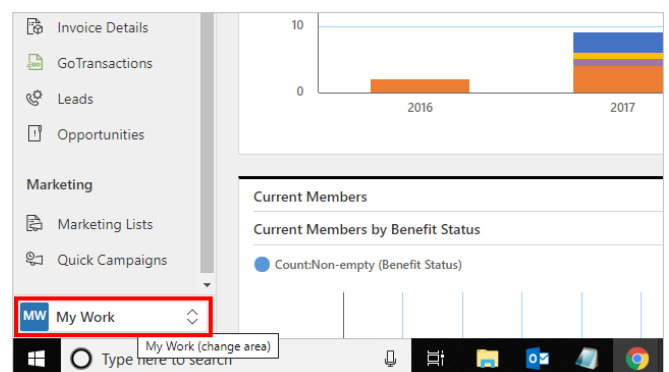


7.8. Processing Back Ordered Invoices Flagged for Fulfillment

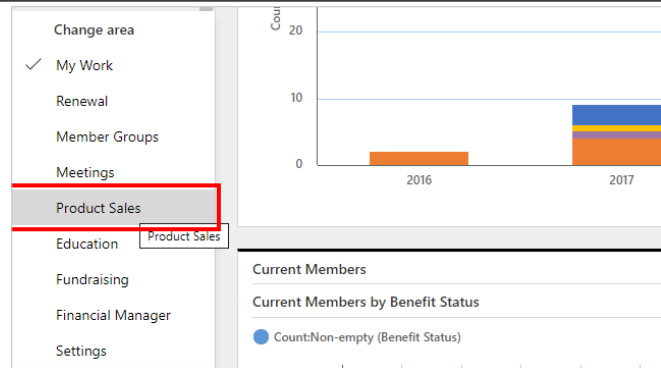
7.8.1. Flagging back-ordered invoices for fulfillment

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)**

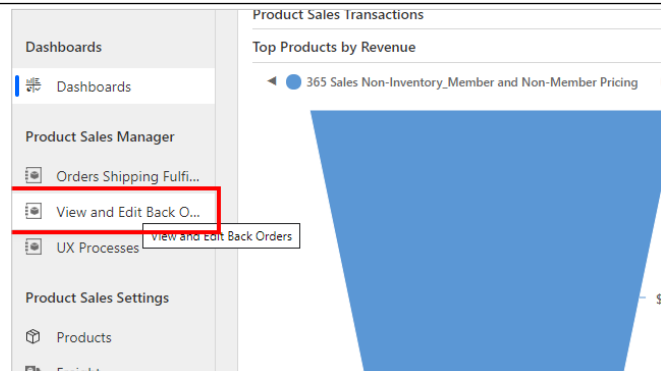


Click on the item **Product Sales**



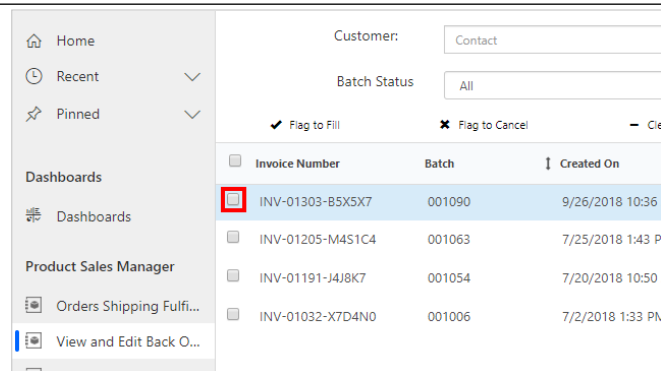
The screenshot shows a sidebar menu on the left with the following items: Change area, My Work (checked), Renewal, Member Groups, Meetings, **Product Sales** (highlighted with a red box), Education, Fundraising, Financial Manager, and Settings. A tooltip 'Product Sales' is visible next to the highlighted item. The main content area on the right displays a bar chart for the years 2016 and 2017, and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **View and Edit Back Orders**



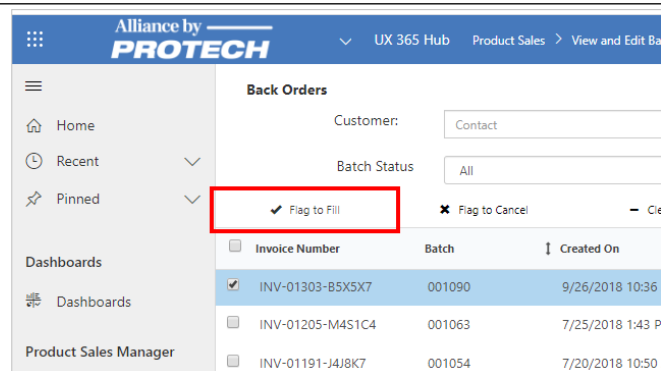
The screenshot shows a sidebar menu on the left with the following items: Dashboards, Product Sales Manager, Orders Shipping Fulfi..., **View and Edit Back O...** (highlighted with a red box), UX Processes, Product Sales Settings, Products, and Freight. A tooltip 'View and Edit Back Orders' is visible next to the highlighted item. The main content area on the right displays a section titled 'Product Sales Transactions' with a sub-section 'Top Products by Revenue' and a large blue funnel chart.

Click on the checkbox on invoice(s) to fill.



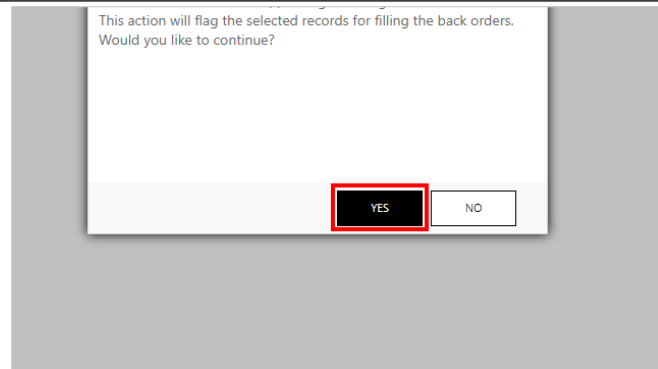
The screenshot shows a sidebar menu on the left with the following items: Home, Recent, Pinned, Dashboards, Product Sales Manager, Orders Shipping Fulfi..., and **View and Edit Back O...** (highlighted with a red box). The main content area on the right displays a table of invoices with columns: Invoice Number, Batch, and Created On. The first row is highlighted in blue. A checkbox is visible next to the first row, and a red box highlights the 'Flag to Fill' checkbox in the table header.

Click on **Flag to Fill**



The screenshot shows the same interface as the previous one, but with the 'Flag to Fill' checkbox checked. The sidebar menu is the same. The main content area on the right displays the same table of invoices, but the first row is now checked, and the 'Flag to Fill' checkbox is checked.

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.

Qty B. Ordered	Balance Due	Action	Process Error
1.00000	\$10.80	F	-
1.00000	\$0.00	-	-
1.00000	€75.00	-	-
2.00000	(\$5.00)	F	-

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 fulfillment.

Home	Customer:	Contact
Recent	Batch Status	All
Pinned	Flag to Fill	Flag to Cancel
Dashboards	Invoice Number	Batch
Dashboards	INV-01303-B5XSX7	001090
Product Sales Manager	INV-01205-M4S1C4	001063
Orders Shipping Fulfi...	INV-01191-J4J8K7	001054
View and Edit Back O...	INV-01032-X7D4N0	001006

Click on **Process Flagged Orders**

Hub Product Sales > View and Edit Back Orders

Contact

Product

All Search Back Order

✖ Flag to Cancel **⚡ Process Flagged Orders**

Batch	Created On	Warehouse	Product
001090	9/26/2018 10:36 AM	Internal Warehouse	INTINV_Product
001063	7/25/2018 1:43 PM	Company 4A-Warehouse	365SALESIN
001054	7/20/2018 10:50 AM	Company 4A-Warehouse	365SALESIN

Click the Lookup button on the Batch Number field and select the batch you created for this process

Product Qty Ordered Qty B. Ordered

Product	Qty Ordered	Qty B. Ordered
house INTINV_Product	2	1.00000
Warehouse 365SALESIN	2	1.00000
		1.00000
		2.00000

Order Processing

Batch Number: *

Do you like to continue?

Select Batch.

Look Up Records

Enter your search criteria.

Look For

Search

Batch Nu...	Batch Date	Name
<input checked="" type="checkbox"/> 001136	1/14/2020	Processing ba...
<input type="checkbox"/> 001134	1/13/2020	BGOLD Batch...
<input type="checkbox"/> 001132	12/20/2019	Batch For Joe...
<input type="checkbox"/> 001133	12/20/2019	Batch for Mat...
<input type="checkbox"/> 001131	12/20/2019	Practice Batch

Click on the button **ADD**

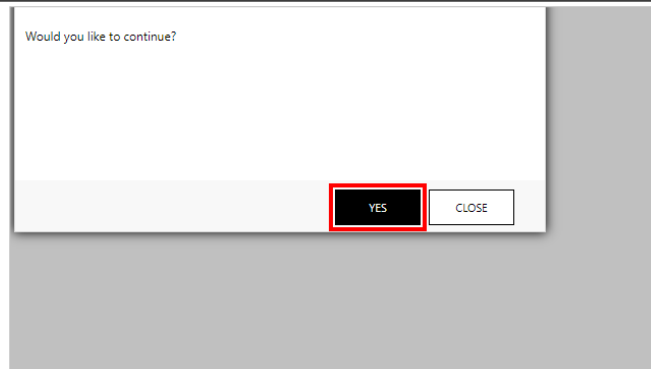
<input type="checkbox"/> 001122	12/6/2019	Meetings Can...	365A - Fabrik...
<input type="checkbox"/> 001117	12/6/2019	arosscoe - Do...	365A - Fabrik...
<input type="checkbox"/> 001121	12/6/2019	Nick CL 12/6	365A - Fabrik...
<input type="checkbox"/> 001111	10/17/2019	Daily Credit C...	365A - Fabrik...
<input type="checkbox"/> 001109	10/11/2019	Daily Credit C...	365A - Fabrik...
<input type="checkbox"/> 001110	10/11/2019	Daily Credit C...	365A - Fabrik...

Showing 1 to 22 of 22 rows

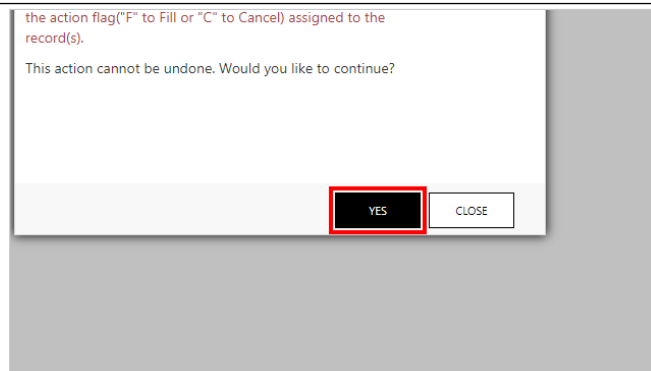
ADD

12:56 PM 1/14/2020

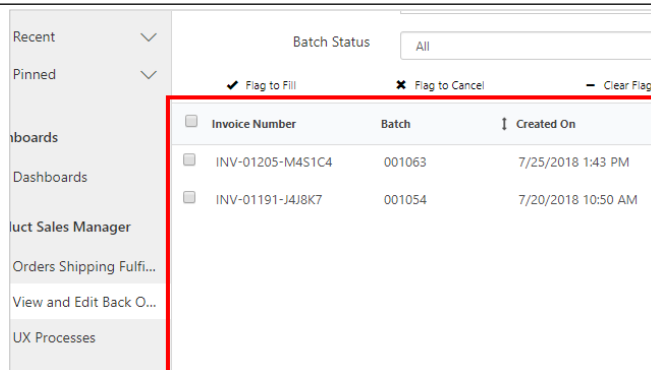
Click on the button **YES**



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.



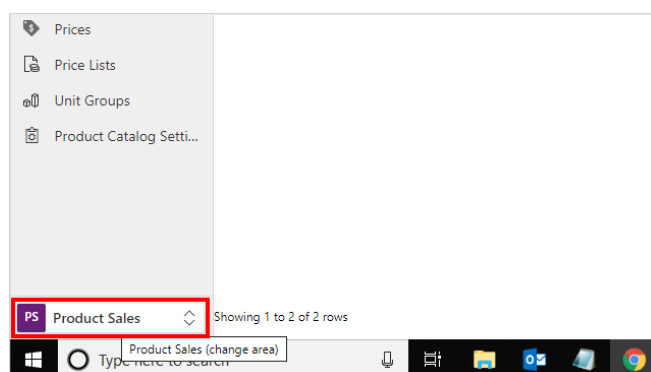
The system removes the processed invoices from the Back Orders list (you may need to refresh) and creates a new invoice for each back-ordered invoice. If the original backordered invoice had a credit balance, it will be transferred to the fulfillment invoice.



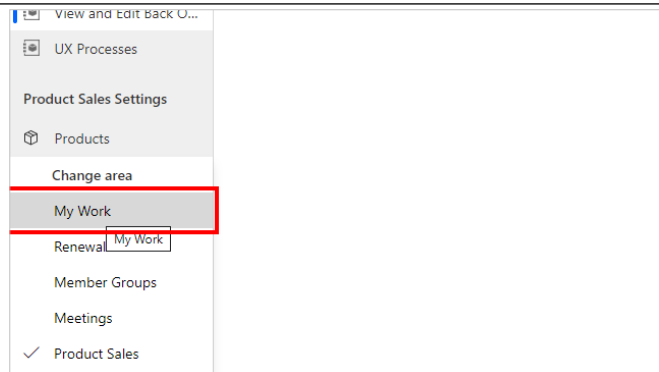
7.8.3. Verifying the new invoices created during back order processing

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.

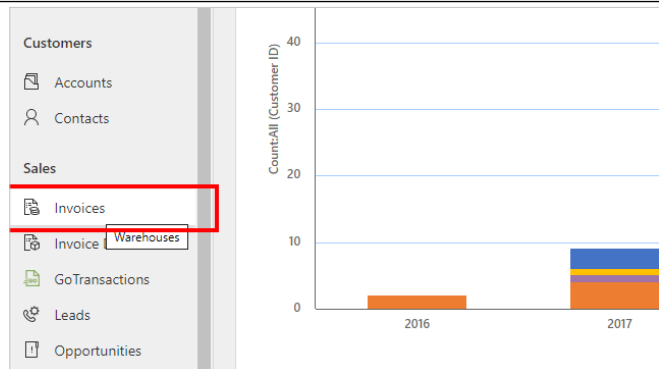
Click on the button **Product Sales (change area)**



Click on the item **My Work**



Click on the item **Invoices**



Click on **Select a view**

A screenshot of the 'My Invoices' view. The 'Select a view' dropdown menu is open, showing options like 'Invoice Date', 'Invoice ID', and 'Custo'. The 'Select a view' option is highlighted with a red rectangle. The table below shows invoice details.

Invoice Date	Invoice ID	Custo
1/14/2020	INV-01431-W5H1Q9	Bacc
1/14/2020	INV-01432-X6J5Q5	Palm

Click on the item **Todays Invoices**

A screenshot of the 'My Invoices' view. The 'Todays Invoices' option is highlighted with a red rectangle in the dropdown menu. The table below shows invoice details.

Invoice Date	Invoice ID	Custo
1/14/2020	INV-01431-W5H1Q9	Bacc
1/14/2020	INV-01432-X6J5Q5	Palm
1/13/2020	INV-01427-G056C7	Ove
1/13/2020	INV-01428-Q2R9L5	Ove
1/13/2020	INV-01429-K4C1J2	Smit
1/13/2020	INV-01430-R7W2G6	Ove
12/5/2019	INV-01423-T0B8J5	Smit

The newly created invoices will appear in the list of invoices created on that day.

Invoice Date	Invoice ID	Customer
1/14/2020	INV-01432-X6J5Q5	Palmer, Christy
1/14/2020	INV-01431-W5H1Q9	Bacon, Chris P.
1/13/2020	INV-01430-R7W2G6	Ovechkin, Alex
1/13/2020	INV-01429-K4C1J2	Smith, Alex

Double click on the cell **Invoice ID**

Invoice Date	Invoice ID	Customer
1/14/2020	INV-01432-X6J5Q5	Palmer, Christy
1/14/2020	INV-01431-W5H1Q9	Bacon, Chris P.
1/13/2020	INV-01430-R7W2G6	Ovechkin, Alex
1/13/2020	INV-01429-K4C1J2	Smith, Alex

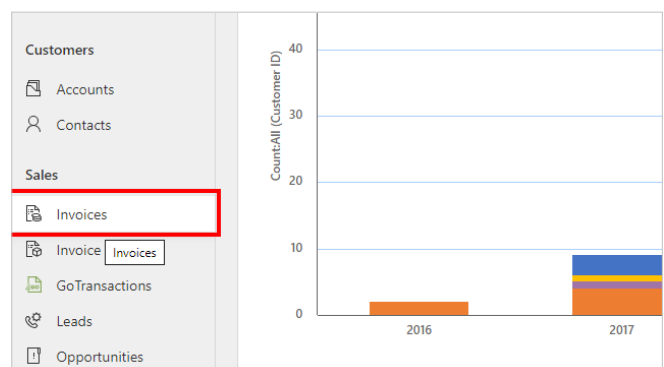
Verify the product sales and/or payment line items. Depending upon the payment entered in the original back-ordered invoice, the system automatically creates the payment for the new invoice.

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.

Description	Batch	Batch Date (Batch)
Internal Inventory Product	001136	1/14/2020

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

Meeting -Test waitlist meeti	1 Testing, 1 Testing
New	1 Testing, 1 Testing
UX Galley Membership	1 Testing, 1 Testing
UX Galley Membership	1 Testing, 1 Testing
Product sales transactions CLX	Test, 1 Protech
Product Sales - Red Shirt	Test, 1 Protech

Be sure to select a batch if you are not already working in one.

Transaction: Prod x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pa

UX 365 Hub My Work > Invoices > Product sales transactions CLX

You are working in batch number: 001130. Batch Date: 12/13/2019 - Michael Click learn 12/13/2019

Save Save & Close Select Batch Address Validation +

Product sales transactions CLX

Invoice

Select Batch
Select Batch for Invoice

General Addresses Additional Activities and Notes Related

Customer * Test, 1 Protech

Click on the menu item **New Transactions**

px?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=entityrecord&etn=invoice&id=8e44c

UX 365 Hub My Work > Invoices > Product sales transactions CLX

001130. Batch Date: 12/13/2019 - Michael Click learn 12/13/2019

Close Select Batch Address Validation + New Transactions Calculate Freight

Product sales transactions CLX

Additional Activities and Notes Related

Test, 1 Protech Price List * Non-Me

When the dropdown menu appears, click product sales.

px?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype=entityrecord&etn=invoice&id=8e44c

UX 365 Hub My Work > Invoices > Product sales transactions CLX

001130. Batch Date: 12/13/2019 - Michael Click learn 12/13/2019

Close Select Batch Address Validation + New Transactions Calculate Freight

Product sales transactions CLX

Additional Activities and Notes Related

Test, 1 Protech

Product Sales
Membership
Benefit Packages
Meetings
Subscription

This is the invoice detail section where you can edit the basic info of the product sale

Invoice Detail - Product Sales	
General	
Invoice Detail	
Product *	Look for Product
Warehouse	---
Transaction Date *	12/13/2019
Quantity Ordered *	---
Back Ordered	---

This section contains the delivery info such as shipped on date and whether or not the packing ticket has been printed.

Customer *	Test, 1 Protech
Delivery	
Shipped On	---
Packing Ticket Printed	---
Serial Number	---
Administration	
Salesperson	Rolando, Thomas

This is the administration section of the invoice detail.

Packing Ticket Printed	---
Serial Number	---
Administration	
Salesperson	Rolando, Thomas

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.

Description *	
Batch	001130
Quantity Shipped	---

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.

The screenshot shows the 'Details' section of an invoice. A red box highlights the product details table:

Description	Batch
Baseball Jersey	001130

Next, apply a payment or click, Save and Close to exit

The screenshot shows the top of the invoice page. The 'Save & Close' button is highlighted with a red box. A tooltip is visible over the button, stating 'Save and close this Invoice.'

7.10. Sales Order Fulfillment

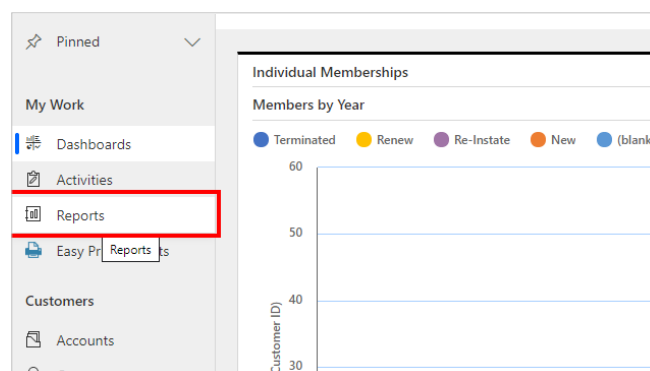
7.10.1. Sales Order Fulfillment

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

UX membership termination report

UX Print Invoice

UX Product Sales Backorder Fulfilled Invoices Report

UX Product Sales Backorder Report

UX Product Sales Easy Print Invoice

UX Product Sales Easy Print Packaging Tickets

UX Product Sales Easy Print Proforma Invoice

UX Product Sales Invoice

UX Product Sales Proforma Invoice

Select the search icon

fftrain.crm.dynamics.com/crmreports/viewer/viewer.aspx?action=filter&id=e17be4a3-89f1-e711-a956-0

Group OR

Equals

Enter Value

Click the cell you would like to use for the search

Enter your search criteria.

Look for: Easy Print Report

Look in: Job Log Lookup View

Search: Search for records

Name	Easy Print Report	Job Log Lookup View
Packing Ticket		
Packing Ticket		
Packing Ticket		

Click on the button **Add**

1 - 4 of 4 (1 selected)

Page 1

Selected records:

Packing Ticket

Select

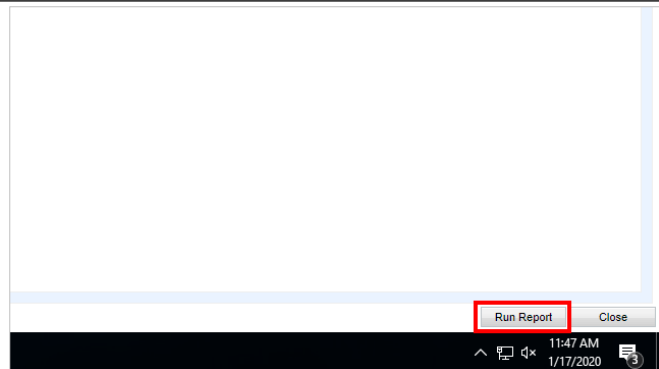
Remove

New

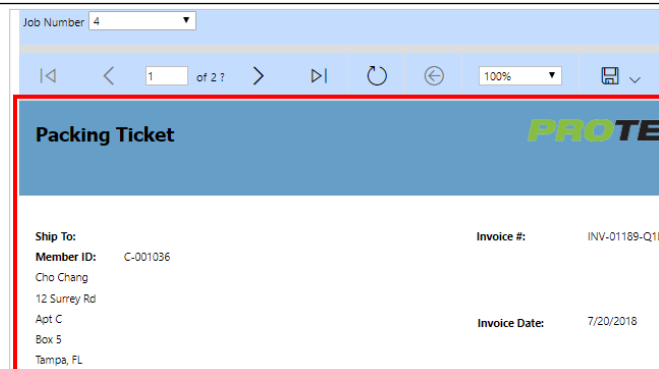
Add

Cancel

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.



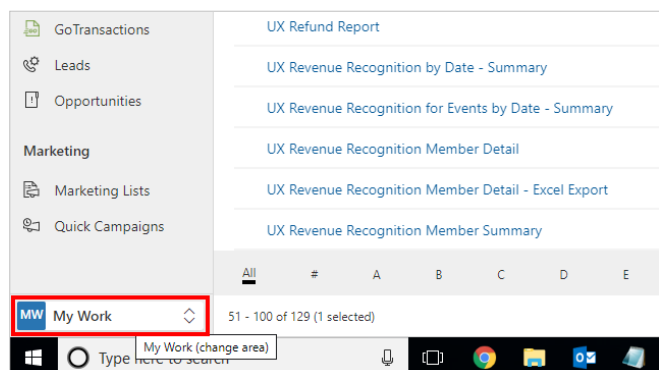
7.10.3. Preparing an Order for Shipping

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.

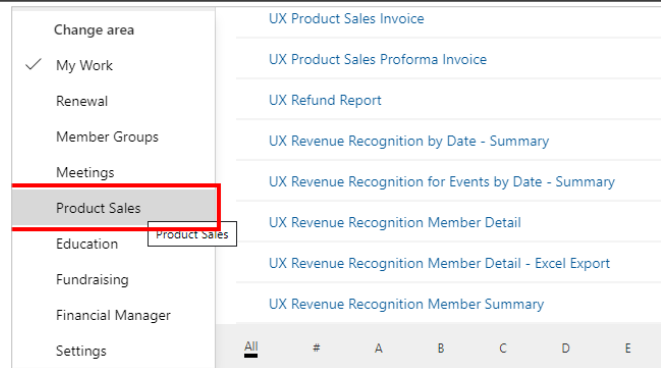
7.10.4. Marking an Order as Shipped

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**

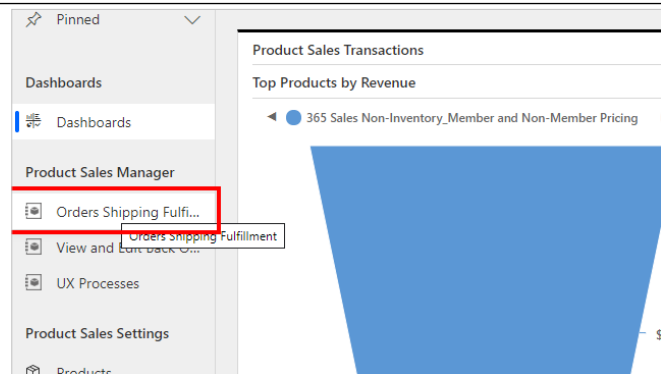


Click on the item **Product Sales**



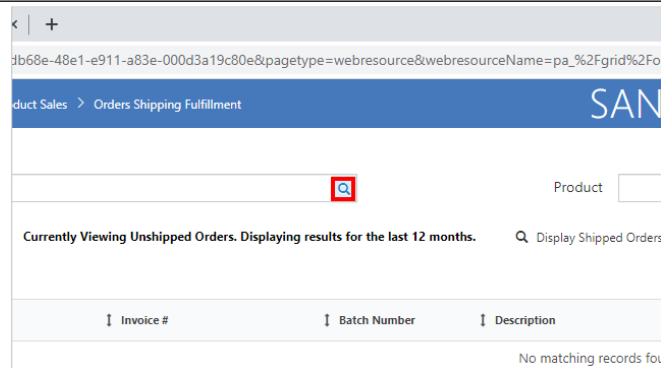
The screenshot shows a navigation menu on the left with the following items: Change area, My Work (checked), Renewal, Member Groups, Meetings, **Product Sales** (highlighted with a red box), Education, Fundraising, Financial Manager, and Settings. A tooltip labeled 'Product Sales' is visible next to the highlighted item. On the right, a list of links is displayed under the 'Product Sales' header, including 'UX Product Sales Invoice', 'UX Product Sales Proforma Invoice', 'UX Refund Report', 'UX Revenue Recognition by Date - Summary', 'UX Revenue Recognition for Events by Date - Summary', 'UX Revenue Recognition Member Detail', 'UX Revenue Recognition Member Detail - Excel Export', and 'UX Revenue Recognition Member Summary'. At the bottom of the list, there is a tab bar with 'All' selected, followed by '#', 'A', 'B', 'C', 'D', and 'E'.

Click on the item **Orders Shipping Fulfillment**



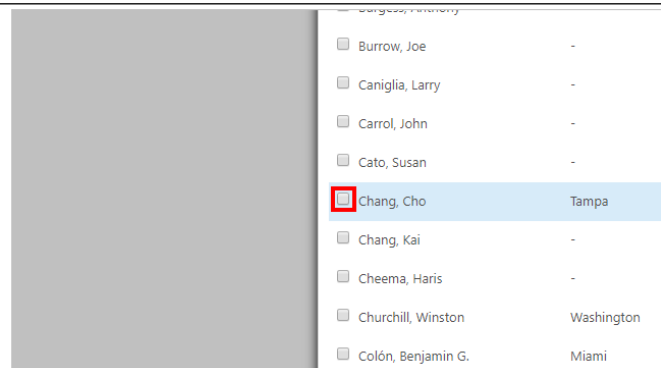
The screenshot shows the 'Product Sales Manager' section in the navigation menu. The menu items are: Pinned, Dashboards, Dashboards (with a sub-menu icon), Product Sales Manager, **Orders Shipping Fulfillment** (highlighted with a red box), View and Edit Back Office, UX Processes, Product Sales Settings, and Products. A tooltip labeled 'Orders Shipping Fulfillment' is visible next to the highlighted item. The main content area on the right shows 'Product Sales Transactions' and 'Top Products by Revenue' with a chart titled '365 Sales Non-Inventory_Member and Non-Member Pricing'.

Click on the search icon



The screenshot shows the 'Orders Shipping Fulfillment' page. The breadcrumb trail is 'Product Sales > Orders Shipping Fulfillment'. The page title is 'SAN'. There is a search bar with a magnifying glass icon highlighted by a red box. Below the search bar, it says 'Currently Viewing Unshipped Orders. Displaying results for the last 12 months.' and a link to 'Display Shipped Orders'. A table with columns 'Invoice #', 'Batch Number', and 'Description' is shown, with a message 'No matching records found' at the bottom.

Select the customer to Display their Unshipped Orders



The screenshot shows a dropdown menu for selecting a customer. The menu items are: Burrow, Joe; Caniglia, Larry; Carrol, John; Cato, Susan; **Chang, Cho** (highlighted with a red box); Chang, Kai; Cheema, Haris; Churchill, Winston; and Colón, Benjamin G. The location 'Tampa' is displayed next to 'Chang, Cho'.

Click on the button Add

A screenshot of a web application interface. It shows a list of items with checkboxes and names. The 'ADD' button is highlighted with a red rectangle. Below the list, it says 'Showing 1 to 50 of 275 rows'. At the bottom right, there are buttons for 'ADD', 'CANCEL', and 'REMOVE VALUE'. The system clock at the bottom right shows 11:48 AM on 1/17/2020.

Click on Search

A screenshot of a search interface. It features a search bar with a magnifying glass icon and a 'SEARCH' button highlighted with a red rectangle. There is also a 'CLEAR' button. Below the search bar, there are columns for 'Ticket Printed', 'Qty Shipped', 'Date Shipped', and 'Balance Due'.

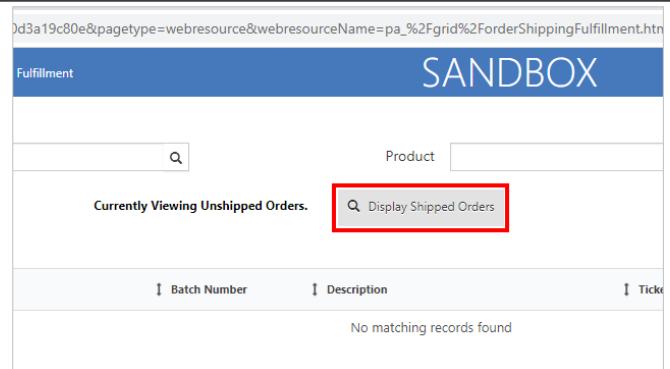
Select which items you would like to Process

A screenshot of a web application interface showing a table of orders. The 'Process Orders as Shipped' button is highlighted with a red rectangle. The table has columns for 'Customer', 'Invoice #', and 'Process Orders as Shipped'. The 'Customer' column lists 'Chang, Cho' and the 'Invoice #' column lists 'INV-0118', 'INV-0119', and 'INV-0119'.

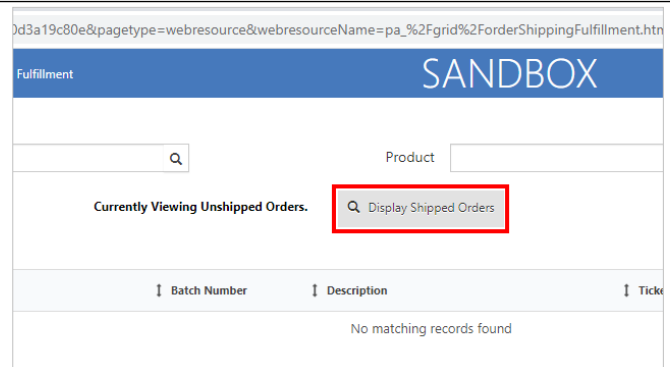
Click on **Process Orders as Shipped**

A screenshot of a web application interface showing a table of orders. The 'Process Orders as Shipped' button is highlighted with a red rectangle. The table has columns for 'Customer', 'Invoice #', and 'Process Orders as Shipped'. The 'Customer' column lists 'Chang, Cho' and the 'Invoice #' column lists 'INV-0118', 'INV-0119', and 'INV-0119'. Checkboxes are selected for the items in the table.

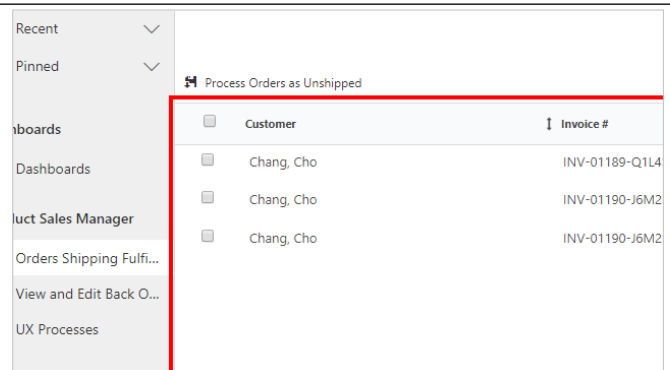
To confirm the results of this process, click Display Shipped Orders to view the list of invoice records that have been processed for shipment. Click the Date Shipped column header to sort the records by date to view your processed records.



Click on **Display Shipped Orders**



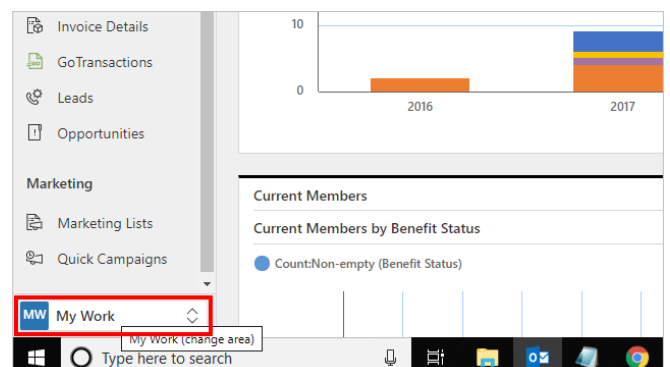
Here you will see your Processed Shipped Orders



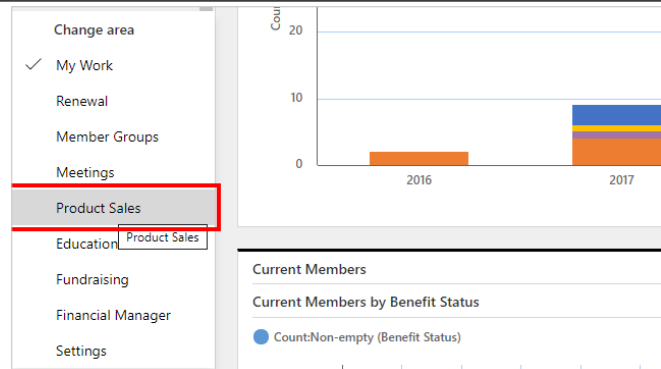
7.11. Warehouse Records

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.

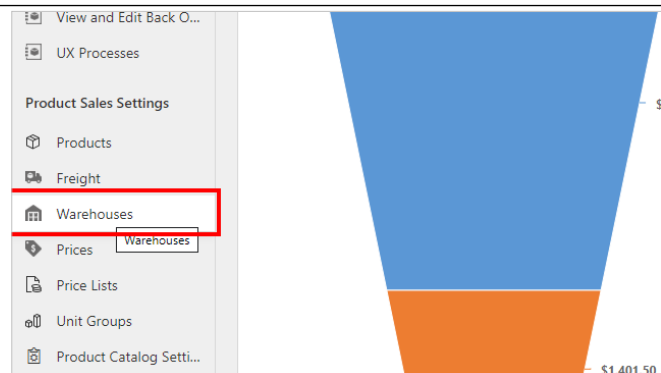
Click on the button **My Work (change area)**



Click on the item **Product Sales**



Click on the item **Warehouses**



Click on the menu item **New**

The screenshot shows the 'Active Warehouses' form in Dynamics CRM. The 'New' button is highlighted in red. The form includes a table with columns for Name and Address, and a 'Select to enter data' button.

Name	Address
Company 4A-Warehouse	
Company 4A-Warehouse 100	

Click on the text field **Name**

The screenshot shows the 'Active Warehouses' form in Dynamics CRM. The 'Name' text field is highlighted in red. The form includes fields for Address and a 'Select to enter data' button.

Enter **Name**.

UX 365 Hub

Save & Close + New Flow

Warehouse

Administration Notes

Name * U|

Warehouse Address

Address1 ---

Click on the text field **Warehouse Code**

Warehouse Code * ---

Select to enter data

Address2 ---

Enter **Warehouse Code**.

Warehouse Code * |

5457 Twin Knolls Rd Suite 400
Test Account

1812 Tufa Terrace
20904

Address2

Address1
Enter the first address line for this warehouse. (This field is optional.)

Name * UX 365 Warehouse

Warehouse Address

Address1 ---

Select to enter data

City ---

Postal Code ---

Address2

Enter the first address line for this warehouse. (This field is optional.)

Warehouse Code	* UX365W
Address2	---
State Or Province	---
Country	---

City

Enter the city where this warehouse is located. (This field is optional.)

Name	* UX 365 Warehouse
Warehouse Address	
Address1	---
City	---
Postal Code	---

State Or Province

Enter the state or province where this warehouse is located. (This field is optional.)

Warehouse Code	* UX365W
Address2	---
State Or Province	---
Country	---

Postal Code

Enter the ZIP or postal code for this warehouse. (This field is optional.)

Warehouse Address	
Address1	---
City	---
Postal Code	---

Country
Enter the country where this warehouse is located. (This field is optional.)

Address2	---
State Or Province	---
Country	---
Select to enter data	

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

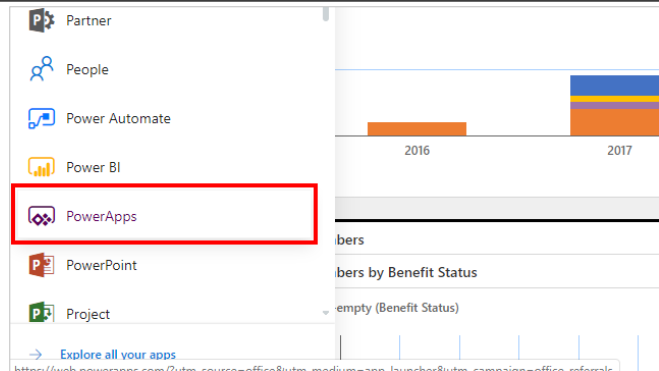
8. Professional Development

8.1. Creating a Credit Category

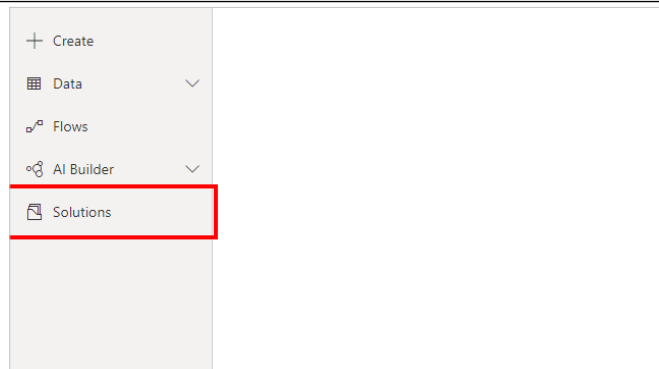
If your organization uses one or more credit category types that are not available in the UX 365 global option set of picklist values, customize the list in the client custom solution by creating new picklist values following standard guidelines for customizing picklists. Do not delete or relabel out 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

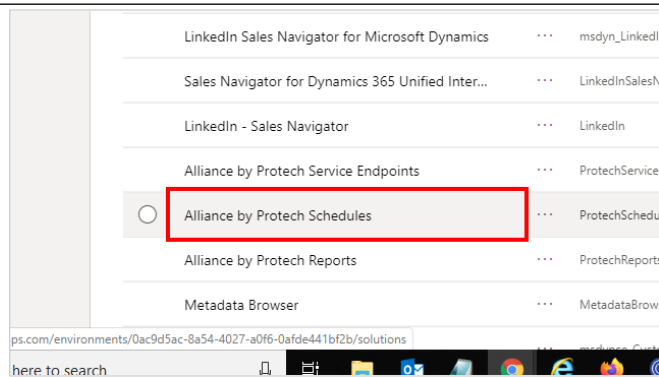
Click on the link **PowerApps**



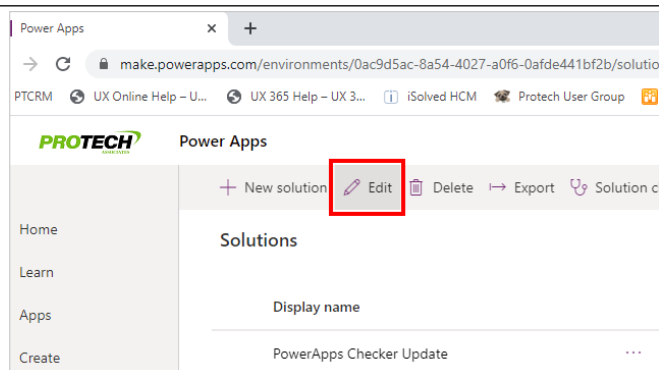
Click on the link **Solutions**



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.

A screenshot of the 'Add existing' dropdown menu in the Dynamics 365 interface. The menu is open, showing a list of entities. The 'Education Credit' entity is highlighted with a red rectangle. Other visible entities include 'MX Nightly Schedule', 'Nightly Capture Job Schedule', 'Nightly Job Schedule', 'Committee', 'Professional Development Recurring Schedule', and 'Renewal Nightly Schedule'.

Click on the button Edit

A screenshot of the Dynamics 365 interface showing the 'Edit' button highlighted with a red rectangle. The interface displays a list of 'Alliance by Protech Schedules' with columns for 'Display name' and 'Name'. The 'Edit' button is located in the toolbar above the list.

Double click on **Credit Category**

A screenshot of the Dynamics 365 interface showing the 'Credit Category' option highlighted with a red rectangle. The interface displays a list of 'Education Credit' entities with columns for 'Display name' and 'Name'. The 'Credit Category' option is highlighted in the list.

Click on the button **Edit option set**

A screenshot of the Dynamics 365 interface showing the 'Edit option set' button highlighted with a red rectangle. The interface displays the 'Credit Category' entity with a list of options. The 'Edit option set' button is located in the toolbar above the list.

Click on the button **Add new item**

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying a list of credit categories: CEC, CEU, CPE, and EC. At the bottom of the list, there is a button labeled 'Add new item', which is highlighted with a red rectangular box.

Click on the input field **New option**

A screenshot of the same software interface. The dropdown menu is open, and the 'Add new item' button has been replaced by a text input field containing the text 'New option'. This input field is highlighted with a red rectangular box.

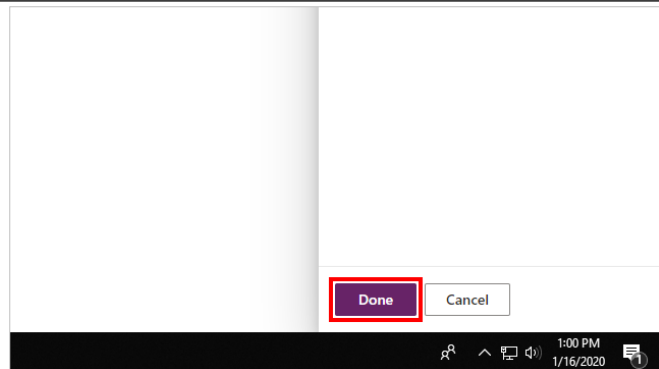
Enter name of Credit Category

A screenshot of the software interface. The dropdown menu is open, and the text input field now contains a vertical cursor (a single vertical line), indicating it is ready for text entry. The input field is highlighted with a red rectangular box.

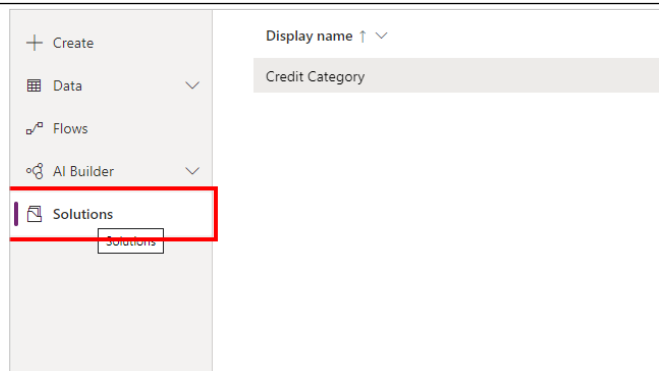
Click on the button **Save**

A screenshot of the software interface. The dropdown menu is closed, and the focus is on the bottom of the window. A button labeled 'Save' is highlighted with a red rectangular box. Next to it is a 'Cancel' button. At the very bottom of the screen, a Windows taskbar is visible, showing the date and time as 1:00 PM on 1/16/2020.

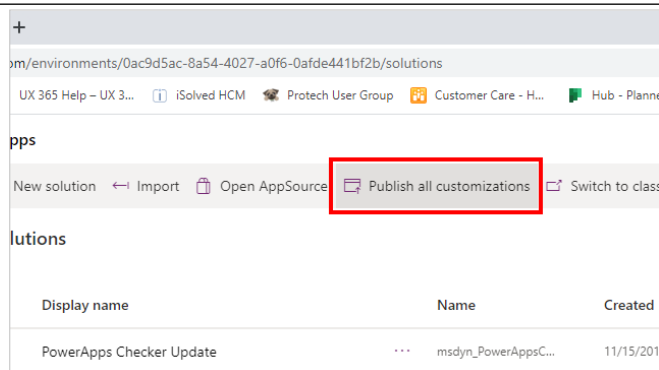
Click on the button **Done**



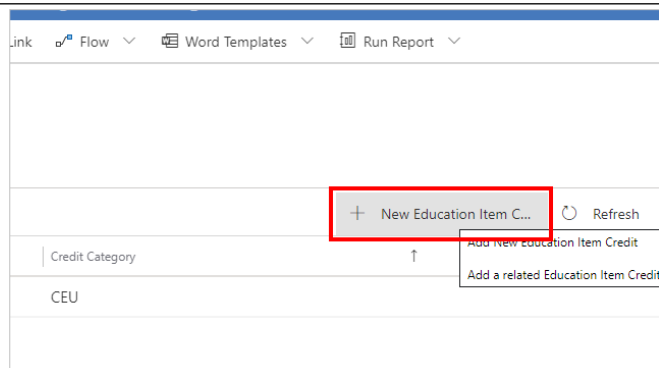
Click on the link **Solutions**



Click on the button Publish all customizations



Now, when adding a New Education Item Credit



Credit Category

Quick Create: Education Item Credit

Education Item * **CEU Course A 10-Max 5 CR to Achieve**

Credit Category * --Select--

Credits * ---

Your credit category will be available to select.

Quick Create: Education Item Credit

Education Item * **CEU Course A 10-Max 5 CR to Achieve**

Credit Category * --Select--

Credits * ---

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.

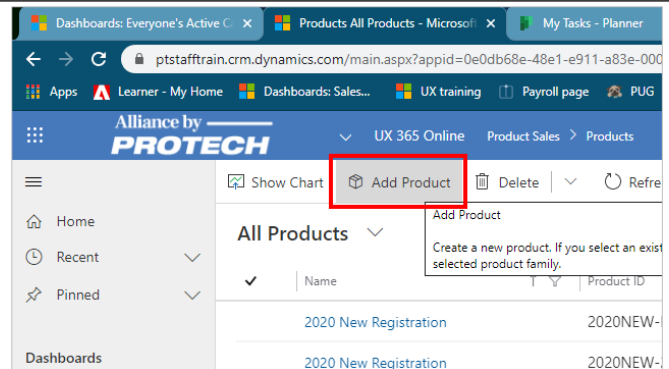
To create an Award product, navigate to the Product Sales work area > Product Sales Settings > Products to open a list of existing products.

Click on the item **Products**

Product Sales manager

- Orders Shipping Fulfi...
- View and Edit Back O...
- UX Processes
- Product Sales Settings
 - Products**
 - Freig...
 - Warehouses
 - Prices
 - Price Lists

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

Product: New Product

Product · Product

mary

Product Properties

Additional Details

Notes

Name	* Award Fee Test
Product ID	* A
Parent	---
Valid From	---
Valid To	---

Click on the link **Unit Group**

ok for Unit Group

Unit Group – Click the Lookup button, select Each, and click OK.

Click on the item **Each**

Unit Group	*	Look for Unit Group
Default Unit	*	Unit Groups
Default Price List	†	Default Unit
Decimals Supported	*	Each
Subject	---	

Click on the link **Default Unit**

Each 

ok for Default Unit 

Default Unit – Click the Lookup button, select Each, and click OK

Click on the item **Each**

Unit Group	* Each
Default Unit	* Look for Default Unit
Default Price List	+ Units
Decimals Supported	* Each
Subject	Primary Unit

Click on the text field **Decimals Supported**

Unit Group	* Each
Default Unit	* Each X
Default Price List	+ ---
Decimals Supported	* ---
Subject	---

Enter **Decimals Supported**.

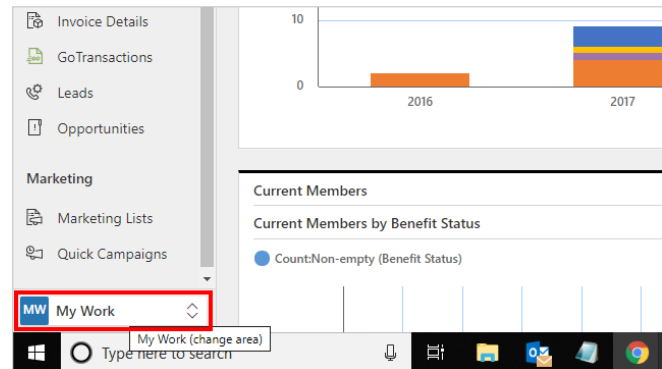
Unit Group	* Each
Default Unit	* Each
Default Price List	+ ---
Decimals Supported	*
Subject	---

Click on Save

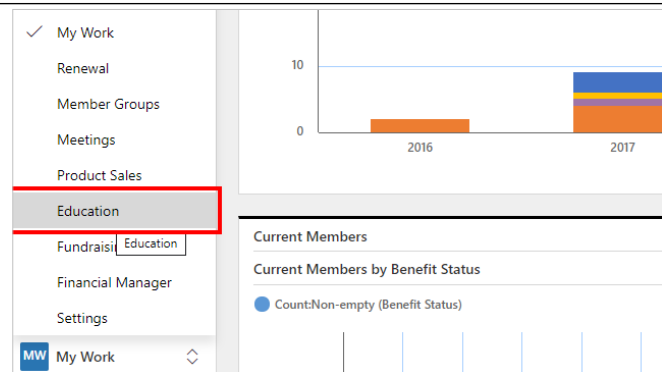
The screenshot shows the 'New Product' form in the Protech UX 365 Online system. The 'Save' button is highlighted with a red box. The form includes fields for Name, Decimals Supported, and Subject. The 'Save' button is located at the top right of the form, next to the 'Save As' and 'Close' buttons.

8.3. Creating an Award

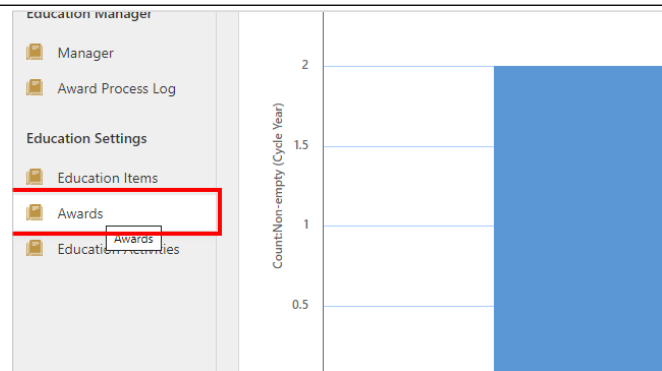
Click on the button **My Work (change area)**



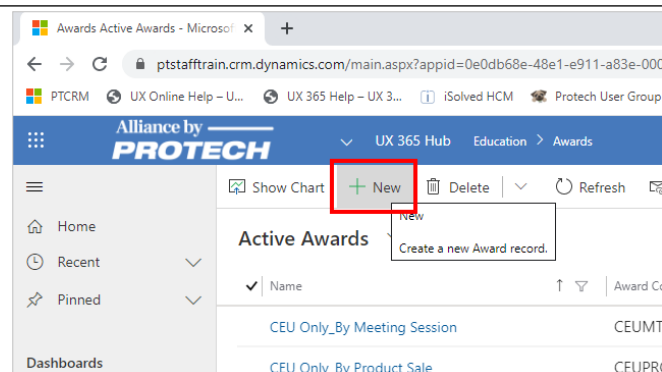
Click on the item **Education**



Click on the item **Awards**



Click on the menu item **New**



Click on the text field **Name**

Save & Close + New Flow

Award

General Award Tracks Recert Requirements Description Administration

General

Name * ---

Award Code * ---

Is Designation? **No**

Designation Sequence ---

Enter **Name**.

Save & Close + New Flow

Award

General Award Tracks Recert Requirements Description Administration

General

Name * U|

Award Code * ---

Is Designation? **No**

Designation Sequence ---

Click on the text field **Award Code**

Award

General Award Tracks Recert Requirements Description Administration

General

Name * UX 365 Award

Award Code * ---

Is Designation? **No**

Designation Sequence ---

Replace Designation ---

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**.

Award

General Award Tracks Recert Requirements Description Administration

General

Name * UX 365 Award

Award Code * U|

Is Designation? **No**

Designation Sequence ---

Replace Designation ---

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.

General	Award Tracks	Recert Requirements	Description	Administration
General				
Name	*	UX 365 Award		
Award Code	*	UX365AWARD		
Is Designation?		No		
Designation Sequence		---		
Replace Designation		---		
Membership		No		

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.

General				
Name	*	UX 365 Award		
Award Code	*	UX365AWARD		
Is Designation?		No		
Designation Sequence		---		
Replace Designation		---		
Membership Required		No		
Permanent		No		

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.

General				
Award Code	*	UX365AWARD		
Is Designation?		No		
Designation Sequence		---		
Replace Designation		---		
Membership Required		No		
Permanent		No		
Number of Months	*	---		

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.

General				
Is Designation?		No		
Designation Sequence		---		
Replace Designation		---		
Membership Required		No		
Permanent		No		
Number of Months	*	---		

Permanent

If this Award should be a lifetime Award, not requiring periodic renewal, click Yes.

Designation	
Sequence	---
Replace Designation	---
Membership Required	No
Permanent	No
Number of Months *	---

Click on the text field **Number of Months**

Sequence	
Replace Designation	---
Membership Required	No
Permanent	No
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**.

Sequence	
Replace Designation	---
Membership Required	No
Permanent	No
Number of Months *	1

Click on the field **Cycle Method**

Cycle Method *	--Select--
Anniversary Month	---
Anniversary Cut Off Day	---
Calendar Month *	---

Select Anniversary or Calendar

Cycle Method	*	--Select--
Anniversary Month		--Select-- Anniversary Calendar
Anniversary Cut Off Day		---
Calendar Month	*	---
Calendar Cut Off	*	---

Anniversary Month

If the Cycle Method = Anniversary, select Current Month, Next Month, or Cut Off Day.

Cycle Method	*	Calendar
Anniversary Month		---
Anniversary Cut Off Day		---
Calendar Month	*	---
Calendar Cut Off	*	---

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.

Cycle Method	*	Calendar
Anniversary Month		---
Anniversary Cut Off Day		---
Calendar Month	*	---
Calendar Cut Off Month	*	---
Total Credits		---

Click on the field **Calendar Month**

Cycle Method	*	Calendar
Anniversary Month		---
Anniversary Cut Off Day		---
Calendar Month	*	--Select--
Calendar Cut Off Month	*	---
Total Credits		---
Required to Renew		---
Invoice Required to	*	---

Select the month of the year when the Award Cycle will begin.

Anniversary Cut Off Day	---
Calendar Month *	--Select--
Calendar Cut Off Month *	January
Total Credits Required to Renew	February
Invoice Required to Renew *	March
Recert/Renew Product	April
	May
	June
	July
	August
	September
	October
	November
	December

Click on the field **Calendar Cut Off Month**

Anniversary Month	---
Anniversary Cut Off Day	---
Calendar Month *	January
Calendar Cut Off Month *	--Select--
Total Credits Required to Renew	---
Invoice Required to Renew *	No
Recert/Renew	

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

Calendar Month *	January
Calendar Cut Off Month *	--Select--
Total Credits Required to Renew	January
Invoice Required to Renew *	February
Recert/Renew Product	March
	April
	May
	June
	July
	August
	September
	October
	November
	December

Total Credits Required to Renew

If Credits are required for renewal, enter the number of credits required.

Anniversary Cut Off Day	---
Calendar Month *	January
Calendar Cut Off Month *	October
Total Credits Required to Renew	---
Invoice Required to Renew *	No
Recert/Renew Product	---

Invoice Required to Renew

If an invoice is required for renewal, select Yes.

Calendar Month	* January
Calendar Cut Off Month	* October
Total Credits Required to Renew	---
Invoice Required to Renew	* No
Recert/Renew Product	---

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.

Calendar Cut Off Month	* October
Total Credits Required to Renew	---
Invoice Required to Renew	* No
Recert/Renew Product	---

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

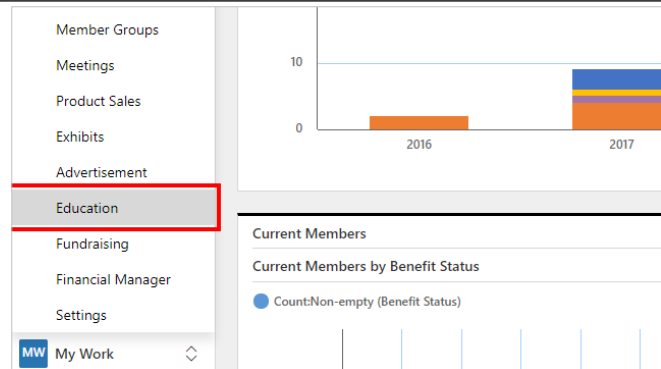
The screenshot shows the 'New Award' form in the Protech UX 365 Hub. The 'Save & Close' button is highlighted with a red box. The form includes fields for 'Name' and 'Description'.

8.4. Creating Award Renewal Requirement Types

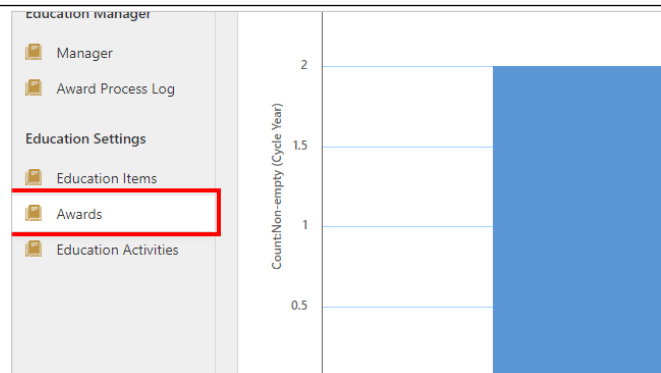
Click on the button **My Work**

The screenshot shows the 'My Work' button highlighted with a red box in the Protech UX 365 Hub. The interface includes a sidebar with navigation options like 'Invoice Details', 'GoTransactions', 'Leads', 'Opportunities', 'Marketing Lists', and 'Quick Campaigns'. The main area displays a bar chart for 2016 and 2017, and a section for 'Current Members'.

Click on the item **Education**



Click on the item **Awards**



Select the Award

The screenshot shows a table of awards. The 'UX 365 Award' is highlighted with a red box. The table has columns for award names and codes.

Award Name	Award Code
FEE-CEU_Calendar_12 Months_Start Jan_Cut Off Dec	FEE-CEU_CAL-JAN-C
FEE-CEU_Calendar_12 Months_Start Jan_Cut Off Nov	FEE-CEU_CAL-JAN-N
FEE-CEU_Calendar_18 Months_Start Jan_Cut Off None	FEE-CEU_CAL-JAN-N
Two Track Award	2TRAWARD
UX 365 Award	UX365AWARD

Click on the item **Recert Requirements**

The screenshot shows the configuration page for the 'UX 365 Award'. The 'Recert Requirements' tab is selected and highlighted with a red box. The page displays the following information:

- Name:** UX 365 Award
- Award Code:** UX365AWARD

Click on the menu item **Add New Award Renewal Requirement**

The screenshot shows the top navigation bar with 'a Link', 'Flow', 'Word Templates', and 'Run Report'. Below this is a table with columns: 'Credit Category', 'Elective', 'Award', and 'Education Item'. A red box highlights the '+ New Award Renewal R...' button in the top right corner of the table area. A tooltip for this button reads: 'Add New Award Renewal Requirement' and 'Add a related Award Renewal Requirement to t'.

The Requirement Type field defaults to Course, but you may select any type other than 'Credits' that best describes the renewal requirement.

The screenshot shows the 'New Award Renewal Requirement' form. The 'General' tab is active. The 'Requirement Type' field is highlighted with a red box and shows a dropdown menu with 'Course' selected. Other fields include 'Education Item', 'Credit Category', 'Requirement Number', and 'Owner'.

Click on the link **Education Item**

The screenshot shows the 'Education Item' selection screen. It has a table with columns: 'Name', 'Award', 'Minimum Credits', 'Maximum Credits', and 'Owner'. A red box highlights the search icon (magnifying glass) in the top right corner of the table area.

Click on an option from the list

The screenshot shows the 'Education Item' list. A red box highlights the list of options, which includes: 'CEU Course A 10-Max 5 CR to Achieve', 'CEU Course A 10-Max 5 CR to Achieve', 'CEU Course A Orring 10 Credits Max 5', 'CEU Course B 10-Max 5 CR to Achieve', 'CEU Course B 10-Max 5 CR to Achieve', 'CEU Course B Orring 10 Credits Max 5', and 'New Education Item'.

Click on the text field **Requirement Number**

Requirement Type	* Application
Education Item	* CEU Course A 10-Max 5 CR to Achieve X
Credit Category	---
Requirement Number	---
Elective	No

Enter a whole number for the Requirement Number.

Requirement Type	* Application
Education Item	* CEU Course A 10-Max 5 CR to Achieve
Credit Category	---
Requirement Number	1
Elective	No

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.

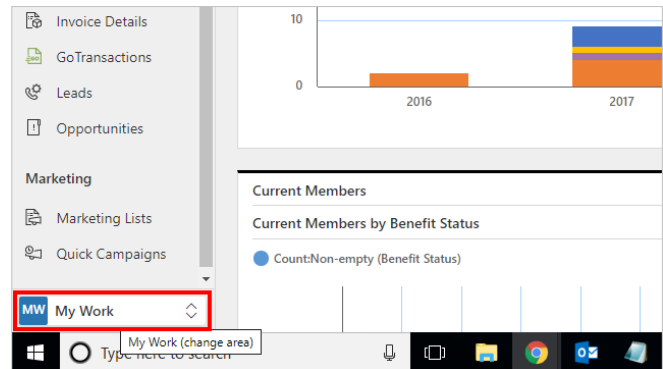
✓	Name	Requirement Type	Requirement Number
	CEU Course A 10-Max 5 CR to Achieve	Application	1

8.5. Creating Award Tracks

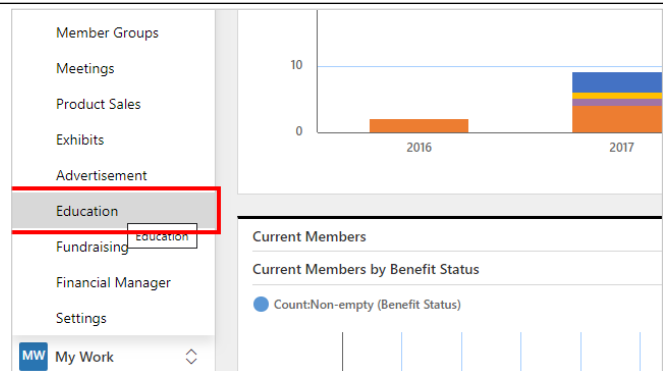
An Award Track and its related Track Requirements define the path toward achieving an Award. As described earlier, you can have one or more Tracks, but you must have at least one. After saving the Award setup, the next step to create an Award Track.

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.

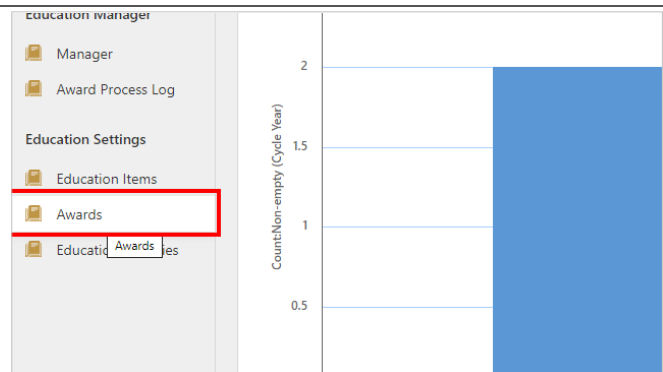
Click on the button **My Work (change area)**



Click on the item **Education**



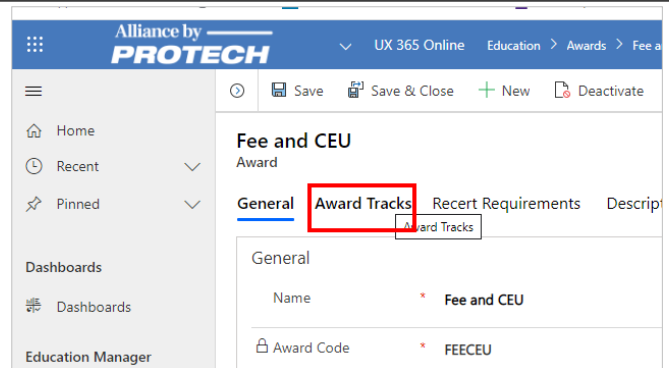
Click on the item **Awards**



Open the Award you want to create a Track for.

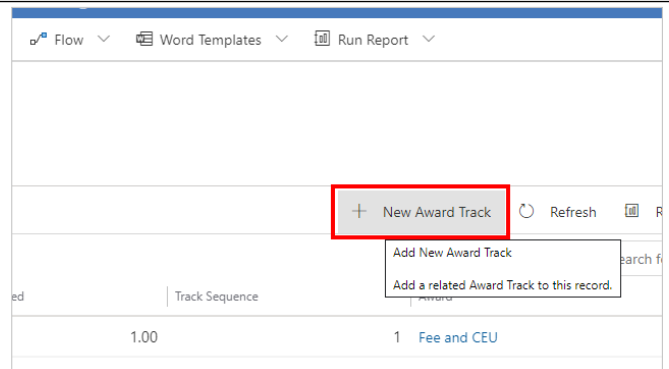
CEU Only_By Meeting Session	CEUWMSSES
CEU Only_By Product Sale	CEUPRODUCT
CEU Only_Membership Required	CEUMBR
CEU Only_Prerequisite Award	CEUPREREQAWARD
CEU Only_Prerequisite Education Items	CEUPREREQEDUCITE
Fee and CEU	FEECEU
Fee On Fee and CEU months	FEE
FEE-CEU_Anniversary_24 Months_Cut Off Day 15	FEE-CEU_ANN_CUT
FEE-CEU_Anniversary_24 Months_Cut Off Day 31	FEE-CEU_ANN_CUT
FEE-CEU_Anniversary_24 Months_Next Month	FEE-CEU_ANN_NEXT

Click on the item **Award Tracks**



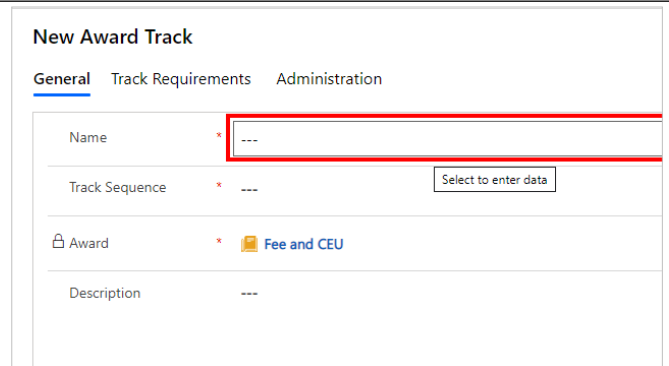
The screenshot shows the PROTECH interface with the 'Award Tracks' tab selected. The 'General' tab is active, showing the 'Name' field with the value 'Fee and CEU' and the 'Award Code' field with the value 'FEECEU'. The 'Award Tracks' tab is highlighted with a red box.

Click on the menu item **Add New Award Track**



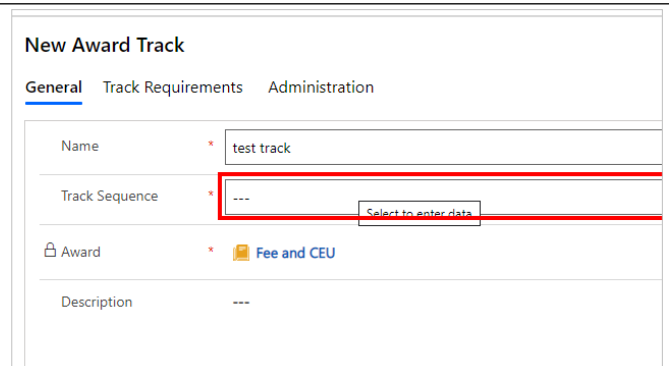
The screenshot shows the PROTECH interface with the 'Add New Award Track' button highlighted by a red box. The button is located in the top right corner of the interface.

Enter a name for the Track.



The screenshot shows the 'New Award Track' form. The 'Name' field is highlighted with a red box and contains the text '---'. The 'Track Sequence' field is also highlighted with a red box and contains the text '---'. The 'Award' field is set to 'Fee and CEU'.

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.



The screenshot shows the 'New Award Track' form. The 'Track Sequence' field is highlighted with a red box and contains the text '---'. The 'Name' field is also highlighted with a red box and contains the text 'test track'. The 'Award' field is set to 'Fee and CEU'.

Enter a very short code for the Track, avoiding special characters. This is required.

Track Code	*	---	Select to enter data
Total Credits Required		---	
Default Credit Category		---	

If credits are required to achieve the Award through this Track, enter the total credits required.

Track Code	*	test	
Total Credits Required		---	Select to enter data
Default Credit Category		---	

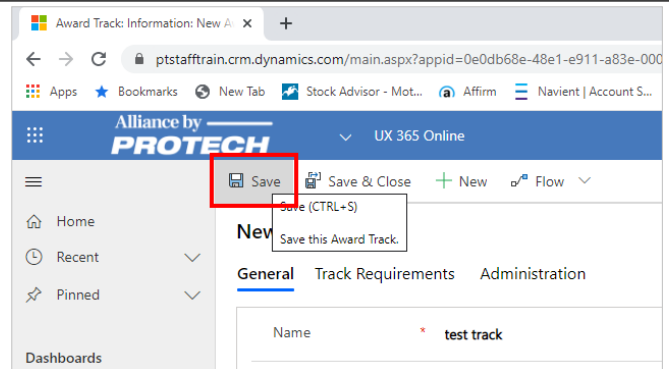
If you entered a value in Total Credits Required, this field is unlocked so that you can optionally enter the default Credit Category for the Track Requirement credits.

Track Code	*	test	
Total Credits Required		---	
Default Credit Category		---	

In the Description you can add any additional text.

Name	*	test track	
Track Sequence	*	3	
Award	*	Fee and CEU	
Description		---	Select to enter data

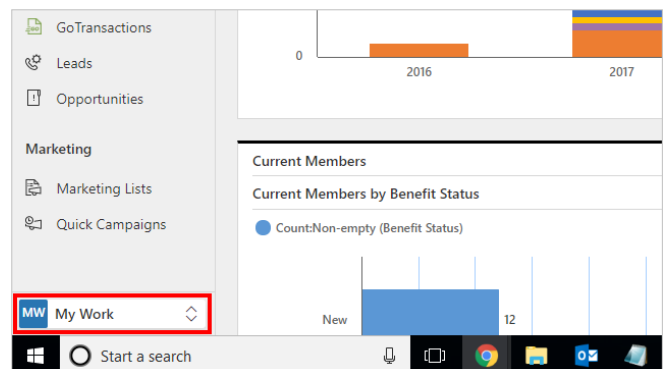
Click on the menu item Save



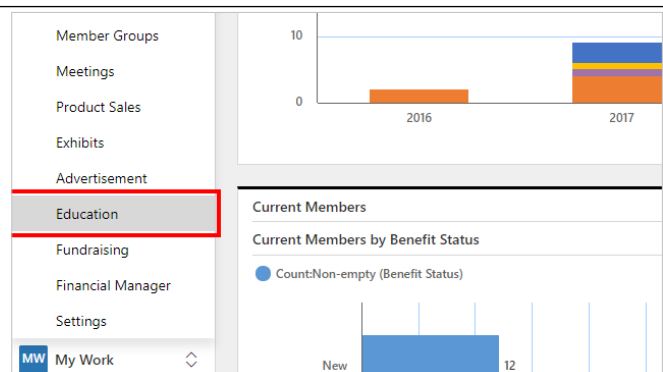
8.6. Creating Education Item

8.6.1. Creating an Education Item

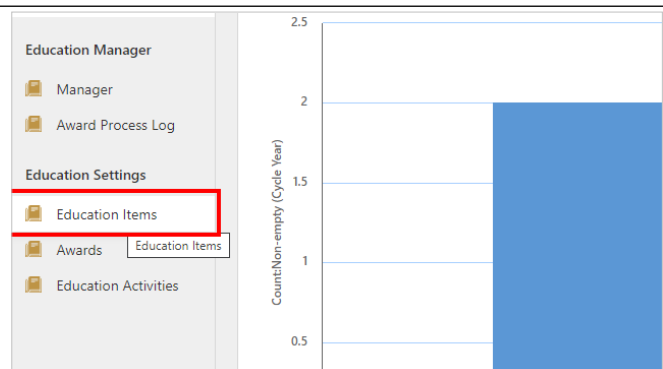
Click on the button **My Work** (change area)



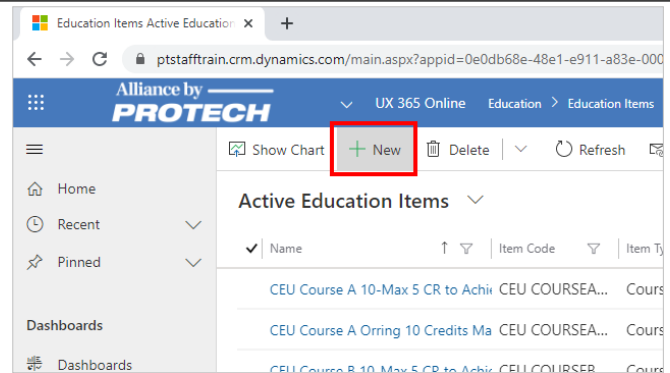
Click on the item **Education**



Click on the item **Education Items**



Click on the menu item **New**



Click on the text field Name and enter a short descriptive name.

The screenshot shows the 'Education Item' form. The 'Name' field is highlighted with a red box. The form includes fields for Name, Item Code, Item Type, and Default Credit Status.

Click on the text field Item Code and enter a very short code and avoid special characters other than a hyphen or underscore.

The screenshot shows the 'Education Item' form. The 'Item Code' field is highlighted with a red box. The form includes fields for Name, Item Code, Item Type, Default Credit Status, and Maximum Credit.

Click on the field Item Type and use the dropdown to select the Item Type. The options include Application, Course, Documentation and Fee.

The screenshot shows the 'Education Item' form. The 'Item Type' dropdown is highlighted with a red box. The form includes fields for Name, Item Code, Item Type, Default Credit Status, Maximum Credit, and Prerequisite Are.

Click on the field Default Credit Status and select the default Education Activity status for this Education Item: Enrolled or Passed.

Name	* Nick Test
Item Code	* 123
Item Type	* Documentation
Default Credit Status	* --Select--
Maximum Credit	---
Prerequisite Are Orring	No

Click on the text field Maximum Credit-- Optional. Enter the maximum number of credits a participant can acquire for this Education Item, if any.

Name	NICK TEST
Item Code	* 123
Item Type	* Documentation
Default Credit Status	* Enrolled
Maximum Credit	---
Prerequisite Are Orring	No


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.

Item Type	* Documentation
Default Credit Status	* Enrolled
Maximum Credit	100
Prerequisite Are Orring	No


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.

Award	Look for Award
Membership Required	No
Self Reported	No
Allow Multiple	Yes


Membership Required – Defaults to No. Change to Yes if membership is required to enroll in this Education Item.

Award	 CEU Only_By Meeting Session X
Membership Required	<input type="text" value="No"/>
Self Reported	<input type="text" value="No"/> <input type="button" value="No"/>
Allow Multiple Enrollments	<input type="text" value="Yes"/>
External Course	<input type="text" value="No"/>

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.

Award	 CEU Only_By Meeting Session X
Membership Required	<input type="text" value="No"/>
Self Reported	<input type="text" value="No"/>
Allow Multiple Enrollments	<input type="text" value="Yes"/> <input type="button" value="No"/>
External Course	<input type="text" value="No"/>

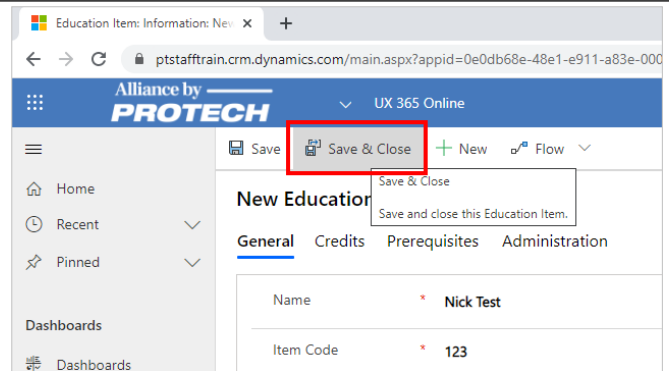
Allow Multiple Enrollments – Defaults to Yes. Change to No if participants are not allowed to enroll multiple times for this Education Item.

Award	 CEU Only_By Meeting Session X
Membership Required	<input type="text" value="No"/>
Self Reported	<input type="text" value="No"/>
Allow Multiple Enrollments	<input type="text" value="Yes"/>
External Course	<input type="text" value="No"/> <input type="button" value="Yes"/>

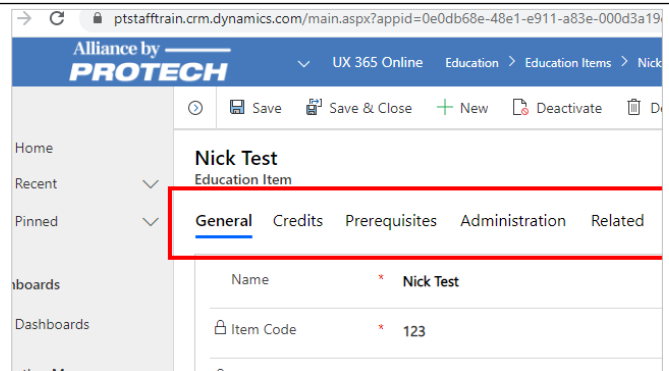
External Course – Defaults to No. Change to Yes if this Education Item represents an external course. This is a data tag for reporting only – there is no logic associated with this field.

Membership Required	<input type="text" value="No"/>
Self Reported	<input type="text" value="No"/>
Allow Multiple Enrollments	<input type="text" value="Yes"/>
External Course	<input type="text" value="No"/>
	<input type="button" value="No"/>

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.

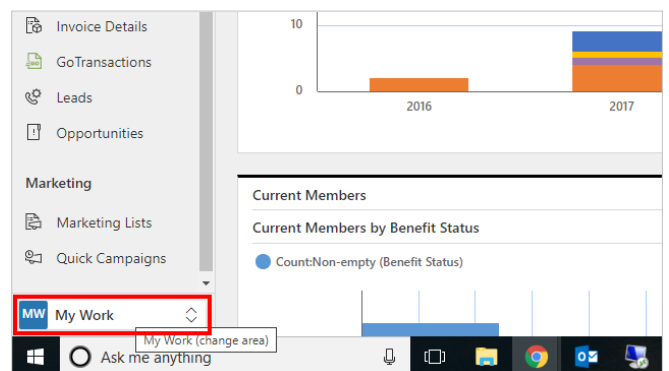


These are the activated remaining tabs on the form.

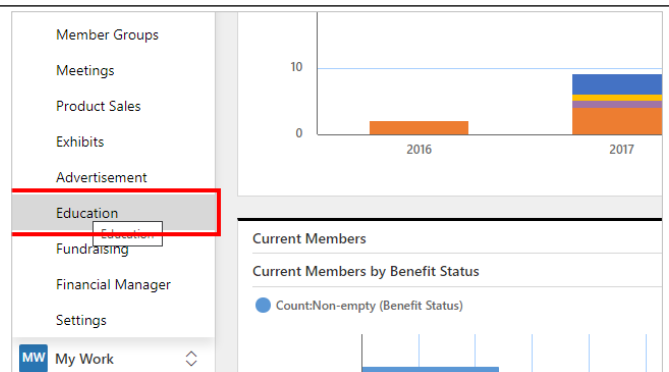


8.7. Creating Education Item Credits

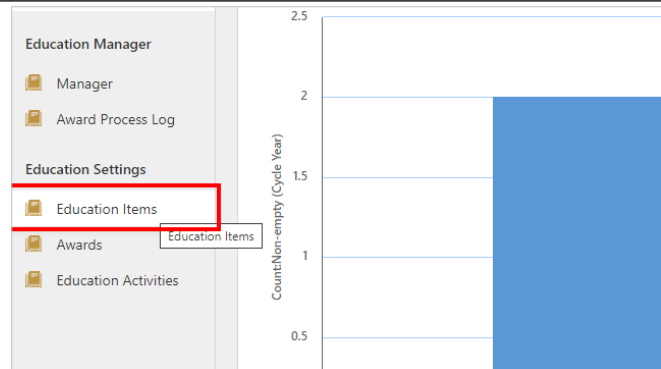
Click on the button **My Work (change area)**



Click on the item **Education**



Click on the item **Education Items**



Select the course you would like to create an education item credit for

The screenshot shows the 'Active Education Items' table. A red box highlights the first row: 'CEU Course A 10-Max 5 CR to Achiev'.

Name	Item Code	Item Type
CEU Course A 10-Max 5 CR to Achiev	CEU COURSEA...	Cours
CEU Course A 10-Max 5 CR to Achiev	CEU COURSEA...	Cours
CEU Course B 10-Max 5 CR to Achiev	CEU COURSEB...	Cours
CEU Course B 10-Max 5 CR to Achiev	CEU COURSEB...	Cours

Click on the item **Credits**

The screenshot shows the 'CEU Course A 10-Max 5 CR to Achieve' form. The 'Credits' tab is selected and highlighted with a red box. The form fields are:

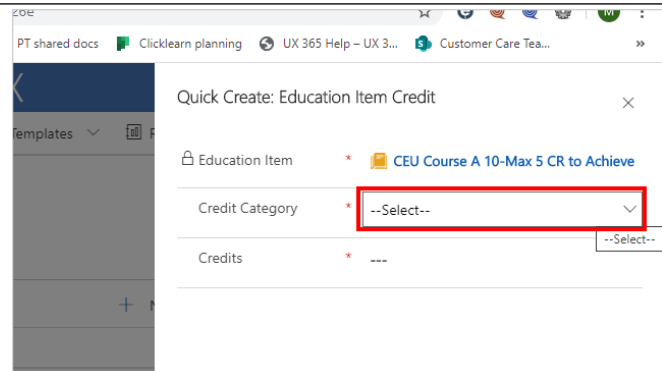
Field	Value
Name	CEU Course A 10-Max 5 CR to Achiev
Item Code	CEU COURSEA_10-5 ACH
Item Type	Course

Click on the menu item **Add New Education Item Credit**

The screenshot shows the 'Add New Education Item Credit' form. A red box highlights the '+ New Education Item C...' button. Below the button is a table with 'Credit Category' and 'CEU'.

Credit Category
CEU

Select the credit category you would like to create



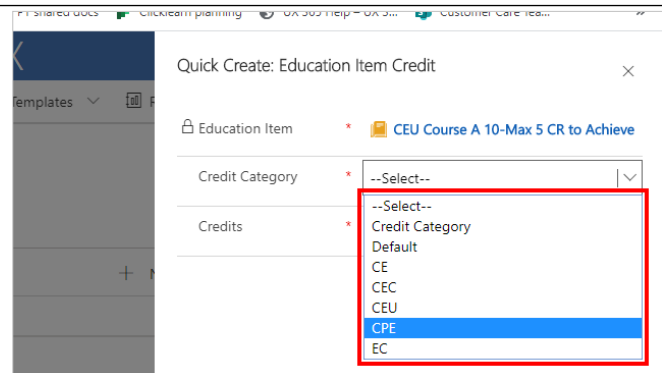
Quick Create: Education Item Credit

Education Item * CEU Course A 10-Max 5 CR to Achieve

Credit Category * --Select--

Credits * ---

Select credit type



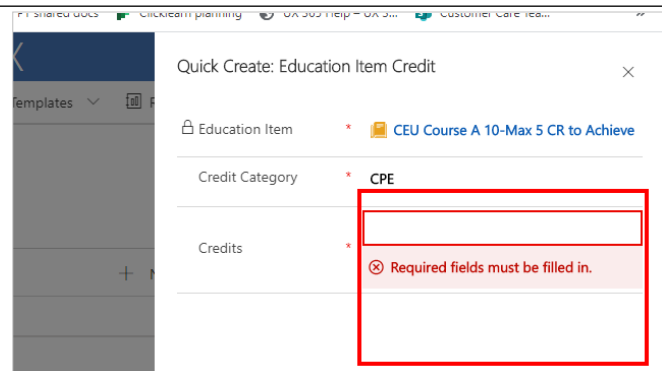
Quick Create: Education Item Credit

Education Item * CEU Course A 10-Max 5 CR to Achieve

Credit Category * --Select--

Credits * ---

Enter the number of credits awarded



Quick Create: Education Item Credit

Education Item * CEU Course A 10-Max 5 CR to Achieve

Credit Category * CPE

Credits *

⊗ Required fields must be filled in.

Click on the button **Save and Close**



Quick Create: Education Item Credit

Education Item * CEU Course A 10-Max 5 CR to Achieve

Credit Category * CPE

Credits *

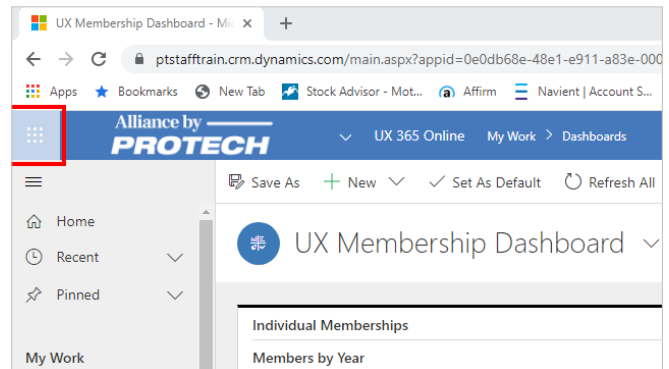
⊗ Required fields must be filled in.

Save and Close

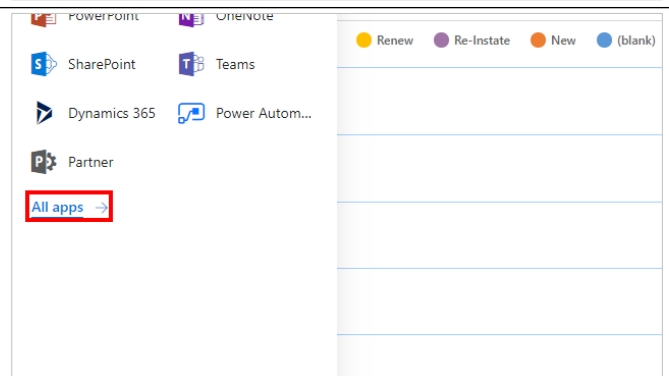
Cancel

8.8. Creating Education Item Types

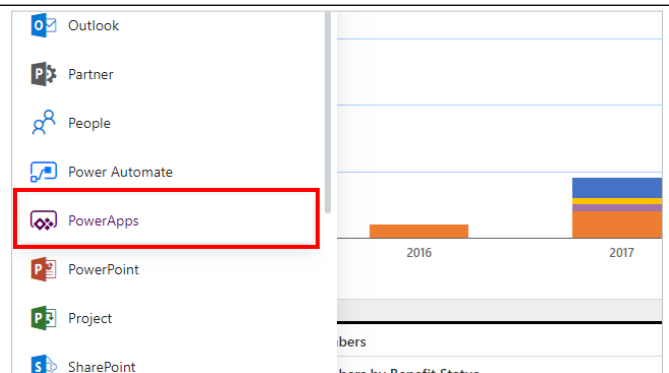
Click on the **waffle** button



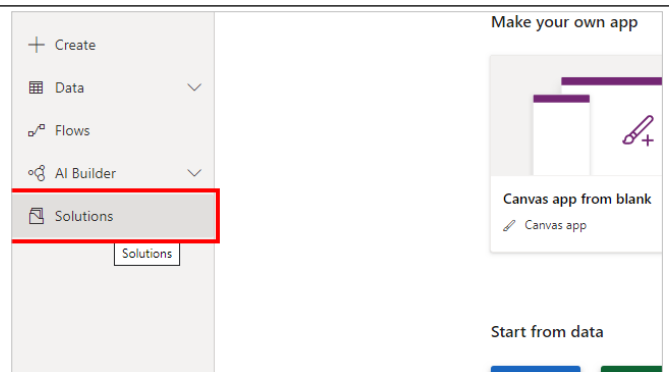
Click on the button **All apps**



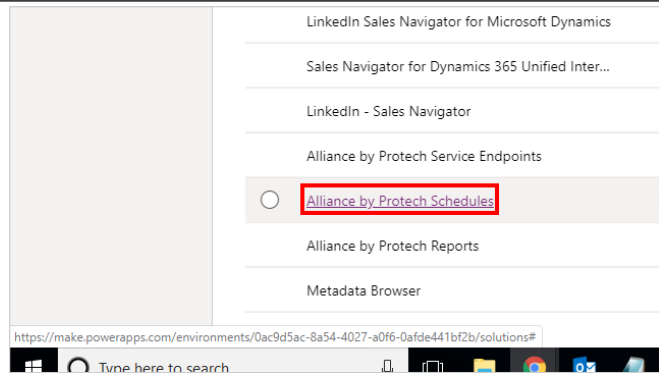
Click on the link **PowerApps**



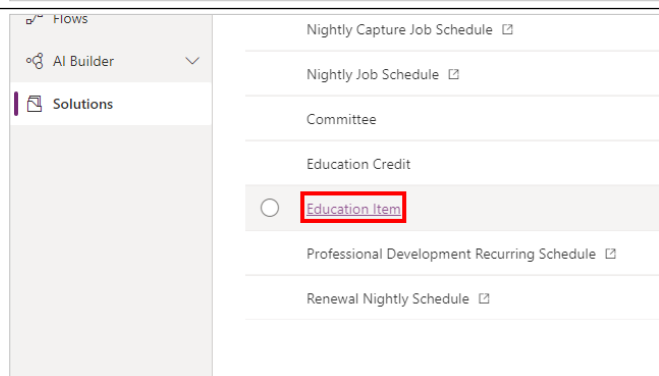
Click on the link **Solutions**



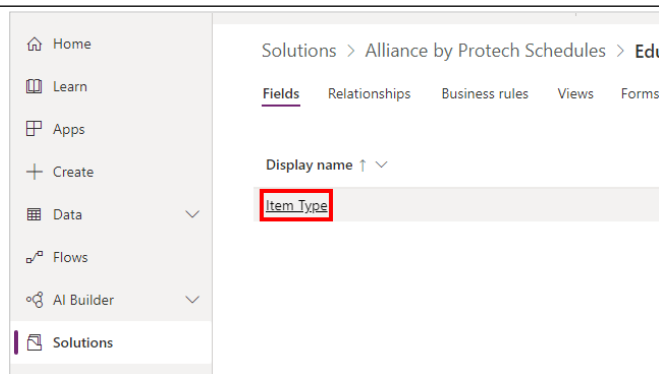
Open your organizations unmanaged solution



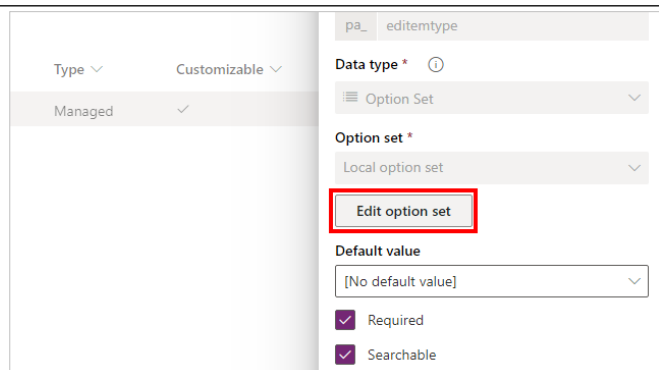
Click on the link **Education Item**



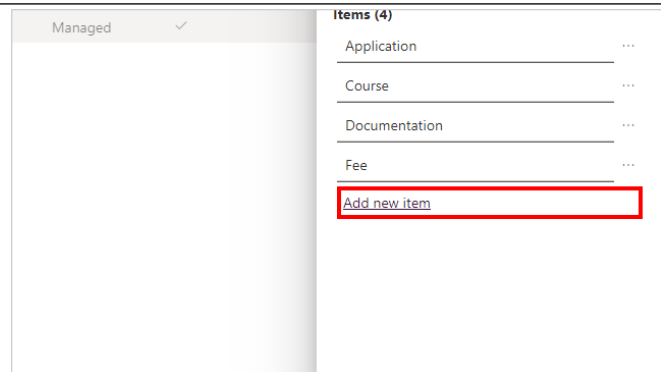
Click on the button **Item Type**



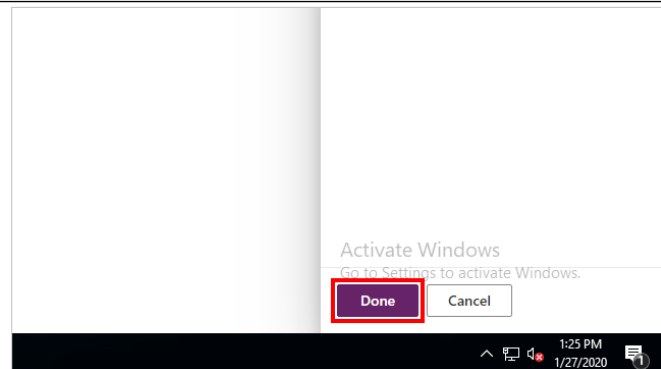
Click on the button **Edit option set**



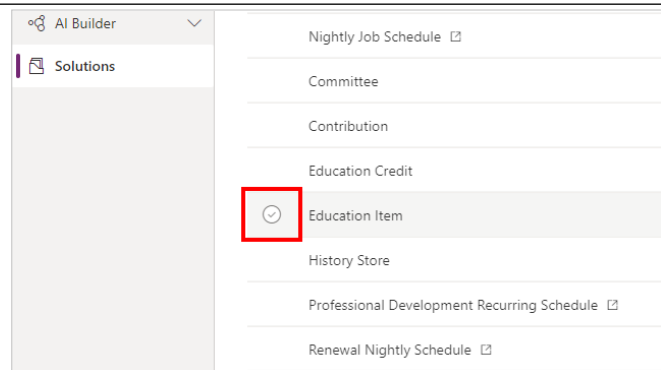
Click on Add new item to create new item types.



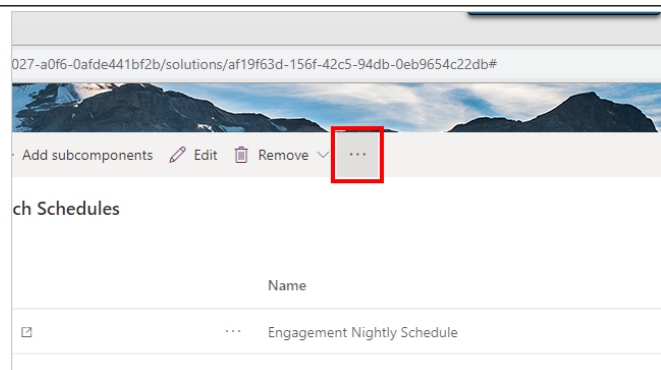
Click Done when you are finished.



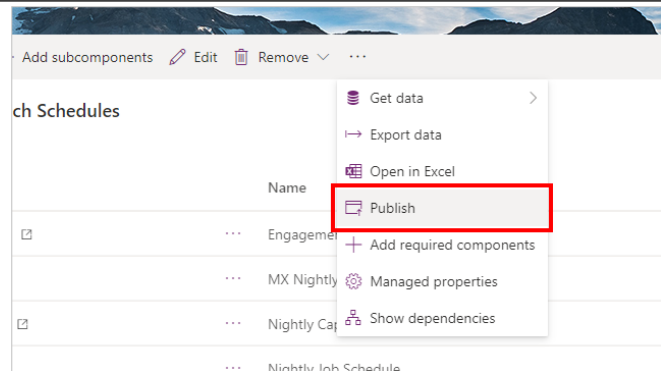
Check Education Item



Click on the more options button

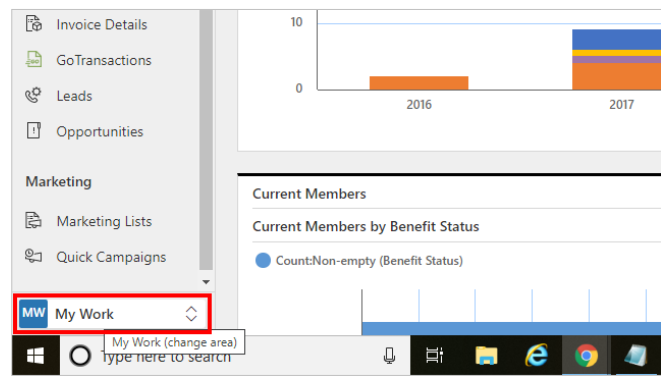


Click on the button Publish. You have successfully added your Education Type option sets

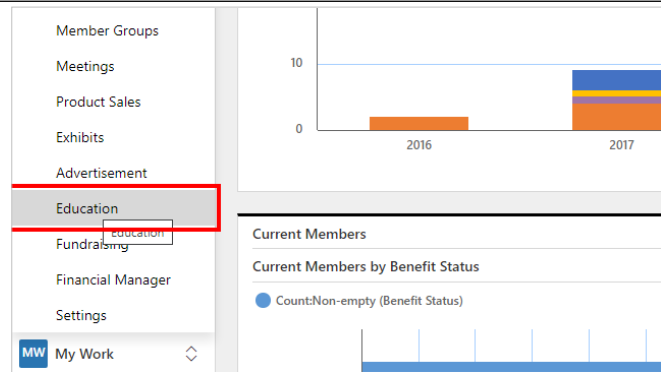


8.9. Creating Renew Recert Requirements

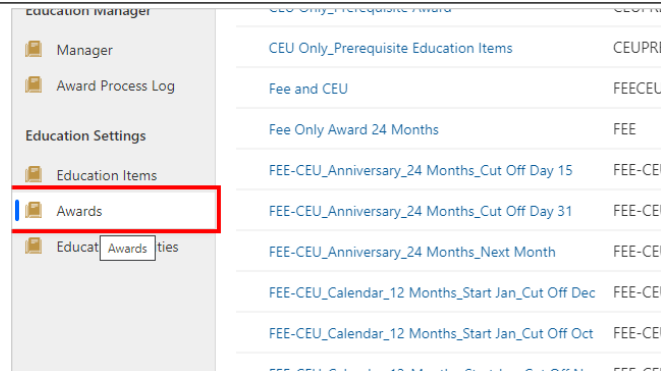
Click on the button **My Work (change area)**



Click on the item **Education**



Click on the item **Awards**



Click into the award you'd like to add a requirement to

Active Awards

Name	Award Code
CEU Only_By Meeting Session	CEUMTGSES
CEU Only	CEUPRODUCT
CEU Only_Membership Required	CEUMBR
CEU Only_Prerequisite Award	CEUPREREQAWARD
CEU Only_Prerequisite Education Item	CEUPREREQEDUCITEM

Click on the item **Recert Requirements**

CEU Only_By Meeting Session

Award

General Award Tracks **Recert Requirements** Description Admin

General

Name * CEU Only_By Meeting Session

Award Code * CEUMTGSES

Click on the menu item **Add New Award Renewal Requirement**

+ New Award Renewal Requirement

Refresh

Add New Award Renewal Requirement

Add a related Award Renewal Requirement

Elective Minimum Credits Award Education Item

No --- CEU Only_By Meeting Session... ---

Click on the field **Requirement Type**

Award Renewal Requirement

Requirement Type * Course

Education Item * ---

Credit Category ---

Requirement * ---

Select an option from the list

UX 365 Online

Save & Close + New Flow

Award Renewal Requirement

General

Requirement Type *	Course
Education Item *	Application
Credit Category	Course
	Documentation
	Fee
	Credits
Requirement	---

click on name to enter name

UX 365 Online

Name *

Award *

Minimum Credits

Maximum Credits

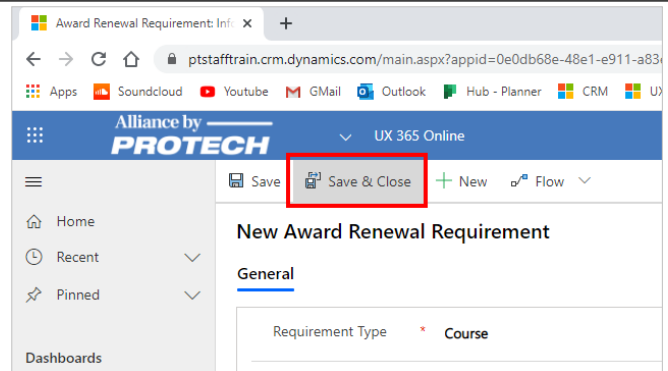
Select an Education Item

Name *	Test Award f
Award *	CEU Only By meeting session
Minimum Credits	---
Maximum Credits	---
Owner	Rolando

Enter a requirement number

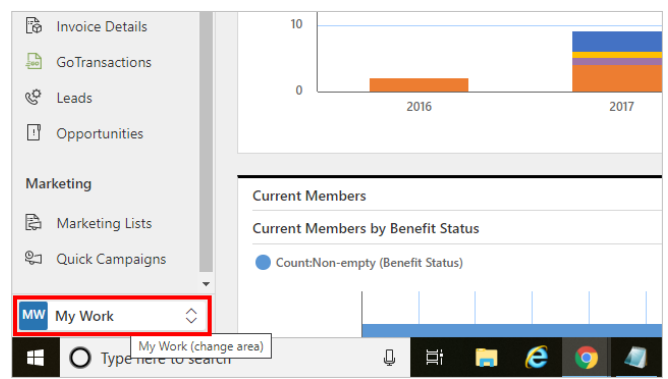
Requirement Type *	Course
Education Item *	CEU Course A 10-Max 5 CR to Achieve
Credit Category	---
Requirement Number *	---
Elective	No

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

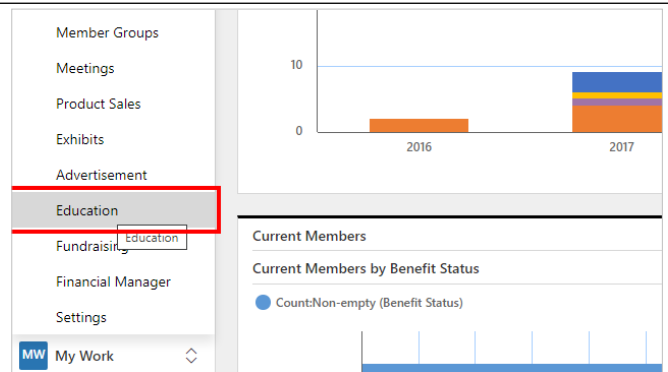


8.10. Creating Track Requirement Types

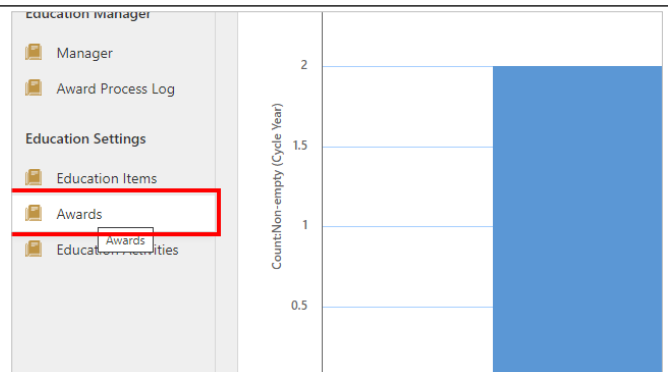
Click on the button **My Work (change area)**



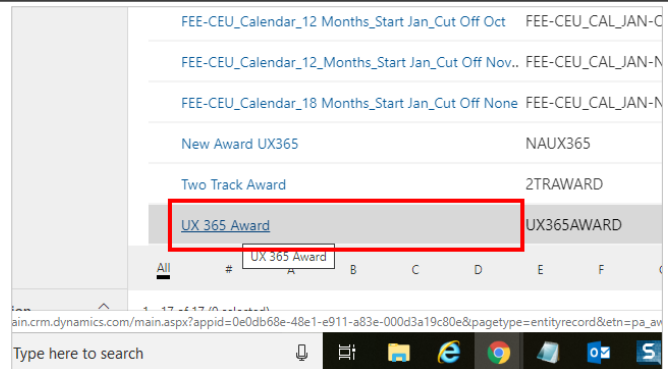
Click on the item **Education**



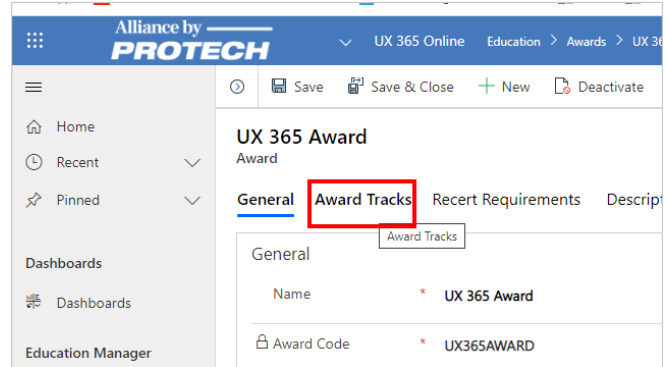
Click on the item **Awards**



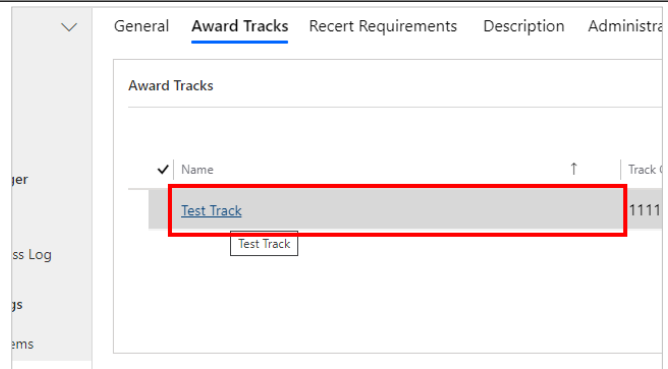
Navigate into the award you would like to make your track requirement in.



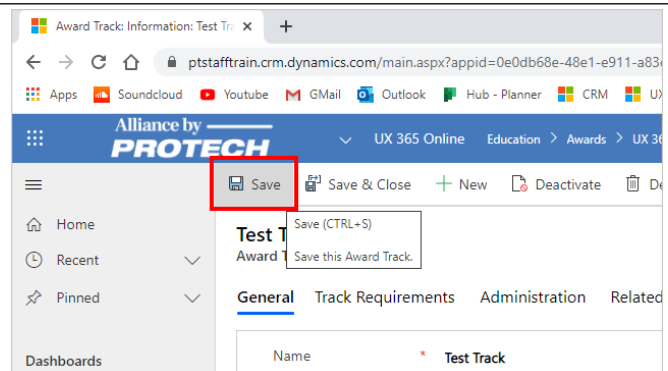
Click on the item **Award Tracks**



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**

The screenshot shows the 'Test Track' form in the Protech system. The 'Track Requirements' tab is highlighted with a red box. The form fields include: Name (Test Track), Track Sequence (1), and Award (UX 365 Award).

Click on the menu item **Add New Track Requirement**

The screenshot shows the 'Add New Track Requirement' button highlighted with a red box. The button is located in the top right corner of the form. Below the button, there is a dropdown menu with the option 'Add New Track Requirement'.

This is the general information section of the requirement record.

The screenshot shows the 'New Track Requirement' form in the Protech system. The 'General' tab is highlighted with a red box. The form fields include: Requirement Type (---), Education Item (---), Requirement Number (---), Credit Category (---), and Elective (No).

Click on the field Requirement Type to select in between the types.

The screenshot shows the 'Requirement Type' field highlighted with a red box. The field is a dropdown menu with the option '--Select--'.

Click on name to add a name to the requirement.

Name	*	<input type="text"/>
Min Credits Required	---	
Max Credits	---	

Required fields must be filled in.

Click on the link **Education Item**

Name	*	<input type="text"/>
Min Credits Required	---	
Max Credits	---	
Award Track	*	<input type="text" value="Test Track"/>
Owner	*	<input type="text" value="Rolando"/>

Required fields must be filled in.

Click on an option from the list

Education Item	*	<input type="text" value="Look for Education Item"/>
Requirement Number	*	<input type="text" value="Education Items"/>
Credit Category		<input type="text" value="Educ Item_Application-No Prereq APP"/>
Elective		<input type="text" value="Educ Item_CEU Course COURSE"/>
Description		<input type="text" value="Educ Item_Documentation-Prereq Application DOC"/>
		<input type="text" value="Educ Item_Fee-No Prereq FEE"/>
		+ New Education Item

Click on the text field **Requirement Number**

Requirement Type	*	<input type="text" value="Application"/>
Education Item	*	<input type="text" value="Educ Item_CEU Course"/>
Requirement Number	*	<input type="text" value="---"/>
Credit Category	---	
Elective	No	
Description	---	

Enter Requirement Number.

General	
Requirement Type	* Application
Education Item	* Educ Item_CEU Course
Requirement Number	* 1
Credit Category	---
Elective	No
Description	---

The locked fields are automatically populated after selecting an education item

Home	New Track Requirement General Requirement Type * Application Education Item * Educ Item_CEU Course Requirement Number * 1111 Credit Category --- Elective No
Recent	
Pinned	
boards	
Dashboards	
ation Manager	
Manager	
Award Process Log	
ation Settings	

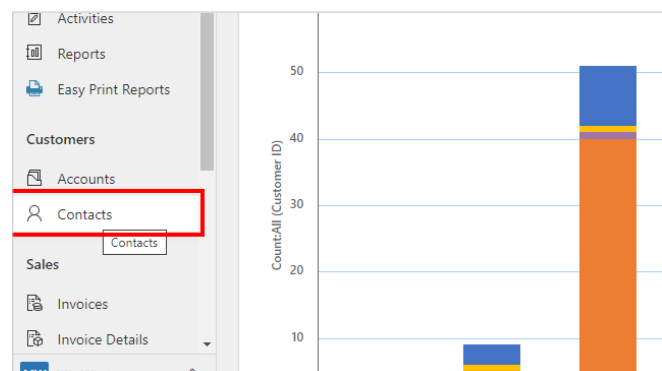
Click on the menu item **Save & Close**

The screenshot shows the Protech UX 365 Online interface. The top navigation bar includes a 'Save & Close' button, which is highlighted with a red box. Below the navigation bar, the 'New Track Requirement' form is visible, showing the 'General' tab with fields for Requirement Type, Education Item, Requirement Number, Credit Category, and Elective.

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

Active Contacts				
Group By: (no grouping)				
Full Name	Company Name	Contact ...	Me...	
Daly, Becca	---	C-001226	No	
deGrom, Jacob	---	C-001272	No	
Delacour, Fleur	Hogw...	C-001038	Yes	
Dill, Steve	---	C-001188	No	
DiNozzo, Anthony...	Naval Criminal Inv...	C-001004	No	
Depp, Khal	COT Enterprises	C-001311	No	

Click on the item **Related**

UX 365 Online Contacts > deGrom, Jacob

Save Save & Close + New Address Validation New

deGrom, Jacob
Contact · Contact

Summary Details Files **Related**

CONTACT INFORMATION

First Name * **Jacob**

Last Name * **deGrom**

Timeline

Enter a n

GB

Click on the menu item **Education Activities**

Last Name **deGrom**

Job Title **Pitcher**

Account Name ---

Email **jdegrom@**

Business Phone **123-234-3**

Mobile Phone ---

Fax ---

Visits

Import Logs

Award Process Log

Award Renewals

Award Renewals

Education Activities

Education Activities

Invoices

Invoice Details

Contact Web Roles

E-mail from Gold
We haven't heard
Dear deGrom, Jac

E-mail from Gold
We haven't heard
Dear deGrom, Jac

E-mail from Gold
We haven't heard
Dear deGrom, Jac

Auto-post on deG
Contact: Created

Click on the menu item **Add New Education Activity**

Home Recent Pinned

My Work

Dashboards

Activities

Reports

Easy Print Reports

Save Save & Close + New Address Valid

deGrom, Jacob
Contact · Contact

Summary Details Files **Education Activities** Related

+ New Education Activity Refresh Run Report

Education Activities

Add New Education Activity

Add a related Education Activity to this record.

Education Item Credit Status Activity Da

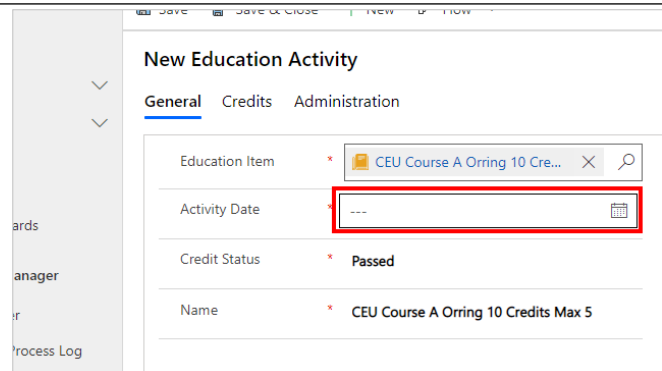
Education Item – Use the lookup to select the Education Item for this record.

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**



New Education Activity

General Credits Administration

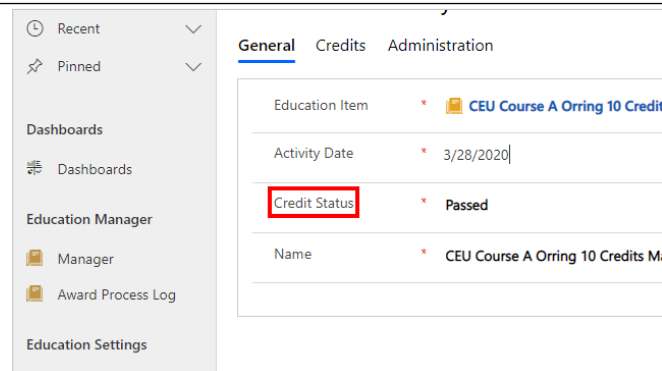
Education Item * CEU Course A Orring 10 Cre...

Activity Date * ---

Credit Status * Passed

Name * CEU Course A Orring 10 Credits Max 5

Credit Status – Defaults to 'Passed' or 'Enrolled' based on the setup of the Education Item selected.



Recent Pinned

Dashboards

Education Manager

Education Settings

New Education Activity

General Credits Administration

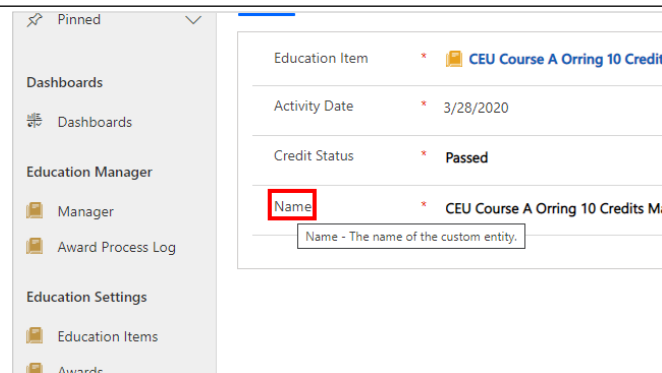
Education Item * CEU Course A Orring 10 Credit

Activity Date * 3/28/2020

Credit Status * Passed

Name * CEU Course A Orring 10 Credits Ma

Name – Populated by UX based on the Education Item selected. This may be edited.



Pinned

Dashboards

Education Manager

Education Settings

New Education Activity

General Credits Administration

Education Item * CEU Course A Orring 10 Credit

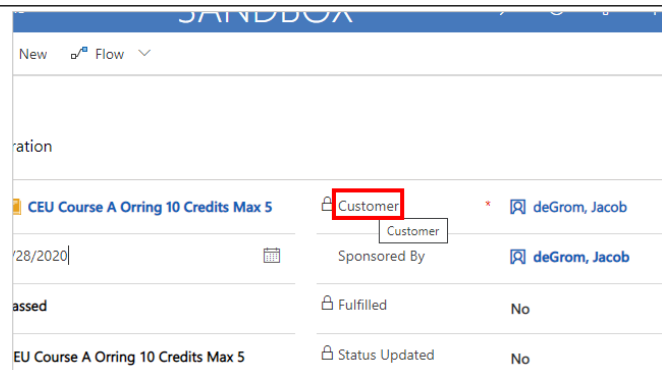
Activity Date * 3/28/2020

Credit Status * Passed

Name * CEU Course A Orring 10 Credits Ma

Name - The name of the custom entity.

Customer – Defaults to the Customer and is locked.



New Flow

ation

CEU Course A Orring 10 Credits Max 5

3/28/2020

assed

EU Course A Orring 10 Credits Max 5

Customer

Sponsored By deGrom, Jacob

Fulfilled No

Status Updated No

Sponsored by – Defaults to the customer and may be edited if your organization works with this data

ation		
CEU Course A Orring 10 Credits Max 5	Customer	* deGrom, Jacob
28/2020	Sponsored By	deGrom, Jacob
Sponsored By - Unique identifier for Contact assoc		
assed	Fulfilled	No
EU Course A Orring 10 Credits Max 5	Status Updated	No

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.

ation		
CEU Course A Orring 10 Credits Max 5	Customer	* deGrom, Jacob
28/2020	Sponsored By	deGrom, Jacob
assed	Fulfilled	No
Fulfilled		
EU Course A Orring 10 Credits Max 5	Status Updated	No

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.

ation		
CEU Course A Orring 10 Credits Max 5	Customer	* deGrom, Jacob
28/2020	Sponsored By	deGrom, Jacob
assed	Fulfilled	No
EU Course A Orring 10 Credits Max 5	Status Updated	No
Status Updated		

Click on the menu item Save

Education Activity: Information: x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Alliance by **PROTECH** UX 365 Online SA

Save Save & Close New Flow

New Save this Education Activity.

General Credits Administration

Education Item * CEU Course A Orring 10 Credit

Activity Date * 3/28/2020

Click on the item **Credits**

Protech Alliance by UX 365 Online CEU Course A Orring 10 Credits

Save Save & Close New Deactivate

CEU Course A Orring 10 Credits Max 5
Education Activity

General **Credits** Administration Related

Education Item * CEU Course A Orring 10 Credits

Activity Date * 3/28/2020

Credit Status * Passed

The records in this view are based on the Education Item Credits setup.

Education Activity

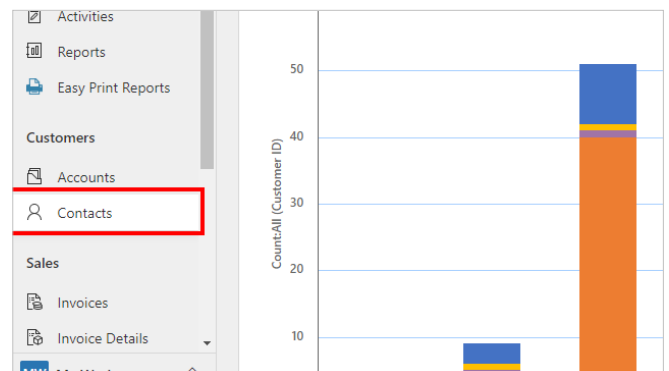
General **Credits** Administration Related

Education Credits

✓ Credit Category	↑ Credits
CEU	

8.11.2. Updating Education Activity Credit Status

Click on the item **Contacts**



Double Click on the Contact

Active Contacts

Group By: (no grouping)

✓ Full Name	↑ Company Name	Contact ...	Me...
Daly, Becca	---	C-001226	No
deGrom, Jacob	---	C-001272	No
Delacour, Fleur	Hogwarts	C-001038	Yes
Dill, Steve	---	C-001188	No
DiNozzo, Anthony...	Naval Criminal Inv...	C-001004	No
Draco, Khal	GOT Enterprises	C-001211	No

Click on the item **Related**

The screenshot shows the 'deGrom, Jacob' contact page in the UX 365 Online system. The 'Related' tab is highlighted with a red box. Below the tabs, the 'CONTACT INFORMATION' section is visible, showing 'First Name' as 'Jacob' and 'Last Name' as 'deGrom'. A 'Timeline' section is partially visible on the right.

Click on the menu item **Education Activities**

The screenshot shows the 'deGrom, Jacob' contact page with the 'Education Activities' menu item highlighted with a red box. The menu includes options like 'Visits', 'Import Logs', 'Award Process Log', 'Award Renewals', 'Invoices', and 'Contact Web Roles'. The 'Education Activities' item is the one selected.

Select the Education Item

The screenshot shows the 'Education Activity Associated View' table. The table has columns for 'Education Item', 'Credit Status', 'Activity Date', and 'Fulfilled'. The 'Credit Status' column is highlighted with a red box, showing the value 'Passed' for the 'CEU Course A Orring 10 Credits' item.

Education Item	Credit Status	Activity Date	Fulfilled
CEU Course A Orring 10 Credits	Passed	3/28/2020	Yes

Check Credit Status

The screenshot shows the 'Education Activity Associated View' table with the 'Credit Status' field highlighted with a red box. The value 'Passed' is displayed next to the 'CEU Course A Orring 10 Credits' item.

Education Item	Credit Status	Activity Date	Fulfilled
CEU Course A Orring 10 Credits	Passed	3/28/2020	Yes

Click on the field **Credit Status**

The screenshot shows the 'Education Activity' record for 'CEU Course A Orring 10 Credits Max 5'. The 'Credit Status' field is highlighted with a red box and contains the value 'Passed'. Other fields include 'Activity Date' (3/28/2020) and 'Name' (CEU Course A Orring 10 Credits Max 5).

□ 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.

The screenshot shows the 'Education Activity' record for 'CEU Course A Orring 10 Credits Max 5'. The 'Credits' tab is selected and highlighted with a red box. The 'Credit Status' field is visible and contains the value 'Passed'.

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.

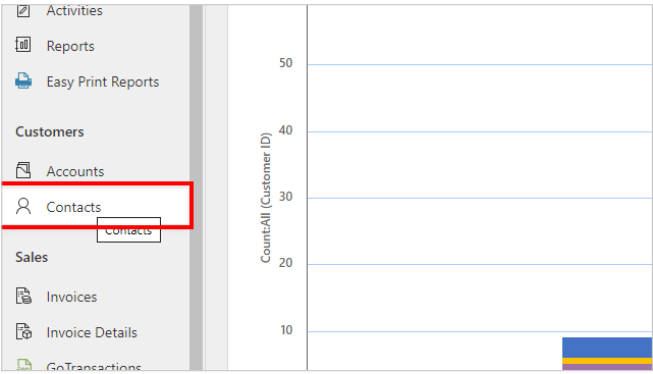
The records in this view are based on the Education Item Credits setup.

The screenshot shows the 'Education Credits' view for 'CEU Course A Orring 10 Credits Max 5'. The 'Credit Category' is 'CEU' and the 'Credits' value is '10'. The 'Credit Status' field is visible and contains the value 'Passed'.

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**

The screenshot shows a table with a sidebar menu on the left. The sidebar has categories: Reports, Easy Print Reports, Customers, Accounts, **Contacts** (highlighted with a blue bar), Sales, Invoices, Invoice Details, and GoTransactions. The table has two columns: 'Full Name' and '---'. The row 'Strasburg, Stephen' is highlighted with a red box, and a tooltip 'Strasburg, Stephen' is visible next to it. Other rows include Sneed, John; Sorto, Theresa; Sotherby, Mark; Stewart, Jerome; Sullivan, Trey; Superuser, MX 8.3; and Svihla, Robert.

Click on the item **Related**

The screenshot shows a form titled 'SANDBOX' with a header bar containing 'Copy Address', 'Deceased', 'Deactivate', 'GoTransactions', and 'Connect'. Below the header are tabs: 'tion Preferences', 'Other Details', 'Notes', and **Related** (highlighted with a red box). The 'Related' tab shows a section titled 'Current and Upcoming Renewal Billing' with a table containing columns for 'Benefit', 'Rate', and 'Cycle'. The 'Benefit' column has a checkmark and an upward arrow. The 'Rate' column has a downward arrow. The 'Cycle' column has a circular arrow. The 'Related' tab also shows a section titled 'Related - Education' with a table containing columns for 'Education Activities', 'Track Header Status', and 'Award Renewals'. The 'Education Activities' column has a checkmark and a downward arrow. The 'Track Header Status' column has a downward arrow. The 'Award Renewals' column has a downward arrow. The 'Related' tab also shows a section titled 'Related - Marketing' with a table containing columns for 'Marketing Activities', 'Track Header Status', and 'Award Renewals'. The 'Marketing Activities' column has a checkmark and a downward arrow. The 'Track Header Status' column has a downward arrow. The 'Award Renewals' column has a downward arrow.

Click on the menu item **Eligibility View**

The screenshot shows a menu with a sidebar on the left. The sidebar has categories: Invoices, Renewal Billing, Meeting Registrations, Gift Certificates, **Eligibility View** (highlighted with a red box), Education Activities, Track Header Status, Award Renewals, and Related - Marketing. The 'Eligibility View' menu item is highlighted with a red box. To the right of the menu is a section titled 'data available.' with a document icon.

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.

Award Code	
+	2TRAWARD
+	2TRAWARD
+	CEUMBR
+	FEE
+	CEUPREQEDUCITEM

Click on the link to show the track requirements.

Award Code	
-	2TRAWARD
>	TRONE-_PD-Two Track Award
+	TRTWO-_PD-Two Track Award
+	2TRAWARD
+	CEUMBR

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.

Name	Award Created	Total Credits Earned
TRONE-_PD-Two Track Award	Yes	3.00
>		
Education Item	Credits Earned	Fulfilled
Educ Item_Application...	-	Yes
Educ Item_Documentat...	-	Yes
-	3.00	Yes
+	TRTWO-_PD-Two Track Award	No
+	2TRAWARD	No
+	CEUMBR	No

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**

Reports	Delacour, Fleur	Hogwarts
Easy Print Reports	Dill, Steve	---
Customers	DiNozzo, Anthony J.	Naval Criminal Investigativ..
Accounts	Drogo, Khal	GOT Enterprises
Change area	Dumbledore, Albus	Hogwarts
✓ My Work	Dunn, Wendy	---
Renewal		
Member Groups		
Meetings		
Product Sales		

Click on the item **Contacts**

Activities	deGrom, Jacob	---
Reports	Delacour, Fleur	Hogwarts
Easy Print Reports	Dill, Steve	---
Customers	DiNozzo, Anthony J.	Naval Criminal Investigativ..
Accounts	Drogo, Khal	GOT Enterprises
Contacts	Dumbledore, Albus	Hogwarts
Sales	Dunn, Wendy	---
Invoices		
Invoice Details		
GoTransactions		

Select Award recipient

Home	Active Contacts	▼
Recent	Group By:	(no grouping) ▼
Pinned	Full Name	Company Name
My Work	Daly, Becca	---
Dashboards	David, Larry	---
Activities	deGrom, J. David, Larry	---
Reports	Delacour, Fleur	Hogwarts
Easy Print Reports	Dill, Steve	---
Customers	DiNozzo, Anthony J.	Naval Criminal Investigativ..

Click on the item **Related**

SANDBOX	
tion Preferences	Other Details
Notes	Related
C-001344	---

Click on the menu item **Award Renewals**

The screenshot shows a sidebar menu with the 'Award Renewals' item highlighted with a red rectangle. The main content area displays a list of related items under 'Related - Education' and 'Related - Marketing'.

This customer has a Current, Terminated Award.

Cycle Year	Cycle State	Award Status	Credit Date From
2020	Past	New	---
2021	Current	Terminated	1/1/2020

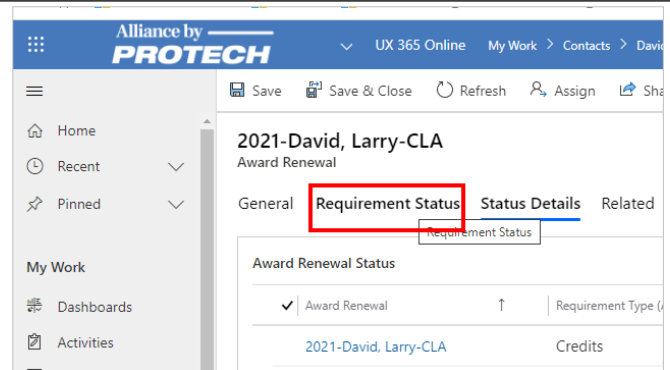
Click on **Award**

The screenshot shows the 'Award Renewal Associated View' for a customer named David, Larry. A table lists awards, with the first row 'CL Award' highlighted by a red rectangle. The table has columns for Award, Customer, and other details.

Click on the menu item **Edit**

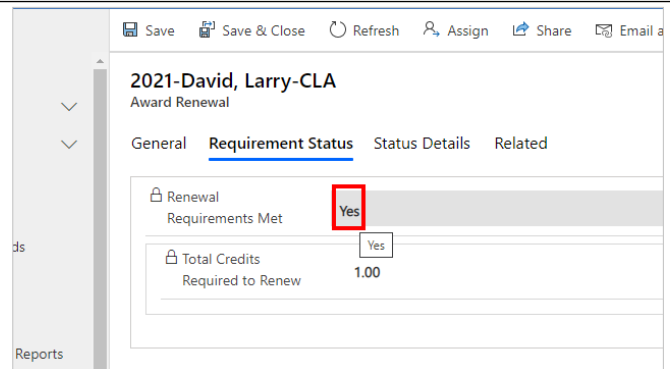
The screenshot shows the 'Edit' button highlighted with a red rectangle. The main content area displays the 'Award Renewal Associated View' for the selected award.

Click on the item **Requirement Status**



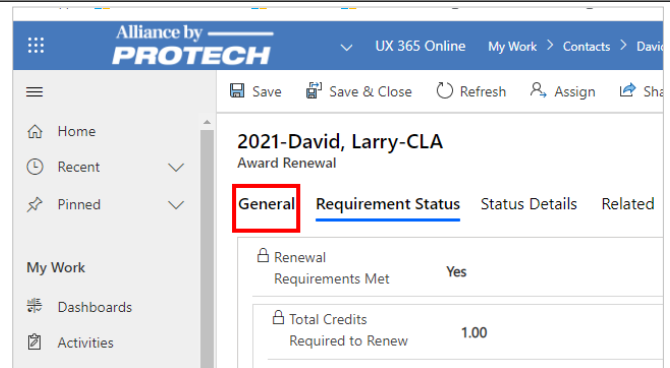
The screenshot shows the 'Requirement Status' tab selected for the record '2021-David, Larry-CLA'. The 'Award Renewal Status' section shows 'Award Renewal' with a checkmark. The 'Requirement Type' is 'Credits'.

If the Renewal Requirements Met = true but Paid On = NULL, then pay the invoice.



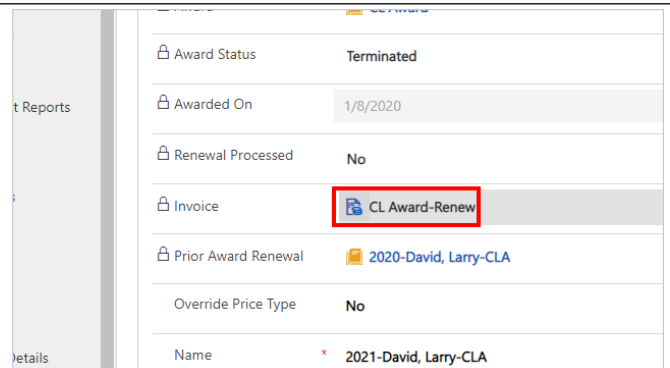
The screenshot shows the 'Requirement Status' tab with 'Renewal Requirements Met' set to 'Yes'. The 'Total Credits Required to Renew' is '1.00'.

Click on the item **General**



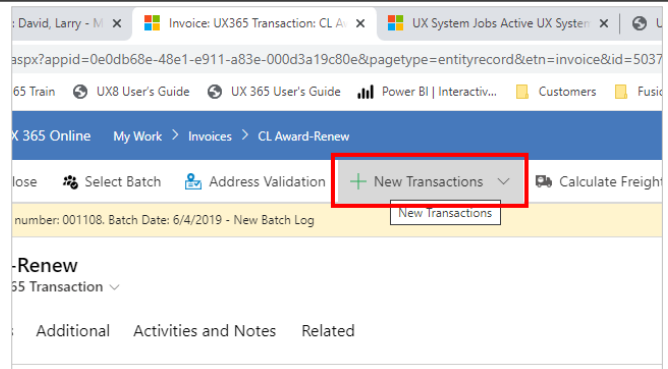
The screenshot shows the 'General' tab selected for the record '2021-David, Larry-CLA'. The 'Renewal Requirements Met' is 'Yes' and 'Total Credits Required to Renew' is '1.00'.

Click on **Invoice**

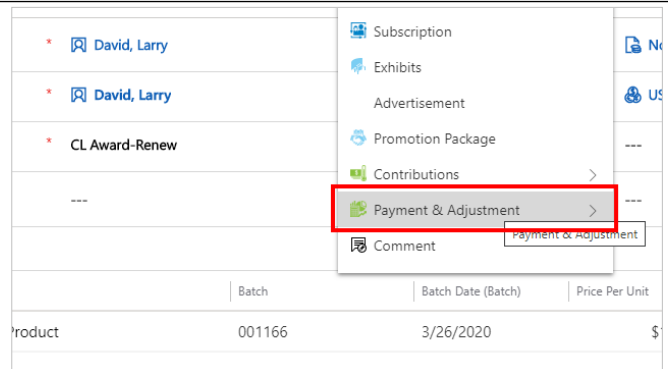


The screenshot shows the 'Invoice' section with 'CL Award-Renew' highlighted. Other details include 'Award Status: Terminated', 'Awarded On: 1/8/2020', 'Renewal Processed: No', 'Prior Award Renewal: 2020-David, Larry-CLA', and 'Override Price Type: No'.

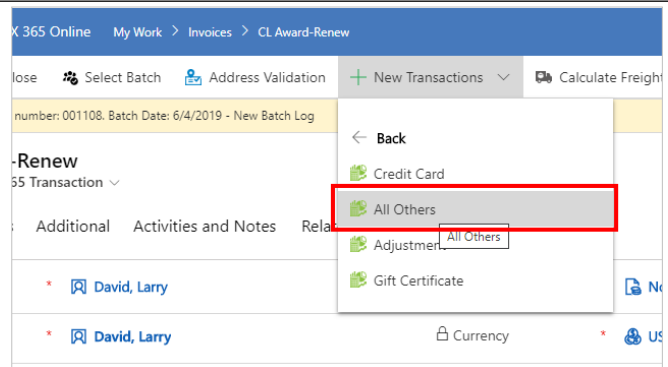
Click on the menu item **New Transactions**



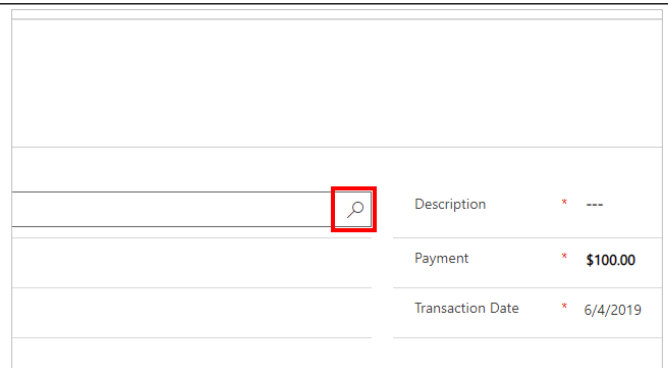
Click on the menu item **Payment & Adjustment**



Click on the menu item **All Others**



Click on the link **Product**



Add a payment product.

The screenshot shows the 'Invoice Detail' form with the 'Product' dropdown menu open. The 'Check Payment CK' option is highlighted with a red box. Other options visible are 'Refund RF' and 'Write Off WO'.

Click on the text field **Reference**

The screenshot shows the 'Invoice Detail' form with the 'Reference' field highlighted by a red box. The 'Product' field now shows 'Check Payment' with a close button. The 'Batch' field contains '001108' and the 'Customer' field shows 'David, Larry'.

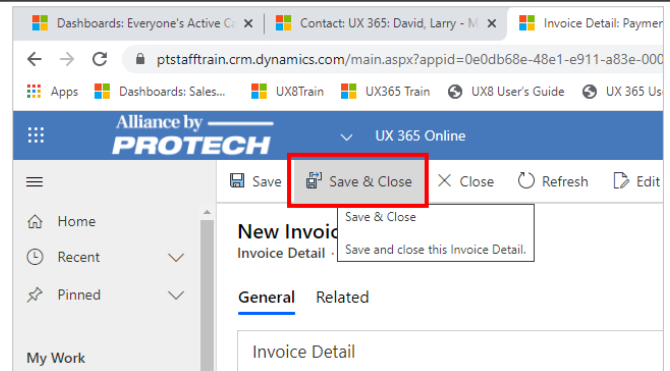
Enter a **Reference Number**.

The screenshot shows the 'Invoice Detail' form with the 'Reference' field highlighted by a red box, indicating it is ready for input. The 'Product' field shows 'Check Payment' and the 'Batch' field contains '001108'.

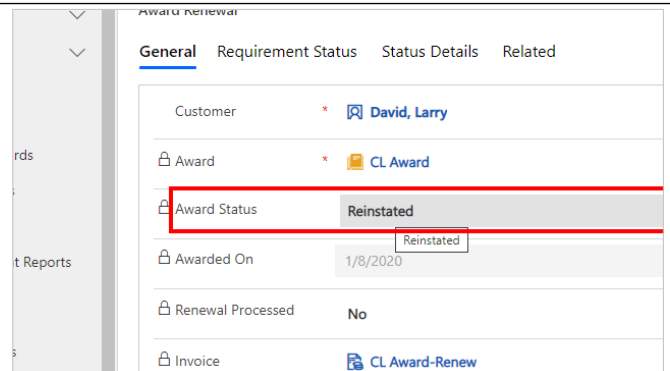
Click on the menu item **Save (CTRL+S)**

The screenshot shows the web application interface with the 'Save' button highlighted in the top navigation bar. The button is labeled 'Save' and has a tooltip that says 'Save (CTRL+S)'. The interface includes a sidebar with 'Home', 'Recent', 'Pinned', and 'My Work' options, and a main content area with 'Invoice Detail'.

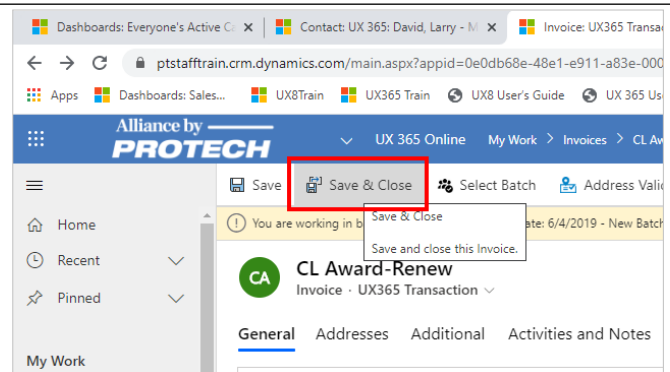
Click on the menu item **Save & Close**



Now the Award is Reinstated.

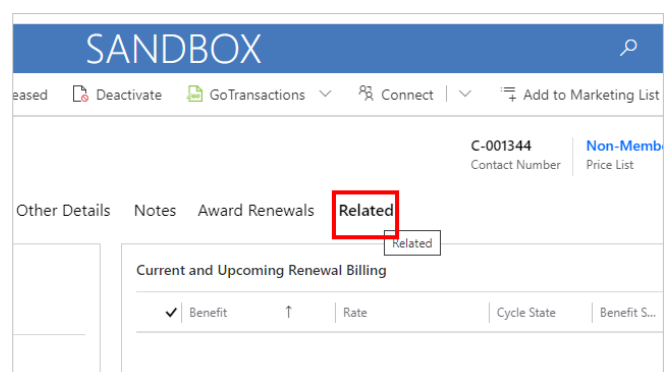


Click on the menu item **Save & Close**



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**

Transactions in the Last 12 Months		Contributions	
✓ Invoic...	Invoice ID ↓	Related - Education	Total Am.
3/26/2020	INV-01601-K4..	Eligibility View	\$10
3/26/2020	INV-01598-C7..	Education Activities	\$10
		Track Header Status	
		Award Renewals	
		Related - Marketing	
		Email Events	
		Sent Emails	
		Unsubscribes	

Note that the Paid On field is blank, the Invoice still needs to be paid.

Credit Date To	12/31/2021
Terminated On	4/19/2020
Termination Reason	Non-Payment & Require
Paid On	---
Paid On Overridden Price	\$0.00

If the Paid On field contains data, ONLY the Education Activity is required to Reinstate the Award.

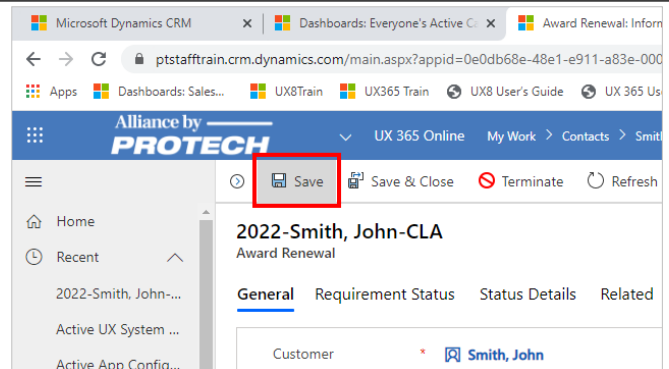
Click on the item **Requirement Status**

Alliance by PROTECH		UX 365 Online	My Work	Contacts	David
Home	Recent	Save	Save & Close	Refresh	Assign
2022-David, Larry-...	David, Larry	2021-David, Larry-...	2022-Smith, John-...	Smith, John	
2022-David, Larry-CLA		Award Renewal			
General		Requirement Status	Status Details	Related	
Customer		* David, Larry	Requirement Status		
Award		* CL Award			
Award Status		Terminated			

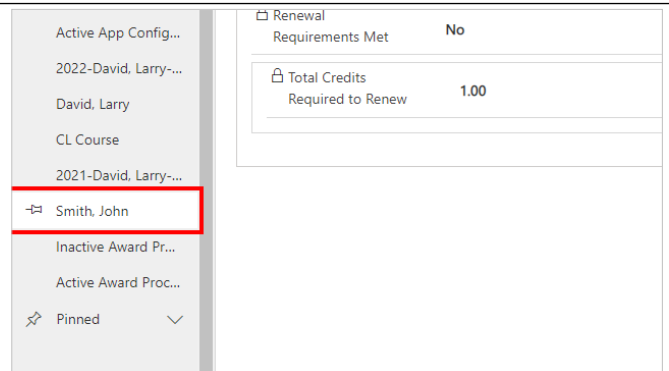
Note that the Renewal Requirements are also not met. Additional Education Activities are needed to meet requirements.

Alliance by PROTECH		UX 365 Online	My Work	Contacts	David
Home	Recent	Save	Save & Close	Refresh	Assign
2022-David, Larry-...	David, Larry	2021-David, Larry-...	2022-Smith, John-...	Smith, John	
2022-David, Larry-CLA		Award Renewal			
General		Requirement Status	Status Details	Related	
Renewal Requirements Met		No	Requirement Status		
Total Credits Required to Renew		1.00			

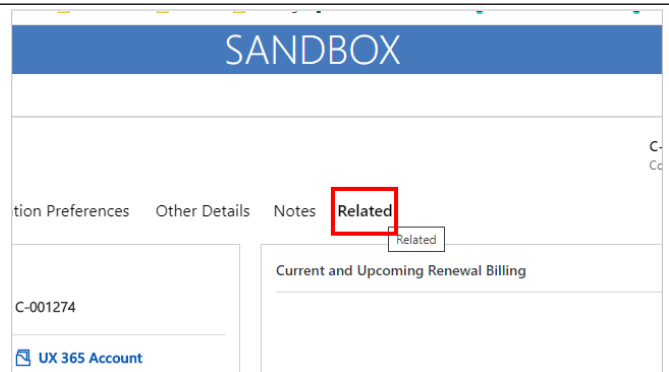
Click on the menu item **Save (CTRL+S)**



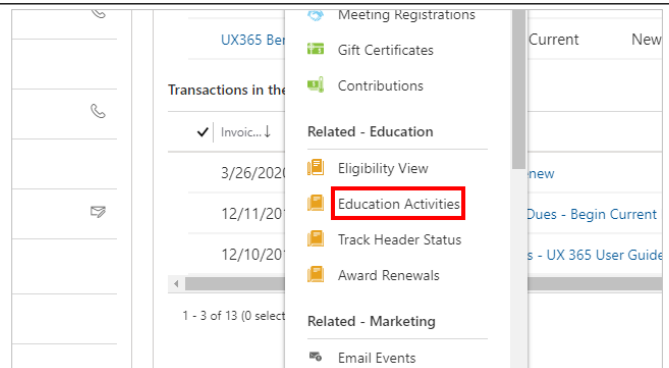
Click on the item **Smith, John**



Click on the item **Related**



Click on the menu item **Education Activities**



Click on the menu item **Add New Education Activity**

Save Save & Close + New Address Validation

Smith, John
Contact - UX 365

Summary Address Information Default Billing Web

+ New Education Activity Refresh Run Report

Education

Education Item CL Course Passed

Click on the link **Education Item**

SANDBOX

Education Item	Customer	Smith, John
Sponsored By	Smith, John	
Fulfilled	No	
Status Updated	No	

Add Education Activities that are required for the Award.

Education Activity

General Credits Administration

Education Item * Look for Education Item

Activity Date * Education Items

Credit Status * CL Course CLC

Name * CL Fee CLF

Educ Item_Application-No Prereq APP

Click on the field **Activity Date**

Education Activity

General Credits Administration

Education Item * CL Course

Activity Date * ---

Credit Status * Passed

Name * CL Course

The Education Activity must be within the Credit Date From and Credit Date To period.

Education Item * **CL Course**

Activity Date * ---

Credit Status * February 2022 ↑ ↓ 2022

Name *

Su	Mo	Tu	We	Th	Fr	Sa	Jan	Feb	Mar
30	31	1	2	3	4	5			
6	7	8	9	10	11	12	May	Jun	Jul
13	14	15	16	17	18	19			
20	21	22	23	24	25	26	Sep	Oct	Nov
27	28	1	2	3	4	5			

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

Microsoft Dynamics CRM | Dashboards: Everyone's Active C... | Education Activity: Info

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps | Dashboards: Sales... | UX8Train | UX365 Train | UX8 User's Guide | UX 365 Us

Alliance by **PROTECH** | UX 365 Online | Education > Education Activity

Save | **Save & Close** | New | Deactivate | De

CL Course | Save & Close | Save and close this Education Activity.

General | Credits | Administration | Related

Education Item * **CL Course**

Click on the item **Related**

SANDBOX

Deactivate | GoTransactions | Connect | Add to Marketing List

C-001274 | Member | Contact Number | Price List

er Details | Notes | Education Activities | **Related**

Activ... | ▾

Fulfilled | Status Updated | Event Session

Click on the menu item **Award Renewals**

No

Yes

N O P Q

Contributions

Related - Education

Eligibility View

Education Activities

Track Header Status

Award Renewals

Related - Marketing

Email Events

Sent Emails

Unsubscribes

V W

Select the Award Renewal

Award Renewal Associated View		
Award	Customer	Cycle Year
CL Award	Smith, John	2021
CL Award	Smith, John	2022

Click on the item **Requirement Status**

2022-Smith, John-CLA Award Renewal	
General	Requirement Status
Customer	Smith, John
Award	CL Award
Award Status	Terminated

Once the Professional Development System Job runs, the Renewal Requirements Met flag will now equal Yes.

2022-Smith, John-CLA Award Renewal	
General	Requirement Status
Renewal Requirements Met	Yes
Total Credits Required to Renew	1.00

Click on the item **General**

2022-Smith, John-CLA Award Renewal	
General	Requirement Status
Renewal Requirements Met	Yes
Total Credits Required to Renew	1.00

Click on **Invoice**

Award Status	Terminated
Awarded On	4/1/2020
Renewal Processed	No
Invoice	CL Award-Renew
Prior Award Renewal	2021-Smith, John-CLA
Override Price Type	No
Name	* 2022-Smith, John-CLA

Click on the menu item **New Transactions**

UX 365 Online My Work > Invoices > CL Award-Renew

Select Batch Address Validation **+ New Transactions** Calculate Freight

number: 001108. Batch Date: 6/4/2019 - New Batch Log

-Renew

55 Transaction

Additional Activities and Notes Related

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

* Smith, John	Subscription	M
* Smith, John	Exhibits	
* CL Award-Renew	Advertisement	
---	Promotion Package	
---	Contributions	
---	Payment & Adjustment	
---	Comment	

	Batch	Batch Date (Batch)	Price Per Unit
Product	001166	3/26/2020	\$

Select the payment option and pay the invoice.

UX 365 Online My Work > Invoices > CL Award-Renew

Select Batch Address Validation + New Transactions Calculate Freight

number: 001108. Batch Date: 6/4/2019 - New Batch Log

-Renew

55 Transaction

Additional Activities and Notes Related

* Smith, John

* Smith, John

Currency * US

Once the invoice is paid, ensure the Balance Due is zero.

Customer Care Tea... SharePoint MB-200: Microsoft... Password Generato...

Card Refresh Process Assign Share Email a Link ...

\$100.00	\$0.00
Payments	Balance Due

Invoice ID * INV-01600-T8D0Z4

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

Microsoft Dynamics CRM Dashboards: Everyone's Active C Invoice: UX365 Transa

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Online My Work Invoices CL Av

Save Save & Close Select Batch Address Valid

You are working in batch Save & Close Save and close this Invoice. 5/4/2019 - New Batch

CA CL Award-Renew Invoice - UX365 Transaction

General Addresses Additional Activities and Notes

Home Recent CL Award-Renew 2022-Smith, John-... Smith, John

Once the Requirments were met and the invoice is paid, the Award Status for the Award Renewal changes from Terminated to Reinstated.

Award Renewal

General Requirement Status Status Details Related

Customer * Smith, John

Award * CL Award

Award Status Reinstated

Awarded On 4/1/2020

Renewal Processed No

Invoice CL Award-Renew

nt Smith, John-... Award-Renew x, John course e UX System ... e App Config... -David, Larry-... l, Larry course David, Larry

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

Microsoft Dynamics CRM Dashboards: Everyone's Active C Award Renewal: Inform

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Online My Work Invoices CL Av

Save Save & Close Terminate Refresh

Save & Close Save and close this Award Renewal.

2022-Smith, John Award Renewal

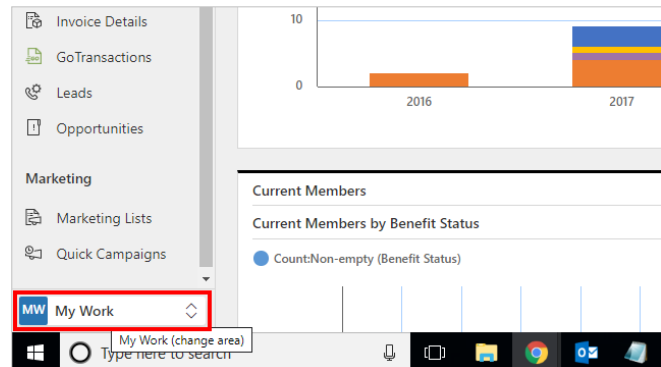
General Requirement Status Status Details Related

Customer * Smith, John

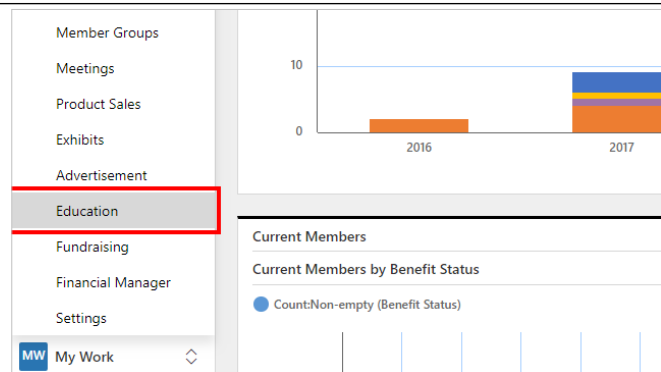
Home Recent 2022-Smith, John-... CL Award-Renew Smith, John

8.14. Renewing Awards

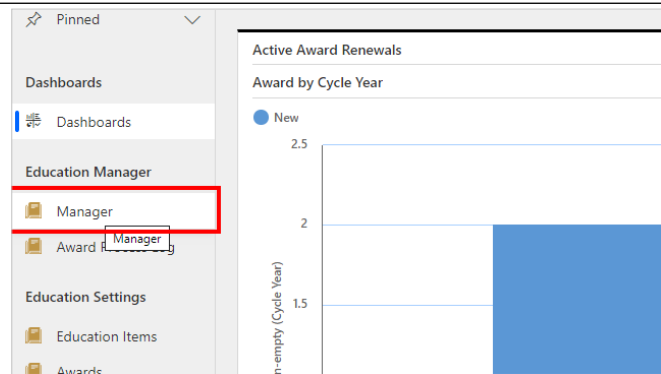
Click on the button **My Work (change area)**



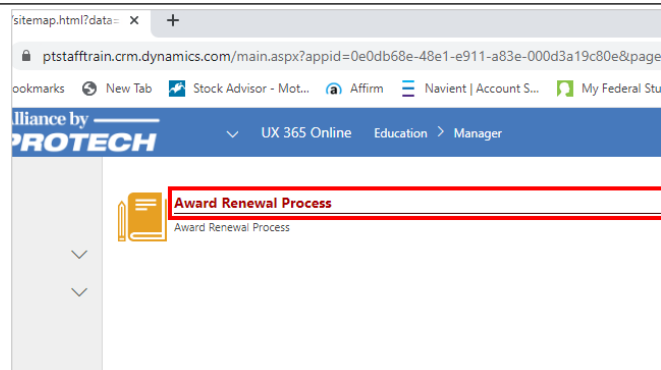
Click on the item **Education**



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.

Award Renewal Process

Cycle Date End: * 01/27/2020 

Batch Number: * 


Award: 


Customer: Contact 


OK CLOSE


Use the lookup to select the batch for this process.

Award Renewal Process

Cycle Date End: * 01/27/2020 

Batch Number: * 

Award: 

Customer: Contact 

OK CLOSE

Select the appropriate batch.

Look Up Record

Enter your search criteria.

Look For Batch Log

Search

Batch Nu...	Batch Date	Name	Company
<input type="checkbox"/> 001139	1/25/2020	CLosed	365A - Fabrik...
<input type="checkbox"/> 001138	1/1/2020	BGOLD batch...	365A - Fabrik...
<input type="checkbox"/> 001132	12/20/2019	Batch For Joe...	365A - Fabrik...
<input type="checkbox"/> 001133	12/20/2019	Batch for Mat...	365A - Fabrik...
<input type="checkbox"/> 001131	12/20/2019	Practice Batch	365A - Fabrik...

Click on the button **ADD**

<input type="checkbox"/> 001122	12/6/2019	Meetings Can...	365A - Fabrik...
<input type="checkbox"/> 001117	12/6/2019	arosscoe - Do...	365A - Fabrik...
<input type="checkbox"/> 001121	12/6/2019	Nick CL 12/6	365A - Fabrik...
<input type="checkbox"/> 001111	10/17/2019	Daily Credit C...	365A - Fabrik...
<input type="checkbox"/> 001109	10/11/2019	Daily Credit C...	365A - Fabrik...
<input type="checkbox"/> 001110	10/11/2019	Daily Credit C...	365A - Fabrik...

Showing 1 to 22 of 22 rows

Activate Windows
Go to Settings to activate Windows.

ADD CANCEL REMOVE VALUE

The Award field is optional. Leave blank to run the process on all Awards, or use the lookup to select one or more Awards.

Award Renewal Process

Cycle Date End: * 01/27/2020

Batch Number: * 001139

Award: [Redacted]

Customer: Contact

OK CLOSE

The customer field is optional. Leave blank for all customers, or use the lookup to select a single customer account or contact record.

Award Renewal Process

Cycle Date End: * 01/27/2020

Batch Number: * 001139

Award: [Redacted]

Customer: Contact

OK CLOSE

Click on the button **OK**

Batch Number: * 001139

Award: [Redacted]

Customer: Contact

OK CLOSE

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.

Award Renewal Process

No records available for Award Renewal Process.
Click Search Again to edit your search or Close to cancel.

SEARCH AGAIN 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**

Maximum Capacity ---


Minimum Capacity ---

Education Item 


Company ---

Primary GL Account *  Me

Secondary GL Account ---

AR GL Account *  Acc

Taxable ☐

Currency  US

Select the Course you would like to add.

Waitlist Off **No**

Members Only **No**


Session Closed

Maximum Capacity

Minimum Capacity


Education Items

- Educ Item_Application-No Prereq APP
- Educ Item_CEU Course COURSE**
- Educ Item_Documentation-Prereq Application DOC
- Educ Item_Ess-No Prereq

Default Price Level *  Nor

Badge or Ticket ---

365

count *  Me

Acc

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**

Event Session Setup: Information

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Learner - My Home Dashboards: Sales... UX training Payroll page PUG

Alliance by **PROTECH** UX 365 Online

Save **Save & Close** Flow

New Event

Save & Close

Save and close this Event Session Setup.

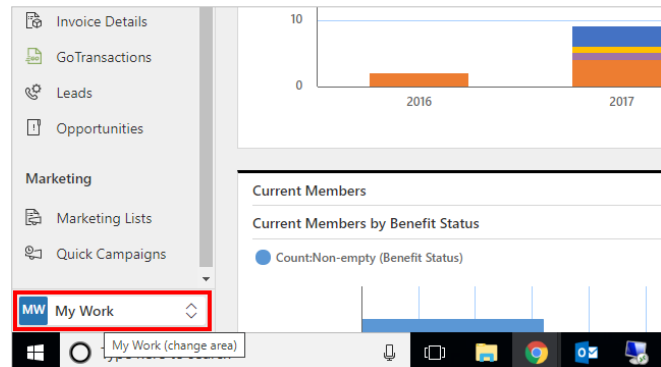
General Description Prices Web Additional Details

Session Information

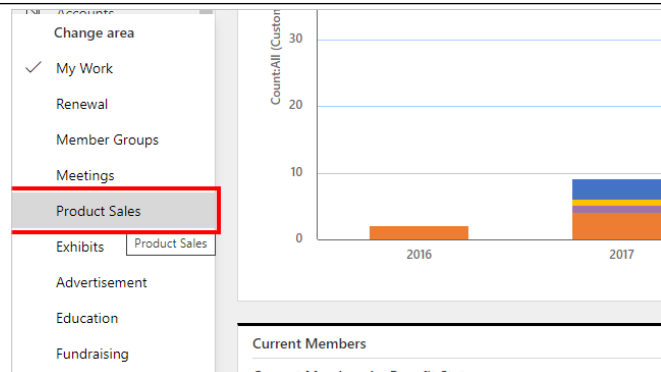
Name * Session with Course Test

8.16. Setting Up Enrollment via Product Sales

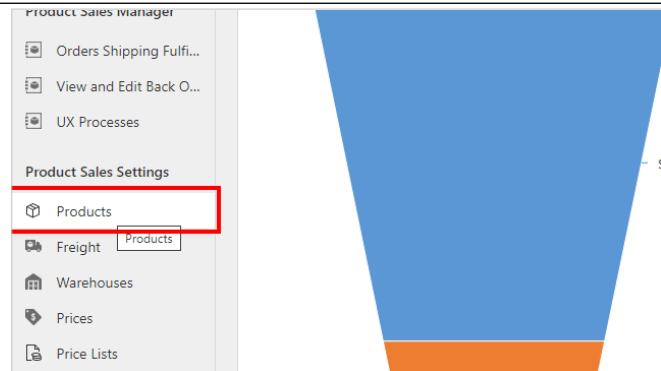
Click on the button **My Work (change area)**



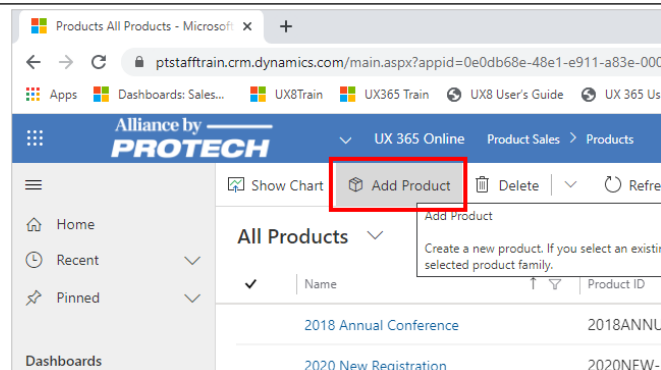
Click on the item **Product Sales**



Click on the item **Products**



Click on the menu item **Add Product**



Click on the text field **Name**

Save & Close Flow

New Product
Product · UX365 Product

General Description Web Online Description Notes

Name * ---

Unit Group * ---

Default Unit * ---

Default Price List + ---

Enter the Enrollment Product Name

Save & Close Flow

New Product
Product · UX365 Product

General Description Web Online Description Notes

Name *

Unit Group * ---

Default Unit * ---

Default Price List + ---

Click on the text field **Product ID**

Product ID * ---

Product Type Sales Non Inventory

Education Item ---

Currency US Dollar

Enter **Enter the Product ID.**

Product ID *

Product Type Sales Non Inventory

Education Item ---

Currency US Dollar

Click on the link **Unit Group**

Product ID	* CE
Product Type	Sales Non Ir
Education Item	---
Currency	US Dola
Single Currency	<input type="checkbox"/>

Click on the item **Each**

Name	* Course Enrollment
Unit Group	* Look for Unit Group
Default Unit	* Unit Groups
Default Price List	* Default Unit
Kit Product?	+ New Unit Group

Click on the link **Default Unit**

Product ID	* CE
Product Type	Sales Non Ir
Education Item	---
Currency	US Dola
Single Currency	<input type="checkbox"/>

Click on the item **Each**

Name	* Course Enrollment
Unit Group	* Each
Default Unit	* Look for Default Unit
Default Price List	* Units
Kit Product?	+ New Unit

Click on Education Item Look Up

Non Inventory	
or Education Item	
Dollar	


Select the Education Item

Education Item	Look for Education Item
Currency	Education Items
Single Currency	<ul style="list-style-type: none"> Prereq Course 2 After Course 1 That Has 3 Prereq Educ Items PREREQCOURSE Prereq Educ Item - Fee After Application PREREQFEE Prereq Educ Item_Course After Fee PREREQCOURSE UX365 Course Enrollment EI365
Cash Basis	+ New Education Item
Ctrl Accrual via AR Utility	

Click on the Primary GL Look Up

Cash Basis	<input type="checkbox"/>
Ctrl Accrual via AR Utility	<input type="checkbox"/>
Secondary GL Account	---
AP GL Account	---

Select the Primary GL Account

Default Unit	*  Each
Default Price List	+ Chart of Accounts
Kit Product?	<ul style="list-style-type: none"> Dues Revenue 000-4100-00 Education Revenue 000-4141-00 Exhibit Revenue 000-4130-00 FL Sales Tax Payable 000-2340-00
Accounting	
Company	*
Reimbursable	+ New Chart of Accounts

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**

The screenshot shows the 'Active Contacts' section of the Protech CRM. A sidebar on the left contains navigation links: Home, Recent, Pinned, My Work, Dashboards, Activities, Reports, and Easy Print Reports. The main area displays a table of contacts. The 'Full Name' column is highlighted with a red box, showing the contact '_PD-Two Track Award'. Other columns include 'Company Name' and '1 Testing, 1 Testing'.

Click on the related tab

The screenshot shows the contact detail page for '_PD-Two Track Award'. The browser address bar shows the URL 'ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83...'. The page has a sidebar with navigation links: Home, Recent, Pinned, My Work. The main area shows the contact's 'Summary' tab, which includes 'CONTACT INFORMATION'.

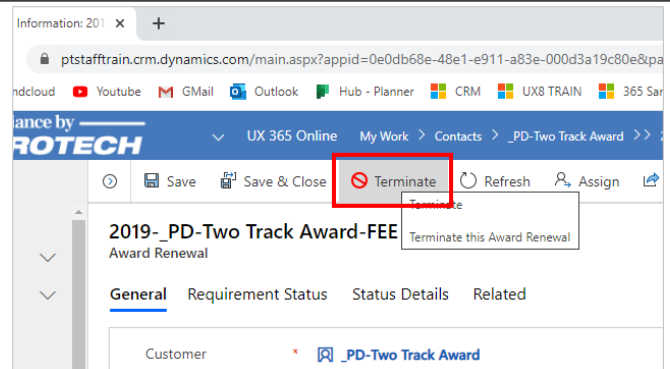
Click on the menu item **Award Renewals**

The screenshot shows the 'Award Renewals' menu item highlighted in the sidebar. The sidebar contains links: Fax, Preferred Method of Contact, Address 1: Street 1, Address 1: Street 2, Address 1: Street 3, Address 1: City, and Active. The main area shows a list of menu items: Posted Forms, Social Clicks, Visits, Import Logs, Award Process Log, Award Renewals (highlighted), Award Renewals, Education Activities, Education Activities, and Invoices.

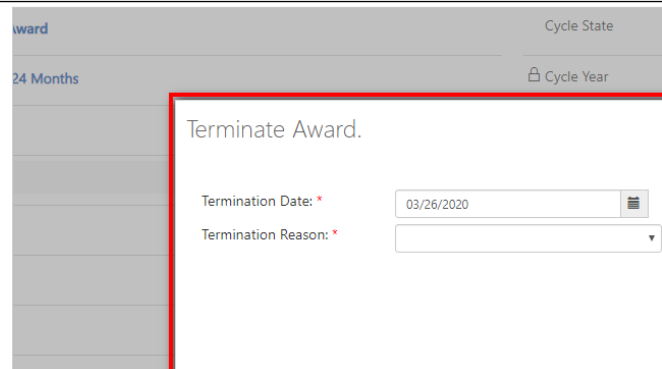
Double click on **Award**

The screenshot shows the 'Award Renewal Associated View' table. The 'Award' column is highlighted with a red box, showing the contact '_PD-Two Track Award'. The table has columns: Award, Customer, and Fee Only Award 24 Months. The 'Award' column is selected, showing the contact '_PD-Two Track Award'.

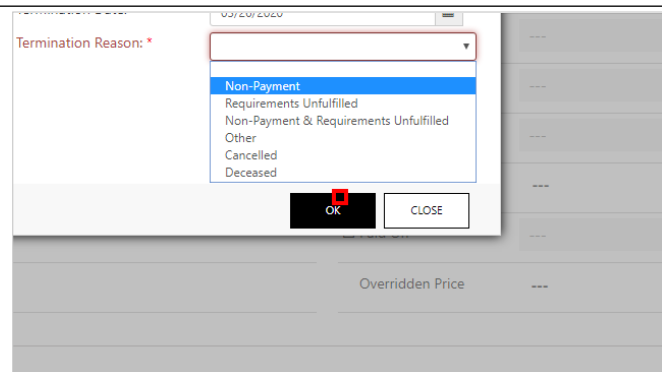
Click on the menu item **Terminate**



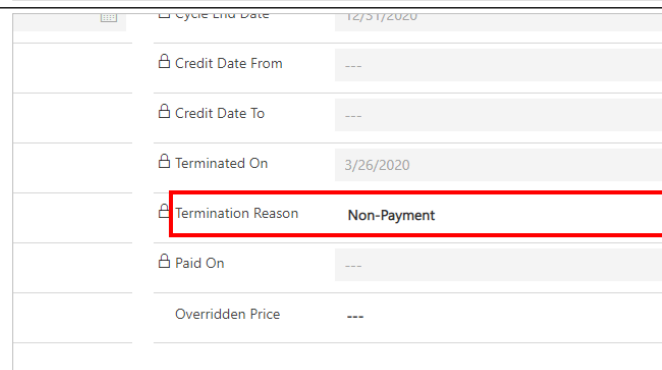
This is where you can add a reason and date of termination



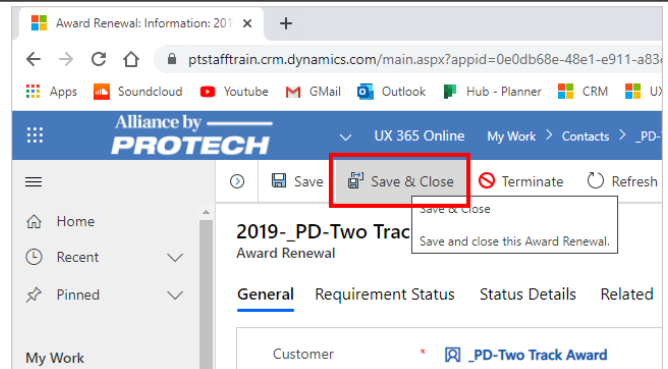
Click ok when you are ready to terminate



When you finish, you can see the termination reason populates

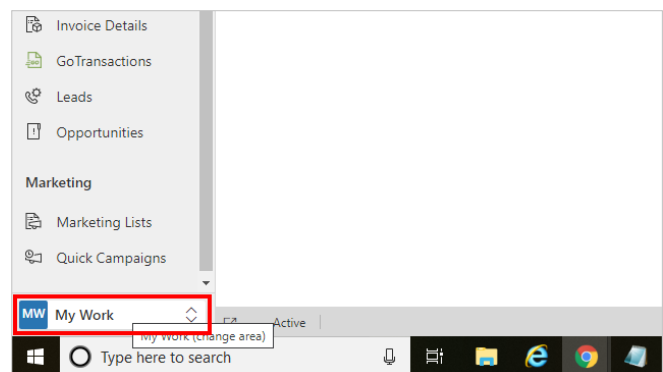


Click on Save and Close

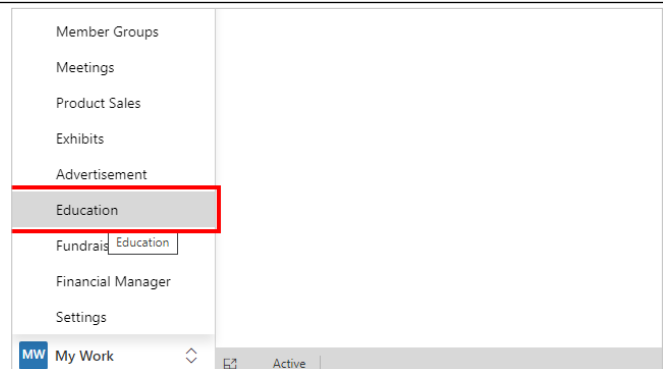


8.17.2. Terminating Awards Process

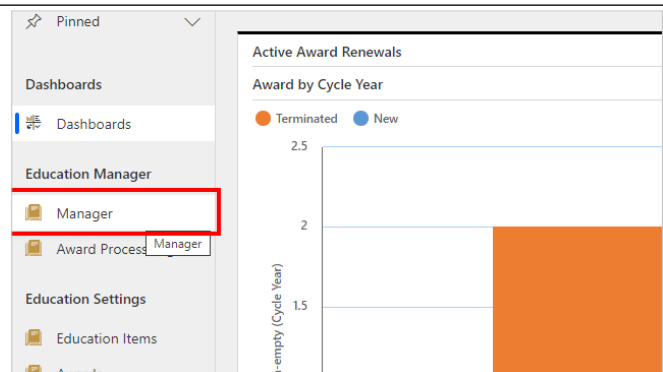
Click on the button **My Work (change area)**



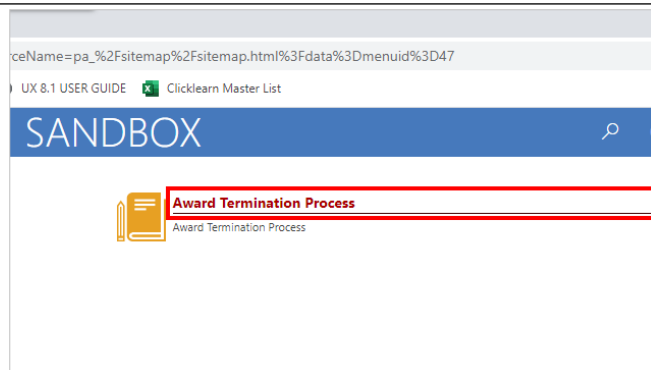
Click on the item **Education**



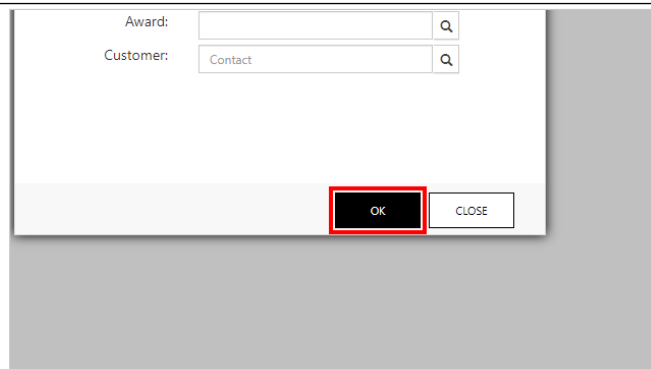
Click on the item **Manager**



Click on **Award Termination Process**



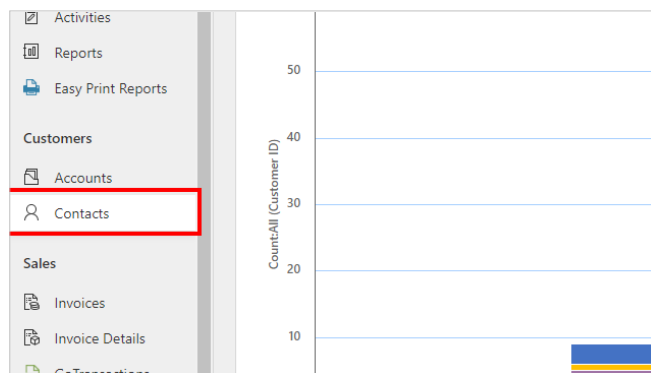
Click ok and follow the steps when ready to terminate



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**

Sales	Stark, Sansa	GOT Enterprises
Invoices	Stewart, Jerome	---
Invoice Details	Stewart, Jerome	---
GoTransactions	Stewart, Jerome	---
Leads	Strasburg, Stephen	Strasburg, Stephen
Opportunities	Sullivan, Trey	---
Marketing	Superuser, MX 8.3	---
Marketing Lists	Svihla, Robert	---
Quick Campaigns		

Click on the item **Related**

The screenshot shows the 'SANDBOX' interface. At the top, there are buttons for 'Copy Address', 'Deceased', 'Deactivate', 'GoTransactions', and 'Connect'. Below this, there are tabs for 'Preferences', 'Other Details', 'Notes', and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a section for 'Current and Upcoming Renewal Billing' with a table showing 'Benefit', 'Rate', and 'Cycle'.

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.

The screenshot shows a dropdown menu for 'Track Header Status'. The menu items include 'Gift Certificates', 'Contributions', 'Related - Education', 'Eligibility View', 'Education Activities', 'Track Header Status' (highlighted with a red box), 'Award Renewals', 'Related - Marketing', 'Email Events', and 'Sent Emails'.

Select and click to open a Track Header record to drill down in to the details of the Track and Track Status.

The screenshot shows the 'Track Header Status Associated View' table. The table has columns for 'Customer' and 'Award (Award Track)'. The first row is highlighted with a red box and contains the text 'Strasburg, Stephen' and 'CEU Only_Prerequisite Education Items'.

Click on the item Track Details to view the Track Requirements satisfied by a fulfilled Education Item.

The screenshot shows the 'Track Details' view for a 'Two Track Award'. The view has tabs for 'General', 'Track Details' (highlighted with a red box), and 'Related'. Below the tabs, there is a table with columns for 'Customer', 'Fulfilled', and 'Award Created'. The first row shows 'Strasburg, Stephen' as the customer, 'No' for fulfilled, and 'No' for award created.

Select and click to open a Track Detail record for further information.

Track Header Status				
General <u>Track Details</u> Related				
✓	Customer	↑	Education Item	Credits E... Fulfilled
	Strasburg, Stephen		<u>Educ Item Application</u>	--- Yes
	Strasburg, Stephen		Prereq Educ Item - Fee	--- Yes
	Strasburg, Stephen		Prereq Educ Item_Cour	--- No
	Strasburg, Stephen		---	3.00 Yes

9. Subscriptions

9.1. Cancelling a Subscription

Cancelling 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 cancelling 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.

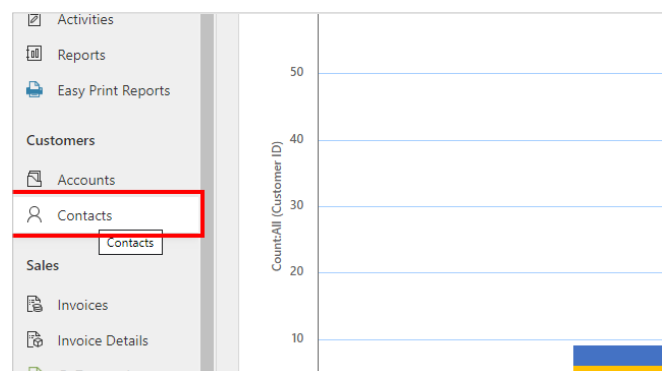
Note

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.

Cancelling 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 you'd like to cancel.



Click into the contact

Home

Recent

Pinned

My Work

Dashboards

Activities

Reports

Easy Print Reports

Show Chart

New

Delete

Refresh

Active Contacts

Full Name

Company Name

_PD-Two Track Award

1 Testing, 1 Testing

Altmann, Diego

1 Testing, 1 Testing

Andryk, Alex

Ann Marie Penaranda

Click the related tab to display a dropdown of associated records.

UX 365 Hub

My Work

Contacts

1 Testing, 1 Testing

Save

Save & Close

New

Address Validation

New

1

1 Testing, 1 Testing

Contact

Summary

Details

Files

Related

CONTACT INFORMATION

First Name

1 Testing

Last Name

1 Testing

Click on the menu item **Invoices**

Mobile Phone

Fax

Preferred Method of Contact

Address 1: Street 1

Address 1: Street 2

Address 1: Street 3

Address 1: City

Any

Invoices

Visits

Import Logs

Award Renewals

Education Activities

General Ledger Details

Invoice Details

Contact Web Roles

Contributions

Engagement Details

Click into the invoice that contains the subscription you wish to cancel

sting	Meeting -2020 New Meeting	1 Testing, 1 Testing
sting	Meeting -Test waitlist meeti	1 Testing, 1 Testing
sting	MX Basic Subscription Benefit	1 Testing, 1 Testing
sting	New	1 Testing, 1 Testing
sting	Subscription - Anniversary - Begin Current Month	1 Testing, 1 Testing
sting	UX Galley	Subscription - Anniversary - Begin Current Month
sting	UX Galley Membership	1 Testing, 1 Testing

G

H

I

J

K

L

M

N

O

P

C

If the subscription contains more than one line item, you can select multiple

Easy Print Reports

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Name * Subscription - Anniversary - Begin

Source Code ---

Details

<input checked="" type="checkbox"/>	Description	Batch
<input type="checkbox"/>	3/31/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	6/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	9/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	12/31/2020 Subscription - Anniversa...	001130

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**

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Source Code ---

Details

<input checked="" type="checkbox"/>	Description	Batch
<input checked="" type="checkbox"/>	3/31/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	6/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	9/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	12/31/2020 Subscription - Anniversa...	001130

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**

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Details

<input checked="" type="checkbox"/>	Description	Batch
<input checked="" type="checkbox"/>	3/31/2020 Subscription - Anniversary...	001130
<input checked="" type="checkbox"/>	6/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	9/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	12/31/2020 Subscription - Anniversa...	001130

Totals

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**

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Marketing

Marketing Lists

Details

<input checked="" type="checkbox"/>	Description	Batch
<input checked="" type="checkbox"/>	3/31/2020 Subscription - Anniversary...	001130
<input checked="" type="checkbox"/>	6/30/2020 Subscription - Anniversary...	001130
<input checked="" type="checkbox"/>	9/30/2020 Subscription - Anniversary...	001130
<input type="checkbox"/>	12/31/2020 Subscription - Anniversa...	001130

Totals

Total Detail Amount \$50.00

Once you have selected the line items, click the item 'cancel'

The screenshot shows an invoice interface with a table of line items. The 'Cancel' button is highlighted with a red box. Below the table, there is a 'Cancel Selected Detail' button.

Quantity	Discount	Tax	Payment
.50	1.00	\$0.00	\$12.50
.50	1.00	---	\$12.50

Click the button OK when you are sure you would like to cancel

The screenshot shows a confirmation dialog box with 'OK' and 'CLOSE' buttons. The 'OK' button is highlighted with a red box.

You can see the line items have been deleted.

The screenshot shows the 'Details' section of the invoice. The 'Description' field is highlighted with a red box and contains the text 'No data available'.

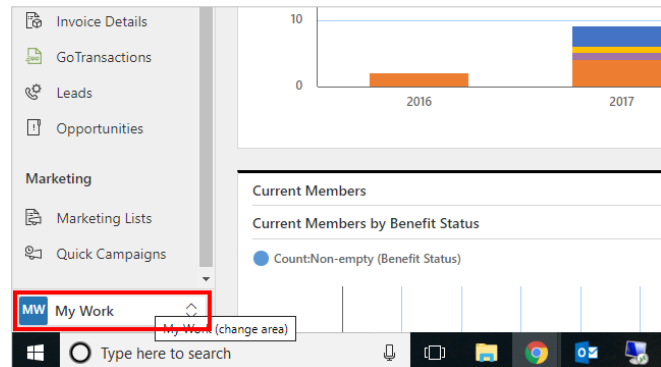
Depending the originating batch status (open or closed), the system will take the following actions: If the originating batch is closed, the system will cancel the original invoice detail line item, and if you selected a partial cancellation, will create a new line item for the prorated subscription 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.

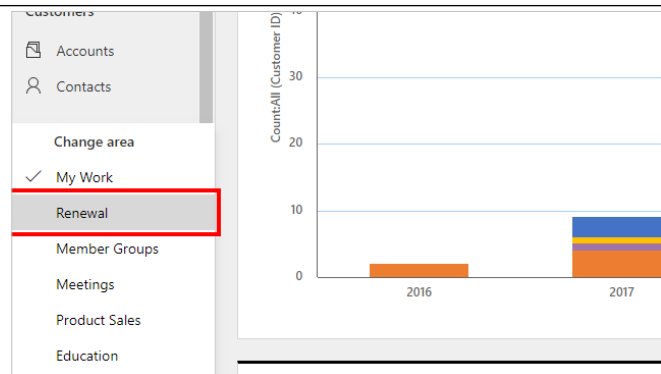
The screenshot shows the 'Subscription - An Invoice' page. The 'Save & Close' button is highlighted with a red box. A tooltip is visible over the button, stating 'Save and close this Invoice.'.

9.2. Creating a Subscription Benefit

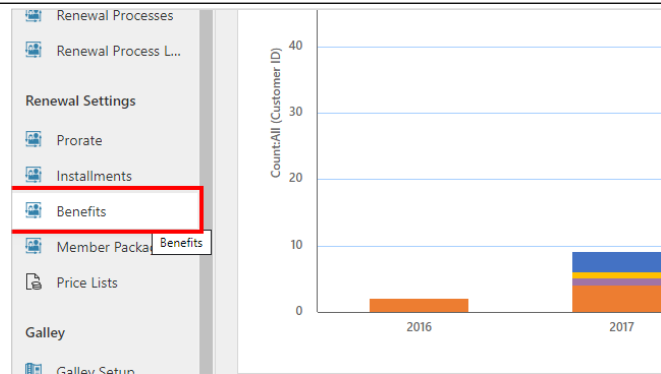
Click on the button **My Work (change area)**



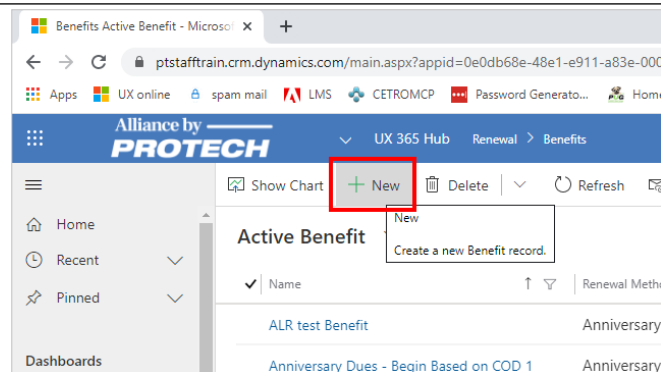
Click on the item **Renewal**



Click on the item **Benefits**



Click on the menu item **New**



Click on the link **Module**

Information		
Module	Look for Module	
Name	Modules	
Renewal Method	10 Membership	
Sequence	40 Subscriptions	
Prorate		
Default Start Date	---	
Allow Renewal On		
Default Product	---	
Is Primary Benefit	No	
Chapter Benefit	No	
Group Invoices	No	

Click on the item **40 Subscriptions**

Information	
Module	Look for Module
Name	Modules
Renewal Method	10 Membership
Sequence	40 Subscriptions
Prorate	
Default Start Date	---
Allow Renewal On	

Click on the link **Default Product**

Information	
Module	Look for Module
Name	Modules
Renewal Method	10 Membership
Sequence	40 Subscriptions
Prorate	
Default Start Date	---
Allow Renewal On	
Default Product	---
Is Primary Benefit	No
Chapter Benefit	No
Group Invoices	No

Select Subscription Billing

Information	
Module	Look for Module
Name	Modules
Renewal Method	10 Membership
Sequence	40 Subscriptions
Prorate	
Default Start Date	---
Allow Renewal On	
Default Product	---
Is Primary Benefit	No
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---

Click on the text field **Name**

Benefit	
General	Rates Web Online Description Notes Administration
Information	
Module	* UX Subscriptions
Name	* <input type="text" value="---"/>
Renewal Method	* Anniversary Select to
Sequence	---
Prorate	---

Enter the name of the subscription

Benefit	
General	Rates Web Online Description Notes Administration
Information	
Module	* UX Subscriptions
Name	* <input type="text" value=" "/>
Renewal Method	* Anniversary
Sequence	---
Prorate	---

Click on the field **Renewal Method**

Benefit	
General	Rates Web Online Description Notes Administration Related
Information	
Module	* UX Subscriptions
Name	* Test
Renewal Method	* Anniversary
Sequence	Anniversary Calendar
Prorate	---
Default Start Date	Beginning of Current Month

Click on an option from the list

Information	
Module	* UX Subscriptions
Name	* Test
Renewal Method	* Anniversary
Sequence	Anniversary Calendar
Prorate	---
Default Start Date	Beginning of Current Month
Allow Renewal on	

Click on the text field **Sequence**

Enter a sequence number to support reporting requirements, otherwise, leave blank

Module	* UX Subscriptions
Name	* Test
Renewal Method	* Anniversary
Sequence	---
Prorate	---
Default Start Date	Beginning of Current Month
Allow Renewal on Unpaid	No

Click on the lookup field **Prorate**

Enter a Prorate only if you selected a Calendar Renewal Method in the previous step, otherwise, leave blank

Module	UX Subscriptions
Name	* Test
Renewal Method	* Anniversary
Sequence	
Prorate	---
Default Start Date	Beginning of Current Month
Allow Renewal on Unpaid	No

Set Primary Benefit to no

Default Product	Subscription Billing
Is Primary Benefit	No
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---

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

Default Product	Subscription Billing
Is Primary Benefit	No
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	--- <input type="button" value="No"/>
Cut Off Day (COD)	* 1

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.

Primary Benefit	No
Chapter Benefit	No
Group Invoices	No
Prorate Cycle	---
Cut Off Day (COD)	1

Click on the field **Default Start Date**

Renewal Method	* Anniversary
Sequence	---
Prorate	---
Default Start Date	--Select--
Allow Renewal on Unpaid	No

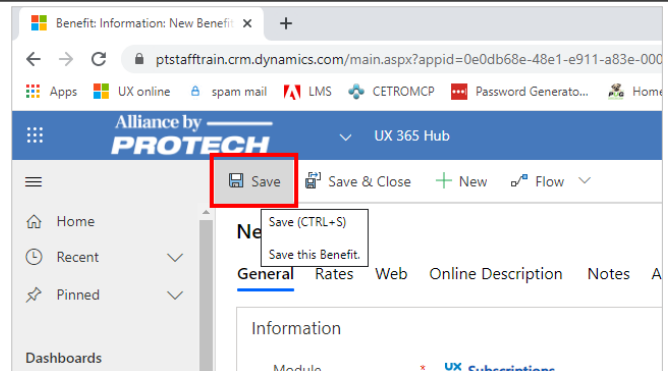
Select how you would like the subscription to begin

Prorate	---
Default Start Date	--Select--
Allow Renewal on Unpaid	--Select--
	January
	February
	March
	April
	May
	June
	July
	August
	September
	October
	November
	December

Enter a Price Start and End Date if there is a specific date range a particular pricing will be available, otherwise, leave blank.

Settings	
Default Start Date	Beginning of Current Month
Allow Renewal on Unpaid	No
Pricing	
Start Date	---

Click on Save to complete the Subscription Benefit setup

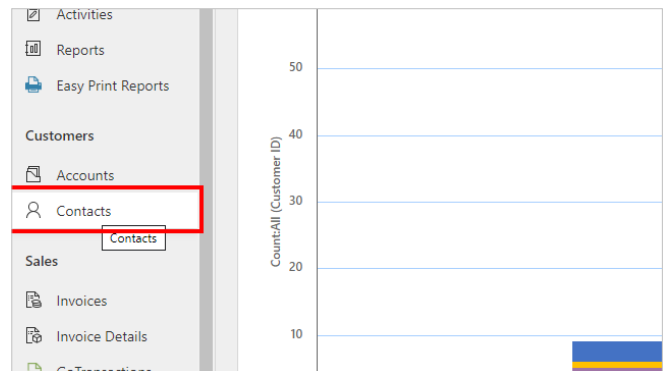


9.3. Creating a Subscription Invoice

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

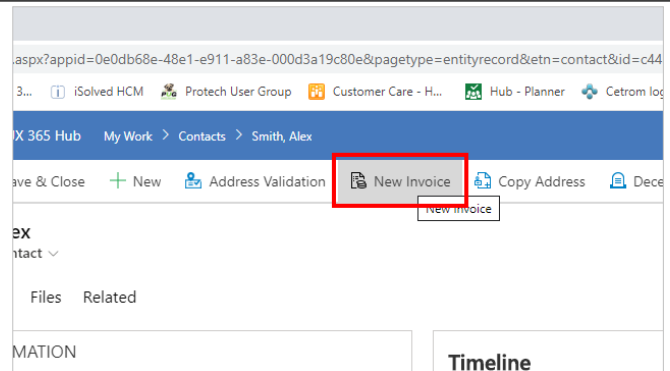
Click on the item **Contacts**



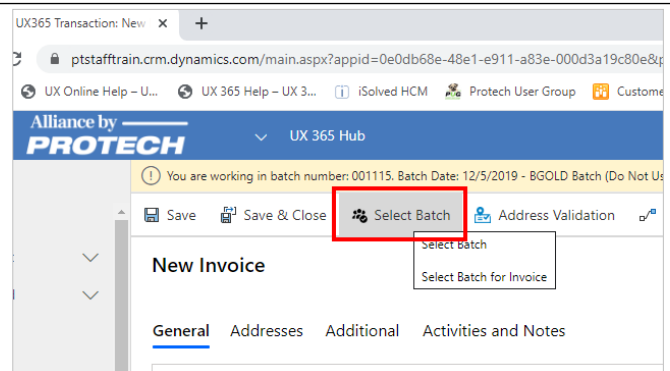
Double click on the cell **Full Name**

My Active Contacts		
✓	Full Name	Contact Number
	Haskins, Dwayne	C-001270
	Ovechkin, Alex	C-001271
	Smith, Alex	C-001269

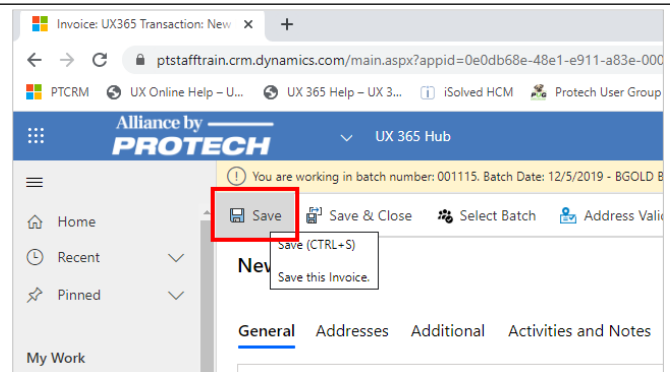
Click on the menu item **New Invoice**



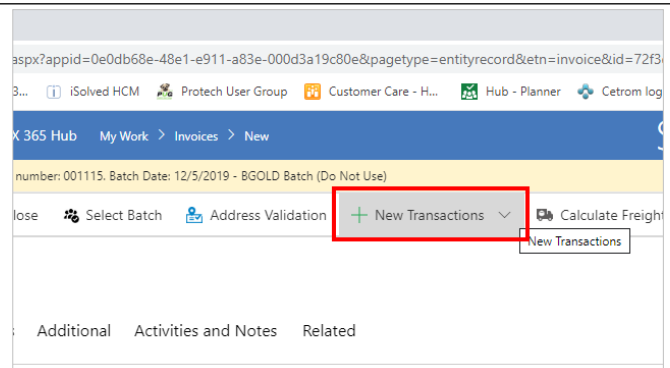
Click Select Batch to select the appropriate open batch based on your organization's business rules.
If the appropriate batch is already selected this step can be skipped.



Click on the menu item **Save**



Click on the menu item **New Transactions**



Click on the menu item **Subscription**

The screenshot shows a software interface with a 'New Transactions' dropdown menu open. The menu items include Product Sales, Membership, Benefit Packages, Meetings, Subscription, Promotion, Contributions, Payment & Adjustment, and Comment. The 'Subscription' item is highlighted with a red box. In the background, a table lists members: 'Smith, Alex' (two entries) and 'New'.

Click on the link **Benefit**

The screenshot shows a 'Benefit' selection screen. It features a search icon (magnifying glass) in a red box. Below the search icon are fields for 'Volume', 'Quantity', 'Cycle Start Date', and '# of Benefit Recipients', each with a red asterisk and a dropdown arrow. The background is a large empty white space.

Select the subscription benefit that is being purchased.

The screenshot shows a 'Look for Benefit' dropdown menu. The menu items include 'MX Basic Subscription Benefit Calendar', 'Subscription - Anniversary - Based on COD 1 Anniversary', 'Subscription - Anniversary - Begin Current Month Anniversary' (highlighted with a red box), and 'Subscription - Anniversary - Begin Next Quarter Anniversary'. A '+ New Benefit' link is at the bottom. The background shows a form with fields for 'Benefit', 'Rate', 'Current Join Date', 'Rate Next', 'Primary Benefit', and 'Invoice'.

Click on the link **Rate**

The screenshot shows a 'Rate' selection screen. It features a search icon (magnifying glass) in a red box. Below the search icon are fields for 'Volume', 'Quantity', 'Cycle Start Date', '# of Benefit Recipients', and 'Paid Through Date', each with a red asterisk and a dropdown arrow. The background shows a form with a 'Current Month' dropdown and a search icon.

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.

Benefit	* Subscription - Anniversary - Begin Current Month
Rate	* <input type="text" value="Look for Rate"/>
Current Join Date	A - Q - 1 Year Quarterly 7/16/2018 1:11 PM
Rate Next	* S - Quantity - 1 Year Annual 7/10/2018 1:29 PM
Primary Benefit	+ New Rate
Invoice	New

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.

Volume	* 1.00
Quantity	* <input type="text" value="1"/>
Cycle Start Date	* 1/1/2020
# of Benefit Recipients	1
Paid Through Date	---

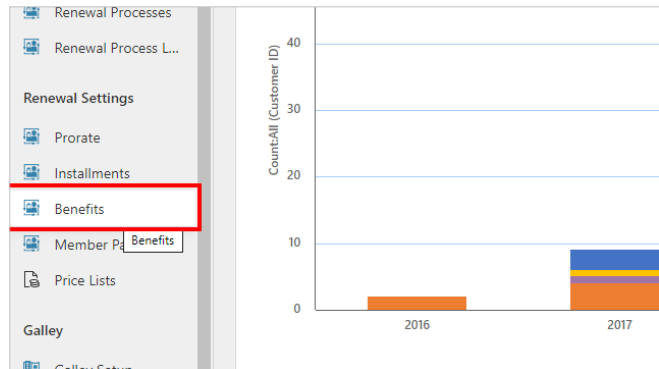
Click on the menu item **Save & Close**

A line item is created and added to the invoice for the subscription that is being purchased.

<p>Easy Print Reports</p> <p>Customers</p> <ul style="list-style-type: none"> Accounts Contacts <p>Sales</p> <ul style="list-style-type: none"> Invoices <ul style="list-style-type: none"> Invoice Details Go Transactions Leads 	<p>Name * Subscription - Anniversary - Begin</p> <p>Source Code ---</p> <p>Details</p> <table border="1"> <thead> <tr> <th>✓ Description</th> <th>Batch</th> </tr> </thead> <tbody> <tr> <td> 12/31/2020 Subscription - Anniversar...</td> <td>001115</td> </tr> <tr> <td> 12/31/2020 Subscrip...</td> <td></td> </tr> </tbody> </table>	✓ Description	Batch	12/31/2020 Subscription - Anniversar...	001115	12/31/2020 Subscrip...	
✓ Description	Batch						
12/31/2020 Subscription - Anniversar...	001115						
12/31/2020 Subscrip...							

9.4. Creating Subscription Benefit Rates and Prices

Go to the Work Area Renewal and click on the menu Benefits



Click on the subscription benefit

The screenshot shows the 'Active Benefit' list view. The table has columns for Name, Renewal Method, and Renewal Date. The first row, 'ALR test Benefit', is highlighted. Below the table, there are links for 'Anniversary Dues - begin based on COD 1', 'Anniversary Dues - Begin Current Month', and 'Anniversary Dues - Begin Next Quarter'.

Name	Renewal Method	Renewal Date
ALR test Benefit	Anniversary	
Anniversary Dues - begin based on COD 1	Anniversary	
Anniversary Dues - Begin Current Month	Anniversary	
Anniversary Dues - Begin Next Quarter	Anniversary	

In the Navigation Pane of the Benefit record, click Rate to open the Rate Associated View.

The screenshot shows the 'ALR test Benefit' record. The 'Rates' tab is selected in the navigation pane. The 'Information' section shows the Module as 'UX Subscriptions' and the Name as 'ALR test Benefit'.

Module	Name
UX Subscriptions	ALR test Benefit

Click Add New Rate on the List View toolbar to create a new rate.

The screenshot shows the 'Add New Rate' dialog box. The 'Add New Rate' button is highlighted. The dialog box has a 'Type' field and an 'Installation' field. The 'Add New Rate' button is located at the bottom right of the dialog box.

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**

Save & Close Flow

/ Rate

ral Prices Rate Level X-ref Web Administration Notes

ormation

Name * --- Select to enter data

Rate Type * Quantity

Installment * ---

Default Price Level * Non-Member

Enter **Name**.

Save & Close Flow

/ Rate

ral Prices Rate Level X-ref Web Administration Notes

ormation

Name * |

Rate Type * Test Tester

Installment * Manage...

Default Price Level * Non-Member

Installment – Click the Lookup button to select the installment schedule for this rate.

Click on the link **Installment**

otes

Benefit * ALR test

Chapter ---

of Benefit Recipients * 1

Default Price * ---

Volume Field_Account ---

Recipient Product ---

Click on the desired installment rate.

Name * One year Subscription

Rate Type * Quantity

Installment * Look for Installment

Default Price Level * Installments

Volume Field_Contact * 1 Year Annual Annual

Product * 1 Year Quarterly Annual


Rate Next * 2 Year Annual Annual

Click on the link **Product**

Search	# of Benefit Recipients * 1
	Default Price * ---
	Volume Field_Account ---
Search	Recipient Product ---
	Late Fee 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 Level *  Non-Member
Volume Field_Account ---
Product * Look for Product
Rate Next * Products
Airmail
Subscription Billing SUBDEFAULT

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.

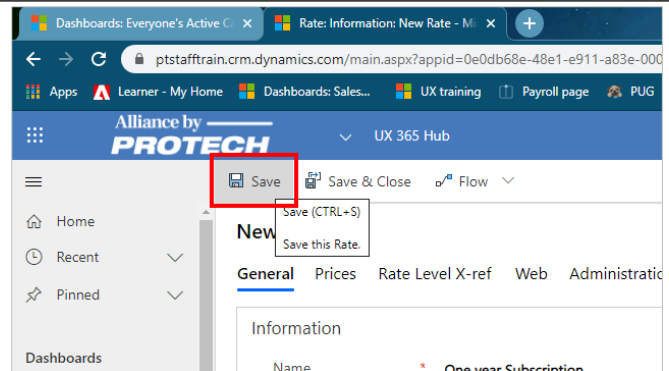
Click on the text field **Default Price**

Benefit *  ALR test Benefit
Chapter ---
of Benefit Recipients * 1
Default Price * ---
Volume Field_Account ---
Recipient Product ---
Late Fee Product ---

Enter **Default Price**.

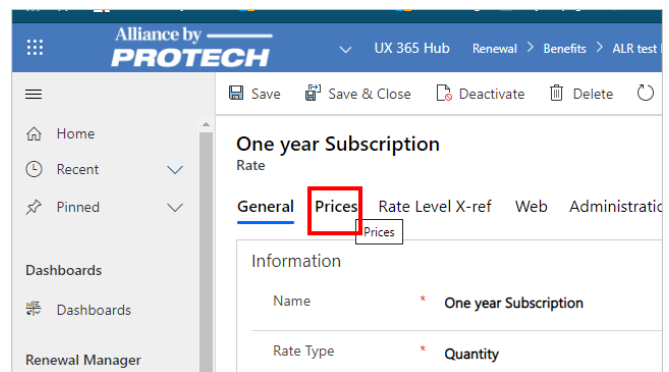
Benefit *  ALR test Benefit
Chapter ---
of Benefit Recipients * 1
Default Price *
Volume Field_Account ---
Recipient Product ---
Late Fee Product ---

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



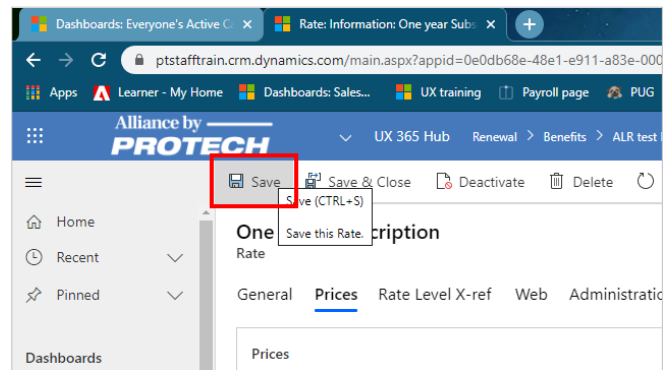
In the Navigation Pane of the rate record, click Prices to display the price records created by the system for each price list in your system setup.

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.

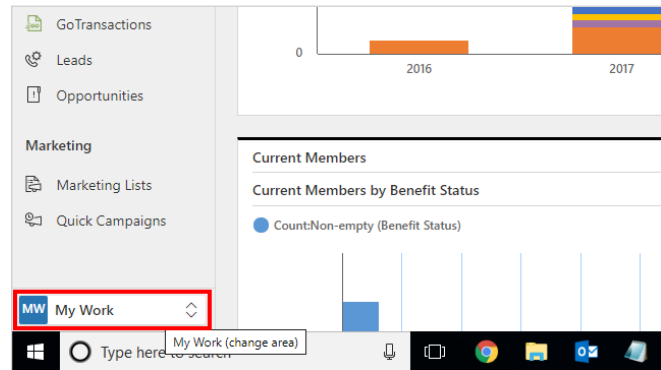
Click on the menu item **Save (CTRL+S)**



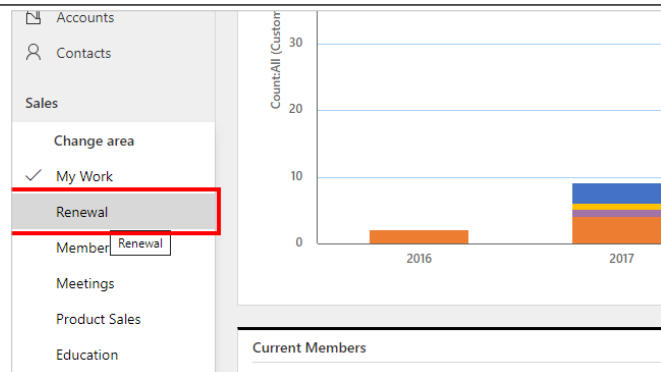
9.5. Setting Up Galleys and Galley Details

9.5.1. Setting Up Galleys and Galley Details

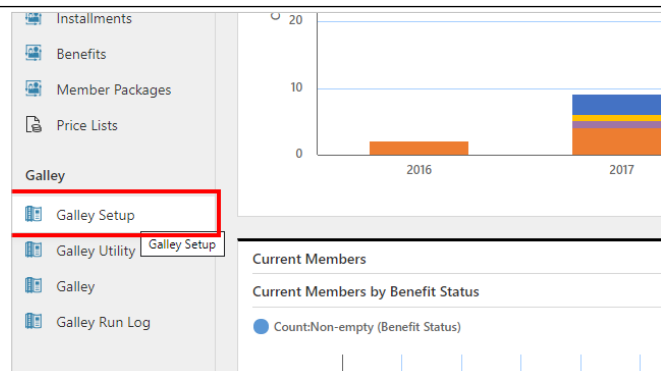
Click on the button My Work



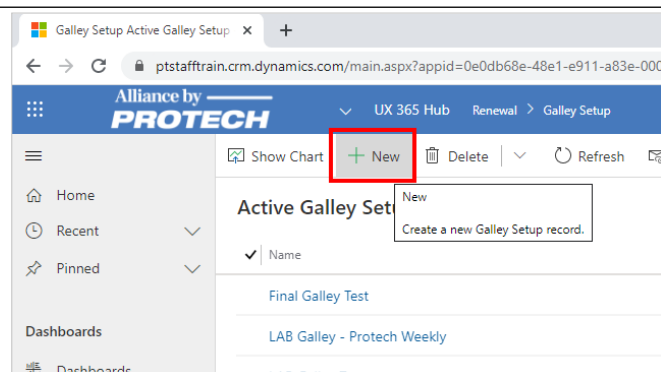
Click on the item **Renewal**



Click on the item **Galley Setup**



Click on the menu item **New**



Enter the full publication name in the Name field.

The screenshot shows the 'New Galley Setup' form. The 'Name' field is highlighted with a red box. The form includes a sidebar with navigation options like Home, Recent, Pinned, Dashboards, and Renewal Manager. The main content area shows the 'General' tab with fields for Name and Benefit.

Text the name of the Galley

The screenshot shows the 'New Galley Setup' form. The 'Name' field is highlighted with a red box. The form includes a sidebar with navigation options like Home, Recent, Pinned, Dashboards, and Renewal Manager. The main content area shows the 'General' tab with fields for Name and Benefit.

The Benefit field defaults from the parent subscription benefit.

The screenshot shows the 'New Galley Setup' form. The 'Benefit' field is highlighted with a red box. The form includes a sidebar with navigation options like Home, Recent, Pinned, Dashboards, and Renewal Manager. The main content area shows the 'General' tab with fields for Name and Benefit.

Click on the link **Benefit**

The screenshot shows the 'New Galley Setup' form. The 'Benefit' field is highlighted with a red box. The form includes a sidebar with navigation options like Home, Recent, Pinned, Dashboards, and Renewal Manager. The main content area shows the 'General' tab with fields for Name and 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.

Quick Create: Galley Setup Details

Benefit * UX365 Benefit

Galley Type * Benefit Recipients

Rate * Look for Rate

BPA Qualifier ---

Name ---

Grace Period Months ---

Click on the rate you would like to use.

Quick Create: Galley Setup Details

Benefit * UX365 Benefit

Galley Type * Benefit Recipients

Rate * Look for Rate

BPA Qualifier ---

Name UX365 Rate
12/9/2019 12:57 PM

+ New Rate

Grace Period Months ---

Change View

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.

Word Templates

Run Rep

Benefit * UX365 Benefit

Galley Type * Benefit Recipients

Rate * UX365 Rate

BPA Qualifier BPA Qualifier

Name BPA Qualifier

Grace Period Months ---

Enter the full publication name in the Name field.

Galley Type * Benefit Recipients

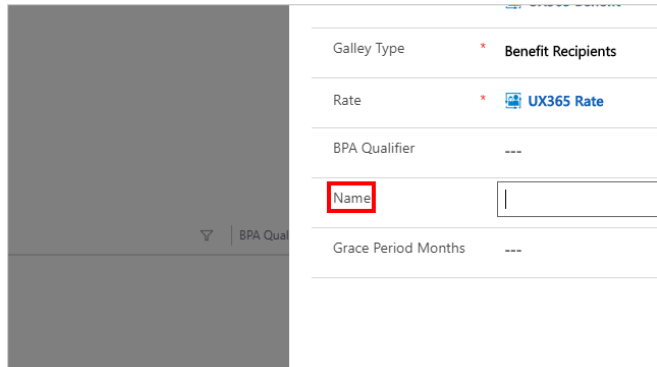
Rate * UX365 Rate

BPA Qualifier ---

Name Name- The name of the custom entity.

Grace Period Months ---

Enter **the Name** in the text field.



Galley Type * **Benefit Recipients**

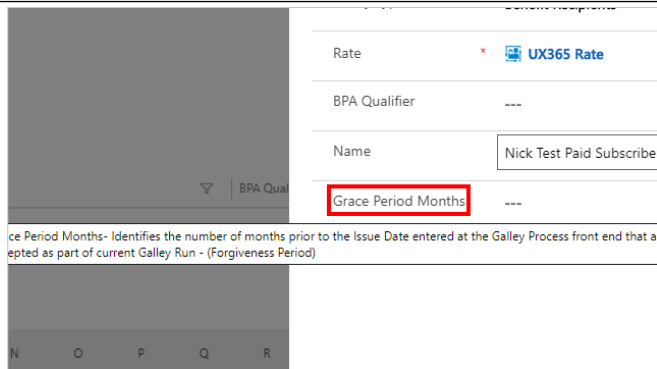
Rate * **UX365 Rate**

BPA Qualifier ---

Name |

Grace Period Months ---

Grace Period Months – Enter the number of months beyond their expiration date that subscribers will continue to receive the publication.



Rate * **UX365 Rate**

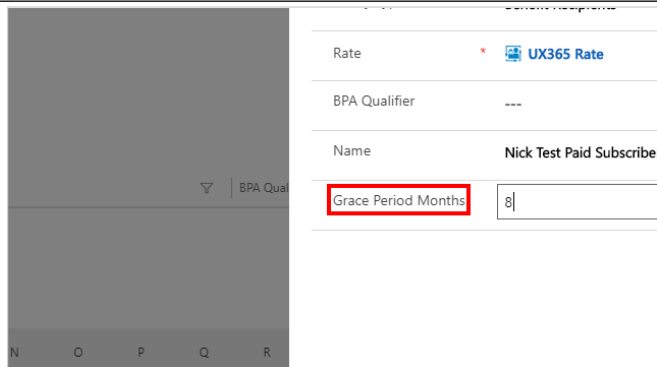
BPA Qualifier ---

Name Nick Test Paid Subscriber

Grace Period Months ---

Grace Period Months - Identifies the number of months prior to the Issue Date entered at the Galley Process front end that is accepted as part of current Galley Run - (Forgiveness Period)

Enter **the Grace Period Months**.



Rate * **UX365 Rate**

BPA Qualifier ---

Name Nick Test Paid Subscriber

Grace Period Months 8

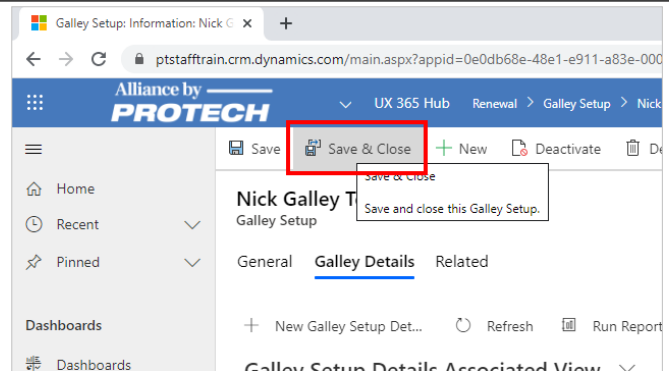
Click on the button **Save and Close**



Save and Close [X] Cancel

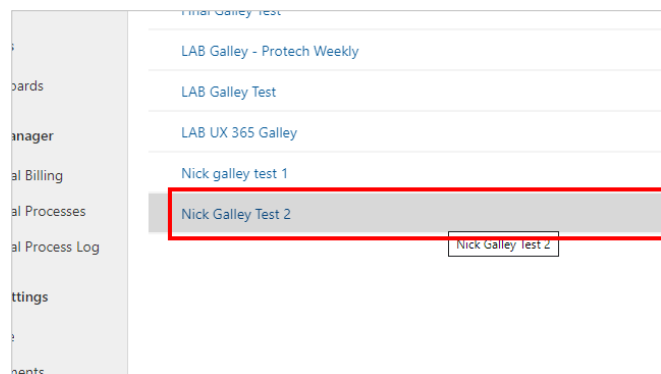
1:37 PM 1/10/2020

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

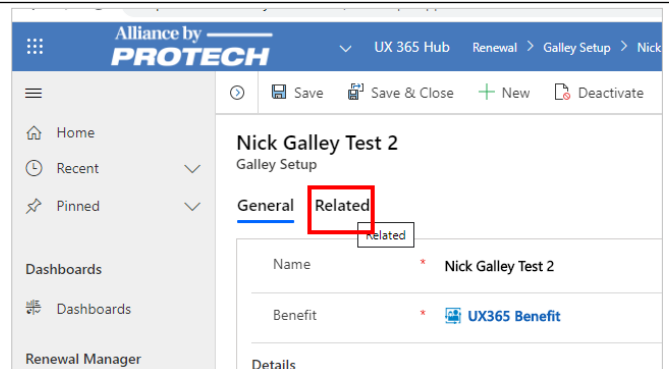


9.5.3. Galley Detail for Membership Benefit

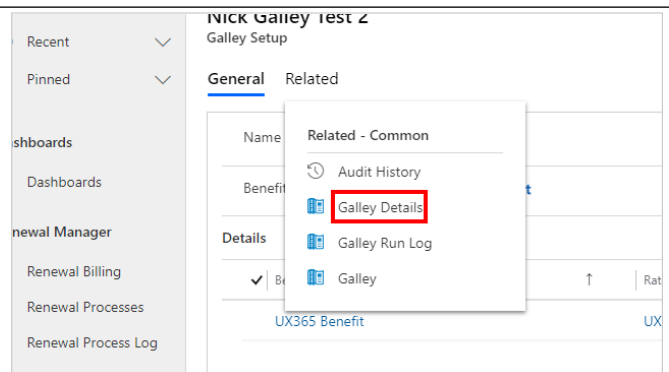
Double click on the Galley.



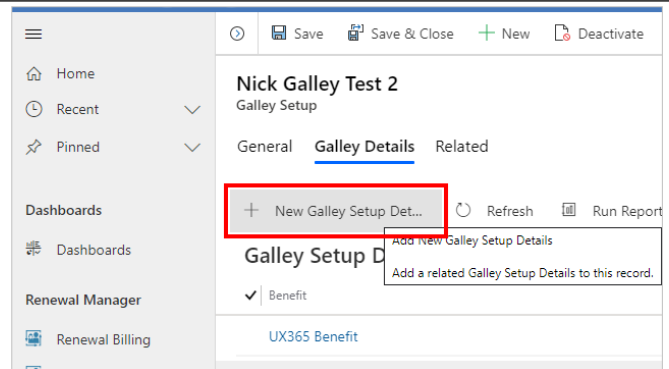
Click on the item **Related**



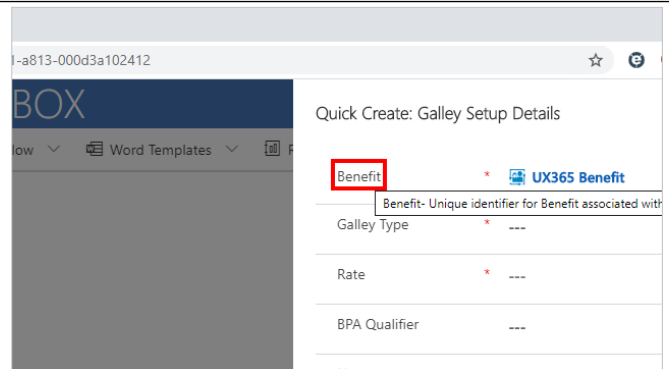
Click on the menu item **Galley Details**



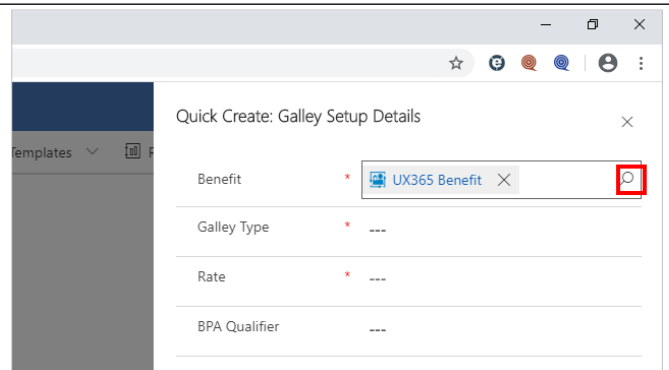
Click on the menu item **Add New Galley Setup Details**



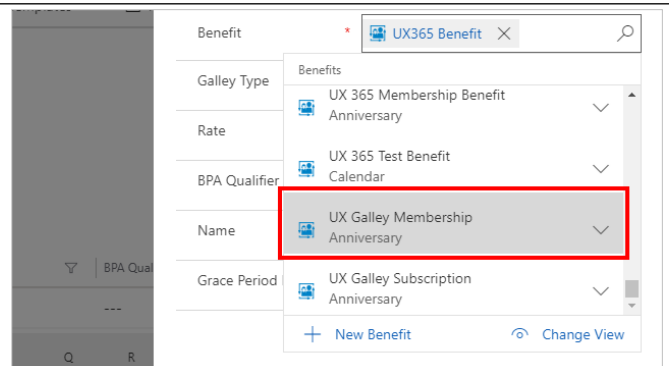
Benefit – Click the Lookup button to select the first dues membership benefit that receives this publication as part of its benefits.



Click on the link **Benefit**



Select the benefit.



Select the Galley Type

Quick Create: Galley Setup Details

Benefit	* UX Galley Membership
Galley Type	* ---
Rate	* ---
BPA Qualifier	---
Name	---

- 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**

Quick Create: Galley Setup Details

Benefit	* UX Galley Membership
Galley Type	* --Select--
Rate	* ---
BPA Qualifier	---
Name	---

Click on the item **Account's Contacts** in the list

Quick Create: Galley Setup Details

Benefit	* UX Galley Membership
Galley Type	* --Select--
Rate	* ---
BPA Qualifier	---
Name	---

Click the Lookup button to select the first renewal benefit rate that should be included in the galley for label printing.

Quick Create: Galley Setup Details

Benefit	* UX Galley Membership
Galley Type	* Account's Contacts
Rate	* ---
BPA Qualifier	---
Name	---
Grace Period Months	---

Click on the link **Rate**

Quick Create: Galley Setup Details

Benefit * **UX Galley Membership**

Galley Type * Account's Contacts

Rate * Look for Rate

BPA Qualifier ---

Name ---

Grace Period Months ---

Select the Galley Rate

Quick Create: Galley Setup Details

Benefit * **UX Galley Membership**

Galley Type * Account's Contacts

Rate * Look for Rate

BPA Qualifier ---

Name ---

Grace Period Months ---

Galley Rate 1
9/20/2018 3:14 PM

Galley Rate 2
9/20/2018 3:15 PM

+ New Rate

Change View

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.

Quick Create: Galley Setup Details

Benefit * **UX Galley Membership**

Galley Type * Account's Contacts

Rate * Galley Rate 1

BPA Qualifier ---

Name ---

Grace Period Months ---

BPA Qualifier

Enter the full publication name in the Name field.

Quick Create: Galley Setup Details

Galley Type * Account's Contacts

Rate * Galley Rate 1

BPA Qualifier ---

Name ---

Grace Period Months ---

Name- The name of the custom entity.

Enter **Name**.

Galley Type	* Account's Contacts
Rate	* Galley Rate 1
BPA Qualifier	---
Name	N
Grace Period Months	---

Grace Period Months – Enter the number of months beyond their expiration date that subscribers will continue to receive the publication.

Rate	* Galley Rate 1
BPA Qualifier	---
Name	Nick Test Membership B
Grace Period Months	---

Grace Period Months- Identifies the number of months prior to the Issue Date entered at the Galley Process front end that is accepted as part of current Galley Run - (Forgiveness Period)

Enter the Grace Period Months

Rate	* Galley Rate 1
BPA Qualifier	---
Name	Nick Test Membership Benefit
Grace Period Months	---

Select to enter data

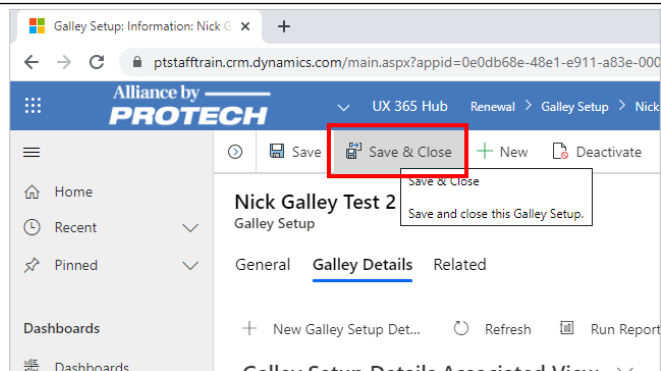
Enter **Grace Period Months**.

Rate	* Galley Rate 1
BPA Qualifier	---
Name	Nick Test Membership Benefit
Grace Period Months	

Click on the button **Save and Close**



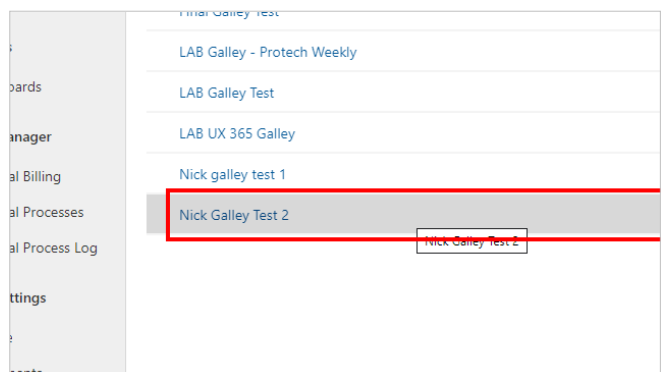
Click on the menu item **Save & Close**



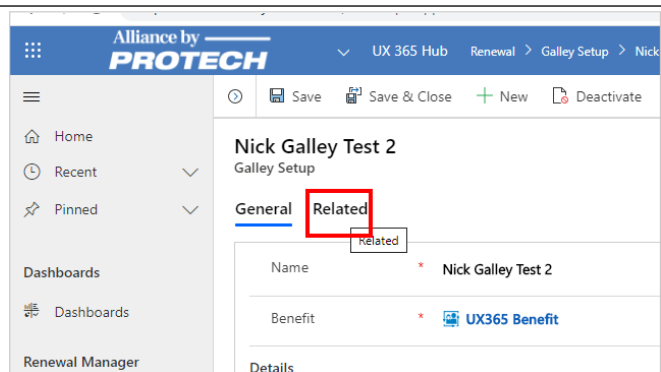
9.5.4. Galley Run Log

Each time the galley process is run for a publication, the date it is run and the subscription issue start date for which it 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.

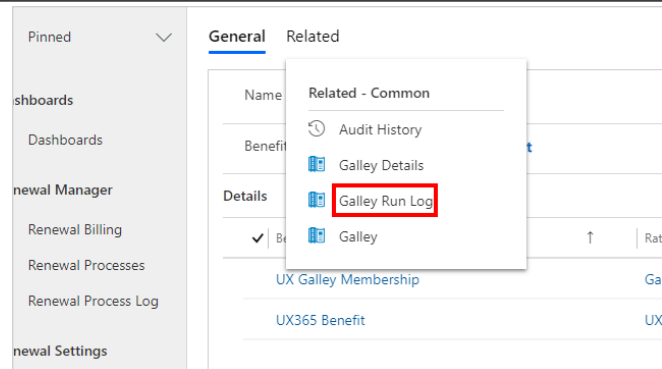
Click on the cell **Name**



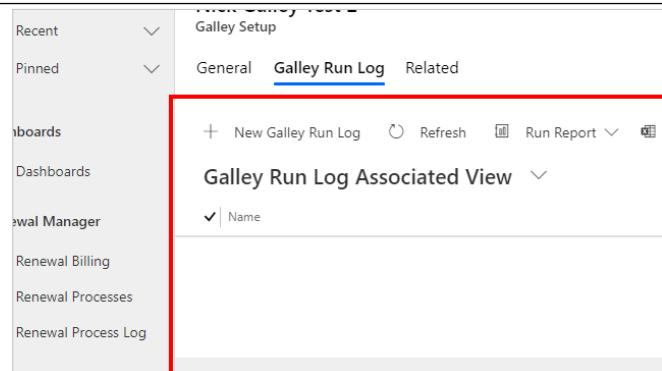
Click on the item **Related**



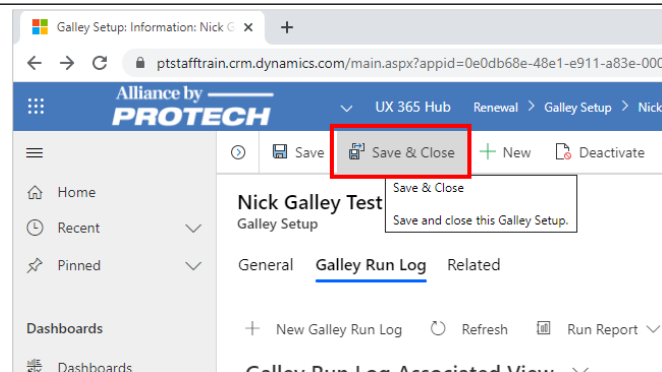
Click on the menu item **Galley Run Log**



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.



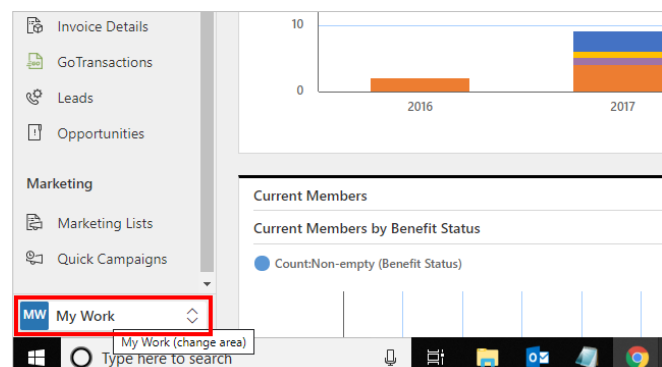
Click on the menu item **Save & Close**



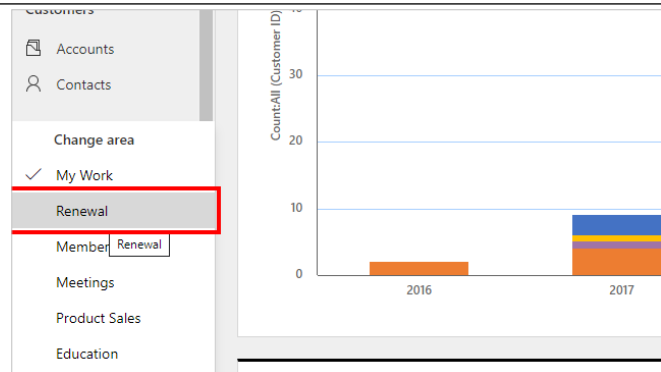
9.6. Subscription Rates

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.

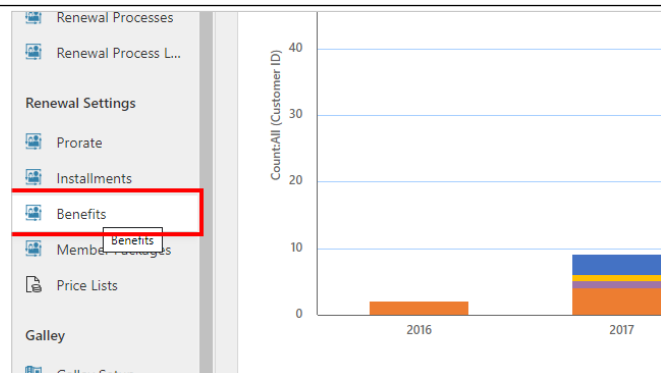
Click on the button **My Work (change area)**



Click on the item **Renewal**



Click on the item **Benefits**



Double click on the cell **Name**

Subscription - Calendar - Jan Start, No Prorate	Calendar
Subscription - Calendar - Jan Start, Next Prorate...	Calendar
Test	Anniversary
UX 365 Membership Benefit	Anniversary
UX 365 Subscription	Calendar
UX 365 Test Benefit	Calendar
UX Galley Membership	Anniversary
UX Galley Subscription	Anniversary

Click on the item **Rates**

UX 365 Subscription

Benefit

General Rates Web Online Description Notes A

Information

Module * UX Subscriptions

Name * UX 365 Subscription

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

The screenshot shows a software interface with a top navigation bar containing 'Email a Link', 'Flow', 'Word Templates', and 'Run Report'. Below this is a table with columns 'Type', 'Installment', and 'No of Benefit Recipients'. A red box highlights the '+ New Rate' button in the table. A dropdown menu is open, showing options: 'Add New Rate', 'Add a related Rate to this record.', and 'r recor'.

Click on the text field **Name**

The screenshot shows the 'Add New Rate' form. The 'Name' field is highlighted with a red box. The form includes tabs for 'General', 'Prices', 'Rate Level X-ref', 'Web', 'Administration', and 'Notes'. The 'Name' field is currently empty, and a 'Select to enter data' button is visible next to it. Other fields include 'Rate Type' (set to 'Quantity'), 'Installment' (set to '---'), and 'Default Price Level' (set to 'Non-Member').

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').

The screenshot shows the 'Add New Rate' form with the 'Name' field containing the letter 'U'. The 'Name' field is highlighted with a red box. The form includes tabs for 'General', 'Prices', 'Rate Level X-ref', 'Web', 'Administration', and 'Notes'. Other fields include 'Rate Type' (set to 'Quantity'), 'Installment' (set to '---'), and 'Default Price Level' (set to 'Non-Member').

Benefit

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

The screenshot shows the 'Add New Rate' form with the 'Benefit' field highlighted by a red box. The 'Benefit' field displays 'UX 365 Subscription'. The form includes tabs for 'General', 'Prices', 'Rate Level X-ref', 'Web', 'Administration', and 'Notes'. Other fields include 'Chapter' (set to '---'), '# of Benefit Recipients' (set to '1'), and 'Default Price' (set to '---').

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.

Benefit	* UX 365 Subscription
Chapter	---
# of Benefit Recipients	* <input type="text" value="1"/>
Default Price	* ---
Volume Field_Account	---
Recipient Product	---

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.

Information	
Name	* UX 365 1 Year Annual Subscription Rate
Rate Type	* Quantity
Installment	* 1 Year Annual X
Default Price Level	* Non-Member X
Volume Field_Contact	---
Product	* ---
Rate Next	* ---

Click on the text field **Default Price**

Benefit	* UX 365 Subscription
Chapter	---
# of Benefit Recipients	* 1
Default Price	* <input type="text" value="---"/>
Volume Field_Account	---
Recipient Product	---
Late Fee Product	---

Enter **Default Price**.

Benefit	* UX 365 Subscription
Chapter	---
# of Benefit Recipients	* 1
Default Price	* <input type="text" value=""/>
Volume Field_Account	---
Recipient Product	---
Late Fee Product	---

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.

Name		UX 363 1 Year Annual Subscription Rate
Rate Type	*	Quantity
Installment	*	1 Year Annual
Default Price Level	*	Non-Member
Volume Field_Contact		---
Product	*	---
Rate Next	*	---
Airmail		<input type="checkbox"/>

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.

Chapter		---
# of Benefit Recipients	*	1
Default Price	*	100.00
Volume Field_Account		---
Recipient Product		---
Late Fee Product		---

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.

Chapter		---
# of Benefit Recipients	*	1
Default Price	*	100.00
Volume Field_Account		---
Recipient Product		---
Late Fee Product		---

Click on the item Subscription Billing

Default Price Level	*	Non-Member
Volume Field_Contact		---
Product	*	Look for Product
Rate Next	*	Products
Airmail		Subscription Billing SUBDEFAULT

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.

# of Benefit Recipients	*	1
Default Price	*	\$100.0000
Volume Field_Account		---
Recipient Product		Look for Recipient Product
Late Fee Product		---

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.

Default Price Level	*	Non-Member
Volume Field_Contact		---
Product	*	Subscription Billing
Rate Next	*	---
Airmail		<input type="checkbox"/>

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.

Volume Field_Contact		---
Product	*	Subscription Billing
Rate Next	*	---
Airmail		<input type="checkbox"/>

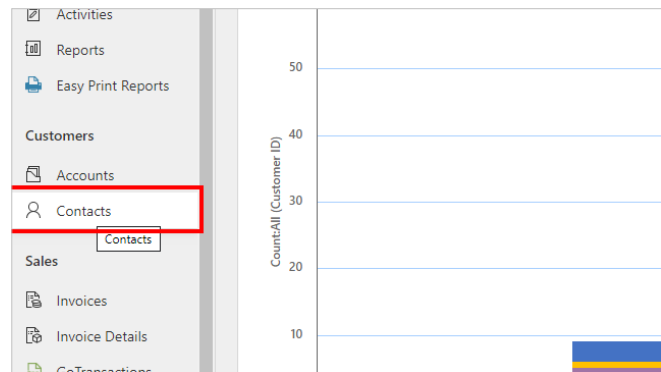
Click on the menu item **Save & Close**

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.

Full Name	Company Name
_PD-Two Track Award	---
1 Testing, 1 Testing	---
Altmann, Diego	1 Testing, 1 Testing
Andryk, Alex	---
Ann Marie Penaranda	---

Click on the item **Related**

1 Testing, 1 Testing
Contact · Contact

Summary Details Files **Related**

CONTACT INFORMATION

First Name * 1 Testing

Last Name * 1 Testing

Click on the menu item **Invoices**

Invoices

Preferred Method of Contact: Any

Address 1: Street 1: ---

Address 1: Street 2: ---

Address 1: Street 3: ---

Address 1: City: ---

Open the invoice that contains the subscription.

	Name	Bill to Customer
sting	Meeting -2020 New Meeting	1 Testing, 1 Testing
sting	Meeting -Test waitlist meeti	1 Testing, 1 Testing
sting	MX Basic Subscription Benefit	1 Testing, 1 Testing
sting	New	1 Testing, 1 Testing
sting	UX Galley Membership	1 Testing, 1 Testing
sting	UX Galley Membership	1 Testing, 1 Testing

Select the appropriate batch based on your Organization's business rules.

Transaction: MX B x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000d3a19c80e&pagetype...

UX 365 Hub My Work > Invoices > MX Basic Subscription Benefit

You are working in batch number: 001131. Batch Date: 12/20/2019 - Practice Batch

Save Save & Close **Select Batch** Address Validation +

MX Basic Subscription Benefit
Invoice

General Addresses Additional Activities and Notes Related

Double click on the subscription product detail record to open the form.

Easy Print Reports

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Name * MX Basic Subscription Benefit

Source Code ---

Details

✓	Description	Batch
✓	12/31/2020 MX Basic Subscription B...	001131

Click on the menu item **Terminate**

Renewal > Renewal Billing > 2020 1 Testing, 1 Testing MX Basic Subscripti...

Close Refresh Re-Calculate Invoice **Terminate** Cancel Re-Calculate B

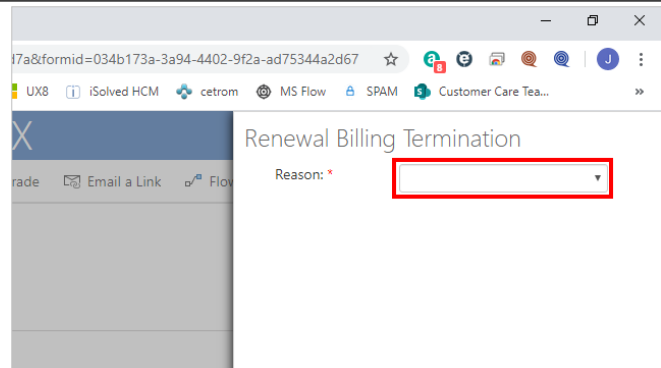
g MX Basic Subscription Benefit MX Basic

ction v

Administration Notes Related

Terminate
Terminate this Renewal

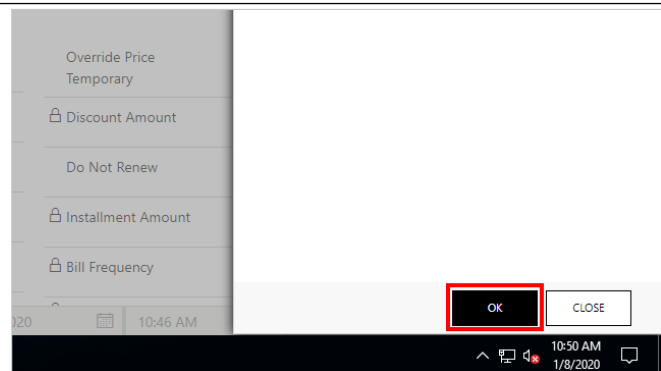
Enter the reason for termination from the drop down menu.



Renewal Billing Termination

Reason: *

Click on the button **OK**



Override Price Temporary

Discount Amount

Do Not Renew

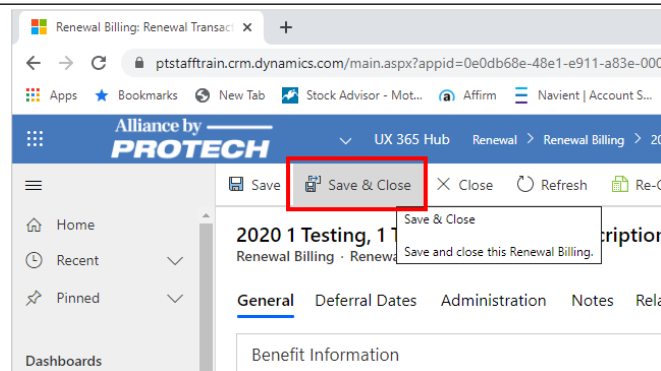
Installment Amount

Bill Frequency

OK CLOSE

10:50 AM 1/8/2020

Click on the menu item save and close to close the form.



Renewal Billing: Renewal Transaction

Save Save & Close Close Refresh Re-C

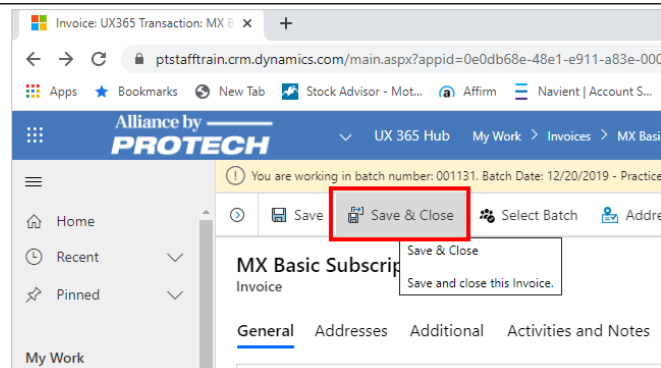
2020 1 Testing, 1

Renewal Billing - Renewal

General Deferral Dates Administration Notes Rel

Benefit Information

Click on the menu item save and close to return to the contact record.



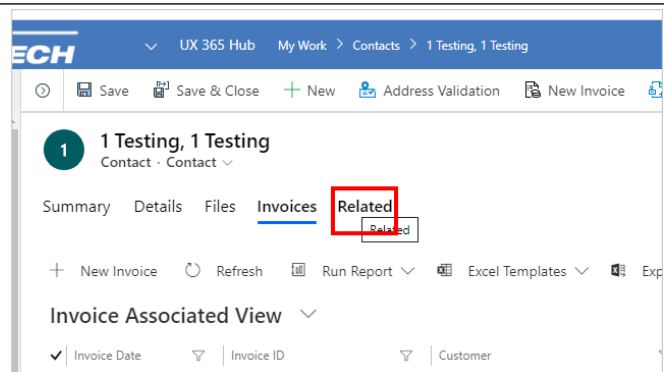
Invoice: UX365 Transaction: MX Basic Subscription

Save Save & Close Select Batch Addre

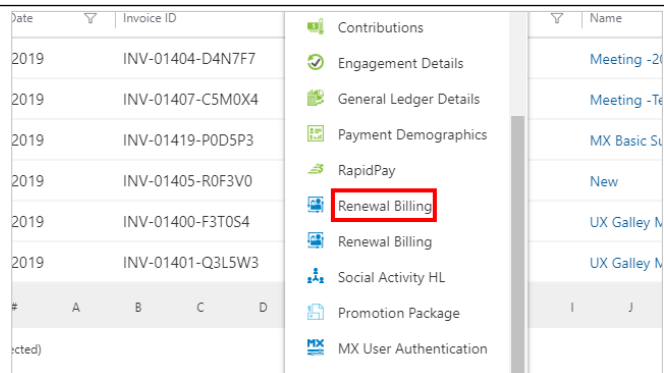
MX Basic Subscription Invoice

General Addresses Additional Activities and Notes

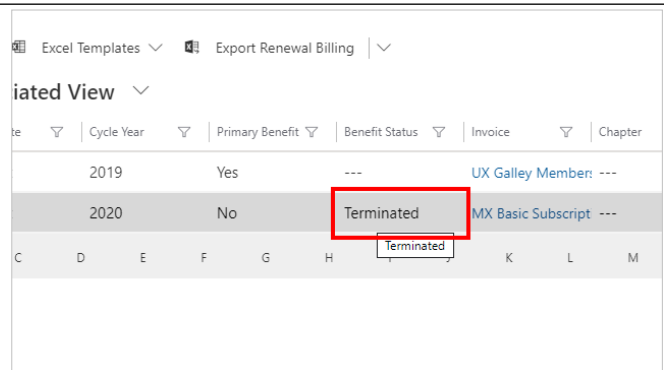
Click on the item **Related**



Click on the menu item **Renewal Billing**



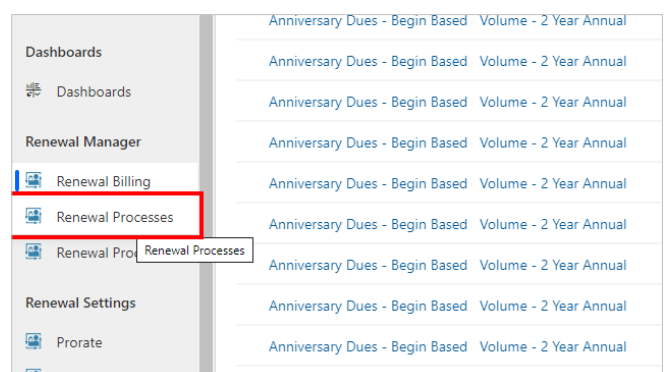
Here you can see the renewal billing record for the subscription has been terminated.



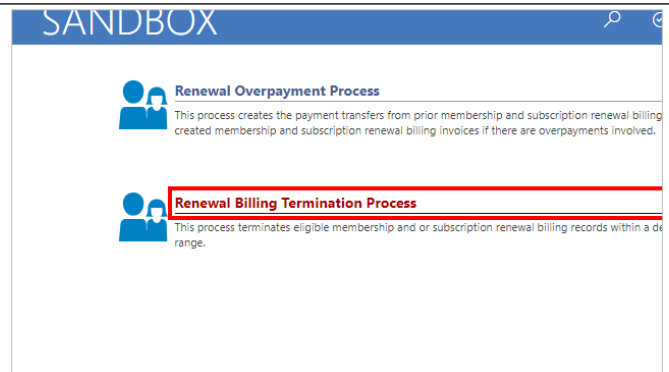
9.8. Terminating Expired Subscriptions

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**

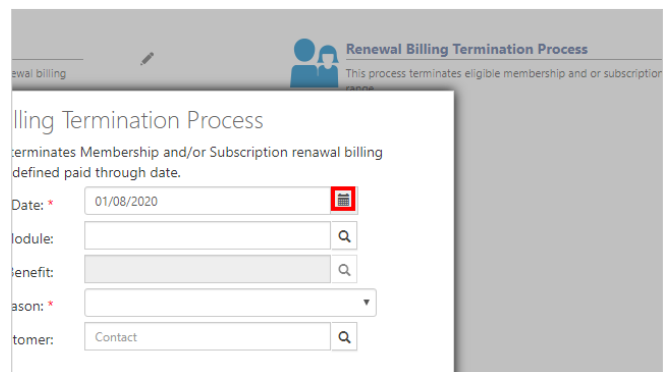


Click on **Renewal Billing Termination Process**

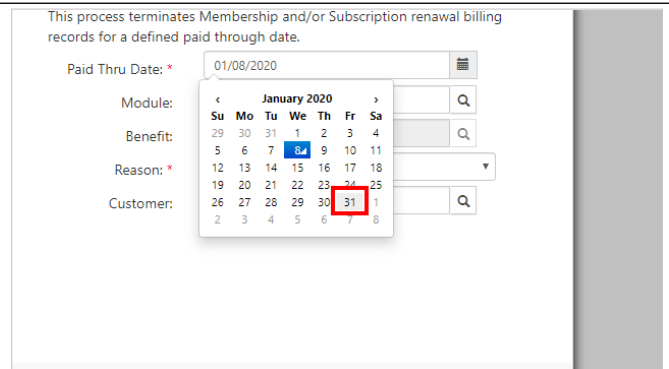


Paid Thru Date – Click the Calendar button and select the expiration date of the subscriptions you want to terminate. This date will always be the last day of the month you are running this for.

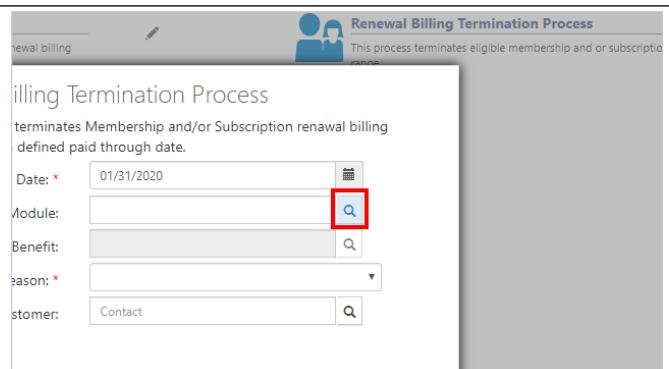
Click on Calendar Look Up



Select the desired paid thru date.



Module – Click the Lookup button and select Subscriptions.



Click on Subscriptions.

Renewal Billing Termination Process
This process terminates eligible membership and or subscription renewal billing invoices.

Look For: Module
Search: Search for records

Name	Code
Membership	10
<input checked="" type="checkbox"/> Subscriptions	40

Click on the button **ADD**

Showing 1 to 2 of 2 rows

ADD CANCEL REMOVE VALUE

12:21 PM 1/8/2020

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

Renewal Billing Termination Process
This process terminates Membership and/or Subscription renewal billing invoices defined paid through date.

Date: * 01/31/2020
Module: Subscriptions
Benefit: **Lookup**
Reason: *
Customer: Contact

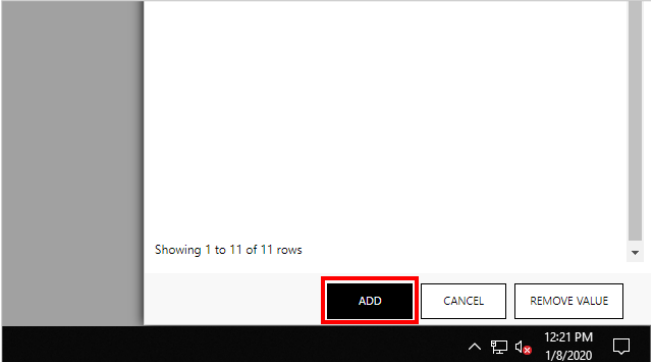
Click on the checkbox **on**

Enter your search criteria.

Look For: Benefit
Search: Search for records

Name	Renewal
<input checked="" type="checkbox"/> ALR test Benefit	Ann
<input type="checkbox"/> LAB Galley - Sub Benefit Recipients	Ann
<input type="checkbox"/> LAB Galley Subscription	Ann
<input type="checkbox"/> MX Basic Subscription Benefit	Cale
<input type="checkbox"/> Subscription - Anniversary - Based on COD 1	Ann

Click on the button **ADD**

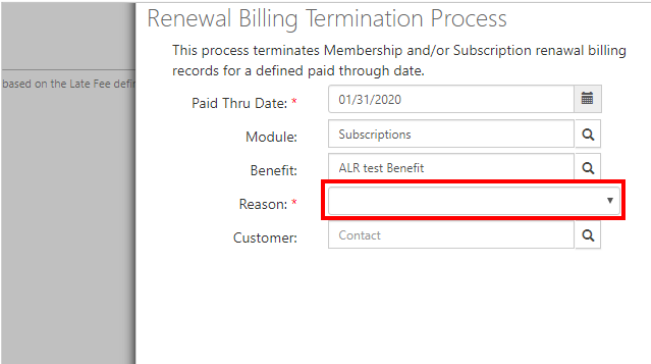


Showing 1 to 11 of 11 rows

ADD CANCEL REMOVE VALUE

12:21 PM
1/8/2020

Reason – Select a termination reason from the menu. This reason will be recorded on each subscribers detail invoice record



Renewal Billing Termination Process
This process terminates Membership and/or Subscription renewal billing records for a defined paid through date.

Paid Thru Date: * 01/31/2020

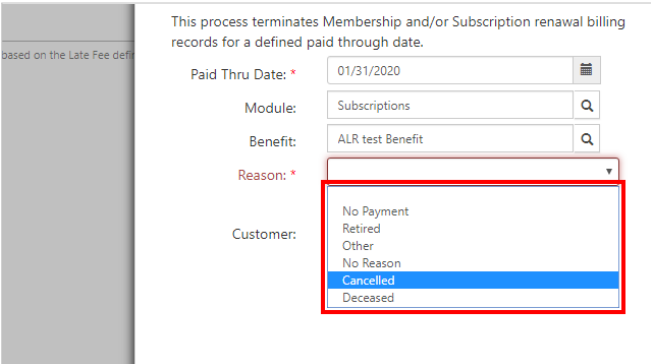
Module: Subscriptions

Benefit: ALR test Benefit

Reason: * **ADD**

Customer: Contact

Select the termination reason.



Renewal Billing Termination Process
This process terminates Membership and/or Subscription renewal billing records for a defined paid through date.

Paid Thru Date: * 01/31/2020

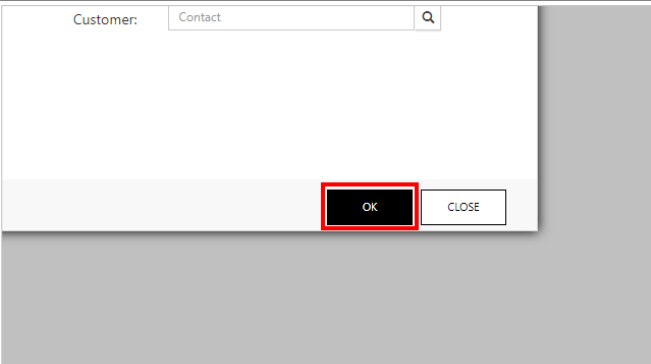
Module: Subscriptions

Benefit: ALR test Benefit

Reason: * **Cancelled**

Customer: Contact

Click on the button **OK**



Customer: Contact

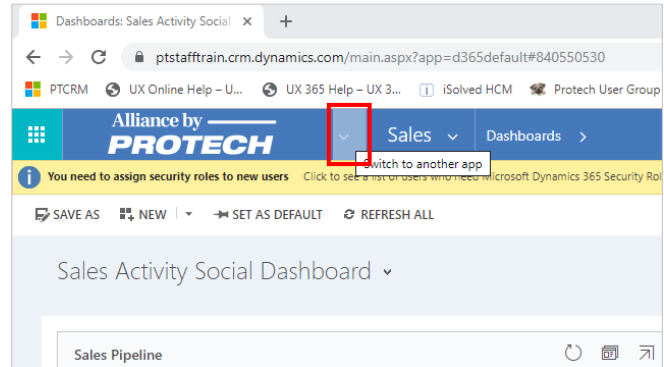
OK CLOSE

10. Whats New in UX 365

10.1. Accessing UX 365 in the Unified Client Interface

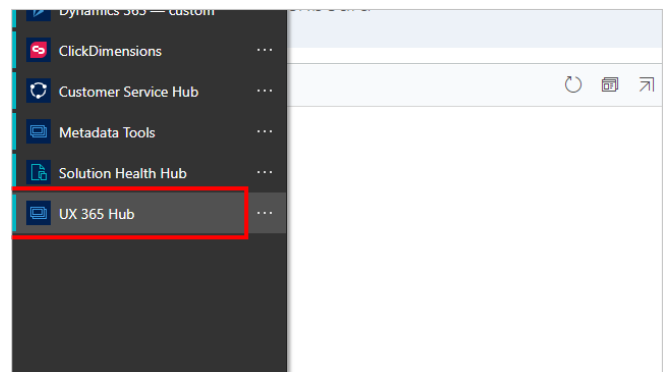
Before you can access UX 365, you must first sign in to Microsoft Dynamics® 365 with your Microsoft user account credentials. Once you sign in, open the Dynamics 365 App Selector by clicking the carat icon to the right of Alliance by Protech.

Click on the navigation button **Switch to another app**



To access UX 365, select UX 365 Hub from the App Selector.

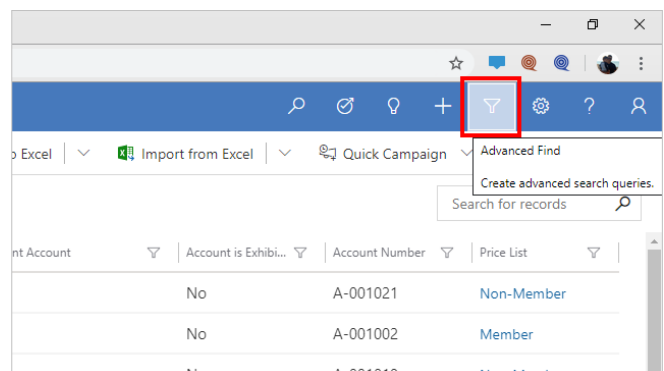
Click on the button **UX 365 Hub**



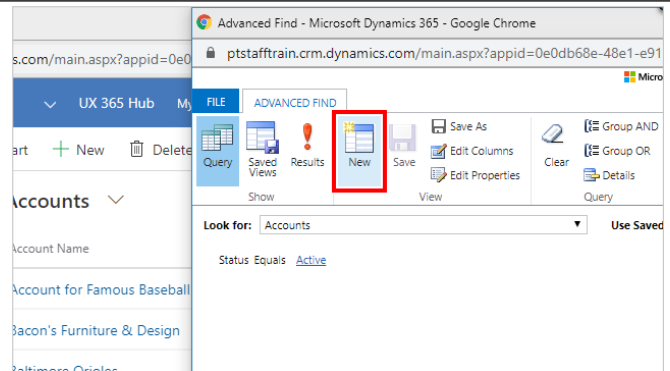
10.2. Advanced Find and Saved Views

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

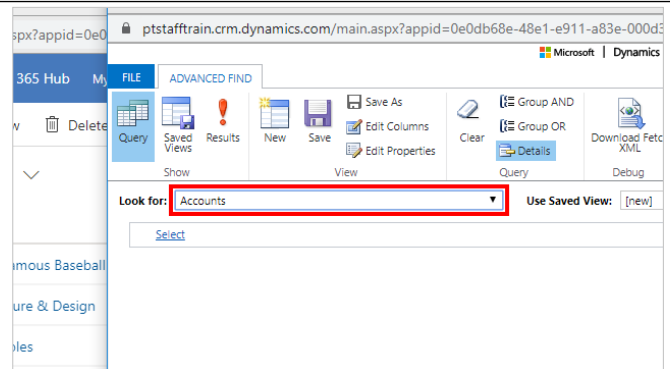
Click on the menu item **Advanced Find**



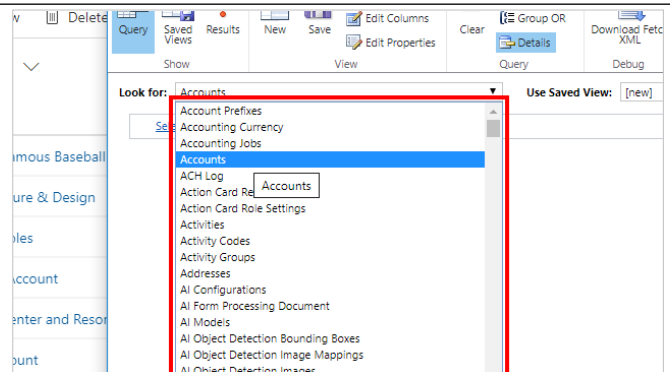
Click on the ribbon item **New**



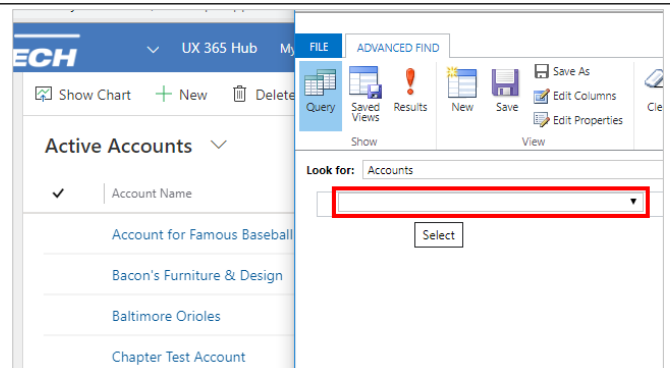
In the Look for list, select a record type



Select Accounts

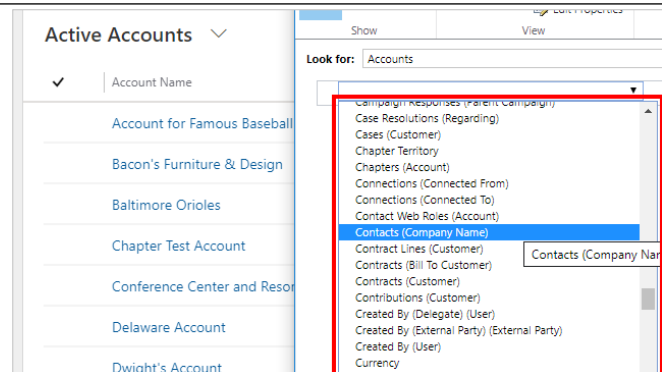


Define search criteria

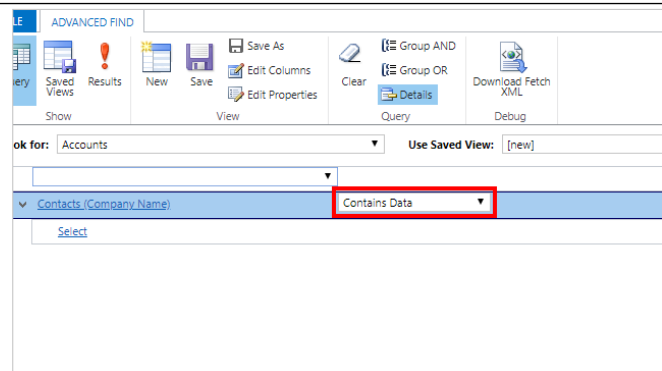


For example, find Accounts without any related Contact records

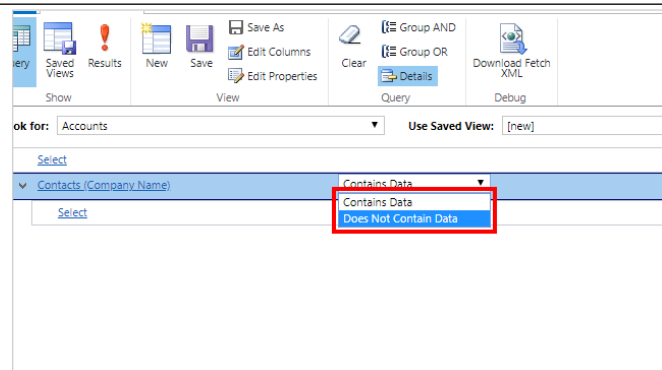
Click on the regarding entity, Contacts



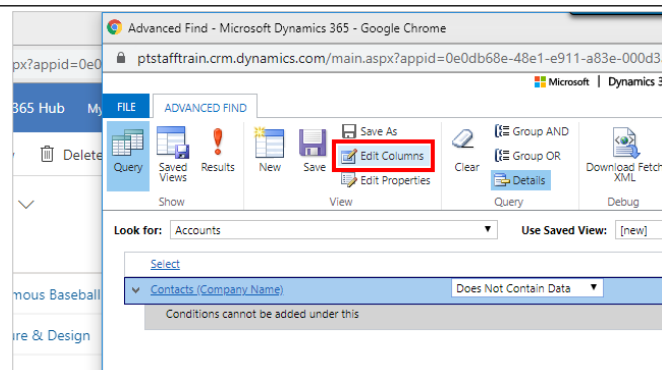
Open the selection criteria



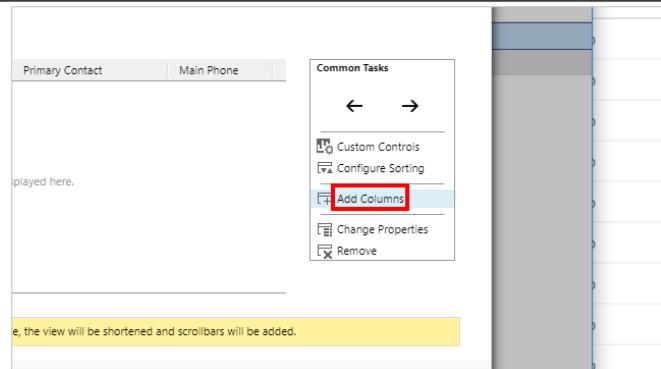
Choose, Does Not Contain Data. This will return all Accounts that do not have any related Contact records



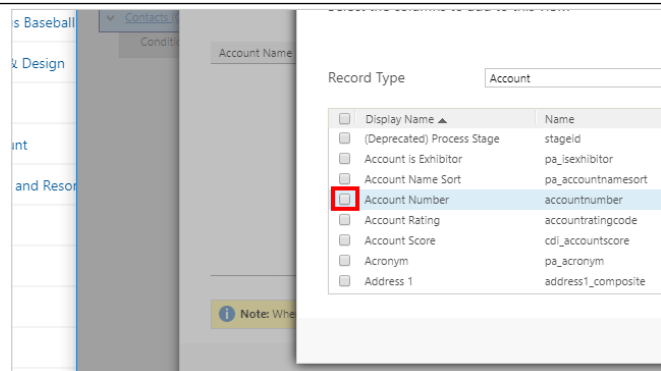
Specify the columns to include in the search results. Click on the button, Edit Columns



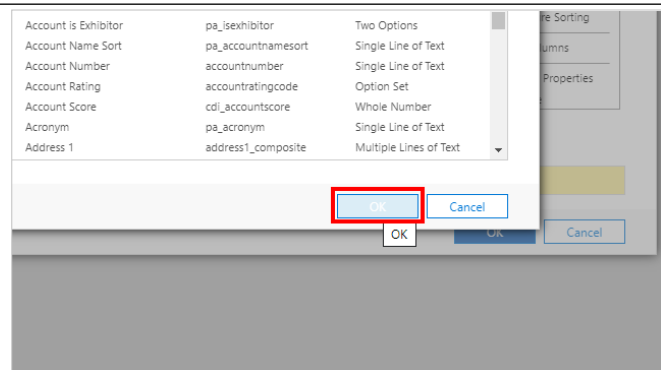
Click on the link **Add Columns**



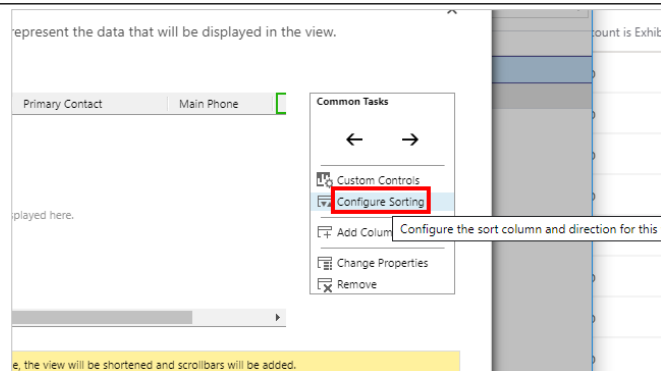
Check mark the fields you would like included in the search results



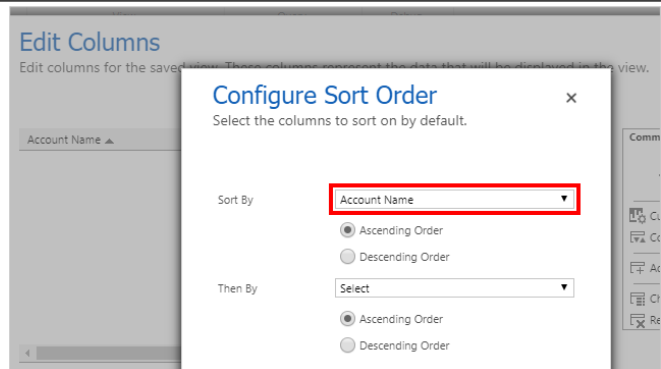
Click on the button **OK**



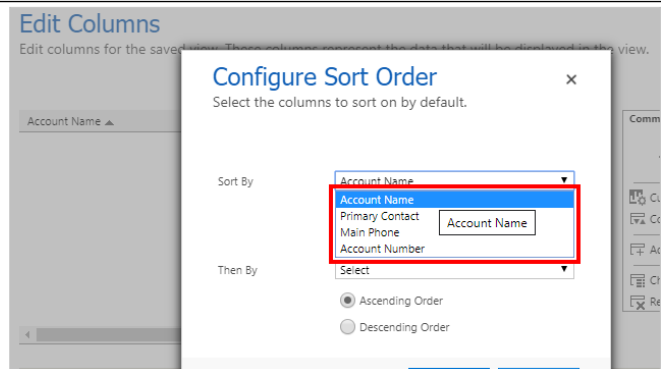
Configure sorting



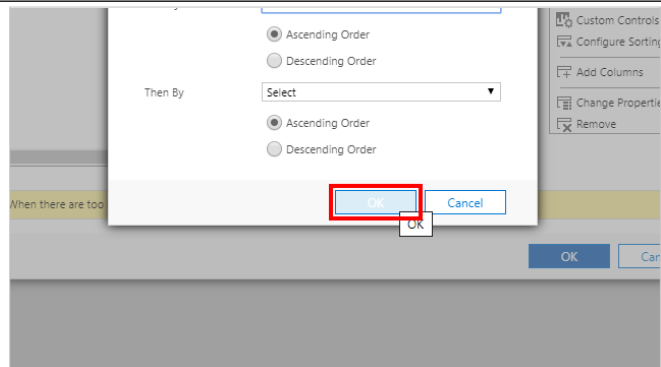
Configure Sort By



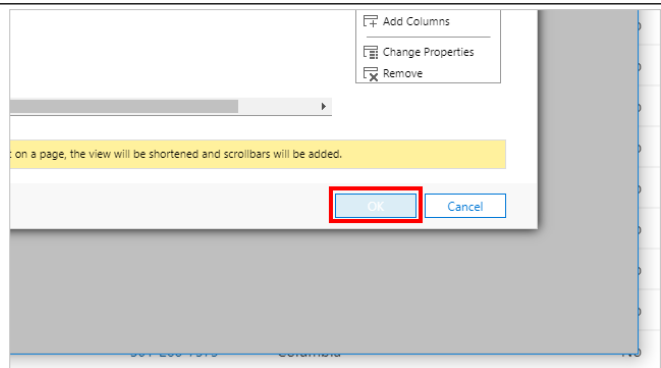
Click on the item **in the list**



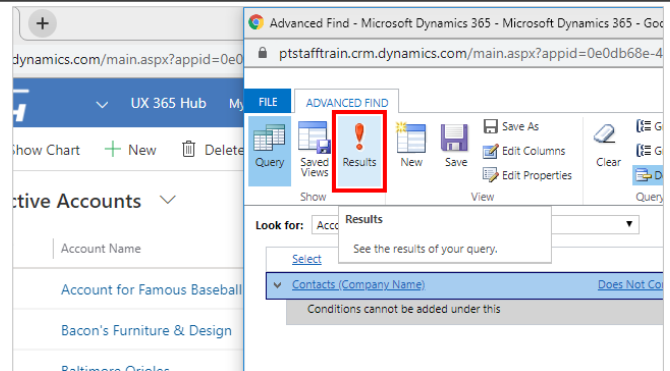
Click on the button **OK**



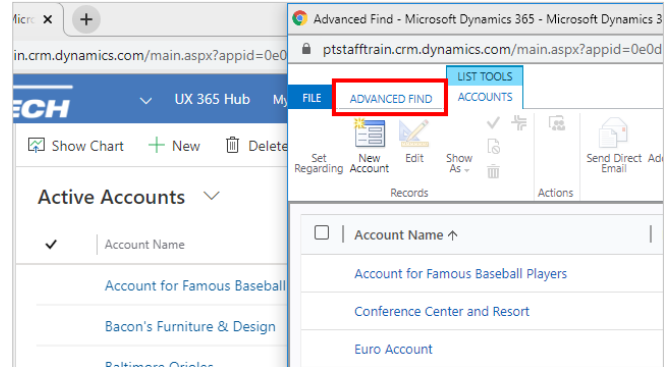
Click on the button **OK**



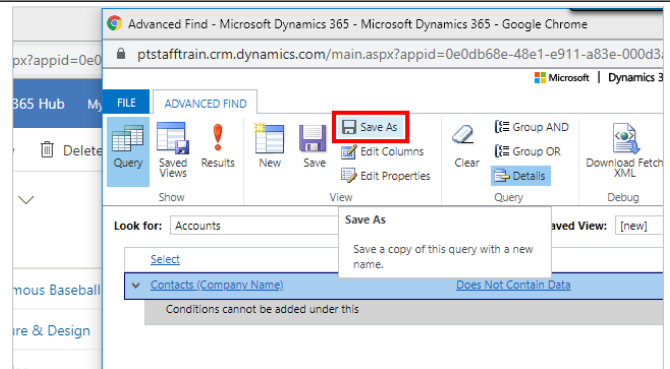
Click on the ribbon item Results to execute the query



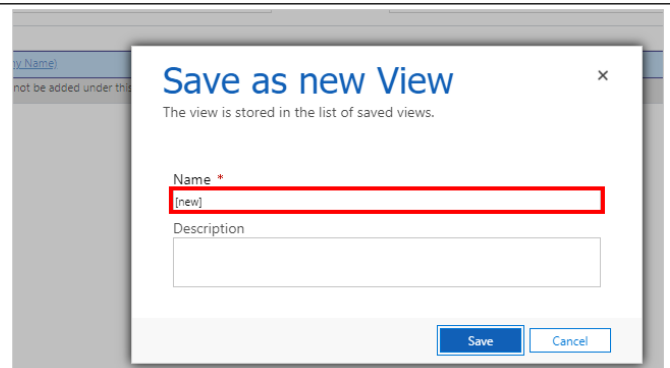
Review results and return to the Advanced Find query builder



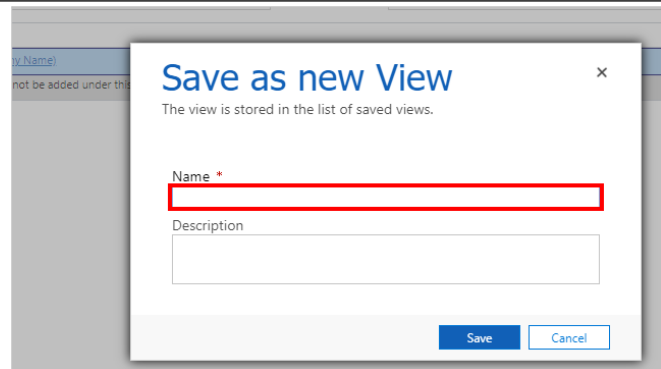
Click on the link **Save As**



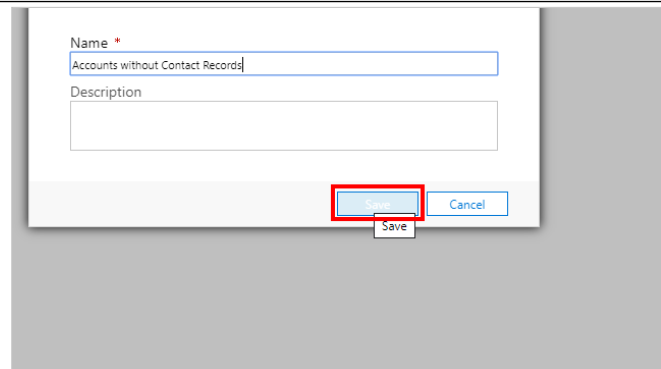
Give your query a name



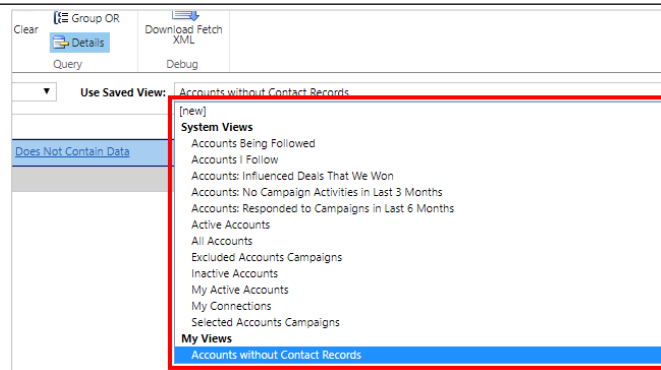
For example, enter the text Accounts without Contact Records



Click on the button **Save**



Your new query is now accessible from, My Views

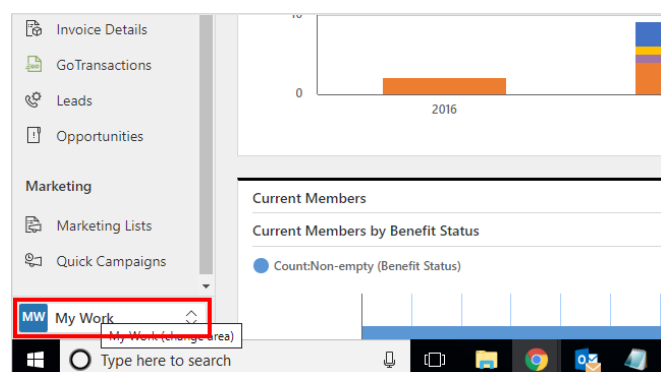


10.3. Editable Grids

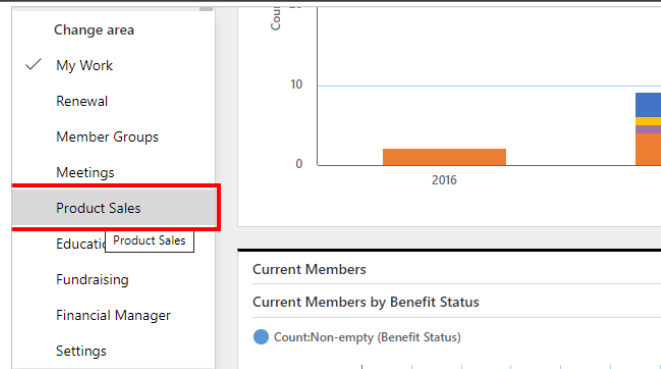
10.3.1.1. Prices

Selected fields in the Prices grid are now editable directly in the grid.

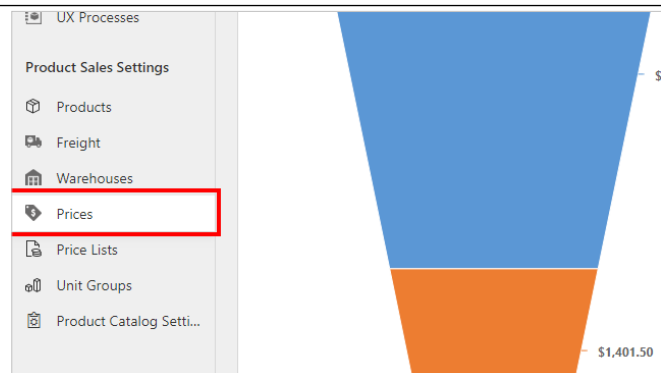
Click on the button **My Work (change area)**



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:

	Name	Calculation Method	Start Date
	Non-Member - Canadian	Flat Price	7/20/2018
	Member	Flat Price	6/29/2018
	Member Euro	Flat Price	6/29/2018
	Non-Member	Flat Price	6/29/2018
	Non-Member Euro	Flat Price	6/29/2018

Click on the Toggle Dropdown button

	Calculation Method	Start Date	End Date
Member - Canadian	Flat Price	7/20/2018	7/20/2068
	Flat Price	6/29/2018	6/29/2068
Euro	Flat Price	6/29/2018	6/29/2068
Member	Flat Price	6/29/2018	6/29/2068
Member Euro	Flat Price	6/29/2018	6/29/2068

Click on **Percent**

↑	Name	Calculation Method	Start Date
	Non-Member - Canadian	Flat Price	7/20/2018
	Member	Flat Price	6/29/2018
	Member Euro	Percent	6/29/2018
	Non-Member	Flat Price	6/29/2018
	Non-Member Euro	Flat Price	6/29/2018
	Non-Member - Canadian	Flat Price	7/20/2018

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**

Product Sales manager	365 Sales Inventory Kit	Non-Member
Orders Shipping Fulfi...	365 Sales Inventory Kit	Non-Member Eur
View and Edit Back O...	365 Sales Inventory Product	Non-Member - C
UX Processes	365 Sales Inventory Product	Member
Product Sales Settings	365 Sales Inventory Product	Member Euro
Products	365 Sales Inventory Product	Non-Member
Freight	365 Sales Inventory Product	Non-Member Eur
Warehouses	365 Sales Non-Inventory_Member a...	Member
Prices	365 Sales Non-Inventory_Member a...	Member Euro
Price Lists		

Click on the product you would like to edit.

Pinned	2020 New Registration	2020NEW-
Dashboards	2020 New Registration	2020NEW-
Dashboards	2020 New Session	2020SESSIO
Product Sales Manager	2020 New Session	2020SESSIO
Orders Shipping Fulfi...	365 Sales Inventory Kit	SALESINKIT
View and Edit Back O...	365 Sales Inventory Pro	365SALESIN
UX Processes	365 Sales Non-Inventory_Member and Non-	365NONIN
Product Sales Settings	365 USD Single Currency Non-Inventory	365USDSIN
Products	365 USD Single Currency Non-Inventory	365USDSIN

Click on the item **Related**

UX 365 Hub	Product Sales	Products	365 Sales Inventory Kit
Save & Close	Revise	Retire	Inventory
Delete	Refresh	Process	
365 Sales Inventory Kit			
Web	Online Description	Notes	Related
			Related
* 365 Sales Inventory Kit			
* Each			
* Each			

Click on the menu item **Prices**

Web	Online Description	Notes	Related
			<div> Related - Common <ul style="list-style-type: none"> Audit History Price List Items Prices Kit Components Connections Product Relationships </div>
	365 Sales Inventory Kit		
	Each		
	Each		
	Non-Member		

Click on the field you would like to edit.

Refresh	Run Report	Excel Templates	Export Prices	Share
Related View				
uping)				
	Currency	Calculation Method	Price Percent	
	US Dollar	Flat Price	Flat Price	
	Euro	Flat Price		
	US Dollar	Flat Price		
	- Canadian	Canadian Dollar	Percent	
	Euro	Euro	Flat Price	

Click on the Toggle Dropdown button

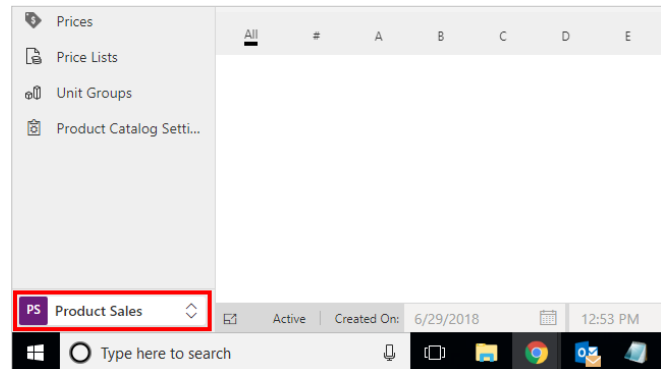
Delete Price	Assign Prices	Share	Email a Link	Run Report
	Calculation Method	Price Percent	Start Date	
lar	Flat Price	Flat Price	\$150.0000	6/29/2018
	Flat Price		€150.0000	6/29/2018
	Flat Price		\$150.0000	6/29/2018
Dollar	Percent		\$150.0000	7/20/2018
	Flat Price		€150.0000	6/29/2018

Click on **Percent**

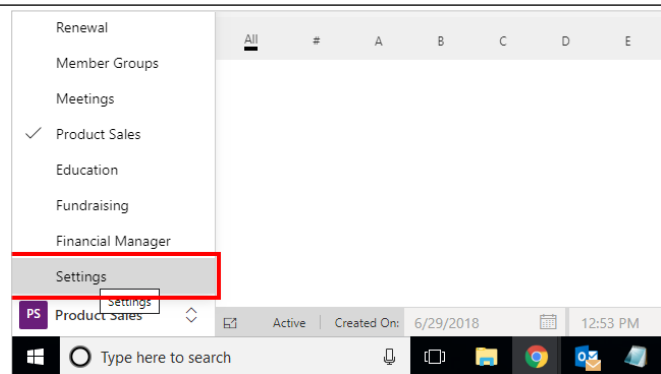
Related View				
uping)				
	Currency	Calculation Method	Price Percent	
	US Dollar	Flat Price	Flat Price	
	Euro	Flat Price	Percent	
	US Dollar	Flat Price		
	- Canadian	Canadian Dollar	Percent	
	Euro	Euro	Flat Price	

10.3.1.2. Application Parameters

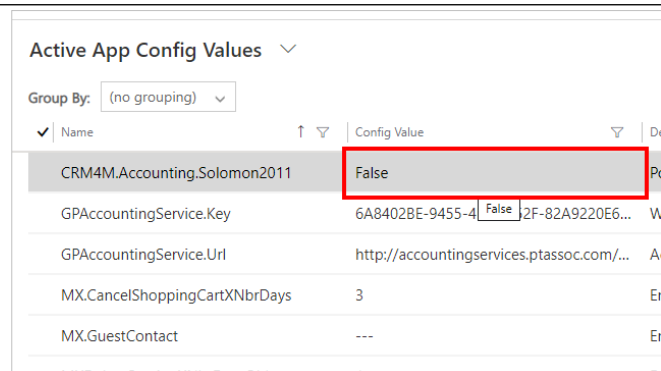
The Application Parameters List View is now an editable grid. Users can modify the Config Value directly in the grid. Changes are saved dynamically as you move from the field. Click on the button **Product Sales (change area)**



Click on the item **Settings**



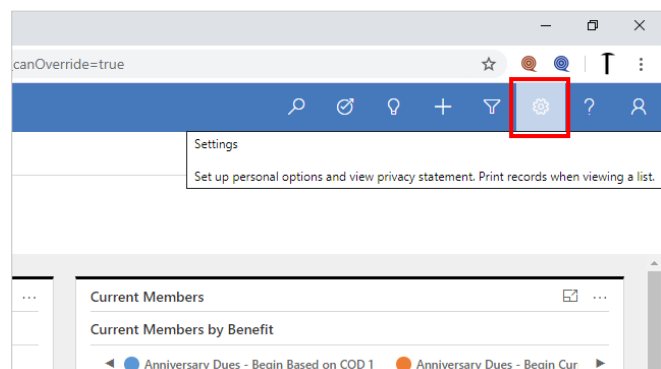
Click directly on the field you would like to edit.



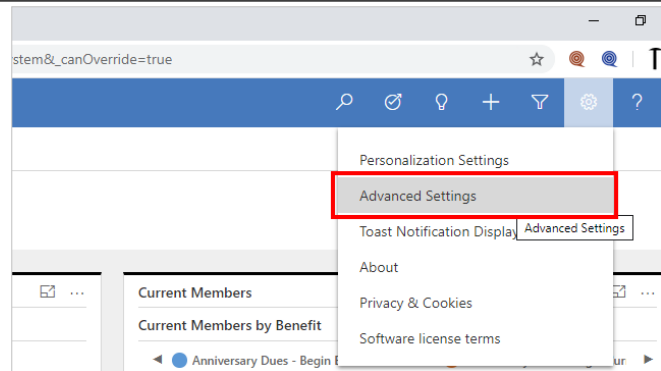
10.4. Forms Customization

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.

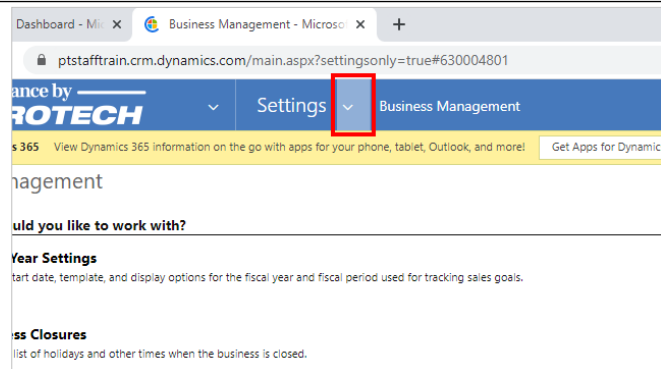
To navigate to Solutions, first click the cog wheel for settings in the top right



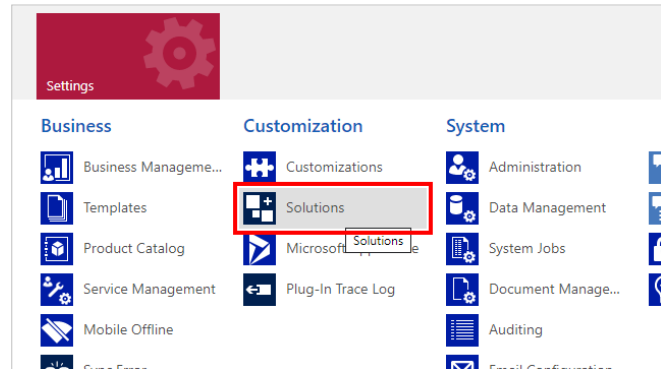
When a dropdown appears, click 'advanced settings'



At the top of the page, click the dropdown button on the right of 'Settings'



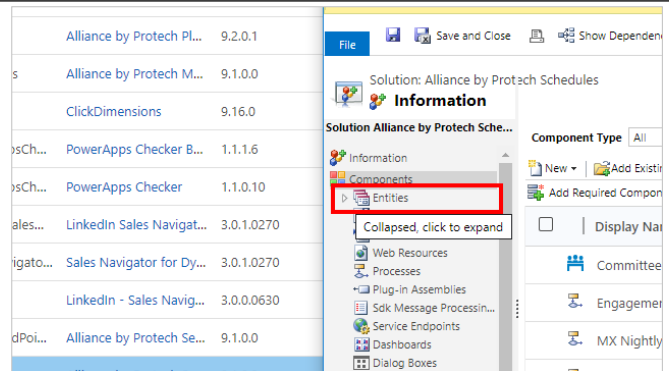
When a dropdown appears, click the 'Solutions' button.



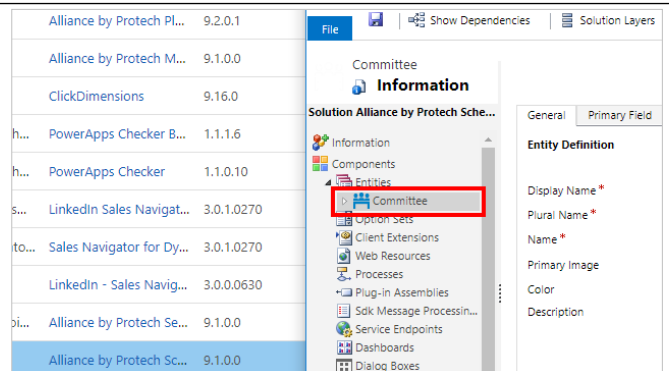
Find your unmanaged solution and click into it.

PowerAppsCh...	PowerApps Checker	1.1.0.10	5/5/2019	Managed	Dynamics 365
LinkedInSales...	LinkedIn Sales Navigat...	3.0.1.0270	4/27/2019	Managed	Dynamics 365
SalesNavigato...	Sales Navigator for Dy...	3.0.1.0270	4/27/2019	Managed	Dynamics 365
	LinkedIn - Sales Navig...	3.0.0.0630	4/27/2019	Managed	LinkedIn
ServiceEndPoi...	Alliance by Protech Se...	9.1.0.0	1/25/2019	Managed	Protech Associates, Inc.
Schedules	Alliance by Protech Sc...	9.1.0.0	1/25/2019	Unmanag...	Protech Associates, Inc.
Reports	Alliance by Protech Re...	9.2.0.0	1/25/2019	Managed	Protech Associates, Inc.
Browser	Metadata Browser	3.0.0.5	11/15/2018	Managed	Microsoft Dynamics C...
CustomerSe...	Customer Service Hub...	9.0.20.0329	8/25/2018	Managed	Dynamics 365
CustomerSer...	Customer Service Hub	9.0.5.56	8/25/2018	Managed	Dynamics 365

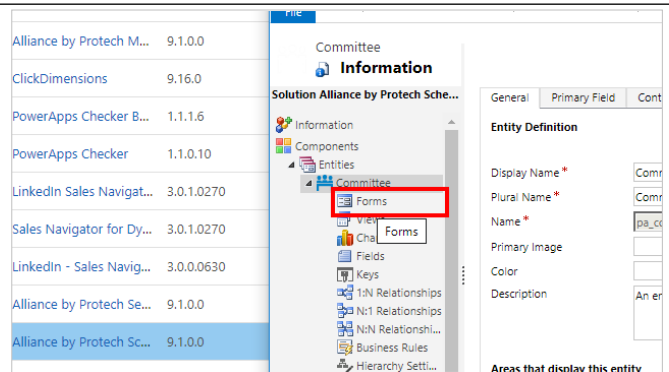
Click on the arrow button next to 'entities'
If you do not have any here, then you will need to add some entities in order to create a form.



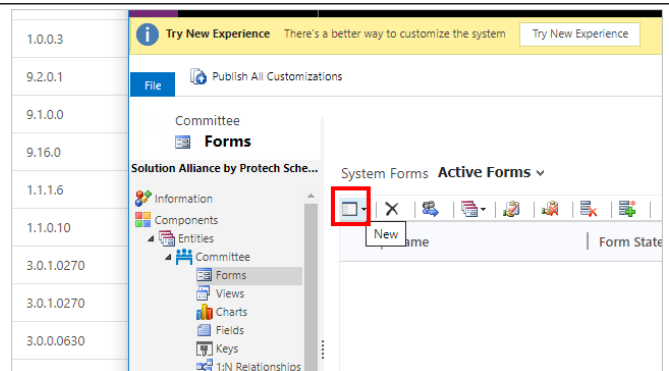
Click on the arrow button next to an entity.



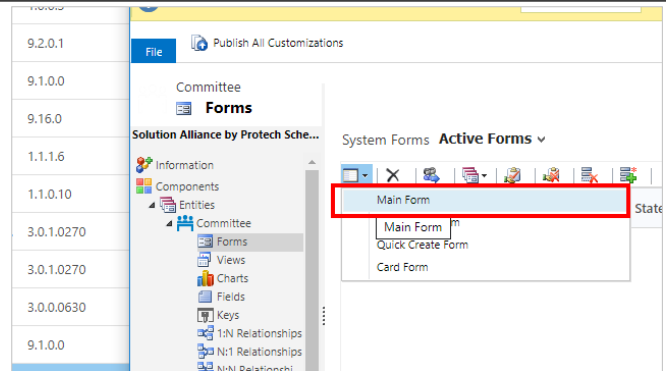
To create a new form for your entity, click 'Forms'



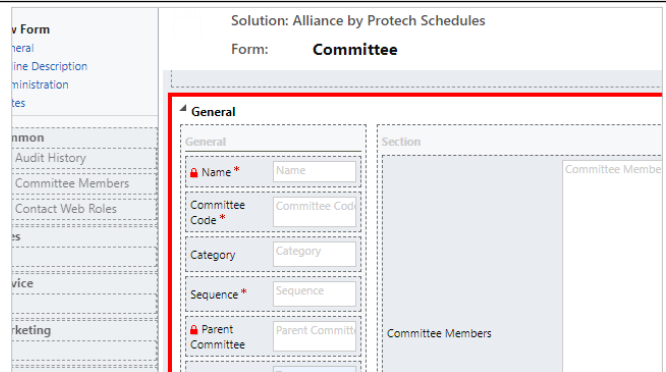
Click on the left button on the toolbar to create a new form.



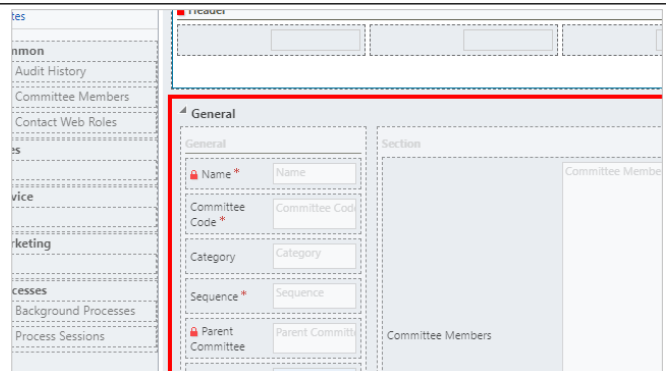
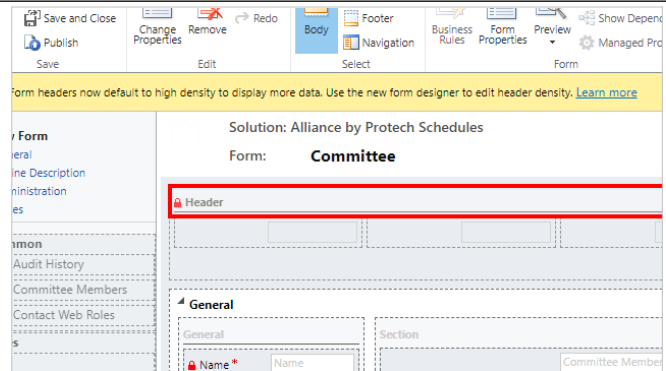
Select the type of form you wish to create



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.

This screenshot shows the Dynamics CRM form editor interface. On the left, a list of fields is displayed, including 'Name', 'Committee Code', 'Category', 'Sequence', and 'Parent'. The 'Name' field is selected, and its properties are shown in the 'General' tab on the right. The 'Name' field is highlighted with a red box, and the 'Committee Code' field is also highlighted with a red box.

The display information is where you can change display options for fields, such as making a field locked.

This screenshot shows the Dynamics CRM form editor interface. The 'Display' tab is selected, and the 'Name' field is highlighted with a red box. The 'Display' tab contains options for 'Label', 'Field Behavior', and 'Locking'. The 'Label' section includes a 'Label *' field with the value 'Name' and a checkbox for 'Display label on the form'. The 'Field Behavior' section includes a checkbox for 'Field is read-only'. The 'Locking' section is currently empty.

Click on the link **Formatting**

This screenshot shows the Dynamics CRM form editor interface. The 'Formatting' tab is selected, and the 'Name' field is highlighted with a red box. The 'Formatting' tab contains options for 'Label', 'Field Behavior', and 'Locking'. The 'Label' section includes a 'Label *' field with the value 'Name' and a checkbox for 'Display label on the form'. The 'Field Behavior' section includes a checkbox for 'Field is read-only'. The 'Locking' section is currently empty.

This is where you can change the number of columns the control occupies.

This screenshot shows the Dynamics CRM form editor interface. The 'Layout' tab is selected, and the 'Name' field is highlighted with a red box. The 'Layout' tab contains options for 'Layout'. The 'Layout' section includes a 'Select the number of columns the control occupies:' section with radio buttons for 'One column', 'Two columns', 'Three columns', and 'Four columns'. The 'One column' option is selected. To the right of the radio buttons, there are four visual representations of the field layout for each option: 'One column' (a single column), 'Two columns' (two columns), 'Three columns' (three columns), and 'Four columns' (four columns).

Click on the link **Details**

The screenshot shows the 'Field Properties' dialog box in Microsoft PowerApps. The 'Details' tab is selected and highlighted with a red box. The dialog box has tabs for Display, Formatting, Details, Events, Business Rules, and Controls. Under the 'Layout' section, there is a 'Select the number of columns the control occupies:' with two radio buttons: 'One column' (selected) and 'Two columns'.

This is where you provide the metadata for your field.

This screenshot shows the 'Details' tab of the 'Field Properties' dialog box. A red box highlights the 'Details' section, which contains the following fields: 'Display Name' (with value 'Name'), 'Name' (with value 'pa_name'), and 'Description' (with value 'The name of the custom entity.'). There is an 'Edit' button at the bottom of the section.

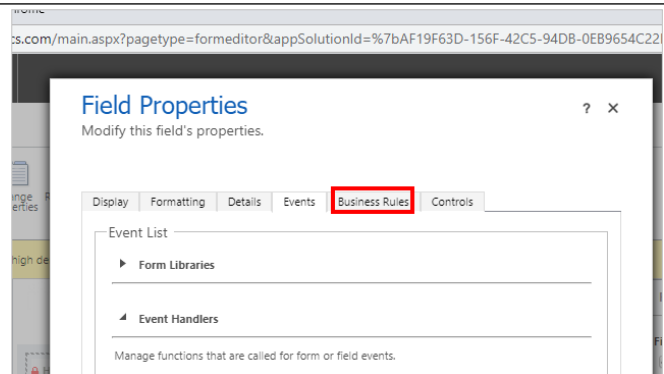
Click on the link **Events**

The screenshot shows the 'Field Properties' dialog box with the 'Events' tab selected and highlighted with a red box. The 'Details' section is still visible in the background. The 'Events' tab is currently empty, showing only the tab label.

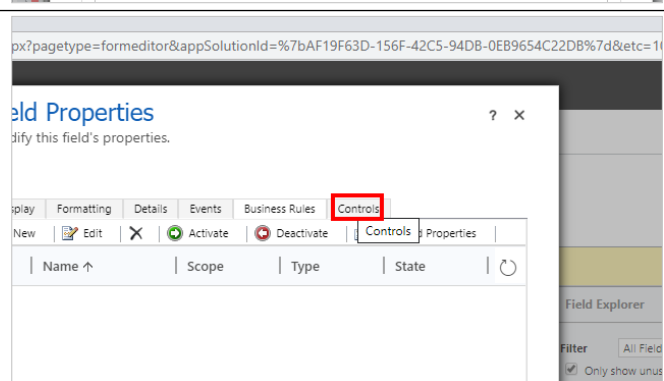
This section is where the event list is located.

This screenshot shows the 'Events' tab of the 'Field Properties' dialog box. A red box highlights the 'Event List' section. It contains a 'Form Libraries' section and an 'Event Handlers' section. The 'Event Handlers' section has a description: 'Manage functions that are called for form or field events.' Below this, there are dropdowns for 'Control' (set to 'Name') and 'Event' (set to 'OnChange'). At the bottom, there is a table with columns 'Library', 'Function', and 'Enabled', and buttons for 'Add', 'Remove', 'Up', 'Down', 'Edit', and 'Edit Library'.

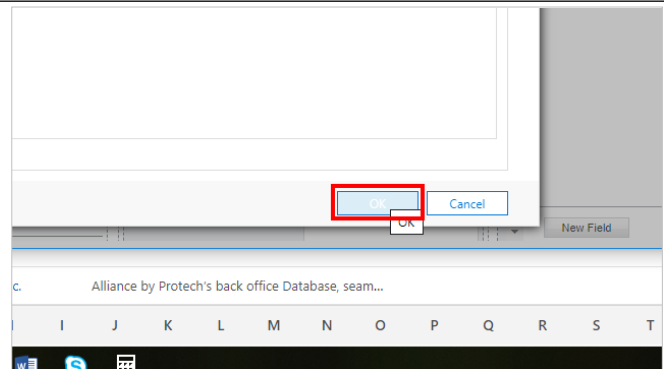
click on Business rules to show processes.



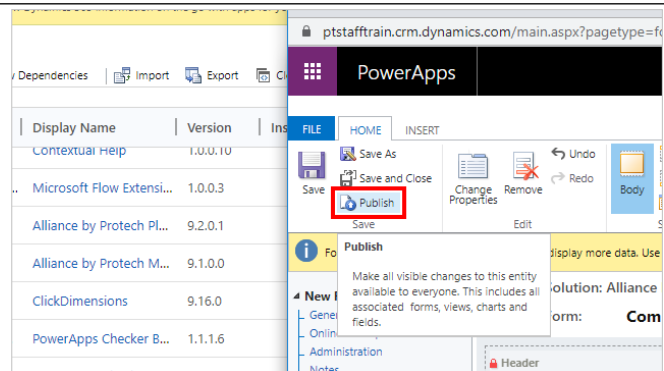
Click controls to add controls



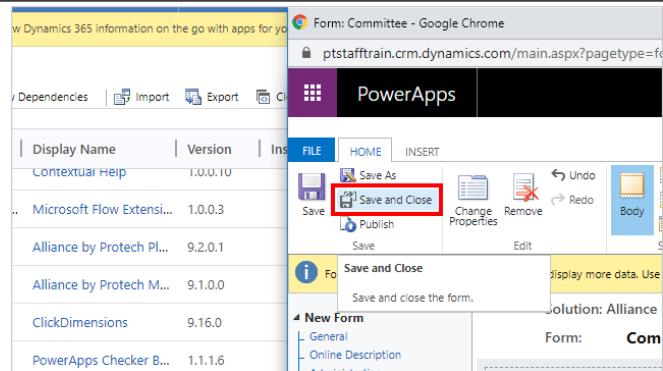
When you are done editing field properties, press OK in the bottom right



When you are done customizing the form, be sure to publish your work.



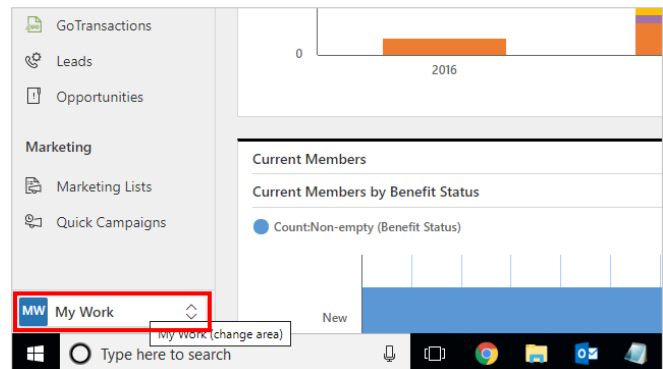
When you are done with forms customization, click save and close.



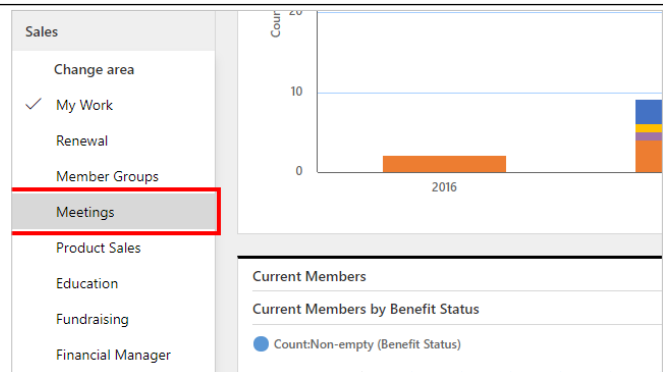
10.5. Is Cancellation Fee

10.5.1. Is Cancellation Fee in UX 365

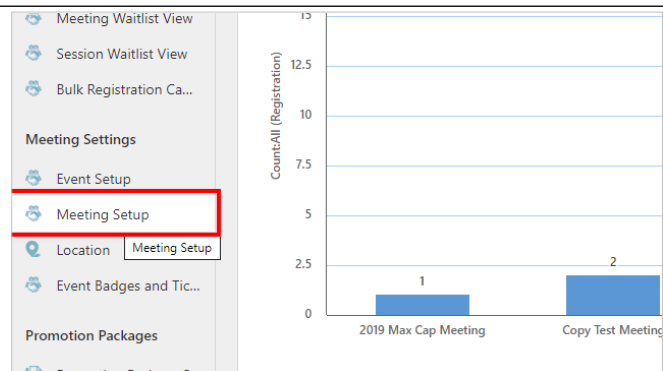
Click on the button My Work



Click on the item **Meetings**



Click on the item **Meeting Setup**



Click on the Meeting you would like to select

12/16/2019 12:00...	12/20/2019 12:00...	Test Meeting 1
12/25/2019 12:00...	12/25/2019 2:00...	Test waitlist meeti
9/1/2018 12:00 ...	9/7/2018 12:00 ...	USD Single Currency Meeting
12/19/2019 12:00...	12/21/2019 11:3...	UX 365 Annual Conference
1/31/2020 12:00...	2/2/2020 12:00 ...	UX 365 Bulk Cancellation Meeting
8/1/2018 12:00 ...	8/6/2018 12:00 ...	UX 365 Test Meeting

All # A B C D E F UX 365 Test Meeting

1 - 18 of 18 (0 selected)

Click on the item **Registration Setup**

Alliance by **PROTECH**

UX 365 Hub Meetings > Meeting Setup > UX 365 Test Meeting

Save Save & Close Deactivate Delete Refresh

UX 365 Test Meeting
Event Meeting Setup

Meeting Accounting **Registration Setup** Session Setup Web D

Registration Setup

Meeting

Name * UX 365 Test Meeting

Meeting Code * 365TEST

Select the correct Registration you would like to edit

ing Partici...	Yes	Euro Non-Members Only Registrat	EUROMEM
waitlist View	No	Group Guest Registration	GROUPGUEST
aitlist View	Yes	Group Registration	GROUP
tration Ca...	Yes	Group Registration by Percent	GROUPER
gs	No	Guest	GUEST

1 - 6 of 13 (0 selected)

This is where the 'Is Cancellation Fee' field is located in UX 365 in the Event Registration Setup form.

Registration Options

Is Main Registration? * No

Is Package No

Is Cancellation Fee No

Is Cancellation Fee

Restricted Sessions No

Group Pricing No

If a user changes the value to No, UX unlocks the other registration options.

Registration Options		Price
Is Main Registration? *	No	Price
Is Package	No	Default
Is Cancellation Fee	No	Price L
		Badge
Restricted Sessions	No	
Group Pricing	No	Account

Registration option fields include: -Is Main Registration -Is Package -Restricted Sessions -Group Pricing -Members Only

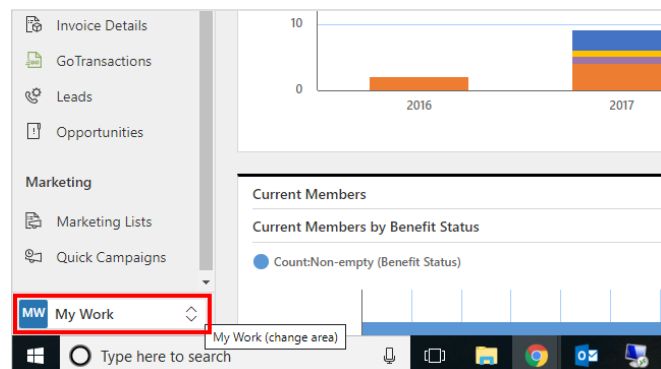
If Yes, then other Registration options = No and are locked.

Registration Options		Price
Is Main Registration? *	No	Price
Is Package	No	Default
Is Cancellation Fee	Yes	Price L
		Badge
Restricted Sessions	No	
Group Pricing	No	Account

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**

Renewal
Member Groups
Meetings
Product Sales
Education
Fundraising
Financial Manager
Settings
MW My Work

10
0
2016 2017

Current Members
Current Members by Benefit Status
CountNon-empty (Benefit Status)

Click on the item **UX System Jobs**

Rollup Queries
Engagement Run ...
UX Manager
Bulk Address Valid...
Address Type Setup
UX System Jobs
MX Settings
Refresh
Shopping Carts
Web Roles

PAAAddress.DefaultCountry	US
PAAAdvertisement.License	---
PAAzureFunctions.SecurityKey	0eIFmSRB3C6f
PAAzureFunctions.Url	https://qaux36
PABackOrders.ApplyFreight	true
PABackOrders.ApplyPayments	true
PABankRecModule	FALSE
PABatch.ValidatePaymentControl	true
PABatchWeb.ValidatePaymentControl	true

Click on the menu item **New**

UX System Jobs Active UX System: x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps UX online spam mail LMS CETROMCP Password Generato... Home

Alliance by **PROTECH** UX 365 Hub Settings > UX System Jobs

Show Chart **+ New** Delete Refresh

Active UX System
New
Create a new UX System Jobs record.

✓ Name
Validate
RenewalBilling Nightly Process

Click on the text field **Name**

UX 365 Hub

Save & Close + New Flow

UX System Jobs

Name ---

Job Type *

Additional Attribute 1 ---

Additional Attribute 2 ---

Enter **Name of manually run job** .

UX 365 Hub

Save & Close + New Flow

New UX System Job

General

Name

Job Type * ---

Additional Attribute 1 ---

Additional Attribute 2 ---

Click on the field **Job Type**

UX 365 Hub

Save & Close + New Flow

New UX System Job

General

Name

Job Type * --Select--

Additional Attribute 1 ---

Additional Attribute 2 ---

Additional Attribute 3 ---

In the 'Job Type' dropdown field, select the "manual" option for the system job that you want to run

Name **Example Job**

Job Type * --Select--

Additional Attribute 1 --Select--

Additional Attribute 2 Nightly Process(Daily Job)

Additional Attribute 3 RenewalBilling Nightly Process

Additional Attribute 4 Nightly Capture Process

Additional Attribute 5 MX Nightly Process

Additional Attribute 6 Engagement Nightly Process

Additional Attribute 7 Professional Development Job

Additional Attribute 8 Bulk Address Validation Process

Additional Attribute 9 Backorder Processing

Additional Attribute 10 Sync Contact Web Roles

Additional Attribute 11 Restore GL Accounts Process

Additional Attribute 12 Transaction Warning

Additional Attribute 13 Manual Nightly Trigger

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

UX System Jobs: Information: Ne x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps UX online spam mail LMS CETROMCP Password Generato... Home

Alliance by **PROTECH**

UX 365 Hub

Save Save & Close + New Flow

New UX System Job

General

Name **Example Job**

Job Type Cross Reference

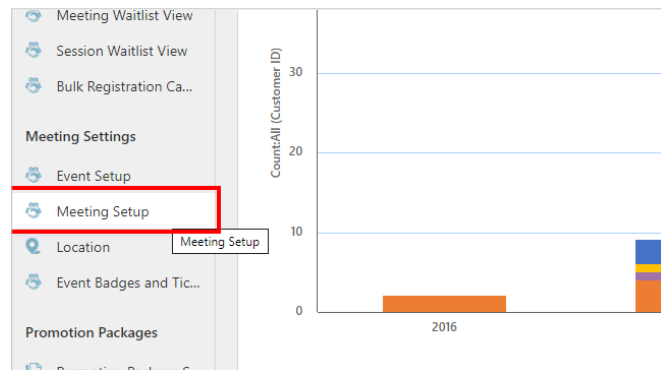
The following table is a cross-reference of the Job Type that should be selected in order to run each recurring UX System Job manually.

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

1/1/2018 1:00 PM	1/5/2018 1:00 PM	2018 Copy - Deferred By Date
5/1/2019 12:00 ...	5/2/2019 12:00 ...	2019 Max Cap Meeting
3/1/2019 1:00 PM	3/6/2019 1:00 PM	2019 Meeting - No Guests
2/1/2019 1:00 PM	2/5/2019 1:00 PM	2019 Meeting - No Sessions
1/1/2020 12:00 ...	1/3/2020 12:00 ...	2020 New Meeting
1/1/2020 12:00 ...	1/3/2020 12:00 ...	Copy Meeting 2020 New Meeting
8/1/2018 12:00 ...	8/11/2018 12:00...	Copy Meeting
1/1/2019 1:00 PM	1/3/2019 1:00 PM	Copy Test Meeting
10/1/2019 12:00 ...	10/5/2019 12:00 ...	Copy 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**

Meeting Setup

Accounting Registration Setup Session Setup Web Details Online Description

Meeting

Name * 2020 New Meeting

Meeting Code + 2020NEW

Event * 2020 New Event

Meeting Date and Time

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**

Meeting

Name * 2020 New Meeting

Meeting Code + 2020NEW

Event * 2020 New Event

Meeting Date and Time

Start Date * 1/1/2020

10.8. Member Engagement

Click on the item **Contacts**

Activities

Reports

Easy Print Reports

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Count All Customer (D)

40

30

20

10

Select the desired Contact

Customers

Accounts

Contacts

Sales

Invoices

Invoice Details

GoTransactions

Leads

Opportunities

Sims, Ali

Sisson, Joanne

Smith, Alex

Smith, Jerry

Smith, John

Smith, John

Smith, Shelly

Smith, Tina

Delaware Account

Click on the item **Related**

The screenshot shows a 'Sandbox' interface with a blue header. Below the header, there are tabs: 'Engagement Preferences', 'Other Details', 'Notes', and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a section for 'Current and Upcoming Renewal Billing' with a table showing 'Benefit', 'Rate', and 'Cycle'. The table has a row for 'Anniversary Dues - Beg' and 'Anniversary Quantity - Up'.

Click on the menu item **Engagement Details**

The screenshot shows a sidebar menu with various items. The 'Engagement Details' item is highlighted with a red box. Other items in the menu include 'Posted Fields', 'Posted Forms', 'Social Clicks', 'Visits', 'Import Logs', 'Promotion Package', 'MX User Authentication', 'Social Activities', and 'Contributions'.

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

The screenshot shows a sidebar menu with various items. The 'Add New Engagement Detail' item is highlighted with a red box. Other items in the menu include 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Reports', and 'Easy Print Reports'.

Click on the search icon to select Engagement product

The screenshot shows a 'Sandbox' interface with a blue header. Below the header, there is a search bar with a magnifying glass icon highlighted in a red box. To the right of the search bar, there are fields for 'Engagement Points', 'Customer', and 'Engagement Type'.

Click on the item **Engagement product**

Engagement Detail

General

Engagement

Activity Date *

Name *

Owner *

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.

Engagement Points *

Customer *

Engagement Type

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.

New Engagement Detail

General

Engagement

Activity Date *

Name *

Owner *

Click on the menu item **Save**

Microsoft Dynamics CRM

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83e-000

Apps Dashboards: Sales... UX8Train UX365 Train UX8 User's Guide UX 365 Us

Alliance by **PROTECH** UX 365 Hub

Detail

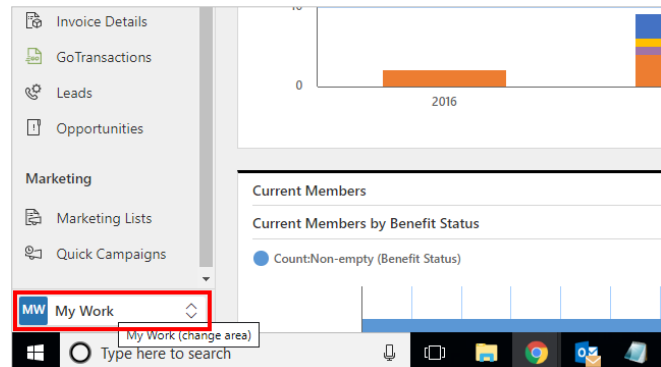
General

Engagement

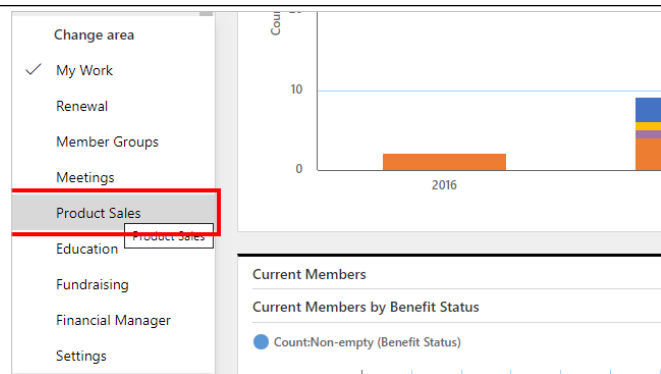
10.9. Payments Adjustments Product Setup Payment Type Option Set

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.

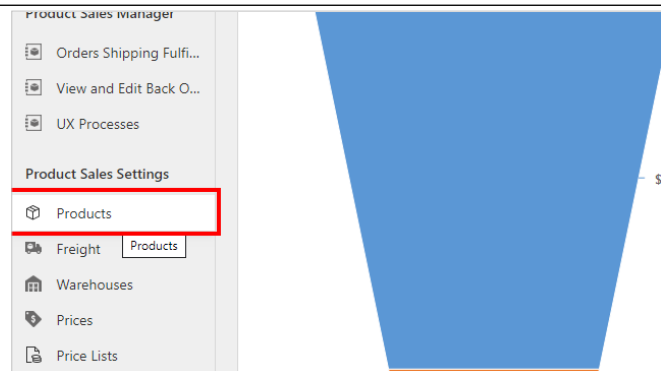
Click on the button **My Work (change area)**



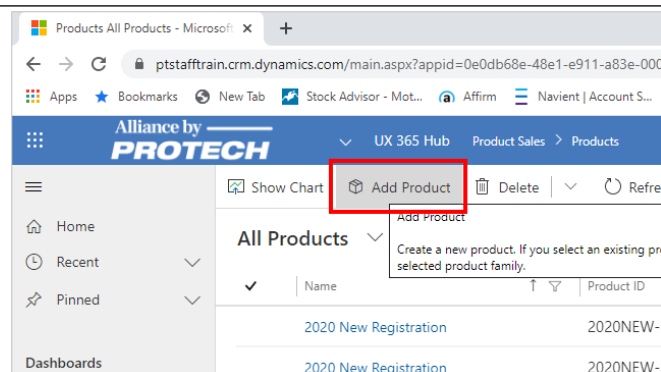
Click on the item **Product Sales**



Click on the item **Products**



Click on the menu item **Add Product**



Click on the field **Product Type**

The screenshot shows the UX 365 PRODUCT form. The 'Product ID' field is marked with a red asterisk and contains '---'. The 'Product Type' field is highlighted with a red border and contains 'Sales Non Inventory'. Below it, the 'Education Item' field contains '---' and a small 'Sales Non Inventory' button. The 'Currency' field shows 'US Dollar' with a dollar sign icon. The 'Single Currency' field has an unchecked checkbox.

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.

The screenshot shows the 'Sales Non Inventory' dropdown menu open. The list includes: --Select--, Services, Additional Benefit Recipients, Award, Chapter Billing, Comment, Custom Client Transaction, Dues Billing, Flat Fees, Freight, Miscellaneous Charges, Online Assessments, **Payments & Adjustments** (highlighted in blue), Renewal Late Fee, and Sales Inventory.

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

The screenshot shows the UX 365 PRODUCT form. The 'AR GL Account' field is marked with a red asterisk and contains '---'. The 'Payment Product Info' section is visible. The 'Payment Type' field is marked with a red asterisk and has a dropdown menu open showing '--Select--'. The 'Inventory and Backorder Info' section is also visible, with the 'Warehouse' field containing '---'.

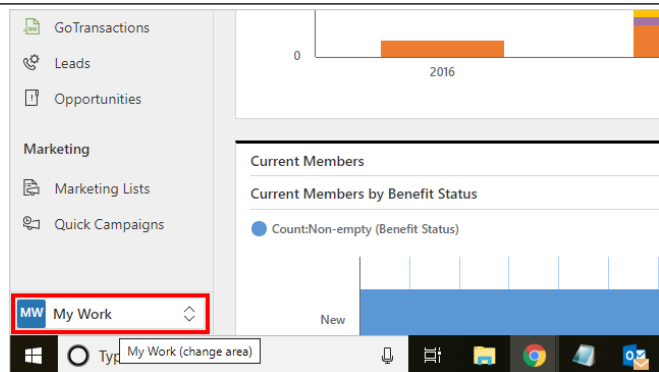
Select the payment type for this Payments & Adjustments Product.

The screenshot shows the UX 365 PRODUCT form. The 'Payment Type' field is marked with a red asterisk and has a dropdown menu open. The list includes: --Select--, --Select--, **Credit Card** (highlighted in blue), Check/Cash, Gift Certificate, Adjustment, ACH Payment, Refund, Write-off, and Transfer. The 'Inventory and Backorder Info' section is also visible, with the 'Warehouse' field containing '---'.

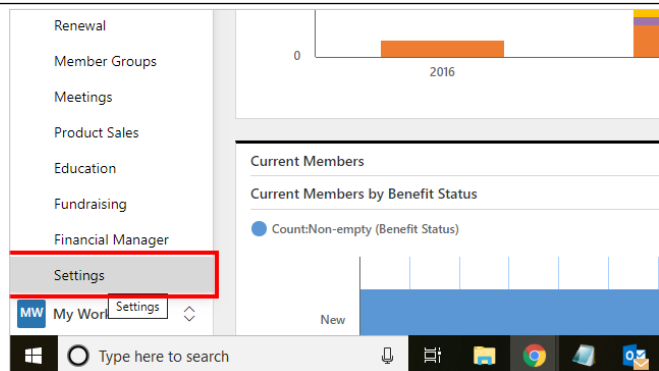
10.10. Price Level Controlled Promotion Discounts

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.

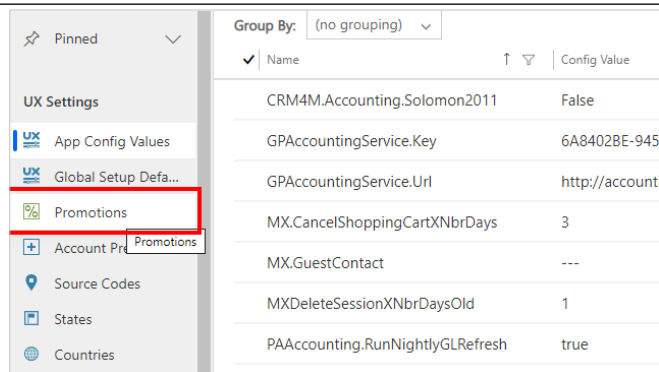
to navigate to promotions, first click on the bottom 'My Work' to change areas



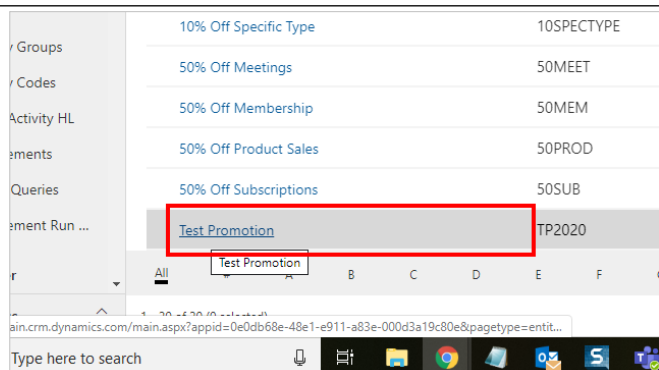
Click on the item **Settings**



Click on the item **Promotions**



Locate and click into the desired promotion setup record



Price List limits the promotion discounts by price level.

UX Settings

- App Config Values
- Global Setup Defa...
- Promotions**
- Account Prefixes
- Source Codes
- States
- Countries
- Credit Cards

Name * Test Promotion

Start Date * 12/19/2019

Discount Type * Flat Price

Price List ---

Apply Promotion

click on the lookup icon on the right of 'Price List'

Promotion Code * TP2020

End Date * 12/20/2019

Amount * \$20.00

Currency * US Dollar

Owner * Rolan

Select desired price level.

Start Date * 12/19/2019

Discount Type * Flat Price

Price List Look for Price List

Price Lists

- Member US Dollar**
- Non-Member US Dollar

Apply Promotion

All Products

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**

Promotion: Information: Test Pro x +

ptstafftrain.crm.dynamics.com/main.aspx?appid=0e0db68e-48e1-e911-a83x

UX 365 Hub Settings > Promotions > Test P

Save Save & Close + New Deactivate

Test Promotion

Promotion

General Notes Related

Name * Test Promotion

Start Date * 12/19/2019

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

The screenshot shows the 'Member Packages' menu on the left. The 'UX365 Benefit' item is highlighted with a red box. The right pane shows a list of benefits, including 'UX365 Membership Benefit', 'UX365 Test Benefit', 'UX Galley Membership', 'UX Galley Subscription', and 'UX365 Benefit' (highlighted). The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Click on the item **Rates**

The screenshot shows the 'UX365 Benefit' page. The 'Rates' tab is selected and highlighted with a red box. The page displays the 'Information' section for the benefit, including the 'Module' (UX Membership) and the 'Name' (UX365 Benefit). The left sidebar shows the 'Renewal Manager' section.

Select your desired Rate

The screenshot shows the 'UX365 Rate' page. The 'Rates' tab is selected and highlighted with a red box. The page displays a list of rates, including 'UX365 Rate' (highlighted). The left sidebar shows the 'Renewal Manager' section.

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

The screenshot shows the 'UX365 Rate' page. The 'Rate Level X-ref' tab is selected and highlighted with a red box. The page displays the 'Information' section for the rate, including the 'Name' (UX365 Rate) and the 'Rate Type' (Quantity). The left sidebar shows the 'Renewal Manager' section.

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

The screenshot shows a web application interface with a 'Run Report' dropdown menu. The menu is open, and the option 'Add New Rate Price Level X-ref' is highlighted with a red box. Other options visible include 'New Rate Price Level ...', 'Refresh', 'Price Level Terminated', and 'Non-Member'.

The Quick Create dialog opens on the right side of the window.

The screenshot shows a 'Quick Create: Rate Price Level X-ref' dialog box. The dialog has a red border and contains the following fields: 'Currency' (with a red asterisk), 'Price Level Active' (with a red asterisk), and 'Price Level Terminated' (with a red asterisk). Each field has a dropdown arrow next to it.

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**

The screenshot shows a web application interface with a 'Save & New' button highlighted by a red box. The button is located in the top right corner of the page. Below the button, there is a dropdown menu with the options 'Save & New' and 'Save this RapidPay and open a form to create'.

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 screenshot shows a web application interface with a form. The 'Batch' field is highlighted with a red box and contains the value '001117'. Other fields visible include 'Amount' (with a red asterisk) and 'CVV2'.

The currency type remains the same.

A screenshot of a web form with several input fields. The 'Currency' field is highlighted with a red rectangle and contains the text 'US Dollar' with a dropdown arrow. Other fields include 'Name', 'Expire Date (MMYY)', and 'Payment Product'.

The payment source also populates with the same information.

A screenshot of a 'New RapidPay' form. The 'Payment Product' field is highlighted with a red rectangle and contains the text 'Visa Credit Card Payment' with a dropdown arrow. Other fields include 'Customer', 'Credit Card No', and 'Expire Date (MMYY)'.

10.13. Refresh Cache and Refresh Metadata

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

A screenshot of a dashboard interface. On the left is a sidebar menu with items like 'Invoice Details', 'GoTransactions', 'Leads', 'Opportunities', 'Marketing Lists', and 'Quick Campaigns'. At the bottom of the sidebar, the 'My Work' button is highlighted with a red rectangle. The main area shows a bar chart for the year 2016 and a section titled 'Current Members' with a sub-section 'Current Members by Benefit Status'.

Click on the item **Settings**

A screenshot of the same dashboard interface. In the sidebar menu, the 'Settings' item is highlighted with a red rectangle. The main area remains the same, showing the 2016 bar chart and the 'Current Members' section.

Click on the item **Refresh**

Setting Name	Value
GPAccountingService.Url	http://accounti
MX.CancelShoppingCartXNbrDays	3
MX.GuestContact	---
MX.DeleteSessionXNbrDaysOld	1
PAAccounting.RunNightlyGLRefresh	true
PAAddress.DefaultCountry	US
PAAdvertisement.License	---
PAAzureFunctions.SecurityKey	0eIfmSRB3C6f
PAAzureFunctions.Url	https://qaux36

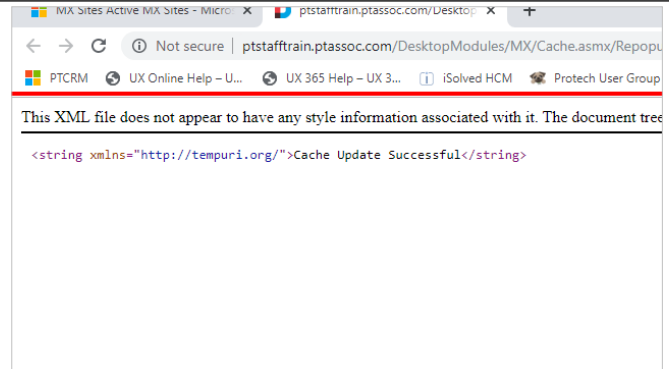
To run either the Refresh Caches or the Refresh Metadata utility, start by selecting a single MX Site record. Once a record is selected The Refresh Caches and Refresh Metadata buttons become available on the list view toolbar.

Click on the menu item **Refresh Caches**

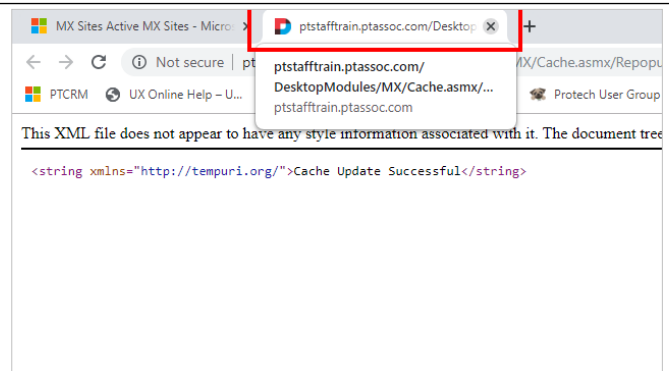
UX will display a blank dialog while it waits to connect to the selected site and runs the utility. Do not close this dialog, or you risk interrupting the utility. When the process is complete, UX will automatically close the blank dialog and display a new dialog with the results.

This process should be run after modifying any Advanced Find or setup data that is exposed to MX Online.

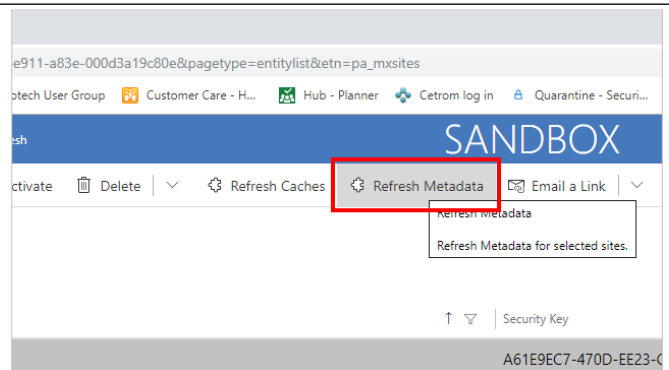
Once MX Cache has been refreshed a message of Cache Update Successful will show.



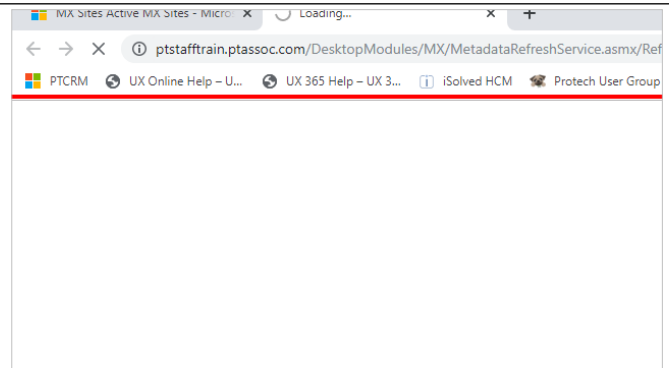
Once successful, close the tab.



Click on the menu item **Refresh Metadata**

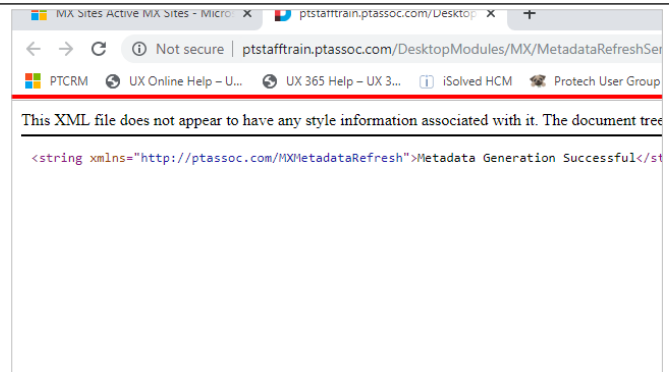


UX will display a blank dialog while it waits to connect to the selected site and runs the utility. Do not close this dialog, or you risk interrupting the utility. When the process is complete, UX will automatically close the blank dialog and display a new dialog with the results.



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.

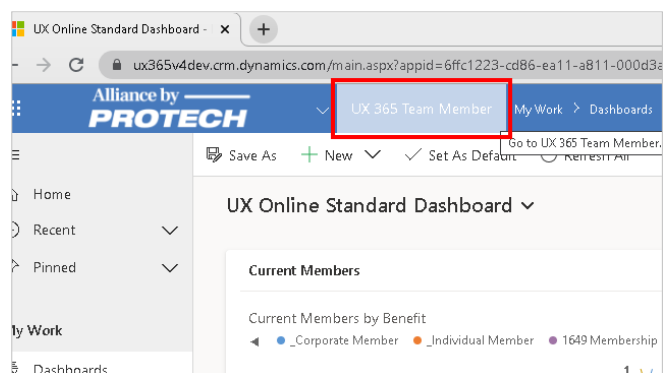


If you want to run both utilities while the same record is selected, you will have to wait to close the confirmation dialog box from the first utility before clicking the button to start the second utility. Each utility runs on one MX site record at a time. Therefore, if multiple MX Site records are selected, the utility will not run.

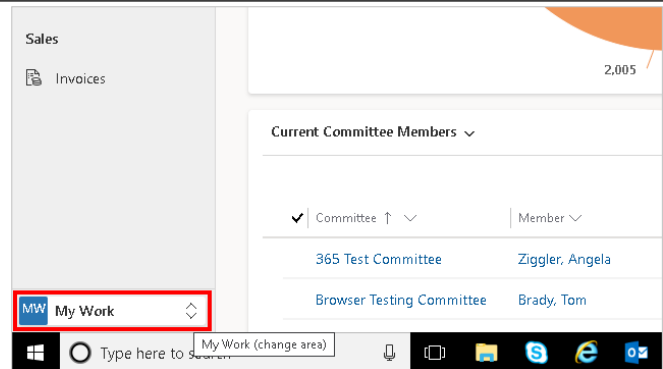
10.14. UX 365 Team Member App

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.

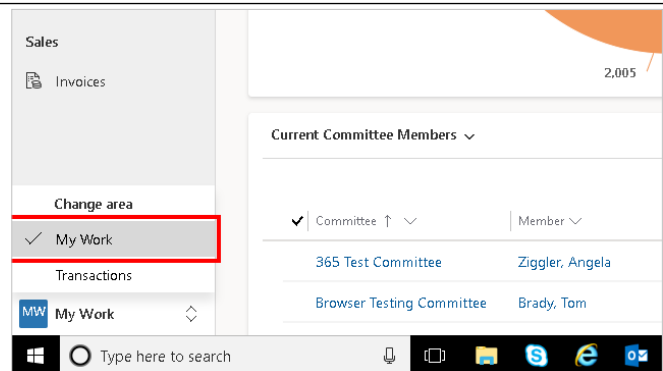
You will know that you are logged into the system as a Team Member when you see the UX 365 Team Member home button at the top navigation.



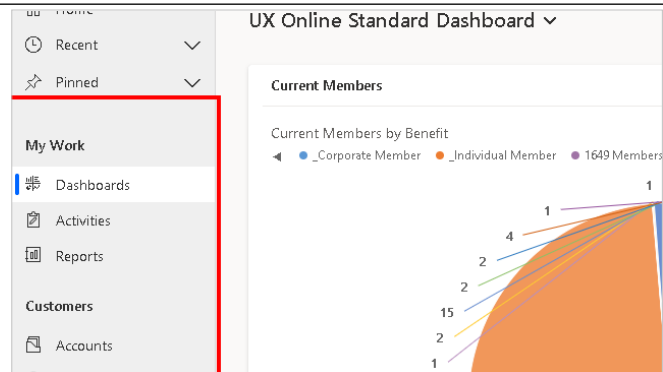
The UX 365 Team Member App features a more streamlined sitemap for navigation, including two different work areas in the sitemap. My Work and Transactions



Click on My Work

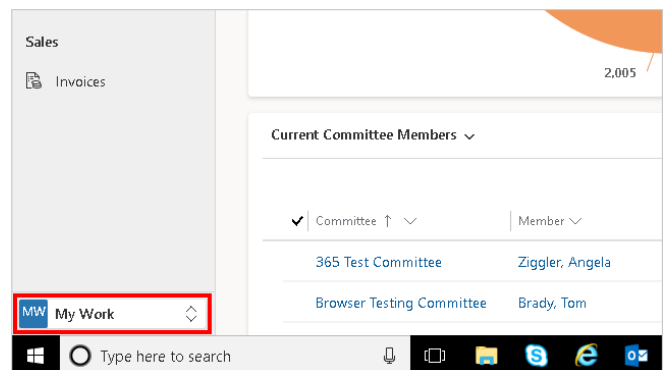


Entities available within My Work

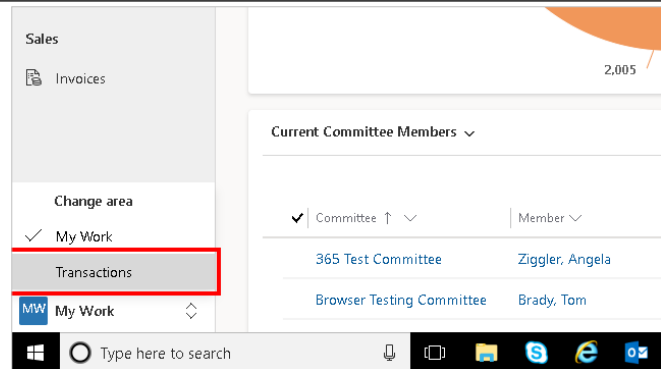


Access Rights to Contacts, Committee Members, Chapter Officers, Roster Members, Speaker Profile , Views, Dashboards, Activity Records, Notes, Reports will include create, read, update and delete. All other entities will be Read Only

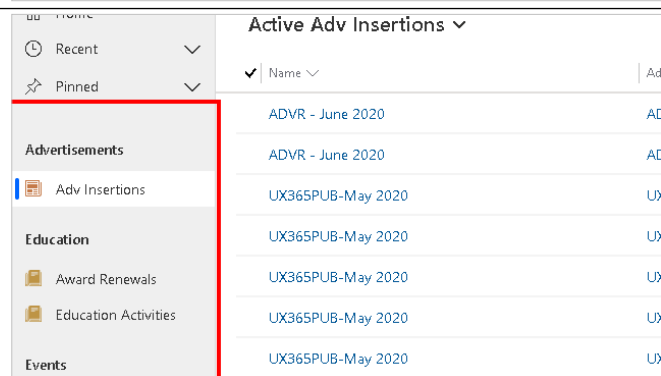
Click on the button **My Work (change area)**



Click on Transactions



Entities available within Transactions

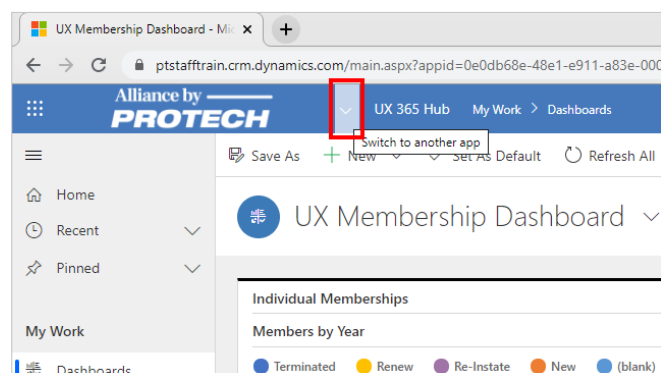


When will this happen? Protech will roll out this new app as Microsoft's technical enforcement of the Dynamics 365 Team Member license for partners is applied to U.S. Dynamics 365 customer tenants. This is expected to take place during the week of June 21, 2020.

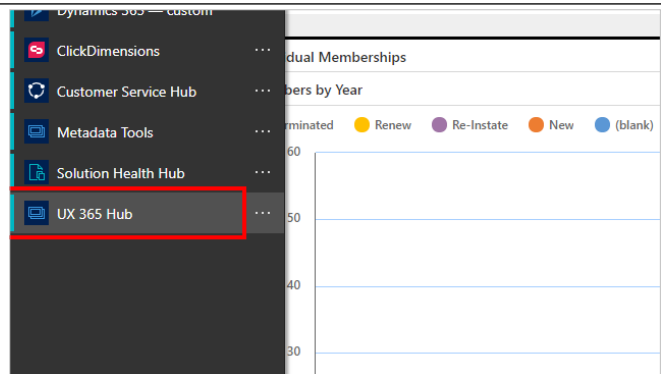
10.15. UX 365 Unified Client Interface Basics

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.

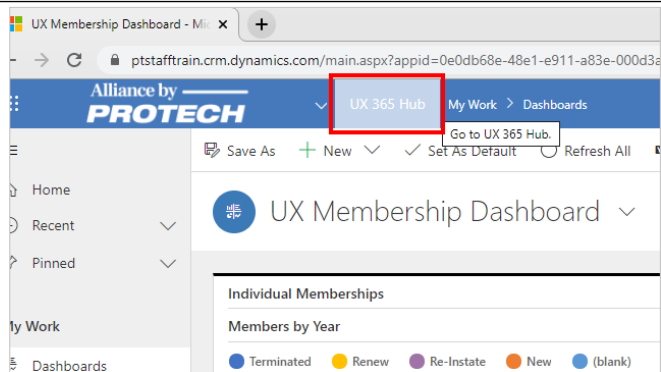
Click on the switch app button to change applications



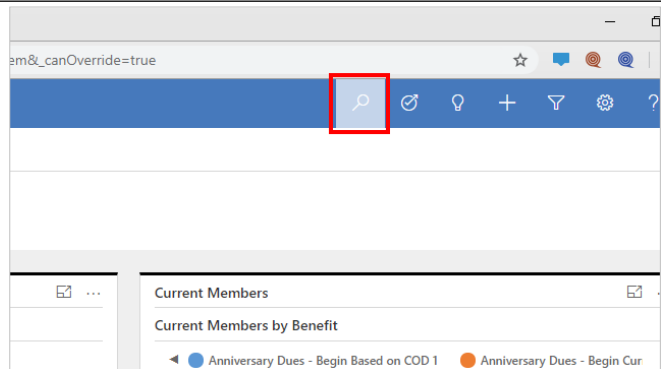
UX 365 Hub



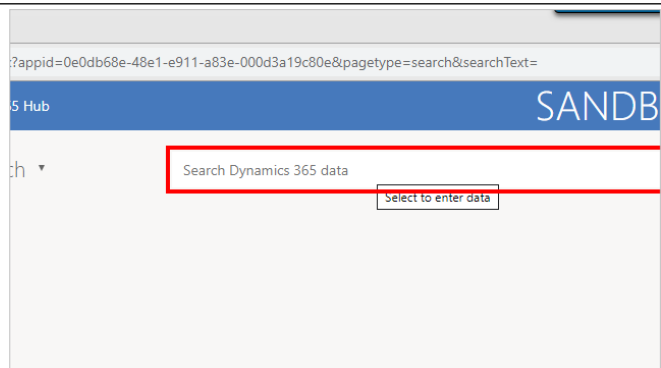
On the top command bar, you will find the navigational bread crumbs that allow you to quickly see where you are in the system



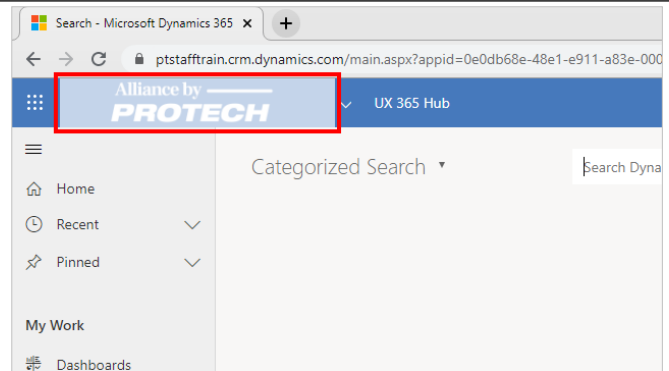
Search for records



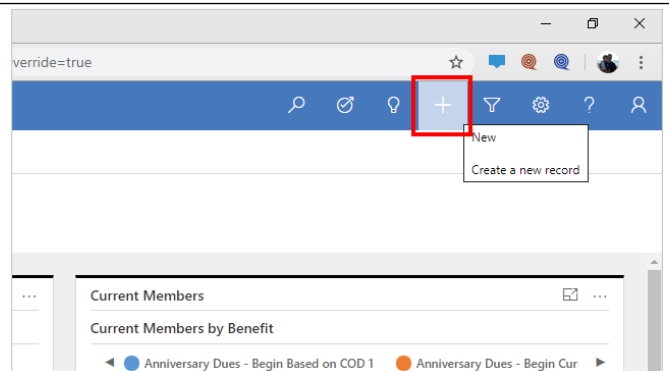
Enter search text here



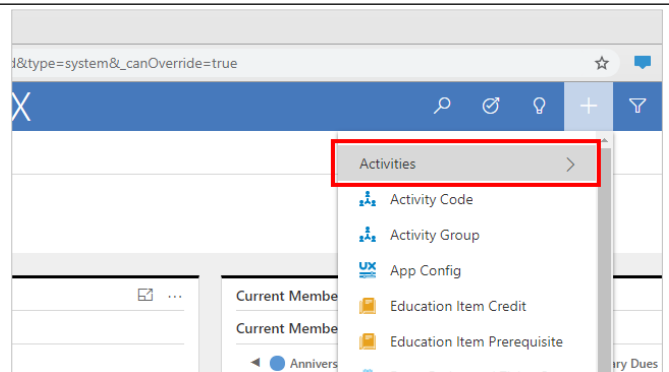
Click on the **home** button



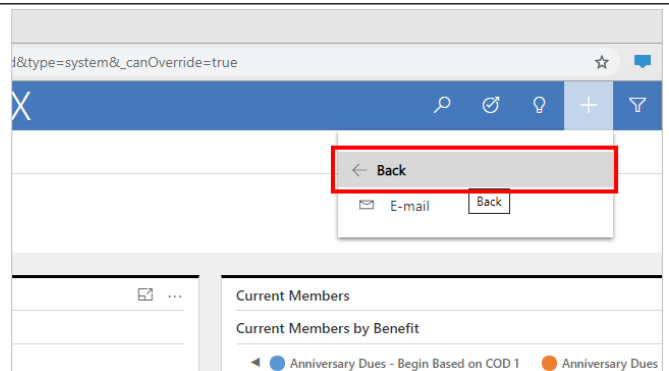
Quickly create a new record



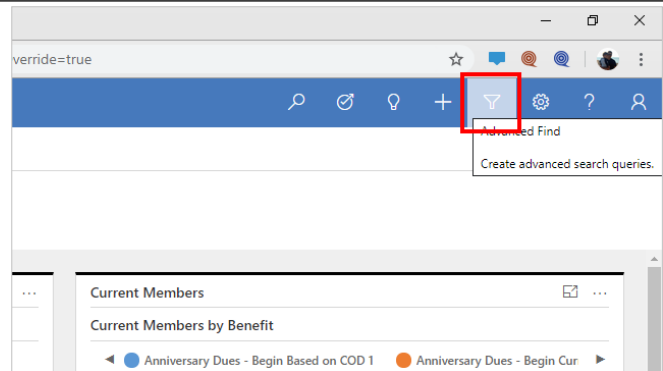
Click on the menu item **Activities**



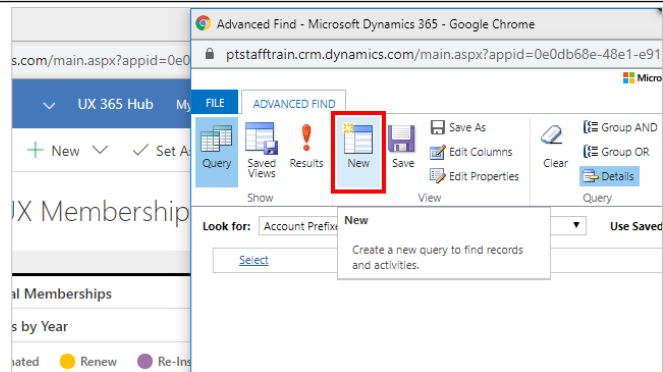
Click on the item **Back**



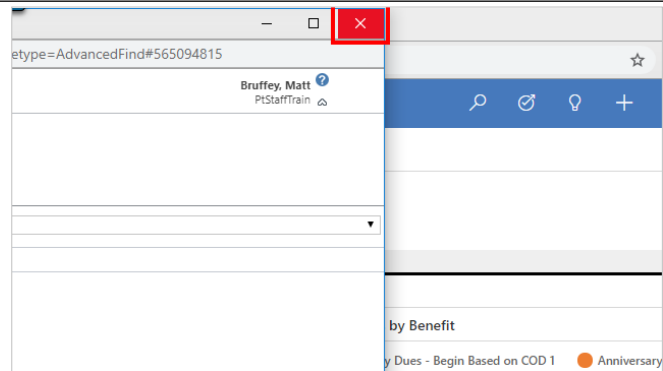
Click on the menu item **Advanced Find**



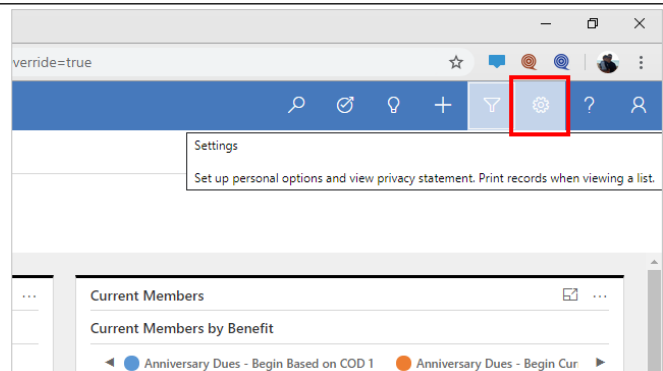
click here to create a new query



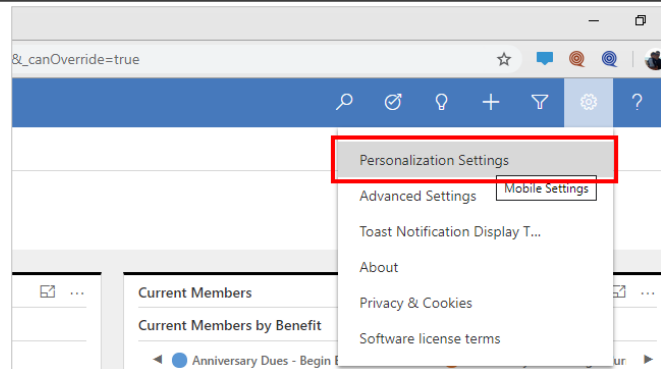
Click on the button **Close**.



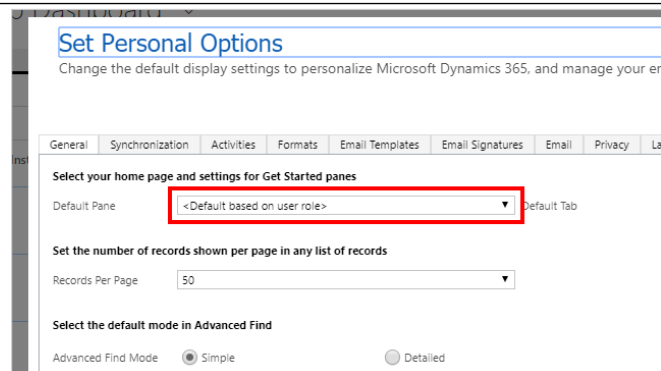
Click on the menu item **Settings**



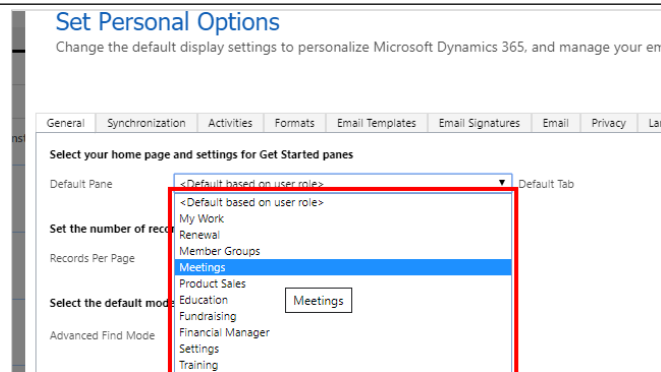
Click on the menu item **Personalization Settings**



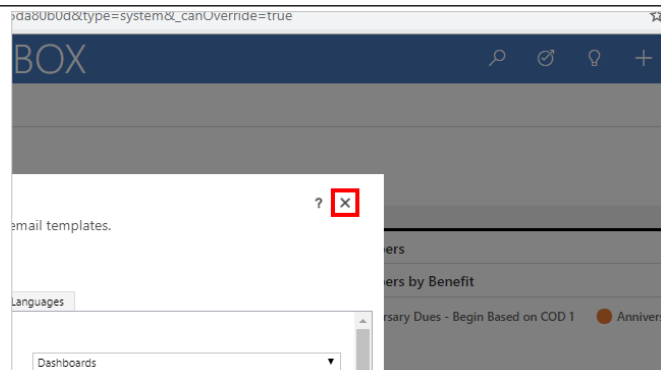
Configure your default home page



Click on an option from the list



Click on the link **Cancel**



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

The screenshot shows the Protech UX dashboard. On the left sidebar, the 'My Work' button is highlighted with a red box. The main area displays a bar chart for 'Current Members' by year (2016, 2017) and a table for 'Current Members by Benefit Status'.

Click on the item **Meetings**

The screenshot shows the Protech UX dashboard. On the left sidebar, the 'Meetings' item is highlighted with a red box. The main area displays a bar chart for 'Current Members' by year (2016, 2017) and a table for 'Current Members by Benefit Status'.

Click on the item **View Meeting Participants**

The screenshot shows the Protech UX dashboard. On the left sidebar, the 'View Meeting Participants' item is highlighted with a red box. The main area displays a bar chart for 'This Year's Meeting Registrations' and a table for 'Registration Count by Meeting'.

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

The screenshot shows the Protech UX dashboard. On the left sidebar, the 'Meetings (change area)' button is highlighted with a red box. The main area displays a table for 'Event Badges and Tickets' with columns for 'Members Only', 'Main Registration', and 'Lincoln'.

Click on the item **My Work**

The screenshot shows a navigation menu on the left with the following items: Session Waitlist View, Bulk Registration Ca..., Meeting Settings, Event Setup, Change area, **My Work** (highlighted), Renewal, Member Groups, Meetings (checked), and Product Sales. To the right of the menu is a list of registration types and names: Restricted Guest (Jacobs), Packaged Registration (Pettigrew), Members Only Guest (Snape), Members Only Guest (Brady), Members Only (Potter), Members Only (Jones), Members Only (Lincoln), Main Registration (Bacon), Main Registration (Gibbs), and Main Registration (Maxberry).

Click on the item **Contacts**

The screenshot shows a navigation menu on the left with the following items: Activities, Reports, Easy Print Reports, Customers, Accounts, **Contacts** (highlighted), Sales, Invoices, Invoice Details, and GoTransactions. To the right of the menu is a chart titled 'CountAll (Customer ID)' with a y-axis ranging from 0 to 50. The chart shows a single bar with a value of approximately 10.

Search for a Contact

The screenshot shows a search interface with a search bar at the top. The search bar contains the text 'Search for records' and a magnifying glass icon. Below the search bar is a table with the following columns: Address 1: City, Address 1: State/Pro..., and Created On. The table contains three rows of data:

Address 1: City	Address 1: State/Pro...	Created On
---	---	1/25/2019 11:00 AM
---	---	12/17/2019 10:40 AM
---	---	12/17/2019 9:28 AM

Open Contact record

The screenshot shows a search results page with the title 'Search Results'. Below the title is a table with the following columns: Full Name, Company Name, and a third column. The table contains three rows of data:

Full Name	Company Name	
Bruffey, Matt K	---	
Bruffey, Matt S.	Protech Ass	
Bruffey, Matt S.		

Click on the item **Summary**

The screenshot shows the 'Alliance by PROTECH' interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, and Activities. The main content area displays the contact 'Bruffey, Matt S.' with a sub-tab 'Contact - Contact'. Below this, there are four tabs: Summary, Details, Files, and Related. The 'Summary' tab is currently selected and highlighted with a red box. The 'CONTACT INFORMATION' section shows 'First Name' as 'Matt' and 'Last Name' as 'Bruffey'.

Click on the item **Details**

This screenshot is similar to the previous one, but the 'Details' tab is now selected and highlighted with a red box. The 'CONTACT INFORMATION' section remains visible, showing 'First Name' as 'Matt' and 'Last Name' as 'Bruffey'.

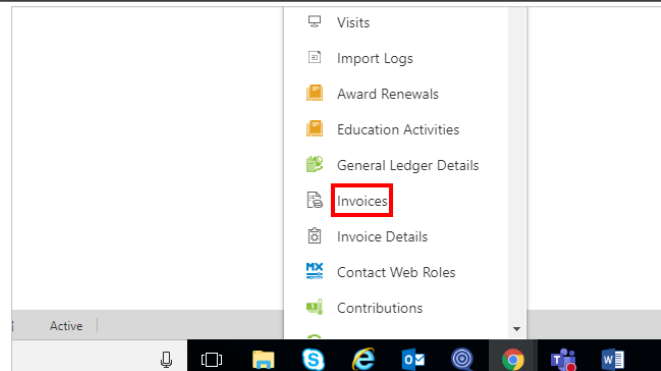
Click on the item **Files**

The screenshot shows the 'Files' tab selected and highlighted with a red box. The 'PERSONAL' section is visible, showing 'Gender' as '---' and 'Marital Status' as '---'.

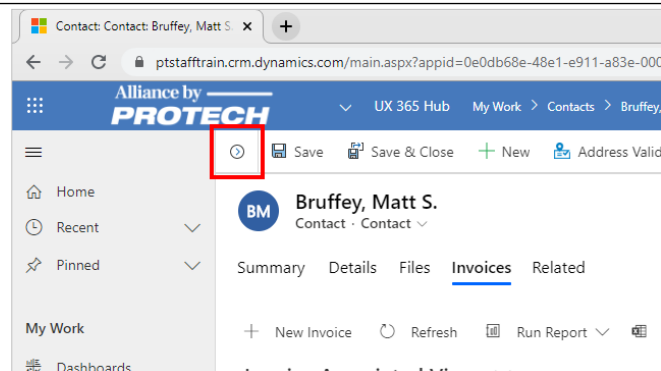
Click on the item **Related**

The screenshot shows the 'Related' tab selected and highlighted with a red box. The 'Document Associated Grid' section is visible, showing a dropdown arrow.

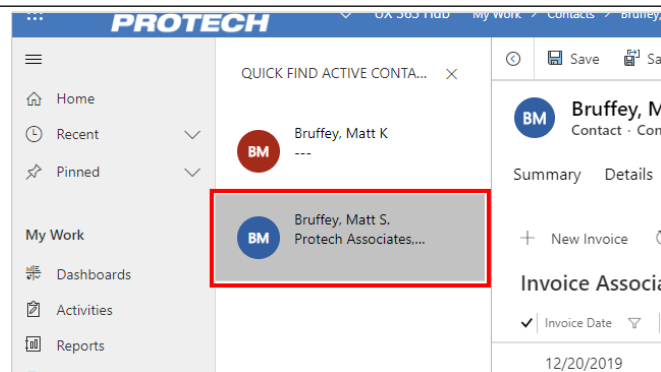
Click on the menu item **Invoices**



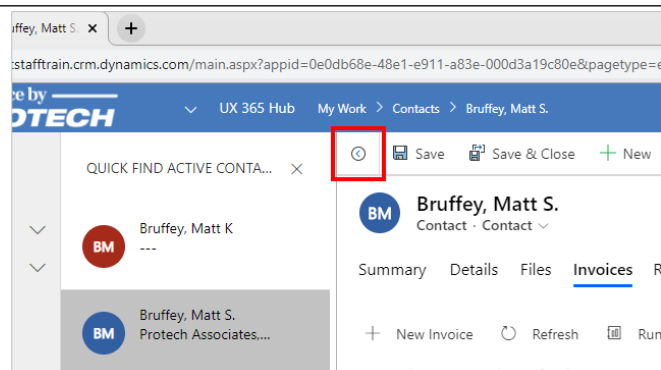
Click on the link Record set navigator that allows you to quickly access other Contact records



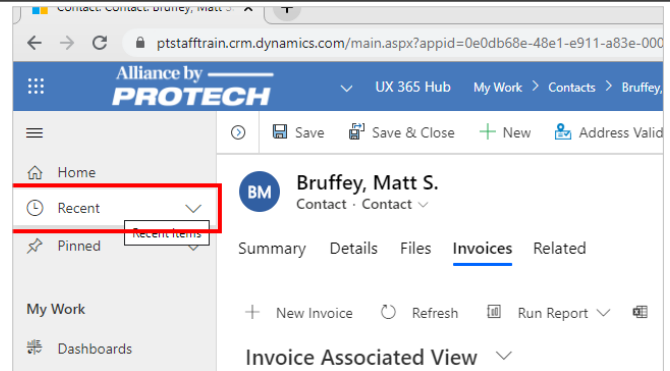
Click on a Contact



Close navigator

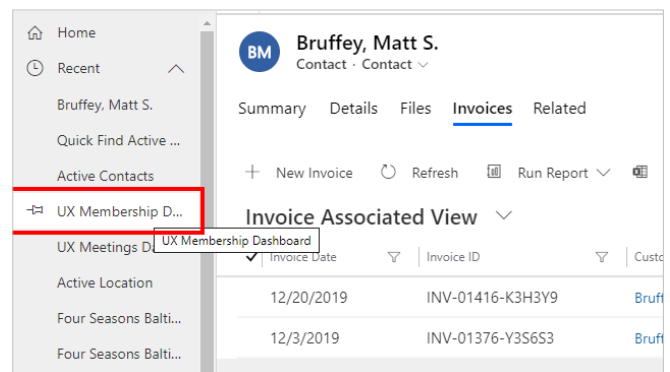


Click on the item **Recent items**

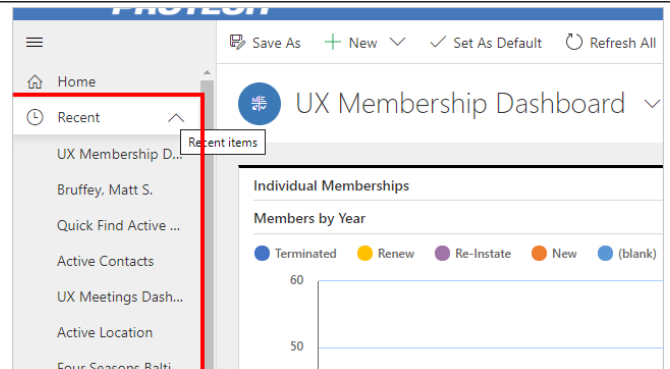


Recent items allows you to quickly access areas of the system you previously navigated to

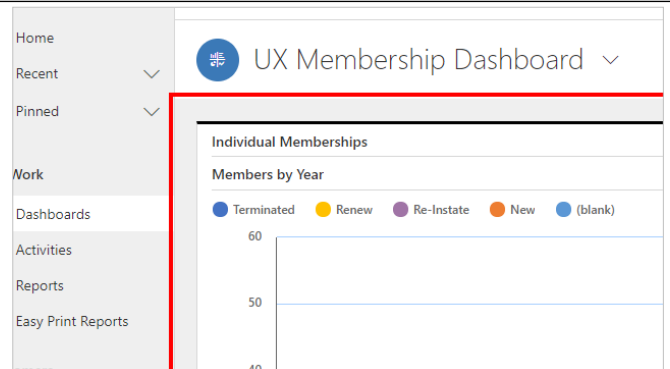
Click on a recent item



Close recent items panel



This concludes the navigational tour of the UX 365 Unified Interface. Enjoy



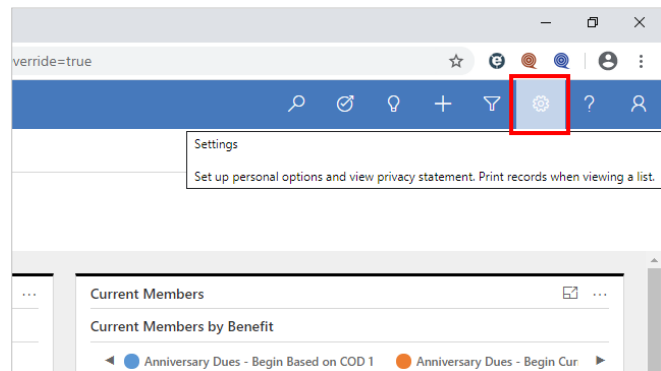
10.16. UX Security Roles

10.16.1. UX Security Roles

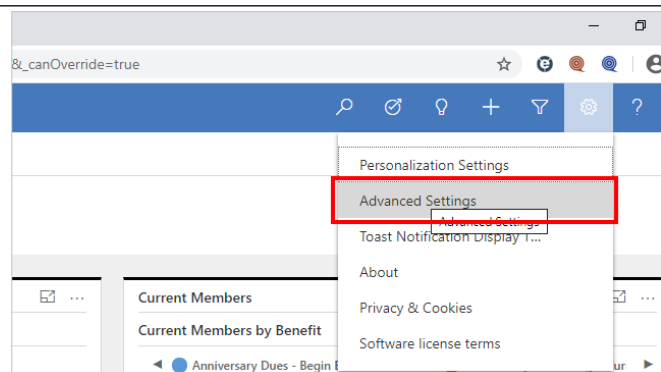
Security roles simplify assigning the privileges and access levels to users

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

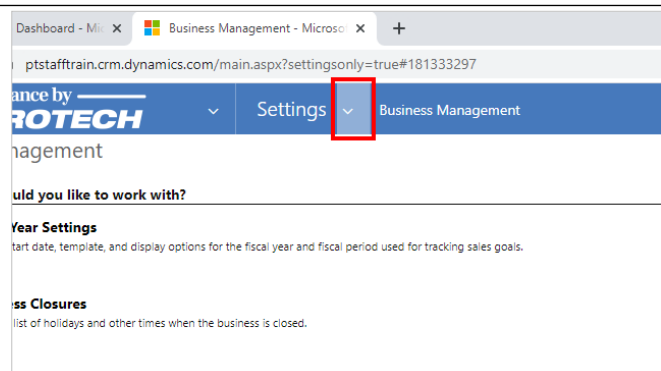
Click on the menu item **Settings**



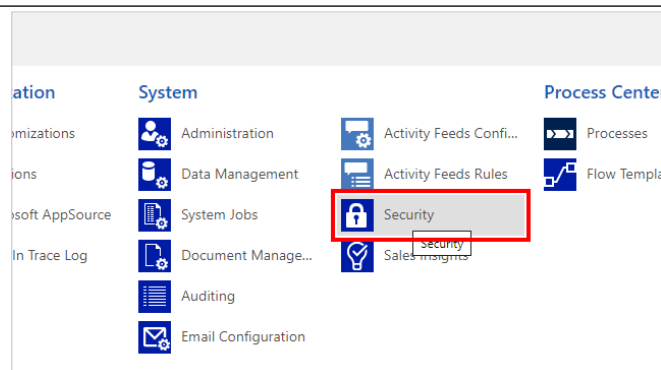
Click on the menu item **Advanced Settings**



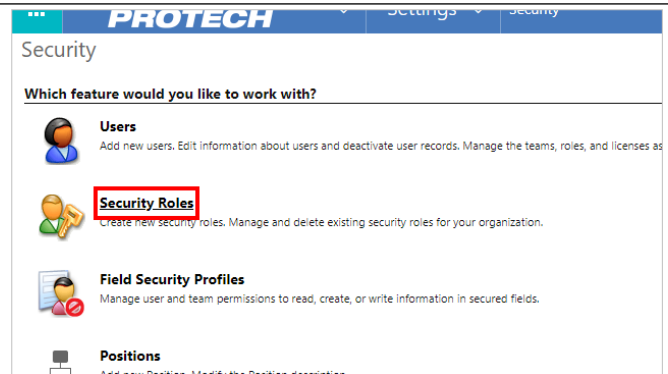
Click on the navigation button **Settings**



Click on the link **Security**



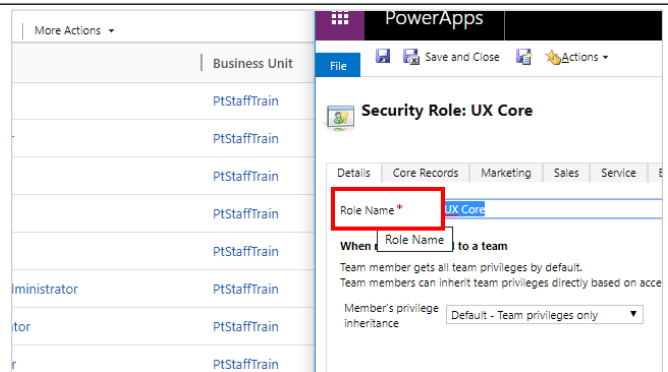
Click on the link **Security Roles**



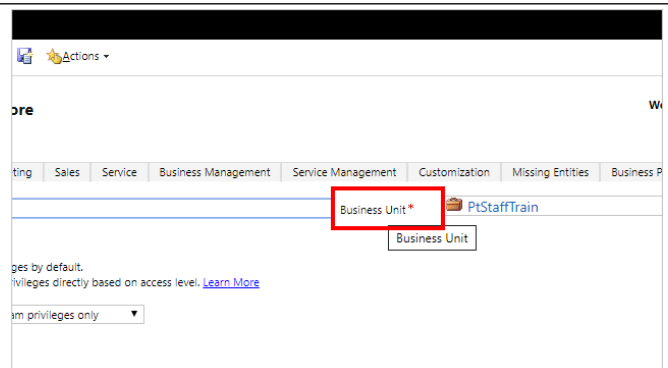
Select a Security Role you would like to view

System Customizer	PtStaffTrain
UX Accounting Manager	PtStaffTrain
UX Administrator	PtStaffTrain
UX Chapter Manager	PtStaffTrain
UX Committee Manager	PtStaffTrain
<input type="checkbox"/> UX Core	PtStaffTrain
UX Fundraising Manager	PtStaffTrain
UX Fundraising User	PtStaffTrain
UX Meeting Manager	PtStaffTrain
UX Meeting User	PtStaffTrain

Role Name is the name of the Security Role

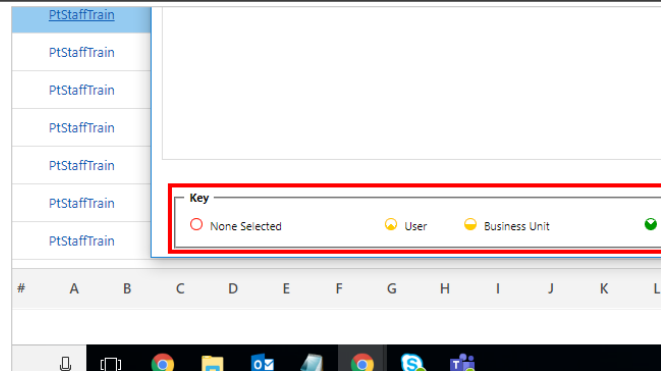


This is the Business Unit



Business Unit is any user who is in the same business unit as a record's owner can perform the action on that record.

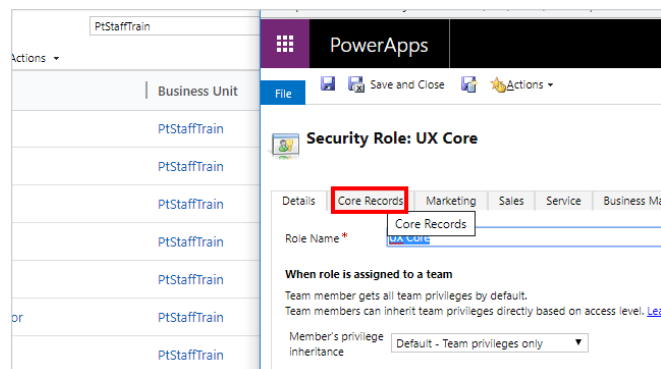
This the key which shows that different access levels for each Security Role



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



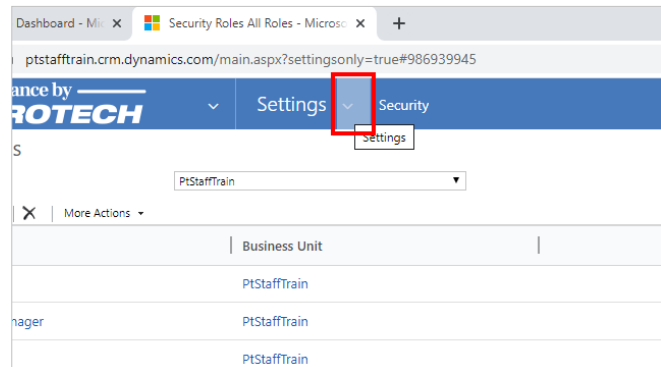
This table shows the the entity and its Privileges, each privilege has its own access level.

Security Role: UX Core					
Details Core Records Marketing Sales Service Business Management Serv					
Entity	Create	Read	Write	Delete	
Account	●	●	●	●	
ACViewMapper	○	○	○	○	
Action Card	○	○	○	○	
Action Card User Settings	○	○	○	○	
Activity	●	●	●	●	
Advanced Similarity Rule	○	○	○	○	
Announcement	●	●	●	●	
Application File	○	●	○	○	
Azure Service Connection	○	○	○	○	
Category	○	○	○	○	

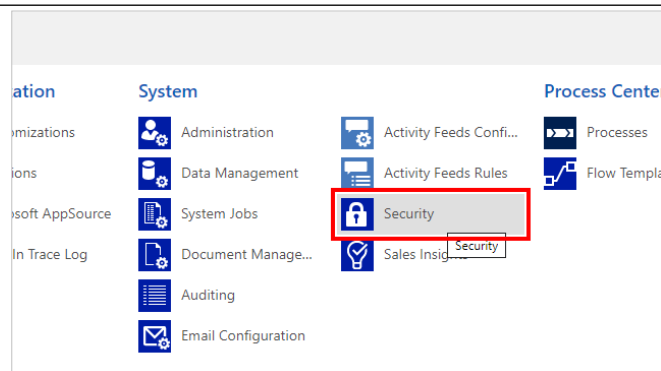
Privileges include the following actions: □ Create – Add a new record. □ Read – View a record. (Some UX processes use this privilege.) □ Write – Edit an existing record. (Some UX processes use this privilege.) □ Delete – Delete a record. (Some UX processes use this privilege.) □ Append – Attach another 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

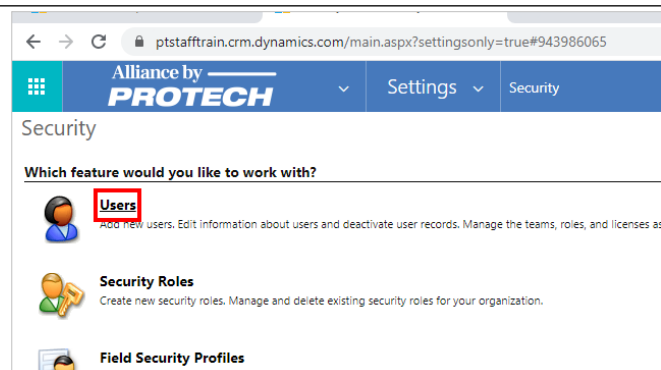
Click on the navigation button **Settings**



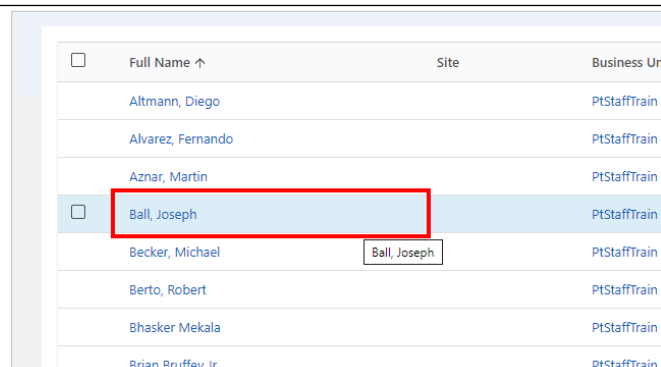
Click on the link **Security**



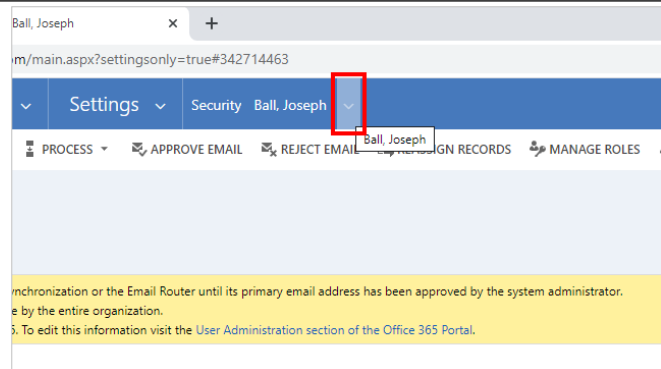
Click on the link **Users**



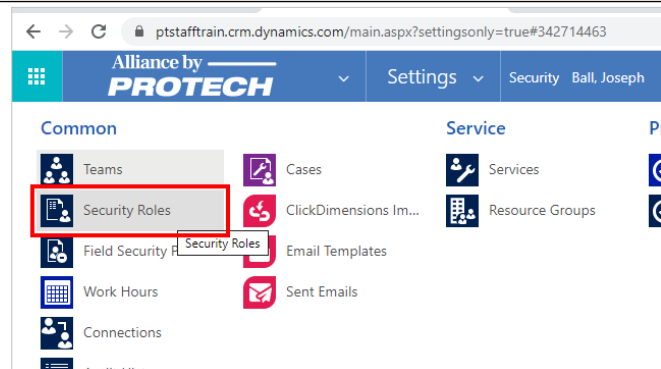
Double click on the User you would like to select



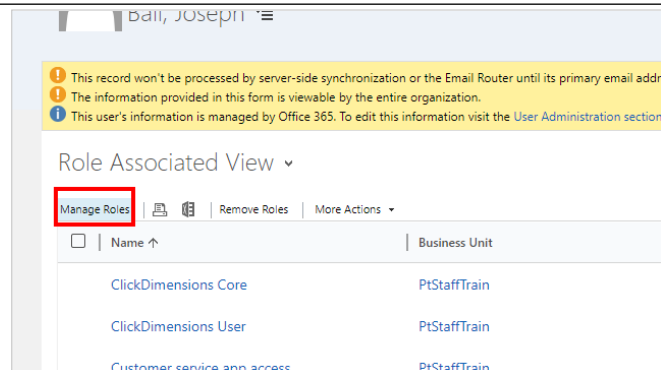
Click on the navigation button for the user



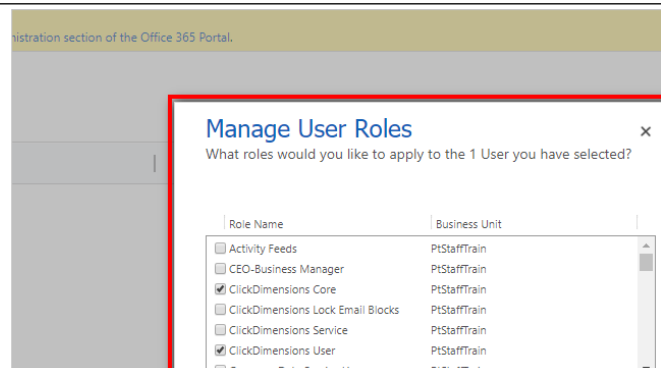
Click on the link **Security Roles**



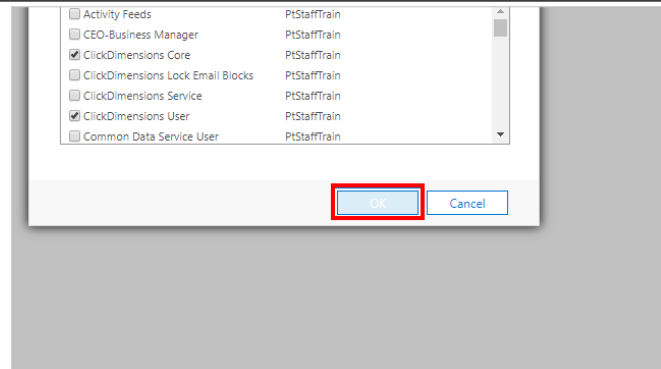
Click on Manage Roles to assign Security roles to the user



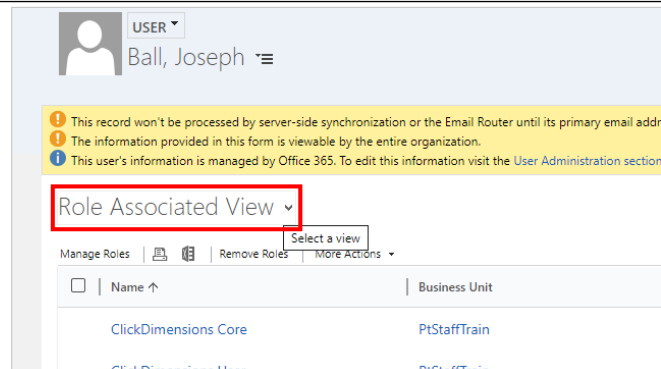
Check the box next to the Security Role to sign to the User



Click on the button OK to confirm these changes

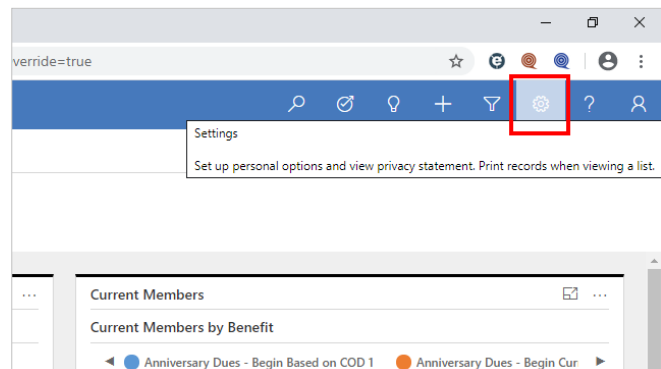


This shows the System Views for this User

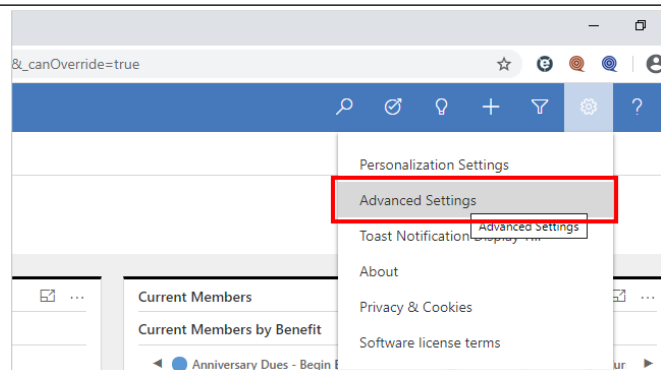


10.16.3. UX Security Roles-Copy a New Security Role

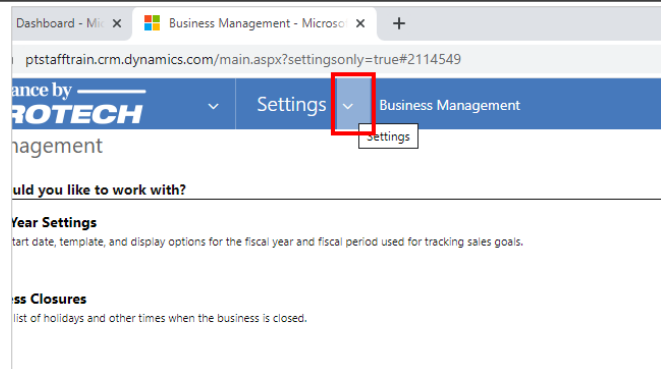
Click on the menu item **Settings**



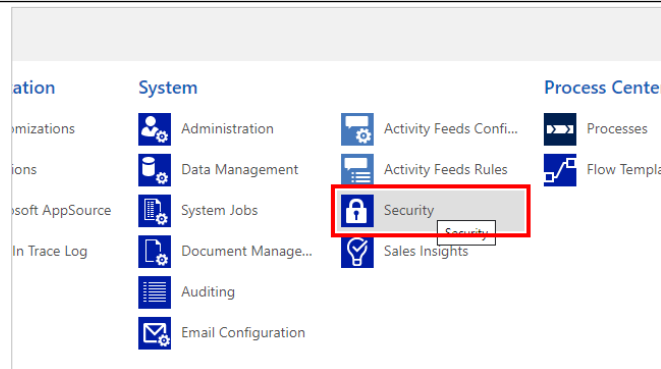
Click on the menu item **Advanced Settings**



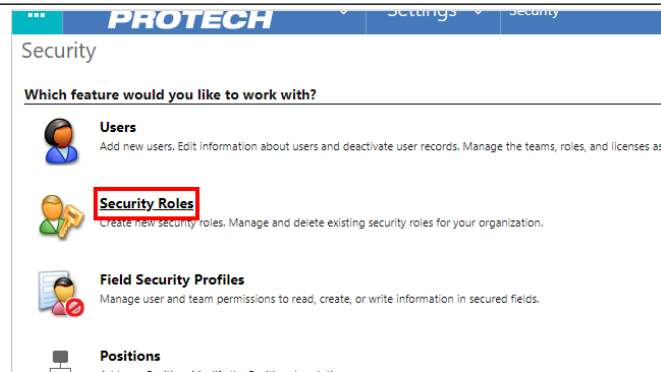
Click on the navigation button **Settings**



Click on the link **Security**



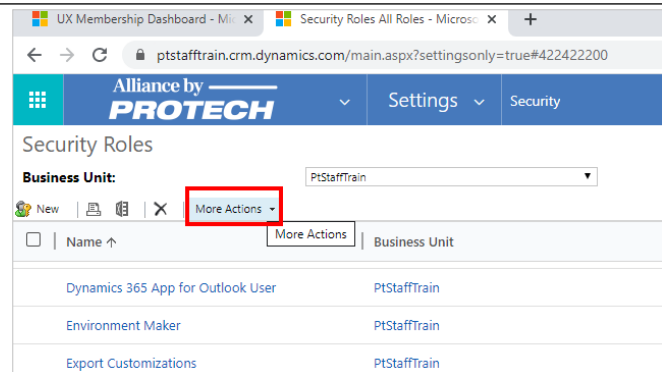
Click on the link **Security Roles**



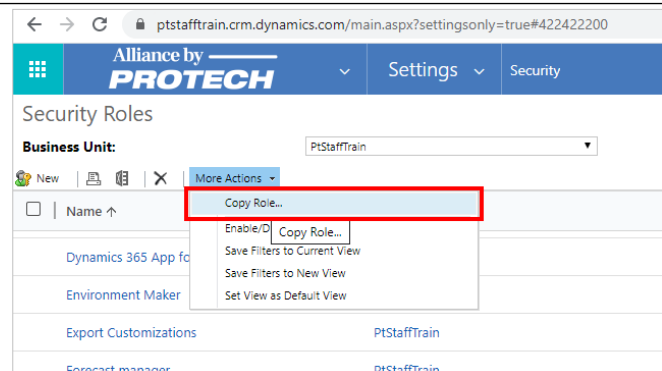
Select the Role you would like to copy

<input type="checkbox"/>	Help Page Consumer	PtStaffTrain
<input type="checkbox"/>	Knowledge Manager	PtStaffTrain
<input type="checkbox"/>	Marketing Manager	PtStaffTrain
<input type="checkbox"/>	Marketing Professional	PtStaffTrain
<input type="checkbox"/>	MX Shopping Cart User	PtStaffTrain
<input checked="" type="checkbox"/>	MX User	PtStaffTrain
<input type="checkbox"/>	Playbook Manager	PtStaffTrain
<input type="checkbox"/>	Playbook User	PtStaffTrain
<input type="checkbox"/>	Relationship Insights Admin	PtStaffTrain
<input type="checkbox"/>	Sales Manager	PtStaffTrain

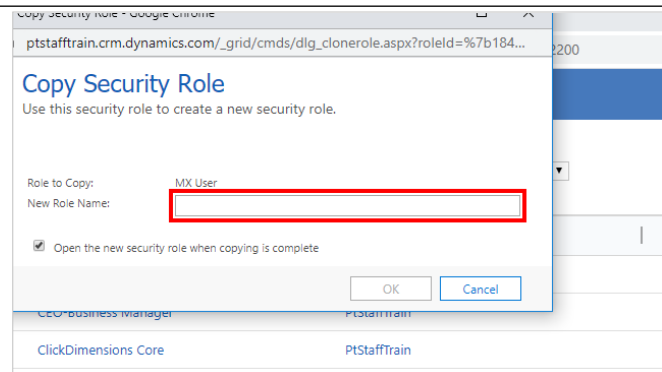
Click on the link More Actions



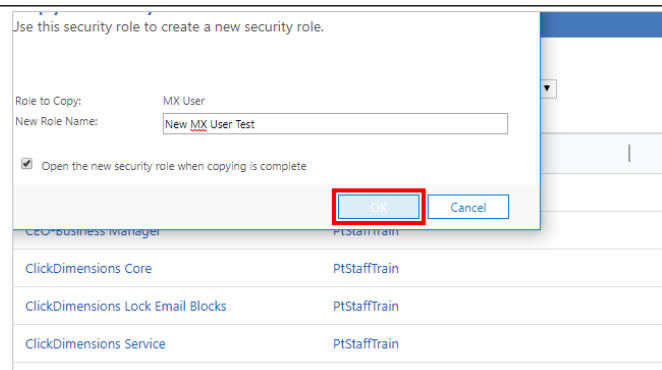
Click on the item **Copy Role...**



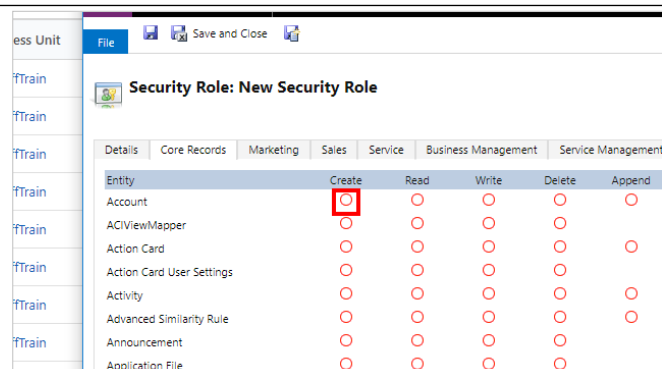
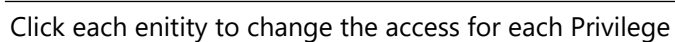
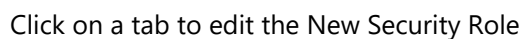
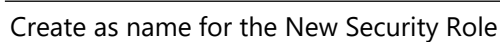
Create a name for the new Security Role



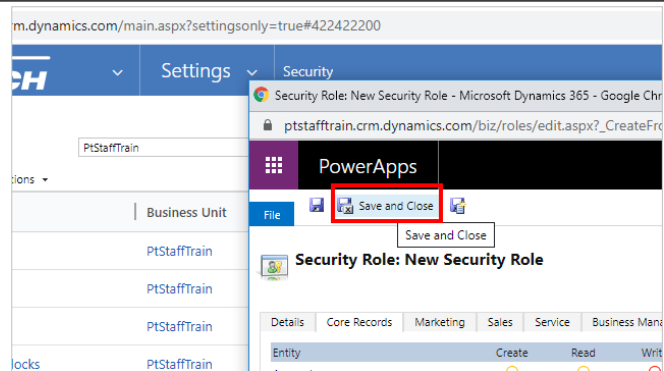
Click OK to create the new Security Role



Click on the link **New**



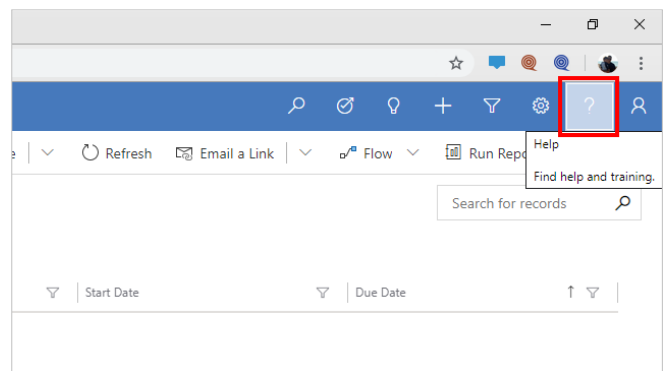
Move the mouse to the link **Save and Close**



10.17. What's New in UX 365 Help

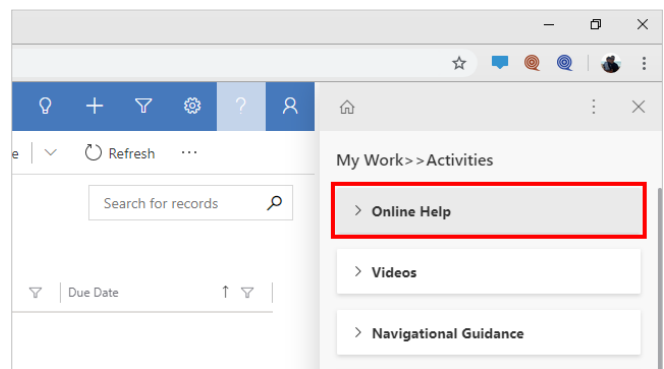
UX 365 help now combines HTML, Videos, PDF's and Dynamic Learning to assist our users in learning the feature rich set of tools available in UX 365. All of this is just one click away.

Click on the menu item **Help**

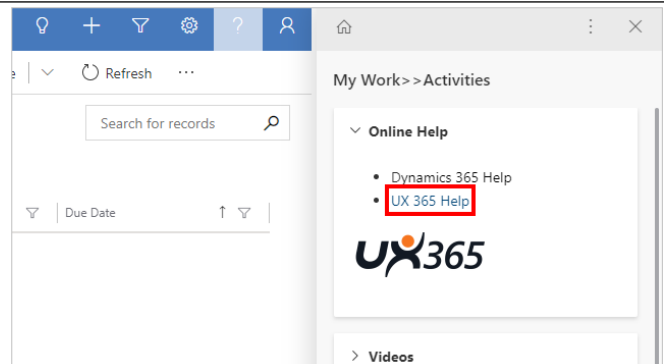


Here you will find several drop down menus containing a variety of learning materials

Select the drop down, Online Help



Click on the link **UX 365 Help**

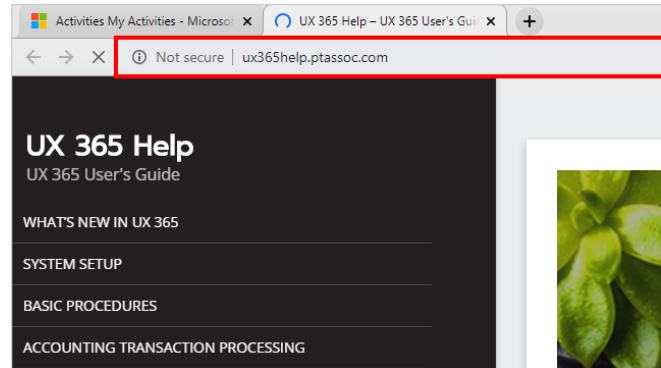


UX 365 Help contains all the documentation for the UX specific modules and features. For example, functionality regarding

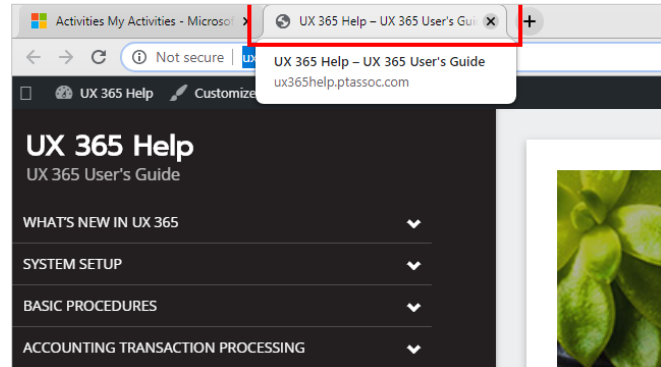
Membership, Accounting, Meetings and Product Sales. As well as much more

The URL is as follows:

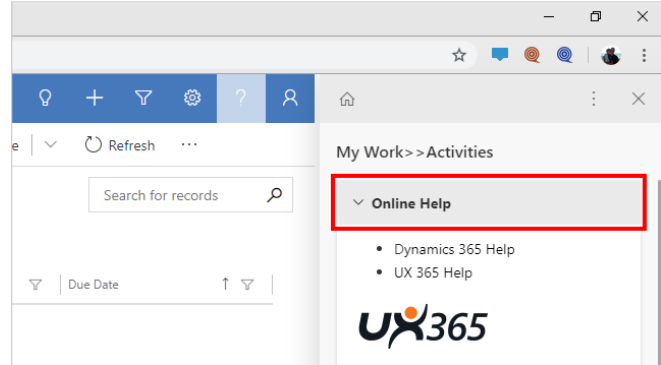
ux365help.ptassoc.com



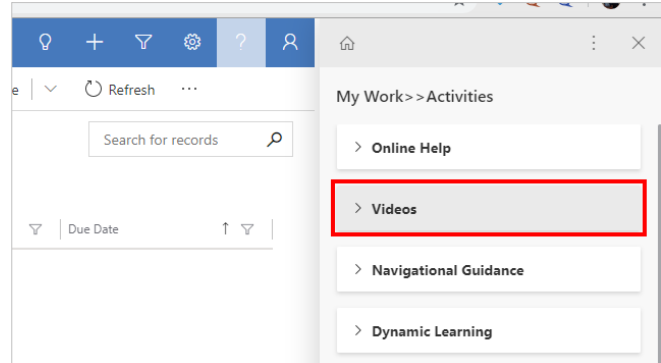
Close out of UX 365 Help



Close the Online Help section

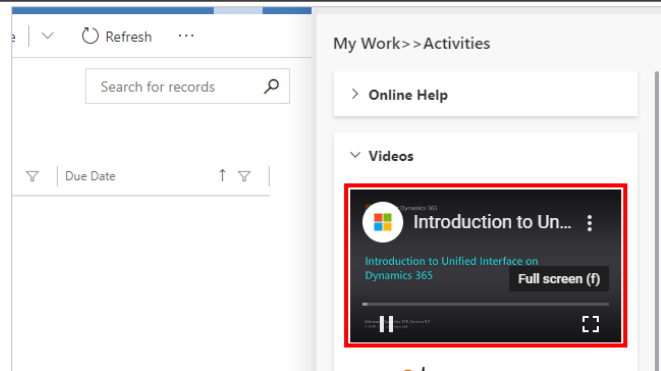


Select the drop down, Videos

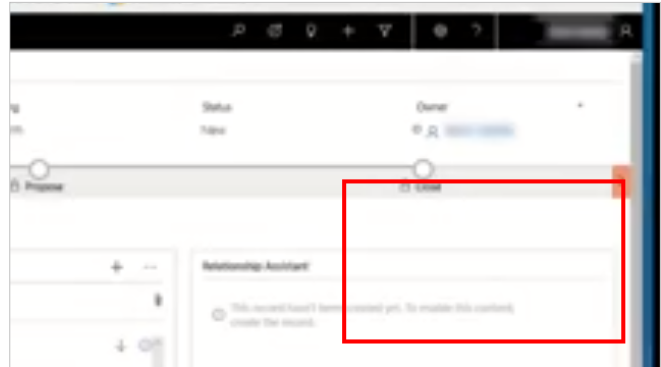


Here you will find any relevant videos based on where you are in the system

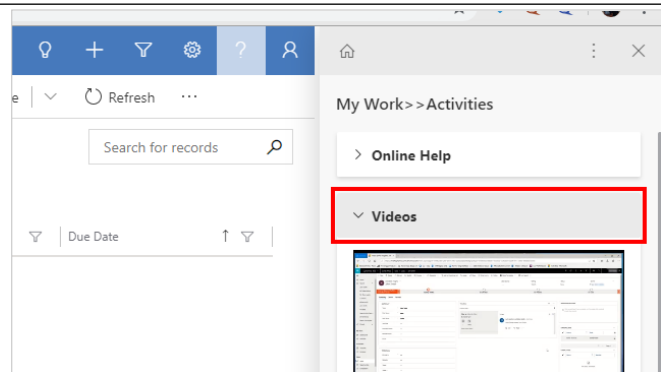
You can play the video within the panel or you can expand the video for a better picture



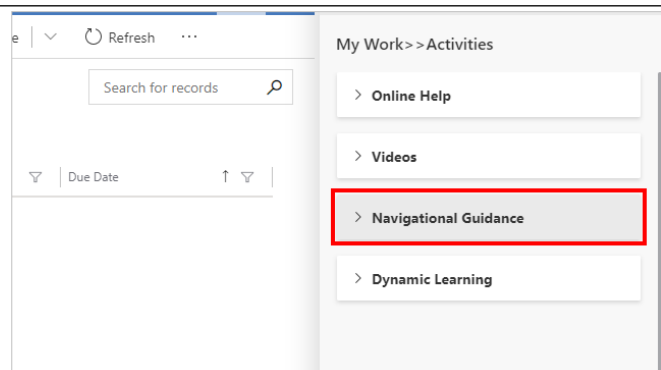
To Exit the video, press the Esc key



Close the video section

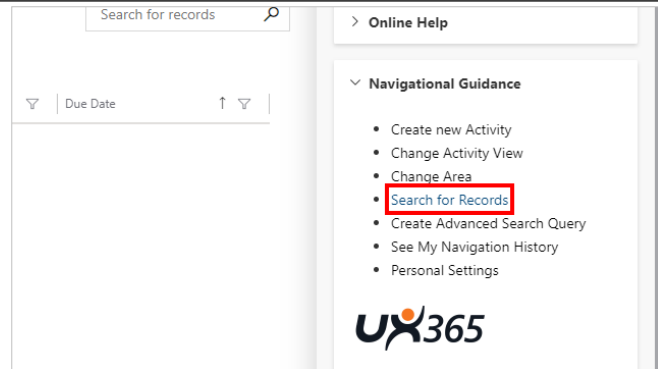


Select the menu, Navigational Guidance



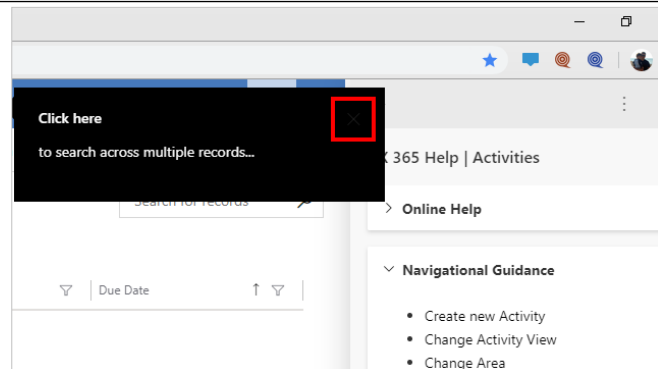
The options found here will quickly direct you to the area of the system you need access to. Once you click a menu item, the system will display a directional button telling you where to go

Click on the link **Search for Records**

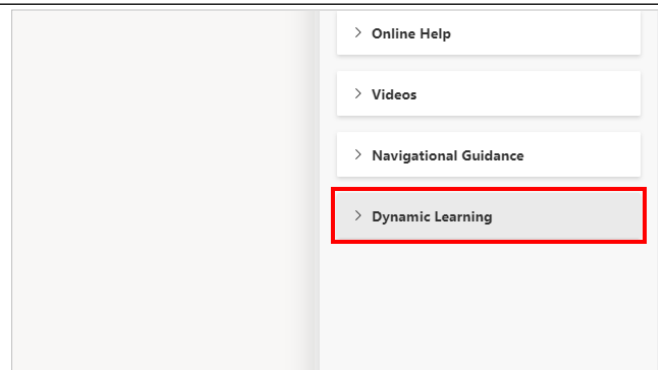


Close prompt

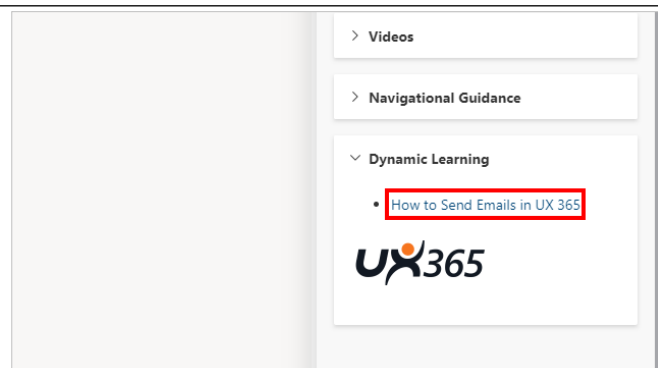
Notice the black and white message prompt that directs the user to the Search



Select the menu, Dynamic Learning

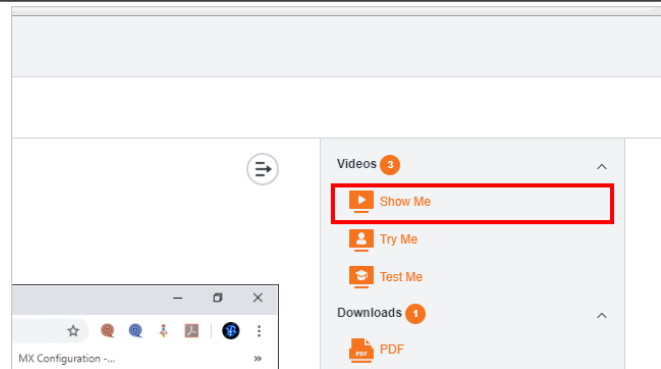


Click on the link **How to Send Emails in UX 365**



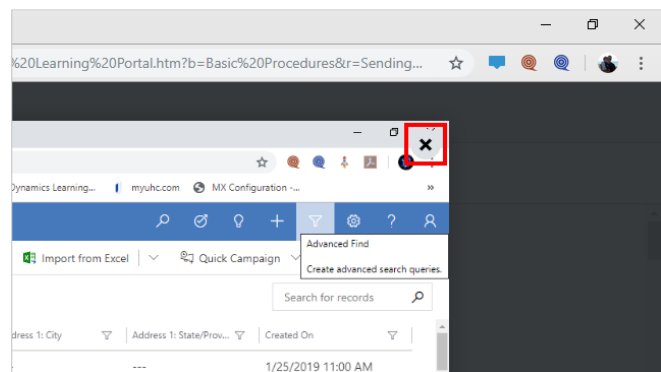
You are now in the Protech Learning Portal. This consists of all of Protech's dynamic learning content. These learning materials allow you to learn the specific subjects you are interested in via HTML, Video and downloadable PDF's. Look to the right hand side for all your options OR simply scroll the HTML to view the information you need

Click on the link **Show Me**

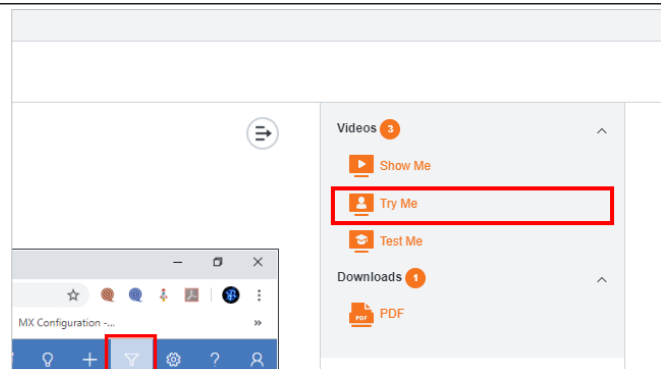


Show me will trigger a video which will take you through the subject material step by step

Close Video

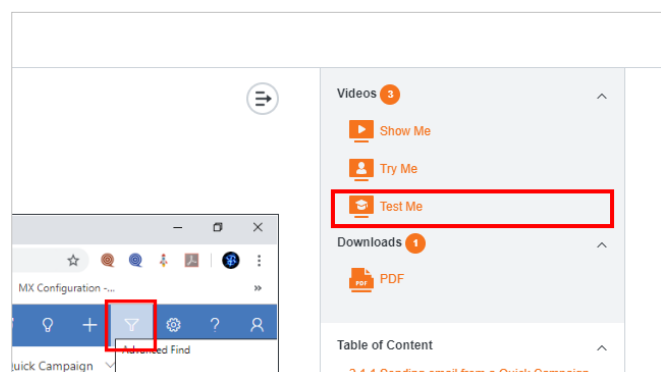


Click on the link **Try Me**



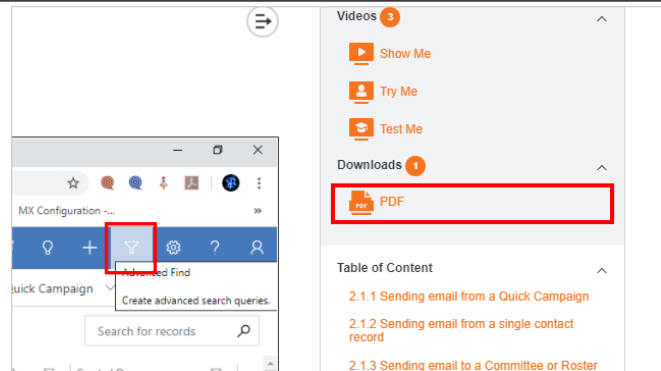
Try Me will trigger a video as well. However, this time the video will direct you where to click within the video step by step to encourage greater learning retention

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.

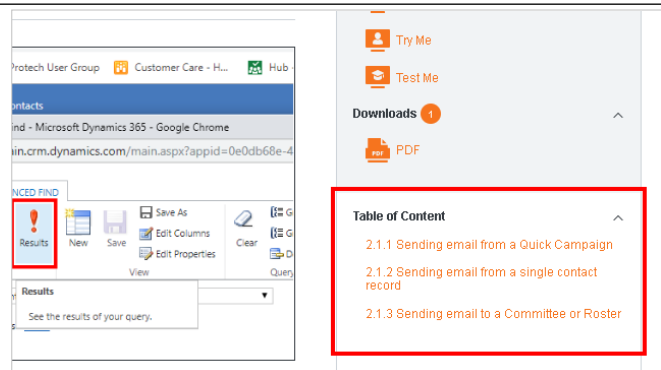
Click on the link **PDF**



Selecting the PDF option allows users to download and save the learning material to their workstations or wherever device they are working with

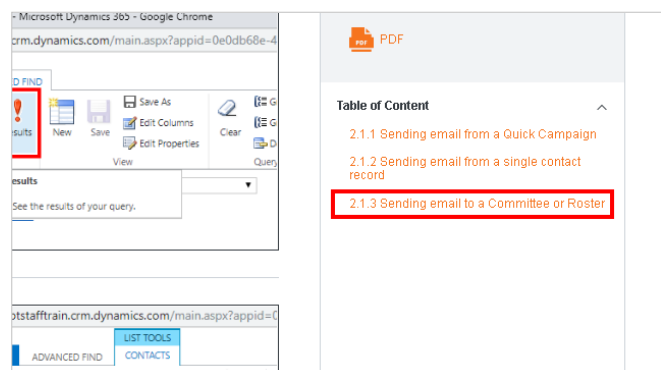


Table of Contents



Here you can quickly jump through the HTML page to get the information you need quickly

Click on a link



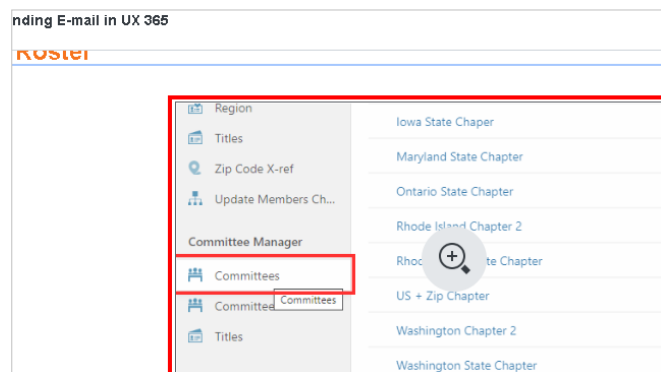
The hyperlink jumps to the section you clicked on

2.1.3 Sending email to a Committee or Roster

Click on the item **Committees**

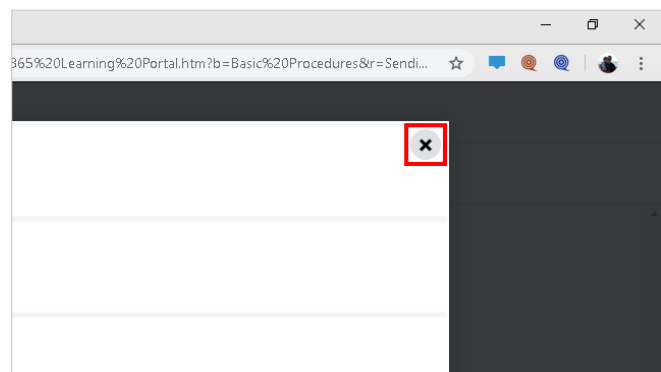
You can get a closer look at any of the images by clicking on the magnifying glass in the center of the image

Click on the image

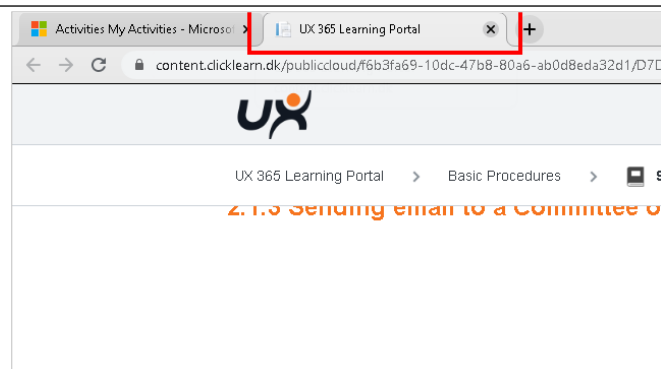


The image becomes much larger and easier to read

Close window



Close window



Close UX 365 Help

This concludes the review of the UX 365 Help learning tools.

Enjoy and happy Learning!

