netFORUM Pro

## Release Notes

Contents

What's New in netFORUM Pro 2015.1

General Updates

HTML Editor

The e-marketing, website, and product setup areas have a new html editor. The new editor features an array of tools for formatting and styling text, editing a document's source code, quickly creating numbered and bulleted lists, adding tables, inserting images, and adding hyperlinks to your messages and website content.

The toolbar buttons on the html editor have icons to easily identify their functions. However, if you are not sure what function a button performs, point to the button to see a tool tip.
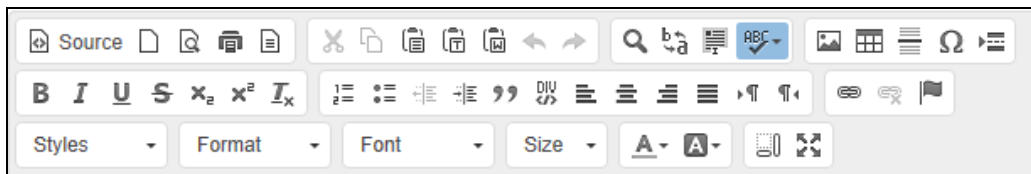
Notes:

The **Show HTML** check box that was used to toggle between text and HTML source view is replaced by the **Source** ⟨⟩ Source button on the new html editor's toolbar.

The **Full Screen** button is replaced by the **Maximize** ⤢ button on the new html editor's toolbar.
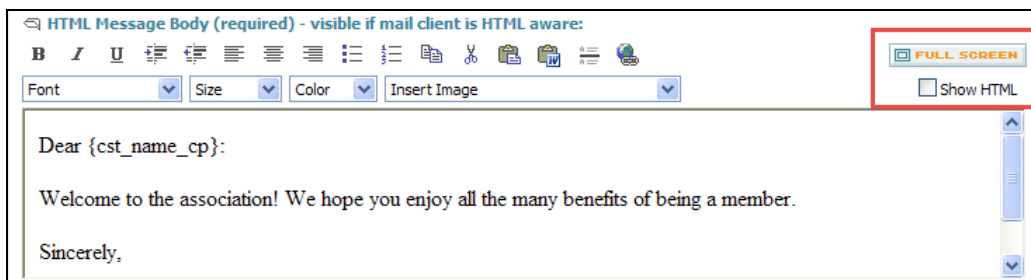
User Interface

The netFORUM Pro user interface features a new color scheme and updated logos.

Note: Due to the extensive number of topics in the Online Help, help topics and screen shots will continue to be updated in future releases with the new color scheme and logos.

Shopping

The **Check out with PayPal** button has been removed from the Shopping Cart. To use PayPal, customers proceed to Checkout and select **PayPal** from the **Payment Information** box.

Customer Support

Customers can chat online with an Abila Customer Support expert from 8:00 am to 5:00 pm CT, Monday through Friday. Open the support chat page by clicking on the **Chat Online** link on the netFORUM Pro sign in page.
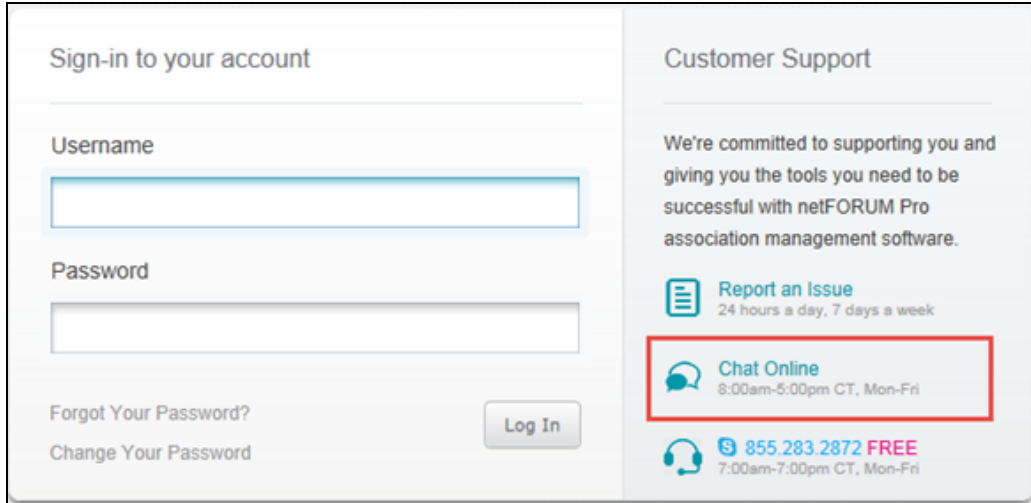
Or, open the page from anywhere in the application by clicking on the Help icon in the top navigation bar, and then clicking on **Support Chat**.

Issues Addressed in netFORUM Pro 2015.1

The following issues are addressed in Build 2015.1.

Tip: Use the number associated with each issue to look up the issue in the Abila **Support Portal**.

Accounting

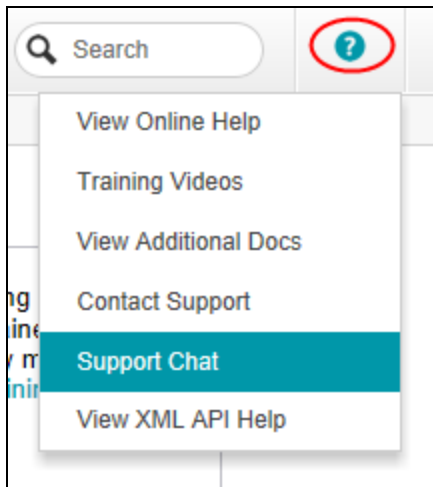| Issue #	Description
9548	Credit can be applied to an installment order.
10776	Both the show fee and the booth fee will change to a member fee when purchasing a membership with a show and a booth.
10787	When applying a mass payment for an organization, the system will show the organization's billing address on the billing information page.
11726	A **Generate Late Fees** process runs for all scheduling options.
11994	The Close Date will not be removed if one registration out of a group registration is cancelled.
12724	The "Internal ccd amount sum error" no longer displays when cancelling an open order invoiced for an event.
12859	The tax amount no longer turns into a credit when cancelling a payment and keeping the full payment amount as a cancellation fee.
12981	Payments by check can be voided if the payment is not in a closed batch.
13111	The correct discounts are applied when purchasing a Group Registration for an Event that has discounts available for both the Event and for the Group Registration.
14020	Cancelling a taxable line item will refund entire amount (including the tax) to credit card when that option is selected.
16303	An invoice paid by credit card and subsequently cancelled will no longer create both a credit card refund and a credit the customer's netFORUM Pro account.

Issue #	Description
16499	Applied credits that are subsequently cancelled are included in the **Available Credit** amount.
16509	A non-prorated child membership remains non-prorated even if the primary membership is prorated, and vice verse. Also issue #17509.
17345	Cancelling a purchase and refunding the amount to the customer's credit card removes the available credit from the customer's record.

Administration

Issue #	Description
11588	When you import a new subscription and renew it, and then renew it a second time, the system now considers the start and end dates of the first renewal when calculating these dates for the second renewal.
12457	The upload button on the Miscellaneous and Marketing sections of the image gallery displays when the default image (last image) is deleted.
12958	Subscriber records will be created for customers when they purchase subscriptions that do not promote immediately.
13082	A Realtor FTP Job with expired date now shows the Add button to create a new job with current dates.
15536	Purchase demographics, added to a product after it has been purchased at least once, display in query results.

CRM

Issue #	Description
9550	For a field tracked in the change log: the change log will track when a value is removed from a field and when a value is added or changed to another value.
12184	Flowdown processing works as designed: flowdown benefits are applied overnight when an individual is added or imported via iWeb. Also issue #13318.
12578	The line through the Individual Profile title has been removed.

Issue #	Description
12734	When saving a new Organization record, the Organization Name displays above the address. Prior to 2015.1, the new record had to be edited and re-saved it before the Organization Name would display above the address.
12798	Once an Individual or Organization Type is set to blank, the previous value for the Type will not display on queries.
13035	Subscriptions paid after the expiration date will promote with the term dates associated with the subscription order/invoice.
13114	FTP transmissions continue to run on Schedule, regardless previous failures and regardless of how many times the previous ones have failed.
13194	Contact Requests can be deleted.
13722	A blank State option for the *country* of Georgia is available.
15505	IE 9 only: Demographics can be deleted even after the form has been designed.
15507	The header image is now included in emails that are sent by using the **E-mail To Contact** link.

Data Import

Issue #	Description
15568	Secondary memberships that have been imported will renew when the primary membership is renewed.

E-Commerce

Issue #	Description
10461	The charge rate for members, instead of the charge rate for non-members, will show for purchase confirmations for event registrants who are members.
11564	When a customer/user shops the Online Store as a guest, and then logs on, items in the cart will not be removed.
12396	Demographics gathered during a purchase now display in **Purchase Details/Demographics** and are listed on the **Purchase Confirmation with Demographics** quick report.

Issue #	Description
12718	A customer can register for an event even if his or her email address contains an apostrophe.
12922	Shop for Merchandise, select a Category, and Search will no longer return all Bundle in the search results.
12938	**Phone Number** is no longer a required field for an alternate billing address.
13048	When shopping from an Organization Profile, the primary contact for the organization will not receive a purchase confirmation when, during checkout, the **Send a confirmation e-mail to customer's primary e-mail address** check box is <u>not selected</u>, and the **Send a confirmation e-mail to an additional e-mail address** check box <u>is selected</u>.
15514	Paying in full with credit now works in Firefox.
15609	The correct shipping is charged when PayPal is used as a payment method.
17307	Featured products now display in the Products section in the Online Store for time period defined by the **Featured Product From** and **Featured Product To** dates. Also issue #16818.

E-Marketing

Issue #	Description
11969	New HTML Editor: hyperlinks can be added.
12684	New HTML Editor replaces the Rich Text option. The Full Screen button is replaced by the Maximize button on the new html editor's toolbar.
12858	New HTML Editor: a link is available to insert images.
12890	New HTML Editor: templates can be successfully designed in IE11.
12983	The time no longer displays on an email sent through a query that uses a date.
15965	The fields in the Available Field drop-down list box, used to personalize the subject and body in eMarketing templates, display the expected information. For example, {prd_name} will display member type in the email.

Events

Issue #	Description
12592	On the Event Setup Wizard, Step 4, the "What is the most used price to show online as the default?" label has been changed to "Is this the default fee? The default fee is typically the most used fee by registrants."
12593	Clicking the Cancel button on the Group Registration page for an inactive event closes the wizard without error.
13424	**Mark as Attended** scheduled jobs will now run.
14697	When event and session registrants are registered as a group, they will now receive their education credits.
16315	Customers can select only the Registration Fees for which they are qualified.
16585	Organizations that do not have a primary contact can be added to an event during group registration.
17126	The Add Session button works in Chrome.
17598	New organizations can be added to events during group registration.

eWeb

Issue #	Description
7351	Affiliates are sorted in ascending order.
9476	The HTML Editor no longer changes the quotes in html tags with multiple attributes.
12126	The Committee Leadership page now displays Country.
12567	The first and last name fields on the Donate Now page accept special characters.
12754	When a membership is purchased for a customer, the **Purchase Date** under **Transaction Details** no longer displays as 1/1/1900.
13057	When the **ShoppingDisplayTopSearchLabel** is set to 1, the *Please use the search to shop for more products* now displays in the Online Store.

Issue #	Description
13180	You can hover over (point to) a pop up nested link.
13224	The **Ambiguous column name** error no longer displays when performing a search in Biographical Information.
13748	In the Online Store, when a product name is too long, the image will no longer overlap the text and category.
15555	Using a DIV based site layout theme with Site Alignment as Center now formats correctly.
15625	The Change Password page, when using the "Div based site layout themes" Site Rendering Layout option, is correctly formatted.

Fundraising

Issue #	Description
12580	On the **Fundraising Product** information form, the **Fund Goal** field will now accept more than eight characters.

General

Issue #	Description
13323	Realtor records are not pushed to NRDS if there is no membership.
14414	The Abila Support links on the Welcome page and from the **Help> Contact Support** menu item direct users to the correct Support Center or Portal webpage.

Help

Issue #	Description
11269	The *FIFO Accounting and Inventory Management* topic is updated so that the dates in the content now match the dates in the screenshot.
13247	Contact information for the Abila Support Center is updated in the XML API Help Guide.

Issue #	Description
13316	Several images are updated to show the 2014.1 feature menus.
13342	The *Setting up Automatic Notification of Customer Transactions* topic is updated to remove a reference to using the Support module.
15628	The *Cancelling a Batch of Dues Orders* topic is updated.
17563	The information about the **AnniversarySubscriberCalendarExpireDateFlag** system option is updated in the *Setting up Subscriptions* topic.
17583	The *Fulfilling a Subscription* topic is updated to remove the out-of-date content about periodically checking for unpaid Subscription orders.

Membership

Issue #	Description
11215	After cancelling a dues order, the membership expiration date rolls back correctly .
11669	Primary and child memberships remain correctly marked as primary and child when merging individual records that have a child membership.
12603	New orders are no longer created when a payment is added on a child membership with installment fees.
12745	The **Life Member** flag is no longer applied to a termed membership when the termed membership order is purchased after a lifetime membership was purchased.
12937	When payments are applied via lock box, the membership expiration date updates correctly.
13065	After paying an invoice and then cancelling the paid invoice, the membership expiration date rolls back correctly.
13066	Primary membership information updates (promotes up) once the dues paid meets the percentage required to promote.
14298	The membership expiration date, on a calendar-based membership with a term longer than 12 months, will now calculate correctly.

Issue #	Description
14502	Using **Cancel Dues** or **Cancel Membership** on a purchased membership only terminates the membership. The dues amount is no longer added back as a credit on a constituent's record.
16382	For calendar-based memberships, selecting a day from the **Sell for next year after day** field requires the user to also select a month from the **Sell for next year after month** field.

Queries - Baseline

Issue #	Description
13175	**Event Registrant Queries**: Soft-deleted registrations, created by the system when editing registrations, will not show.

Reports - Baseline

Issue #	Description
11349	**A/R Transaction by Customer**: Balance Due shows correct total even when payments are cancelled.
12168	**Membership Listing as of a Date**: Dropped customers will not show.
12214	Discounts appear on baseline invoice reports.
12244	**Memberships About To Expire**: Soft-deleted order records no longer show on the report.
12368	**Event Trends Report**: Event totals are not combined when multiple events are purchased on 1 invoice.
12444	**Registrant With Invoice Balance**: An event paid for with credit will not show as a negative balance in the Balance column, and will not be used as a negative balance when calculating the Total Balance.
12451	**Registrant With Invoice Balance**: Balances that have been written off will not be included.
12694	**Membership Renewal Statistics**: Results reported are accurate.
13109	**Order**: Donation amounts will not show on the report when the **Donation/Contribution** option is set to No.

Issue #	Description
13119	**Attendee by Event Type**: The report runs without error.
13125	**Ledger Detail Report by Charge Code**: Processing a credit card refund in same batch as the payment will not duplicate payment entries in batch.
13395	**Event Weeks Out**: When registrants are cancelled or substituted, the registrant count will be adjusted correctly.
15529	**Invoice Report**: Cancelled Invoices with no balance due will not show.
15532	**Memberships About To Expire**: The report includes memberships with an order for future dues that has been cancelled.
15583	**Membership Drop Process**: The report description is updated.
15947	**Membership Card (Avery 8373)**: Country is shown below City, State, Zip.