Protech Business Solutions 4.0
New Features

Protech Associates, Inc.

What’s New in Protech CRM for Members 4.0		
Account and Contact Maintenance	Seasonal Address Plugin	Seasonal Address 3:00 am nightly SQL job replaced with plugin for update. No change visible for end user.
Account and Contact Maintenance	Use Parent Price Level Flow Down	The Use Parent Price Level flow down has been rewritten for more enhanced functionality
Account and Contact Management	Custom contact/account record attribute changes captured in audit log	The issue with custom bit fields modified via the web being captured in the audit log has been resolved.
Account and Contact Management	Deceased Contact Utility	Will update term end date for Chapter Officers and Region Officers (in 3.2, it only updated term end date for Committee members).
Account and Contact Management	Region Officers Update Status process	New nightly plugin added to Region Officers to update member status based on term end date.
Accounting	AutoPay for Renewal Installments	Form change on the web dialog box for the AutoPay for Renewal Installments. In 3.2, the label asked for the Paid Through Date. The label was corrected to Next Installment Dues Date. The logic was looking for the next installment due date on the dues invoice installment detail line item, but the label was wrong.
Accounting	Calculating Tax on Advertising Insertion Invoices	In 4.0, you have the ability to flag the advertisement product as taxable in order to calculate taxes on the insertion billing invoices.
Accounting	Credit Card Type Validation	Validates the credit card type based on the credit card number entered.
Accounting	Currency X-Ref Table	Added a currency cross-reference table to relate Great Plains currency codes to CRM currency codes.
Accounting	Fundraising AutoPay	Removed from Fundraising Manager; only available in Accounting Manager (AutoPay)
Accounting	Gift Certificate Payments	Modify Gift Certificate ID lookup to display only available certificates (exclude expired) and those with status of ‘Used”.
Accounting	Improved Batch Controls	Users must be in an open batch in order to select and open invoice detail.
Accounting	Lockbox Import Batch	The batch used for the lockbox import will not automatically close. It will remain open so that after the import process you can review the transactions and make any necessary edits to invoices (for example; the payment in the lockbox doesn’t match the outstanding balance of the invoice; or a payment is made from a customer not in CRM for Members). Customers can now use the lockbox batch to make the edits than create payments using the same batch.
Accounting	Payflow Pro and Credit Card Setup	4.0 requires changes to an existing 3.2 Payflow Pro account setup to uninstall existing components and installing new Payflow Pro .NET components. Companion change in the credit card setup in CRM for Members is also required. This will affect clients upgrading from 3.2 to 4.0 and must be completed as part of the upgrade process.

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Accounting	RapidPay Create Payments Batch	In 4.0, the batch selected for running the Create Payments process will the batch used to create all invoice detail, including invoice detail for payment transactions for the selected invoices, invoice detail for selected monetary contribution, and invoice detail for payment transactions for the selected monetary contribution products or miscellaneous products. In 3.2, the process created the invoice detail for the selected monetary contribution or miscellaneous product in the user’s working batch. The process no longer looks for a working batch and relies solely on the batch selected to run the process.
Chapters	Chapter Member Status Plugin	Chapter Member Status 11:00 pm nightly SQL job replaced with plugin for update. No change visible for end user.
Chapters	Chapter Officer Status Plugin	Chapter Officer Status 11:00 pm nightly SQL job replaced with plugin for update. No change visible for end user.
Committees	Committee Member Status Plugin	Committee Member Status 11:00 pm nightly SQL job replaced with plugin for update. No change visible for end user.
Customization	Application Parameter – PAOrders.DisableCancelOnFulfilled	New base application parameter to disable delete/cancel functionality for product sales invoice detail line items that have been processed for fulfillment. If the config value = true, the system will not allow the user to cancel or delete the invoice line item if the product has been shipped.
Customization	Application Parameter – PAOrders.RestockingPercent	Optional application parameter to support calculation of re-stocking fee as a percentage of product return value. This is not deployed with base but should be added during implementation if required by the client.
Customization	Application Parameter – PAReportsLogoURL	New base application parameter to set the URL location for the report logo. Clients will need to save their report logo on any public facing web server and enter the full URL here. Once the parameter is updated, all base reports will run with the client logo. If this is parameter Is not updated, the Protech logo will appear on the base reports. This should be configured during implementation or upgrade.
Customization	Form Changes Invoice	Invoice - Select batch arranged differently
Customization	Form Changes - Batch Log Form	New field added to support Currency by batch.
Customization	Form Changes - Contribution Setup	Disable ‘Available in RapidPay’ bit field in the contribution setup except where contribution type = monetary
Customization	Form Changes - Invoice Description	Attribute size increased to 10,000
Customization	Form Changes - Prices Record	Prices Record - fields arranged differently

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Customization	Form Changes - Save and New Button	Save and New Button available: 1. Invoice 2. Product Sales Transaction 3. Payment Transaction 4. Comment Transaction 5. Membership Transaction 6. Subscriptions Transaction 7. Professional Development Course Transaction 8. Meeting Registration 9. Meeting Guest Registration 10. Exhibits 11. Exhibit Booth 12. Exhibit Other Product 13. Exhibit Reps 14. Contributions a. Monetary b. Gift In-kind c. Recurring Gift
Customization	View Changes – Orders Shipment Fulfillment View	• View excludes freightable product transactions where the Packing Ticket Printed is NULL (Easy Print Packing Ticket Report has not been run). • Orders Shipment Fulfillment View invoice hyperlinks changed to the invoice instead of the invoice detail in order to support improved batch controls.
Customization	View Changes - Grid Sorts	All Grids fixed to support Column Sort in Base. • Orders Shipping Fulfillment View • Customer Name • Invoice # • Product # • View and Edit Back Orders • Invoice Number • Warehouse • Product Code • Rapid Pay Detail grid • Customer • Invoice/Product Number – this can only sort by Invoice Number • Inv Date • Inv Balance • Invoice Detail - Transaction • Batch Date • Invoice Detail View • Name – Customer • Invoice Number • Product Type • Status • View Event Participants • Registration
Customization	View Changes – View and Edit Backorders	View and Edit Backorders invoice hyperlinks changed to the invoice instead of the invoice detail in order to support improved batch controls.
Easy Print Reports	Easy Print Job Log	New navigation in CRM for Members to Easy Print Job Log

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Easy Print Reports	Easy Print Reports	• Reports now show stats on the last page • When you want to print a new job, the user will select Reprint = No and there is no past job to select. The job ID field is a picklist that will only have a value of NULL which must be selected when Reprint = No. This eliminates the confusion that we have in earlier versions of having to pick some fictitious job that had nothing to do with anything. • If reprint is Yes, then the Job ID field is enabled with a list of all previous jobs for this report in descending order by job ID. The picklist values name will include the Job ID-Date Run-Report Name-User. • There is no waiting time for the job to appear like we had in earlier versions
History Store	History Store Entries	• No longer on a nightly SQL job; upon batch close, batch transactions go into a queue for processing; may take few minutes, depending on batches in queue and number of transactions in the batch, but you don't have to wait for the next day to see the entries. • History Store Entries now include invoice price level.
Meetings	Copy Registration	When the user uses the Copy Registration functionality, the system now copies packaged and restricted sessions when it copies the Registration.
Meetings	Meeting Participants View	Closed events are available for search.
Product Sales	Order Fulfillment and Product Return Processing	• Modified view for freightable product transaction eligible for order fulfillment processing to include only those transactions where packing tickets have been printed. • New feature added to manage product returns for freightable product transactions that have been processed for fulfillment. Process returns product to inventory, if appropriate, and calculates the credit for the returned product. Works with GP inventory, internal inventory, and no inventory.
Renewal Billing	Cancel Renewal Invoice Name	In 3.2, if you cancelled a renewal in a dues invoice, the system updated the invoice name to New. In 4.0, the system will not change the invoice name.
Renewal Billing	Duplicate Benefit Check on Renewal Package Entry	When using a benefit package to create a new invoice, the system will check to see if the package contains a benefit that already exists. If one or more benefits exist, user has option to proceed with remaining benefits in the package. System will not create duplicates of existing benefits.
Renewal Billing	Membership Transactions	Membership transactions by Benefit and by Benefit Package are now treated as two separate transactions on the New transaction drop down menu. In 3.2, they are on a single transaction.
Renewal Billing	Renewal Process Log	Renewal Process Log now tracks the overpayments process and subscriptions
System	Post Callouts	All Post callouts are migrated as Plugins. And plugins are deployed to database.
System	Security Changes	CRM for Members 4.0 supports both AD and IFD Authentication on single install with IP address range.

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System Setup	My Workplace Settings	In 4.0, each user must set their own formatting values - this is no longer at the server level. These should be consistent across the organization. This includes formatting for numbers, currency, time, dates; selecting default language, selecting E-mail routing, etc. We are looking at a way to apply this organizationally.
System Setup	Price List Items	All new products will be created with all Price List Items
Reports	CRM4M Membership Dues Renewal Edit for Accounts and Contacts Report	In 3.2, we were not able to run the dues renewal edit report on both accounts and contacts within a single report. This is been a pain point for some time. We now have one report for 4.0 that includes both accounts and contacts and the report criteria has been modified to align with the system criteria for generating renewal invoices. The report also no longer excludes renewal records where Primary Benefit = No.
Reports	CRM4M Membership Past Due aging Report	The Past Due Report has been renamed to the CRM for Members Membership Past Due Aging Report (a more accurate description of the report). This report is basically the Membership Past Due Report but with 30-60-90+ aging for past due membership invoices.
Reports	CRM4M Sales Order Packing Ticket Report	Replaces Packing Ticket Edit report; report allows one-off printing of packing ticket by invoice ID or invoice date range
Reports	CRM4M Account Distribution Summary Report	Report modified to show net debit and credit to match up to entries in GP; report modified to show product company for each GL account to match up to entries in GP

What’s New in Web Portal for Members 4.0		
Event Management	Event Description	An Event Description field has been added to the calendar list view.
Exhibit Management	Auto-populate Address	When creating a new representative contact, address information is populated from logged user account.
Exhibit Management	Industry Categories	You can define whether the Industry Categories section will allow single or multiple selections.
Membership Management	Dues Renewal	You can define whether the Dues Items section will allow single or multiple selections.
Shopping Cart	Member Pricing Recalculation	When a Non-Member Contact makes a purchase online, and the purchase goes to the Global Shopping Cart, if the Contact then decides to join online within the same web session, the addition of a primary membership benefit to the online global shopping cart triggers the recalculation of all prices of all items in the shopping cart to the member price. The member price should apply as long as the primary membership benefit remains in the shopping cart. If the membership benefit is removed from the shopping cart, the price recalculates to the non-member price.
Shopping Cart	Invoice Naming Conventions	Invoices generated by web transactions will follow the naming conventions used for invoices created in the back office.
Shopping Cart	Multi-Merchant	If your organization is multi-company based and each company is linked to a different merchant account, products purchased through the shopping cardt are related to the corresponding company in the payment page.
Shopping Cart	Tax Exemption linked to Account	This new feature is directed toward trade organizations. Contacts within Trade Organizations are now tax exempt if they are linked to an account that is tax exempt.
Shopping Cart	Configure Tax Label	Previously the tax label name in the shopping cart could not be changed because the tax label name was coming from the code. Protech has changed this so the label can now be changed through the messages.txt. So, for example, instead of calling this“Estimated Tax” it can be called “Estimated GST” (In Canada GST=Tax)
Shopping Cart	Promotions and Discounts	This new feature will allow your organization to apply promotions by specific product.
Shopping Cart	Gift Certificate Restrictions	The gift certificate is now a configurable option. It works only for the logged in individual if the client wants it that way or it works for the any individual other that the logged in if the certificate is valid.
System Management	Sync Demographics	The admin tool now include a button called “Sync Demographics”. Clicking on this will sync the new fields that were created in CRM to the admin tool. So this avoids going to the sql database to run the sync procedure.
Admin Tool	Form Custom Validations	The admin tool now has a form custom validation feature that will enable Protech to enter JavaScript validations for the custom fields that are required for your association. This has avoided the functionality of creating pre-validations which used to bring up the required message in a pop-up window for custom fields.

What's New in Microsoft Dynamics™ CRM 4.0	
Multi-Tenancy	New in CRM 4.0. "Multi-tenancy allows separation of data and operations on a single group of application servers and a single database engine."" White Paper
IFD Mode	New in CRM 4.0. "Internet Facing Deployment (IFD) allows the customers to configure their CRM system to be reachable from outside the intranet (i.e. internet or outside of the firewall). The main difference when using IFD vs. typical on-premise deployment is how users are authenticated. In IFD, the authentication relies on the presence of the CRM ticket cookie. This cookie is obtained by starting off from a sign-in page."
Settings>Administration Menu Options	New in CRM 4.0. "Administration" menu option within the Settings area. Used to manage system settings, users, announcements, etc.
Settings>Business Managements Menu options	New in CRM 4.0. "Business Management" menu option within Settings area. Used to manage settings for Fiscal Year, Resource Groups, Subjects, Queues, Sales Territories, Currency, etc.
Settings>Templates Menu options	New in CRM 4.0. "Templates Management" menu option within Settings area. Used to manage templates for Articles, Emails, Contracts and Mail Merge.
Settings>Product Catalog Menu options	New in CRM 4.0. "Product Catalog" menu option within Settings area. Provides access to the Product Catalog, Price Lists, Discount Lists, Unit groups, and products.
Settings>Workflows Menu options	New in CRM 4.0. "Workflows" menu option within Settings area. Provides access to the Workflow Manager for creating and managing automated workflows.
Settings>Data Management Menu options	New in CRM 4.0. "Data Management" menu option within Settings area. Provide access to menu options for managing duplicate detection settings, bulk record creation and imports.
Settings>System Jobs Menu options	New in CRM 4.0. "System Jobs" menu option within Settings area. Provides access to log of system jobs run on the database and status of each job, user who ran the job and date of job run.
Contacts and Accounts>Mail Merge to MS Word	New in CRM 4.0. "Mail Merge" icon on Actions tool bar to support mail merge to MS Word. Previously only available from Outlook client; now available on the Web client.
Contacts and Accounts>Reports Icon	New in CRM 4.0. "Reports" menu icon on Accounts and Contacts views Action Tool bar
Contacts and Accounts>More Actions Menu	New in CRM 4.0. Additional functionality added to the more actions menu on the accounts and contacts views; duplicate detection, copy/send shortcut, Add to Marketing List, Add Relationship
Duplicate Detection Rules	New in CRM 4.0. Allows the system administrator to determine the rules an organization will use to define what constitutes a duplicate record. Duplicate Detection Rules can be added to any entity, including custom entities.
Resource Center	New in CRM 4.0. New navigation pane button with access to Microsoft's collection of CRM knowledge. Includes links for help, white papers, and community forums. Content is managed by Microsoft.
Report Wizard	New in CRM 4.0. Report Wizard provides a built-in, simple to use, report development tool with limited design features. It allows for grouping and subgrouping data, column selection, some data summary, and graphing.