MX 8.2 and the New Template Site

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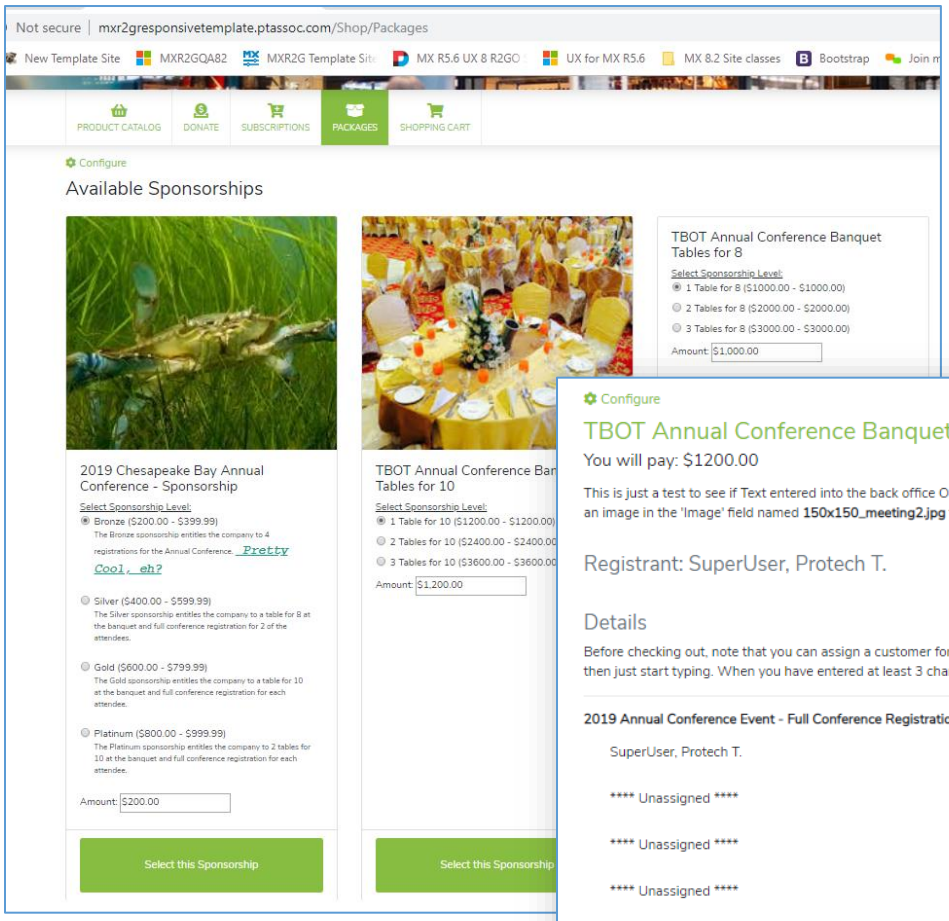
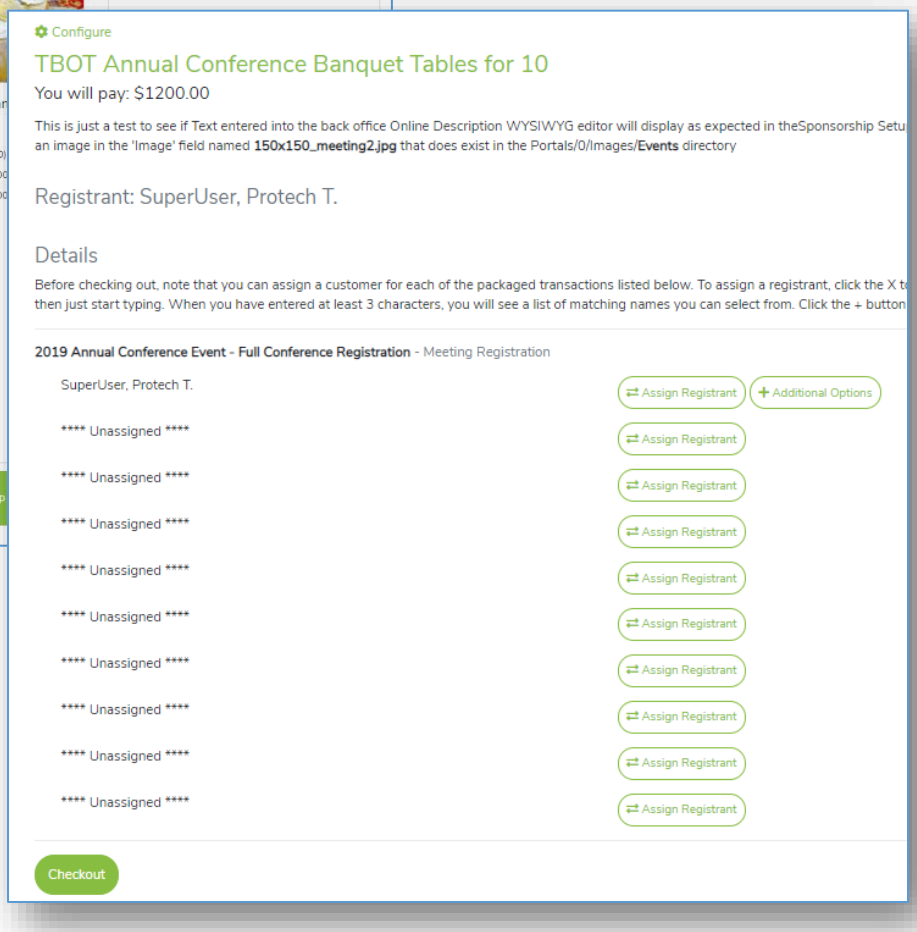
Highlights

Promotional Packages

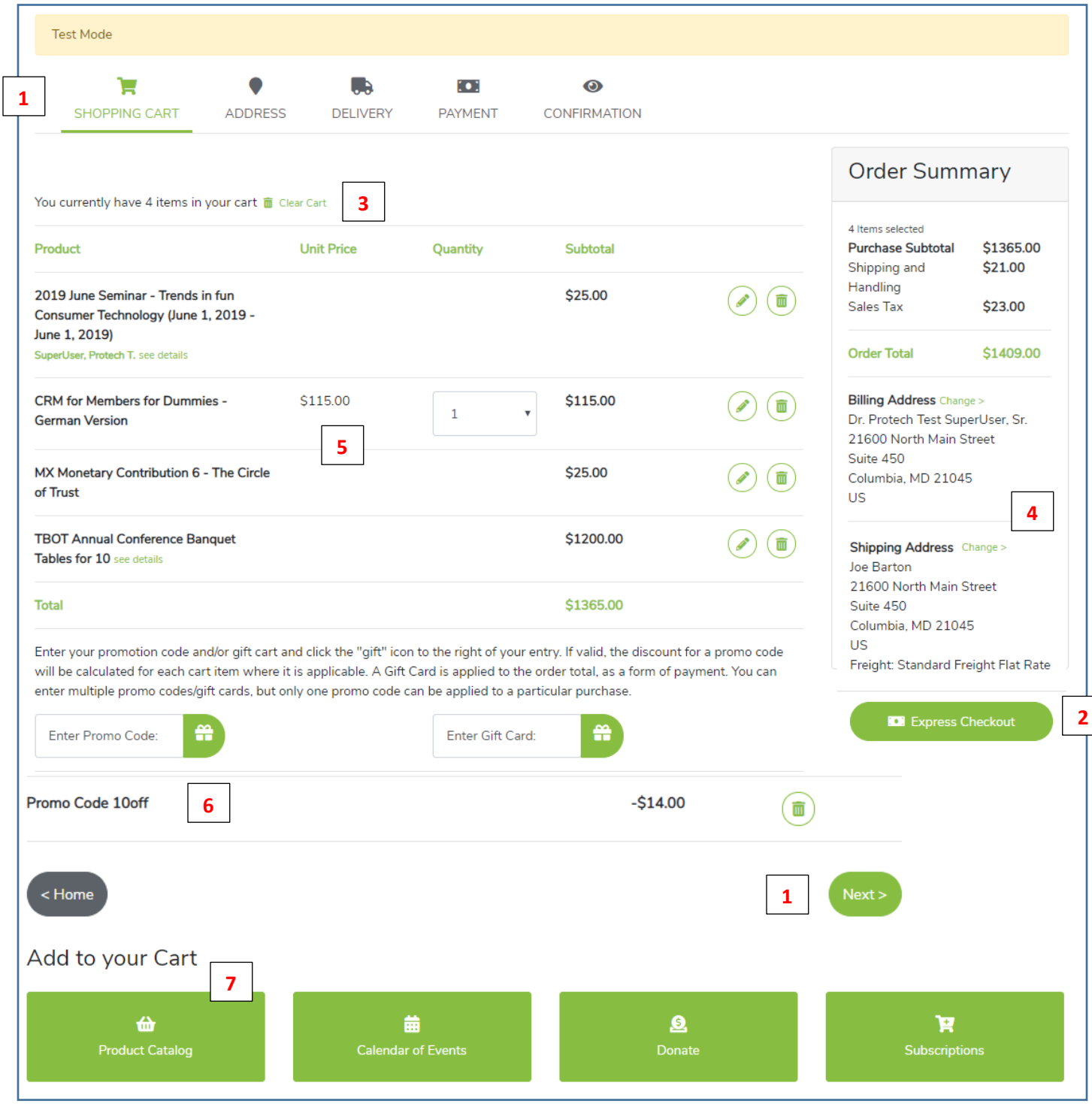
Promotional Packages module.dc

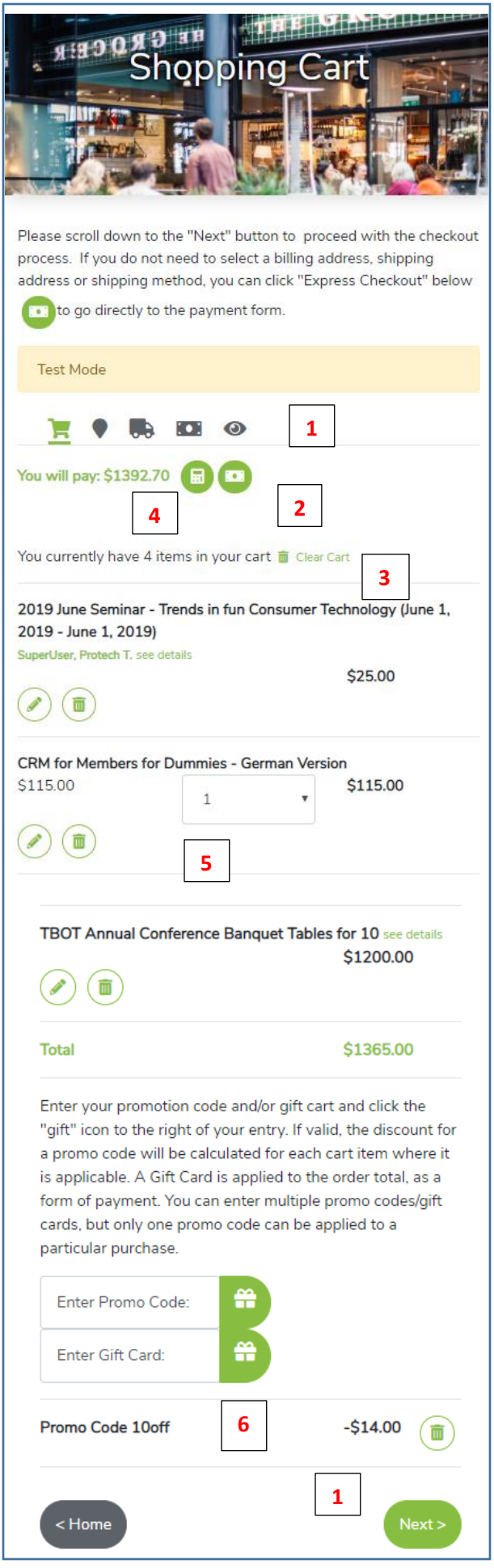




Shopping Cart

The Shopping Cart web part has been completely redesigned to function as a sequence of steps instead of like the UX Invoice UI, in previous versions. There are no popups, and it is completely responsive.





1 Step by step process: Even though this is still a single web part, it is perceived by the user as a checkout process of up to 5 steps. Each step is represented by an icon at the top of the web part, just like the Navigation Tabs web part in process steps:

- **Review cart items**
- **Billing Address**
- **Shipping Address and Freight method**
- **Pay**
- **Order Confirmation.**

Previous and Next buttons, which look exactly like the Navigation Bar buttons in process pages, are built into the Shopping Cart web part to take the user from one step to the next.

2 Express Checkout: By default, the user's Address1 is used for both Billing and Shipping Address, so it is possible that they do not need to go through the two address steps. If there are no missing required fields in that default address, a button with the money icon (in mobile mode) and text "Express Checkout" (in full screen mode) is displayed. If the user clicks that button, they go straight to the payment step.

3 The Clear Cart link is at the top of the page, not grouped with unrelated functions.

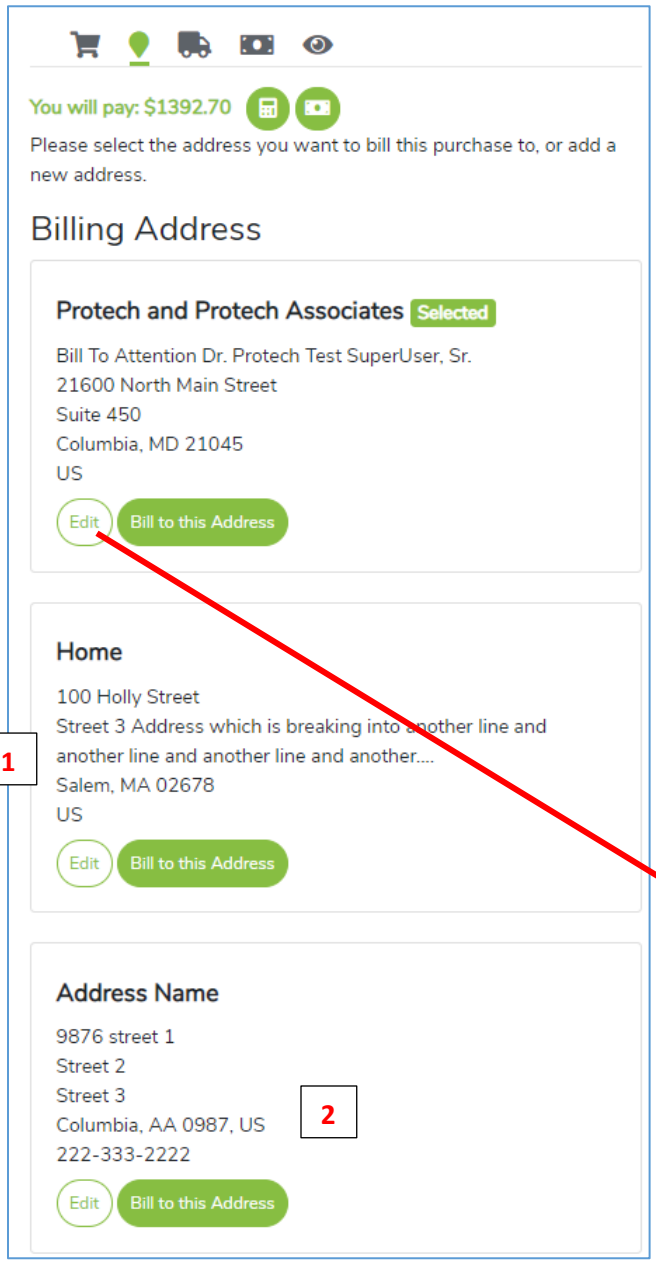
4 Billing Address and Shipping Address are also editable directly from a "change" link in the Order Summary section of the cart, which is displayed on all four steps of the checkout process. In mobile mode, the order summary is hidden, so it doesn't hide the cart items. The user can click the icon of a calculator to display the order summary.

5 All item types listed together in the Cart Items section. Each transaction type is designed to display differently, depending on the sub-items, need for quantity, and other considerations. But there are no longer separate sections with separate headers for the different transaction types. They all display in the same list.

6 Promo codes and gift cards are entered at the bottom of the cart items list. When either type of code is entered and successfully applied to at least one cart item, it is displayed, with the total amount of discount attributed to it. This makes it clear to the user that it did make a difference, and also that they can enter more than one.

7 Instead of adding buttons for adding to the cart inside the items grid, there are 4 buttons to "Add to your cart", each navigating to a different primary e-commerce page. (see screenshot on previous page)

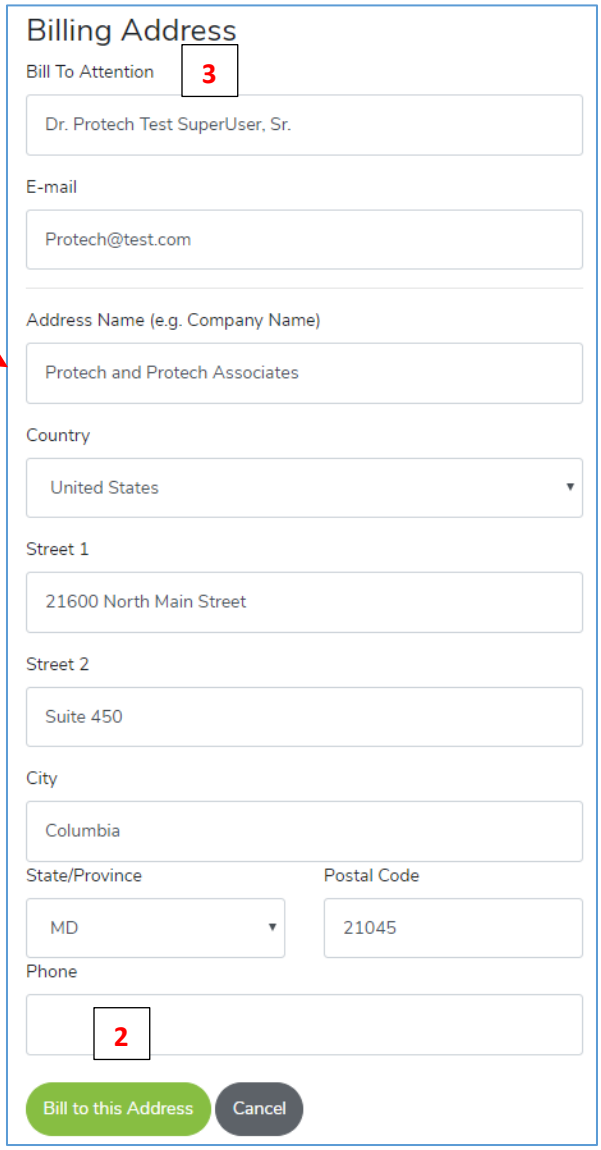
Addresses are listed in full and can be selected in one click – there is no dropdown or radio button to select first. Both contact and account addresses are available for selection, first contact addresses, and then account addresses, and they are listed in order of address number.



1 Edit form: There are no popups for Editing and Adding Addresses – the screen just refreshes to show an edit form instead of the addresses list.

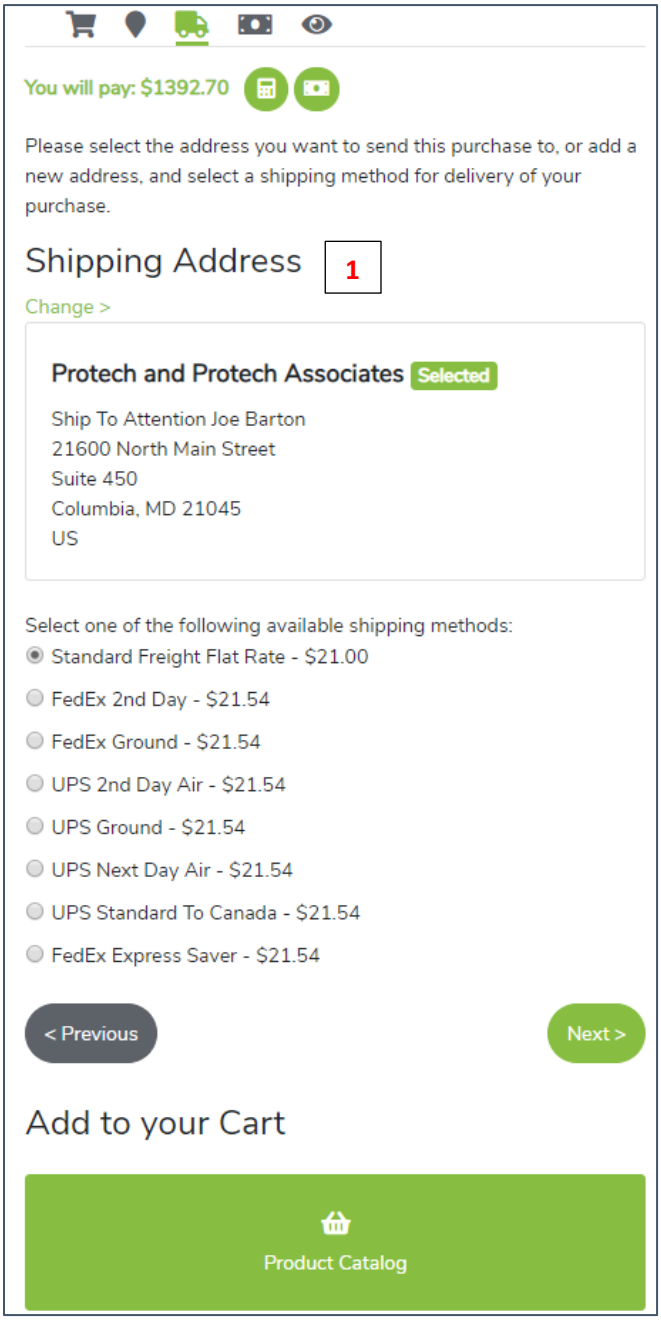
2 Next: Clicking any of the "Bill to This Address" buttons, either on the view mode list of existing addresses, or on the edit/add form, takes the user to the next step, so there are no extra keystrokes to save and select and proceed.

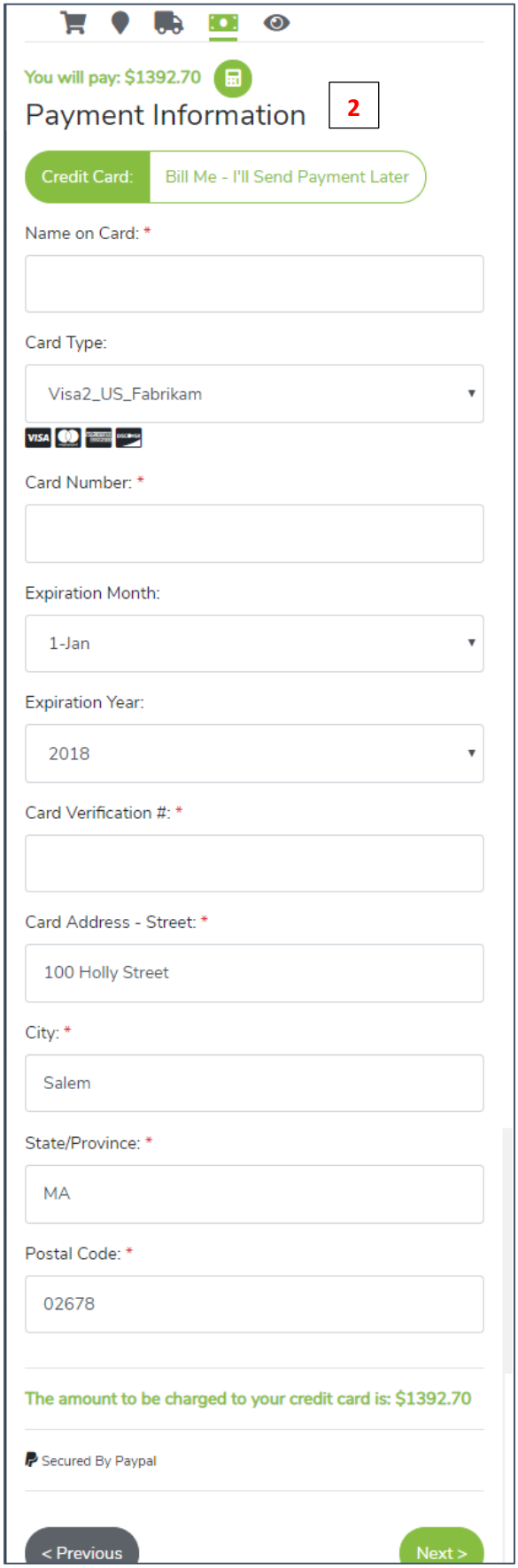
3 Account Addresses: If you edit an account address, it will create a new contact address instead of editing the account's address, because a company contact does not have the right to change account information. Note that Attention field is required.

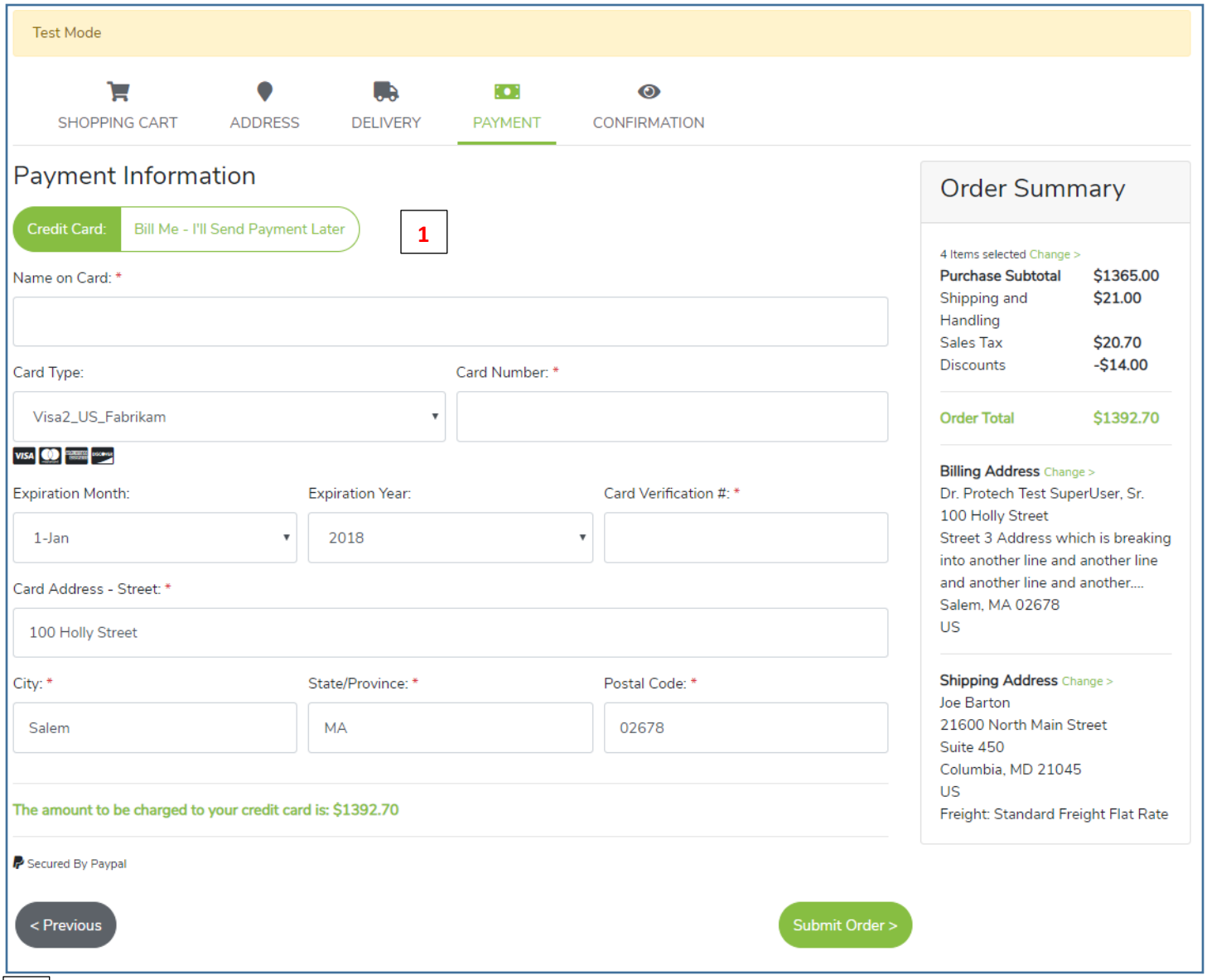


1 Shipping methods are selected on the same step as Shipping address.

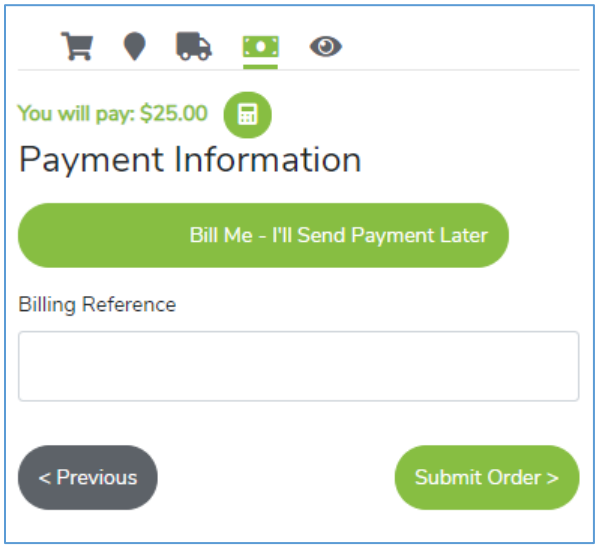
2 The NEXT button takes the user to the Payment step.







1 "Bill Me" and "Credit card" are alternative views. If the user selects "Bill Me", the whole payment form is hidden and only the "Billing Reference" field is displayed:



Test Mode

SHOPPING CART | ADDRESS | DELIVERY | PAYMENT | CONFIRMATION

Order Confirmation

Thank you for your purchase!

Order SC-9000418-74BMR

Date of purchase: 11/8/2018
Payment: Credit Card **** 1111
Bill To: Dr. Protech Test SuperUser, Sr.
Gift Card: -
PO #:

Bill To Address

Dr. Protech Test SuperUser, Sr.
100 Holly Street
Salem, MA 02678, US

Ship To Address

Joe Barton
21600 North Main Street
Suite 450
Columbia, MD 21045, US

Shipping Method

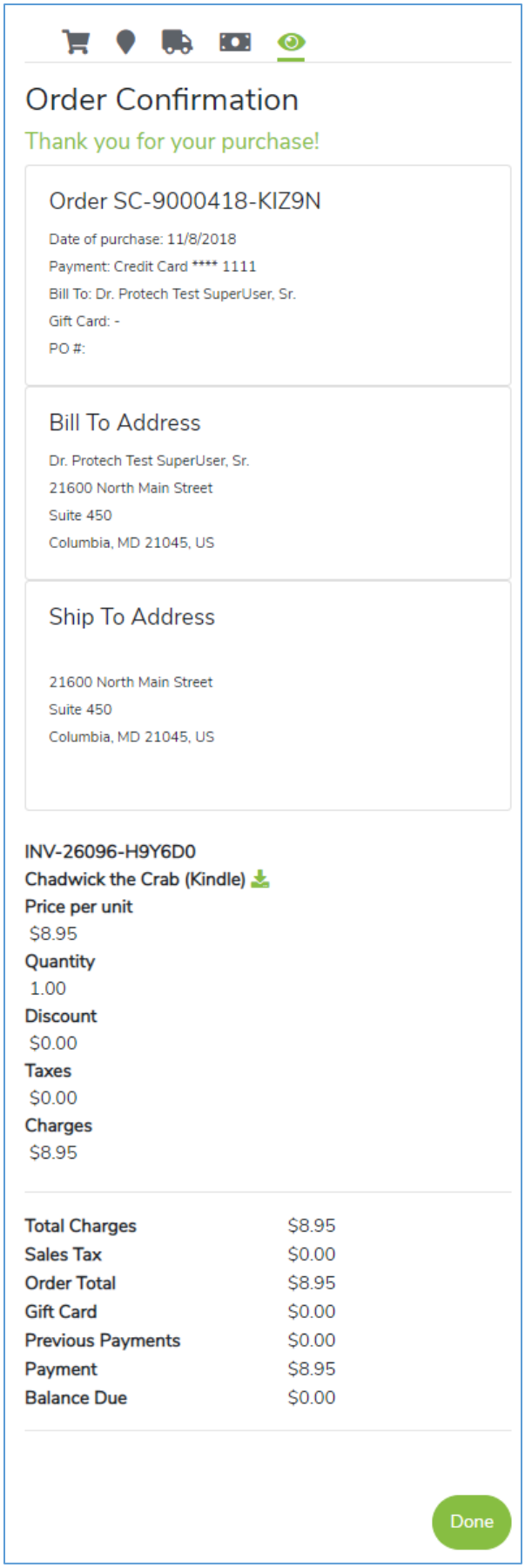
Standard Freight Flat Rate

Invoice	Product	Price per unit	Quantity	Discount	Taxes	Charges
INV-26093-Y4Y2L5	Promotional: TBOT Annual Conference Banquet Tables for 10	$0.00	1.00	$0.00	$0.00	$0.00
INV-26093-Y4Y2L5	Full Conference Registration - SuperUser, Protech Test	$120.00	1.00	$0.00	$0.00	$120.00
INV-26093-Y4Y2L5	Full Conference Registration - **** Unassigned ****,	$120.00	1.00	$0.00	$0.00	$120.00
INV-26093-Y4Y2L5	Full Conference Registration - **** Unassigned ****,	$120.00	1.00	$0.00	$0.00	$120.00
INV-26093-Y4Y2L5	Full Conference Registration - **** Unassigned ****,	$120.00	1.00	$0.00	$0.00	$120.00
INV-26093-Y4Y2L5	Full Conference Registration - **** Unassigned ****,	$120.00	1.00	$0.00	$0.00	$120.00
INV-26092-S9F4D2	CRM for Members for Dummies - German Version	$115.00	1.00	$11.50	$20.70	$124.20
INV-26092-S9F4D2	MX Monetary Contribution - The Circle of Trust	$25.00	1.00	$0.00	$0.00	$25.00
INV-26092-S9F4D2	June Main Registration - SuperUser, Protech Test	$25.00	1.00	$2.50	$0.00	$22.50
INV-26092-S9F4D2	Standard Freight - Flat	$20.00	1.00	$0.00	$1.00	$21.00

Total Charges	$1371.00
Sales Tax	$21.70
Order Total	$1392.70
Gift Card	$0.00
Previous Payments	$0.00
Payment	$1392.70
Balance Due	$0.00

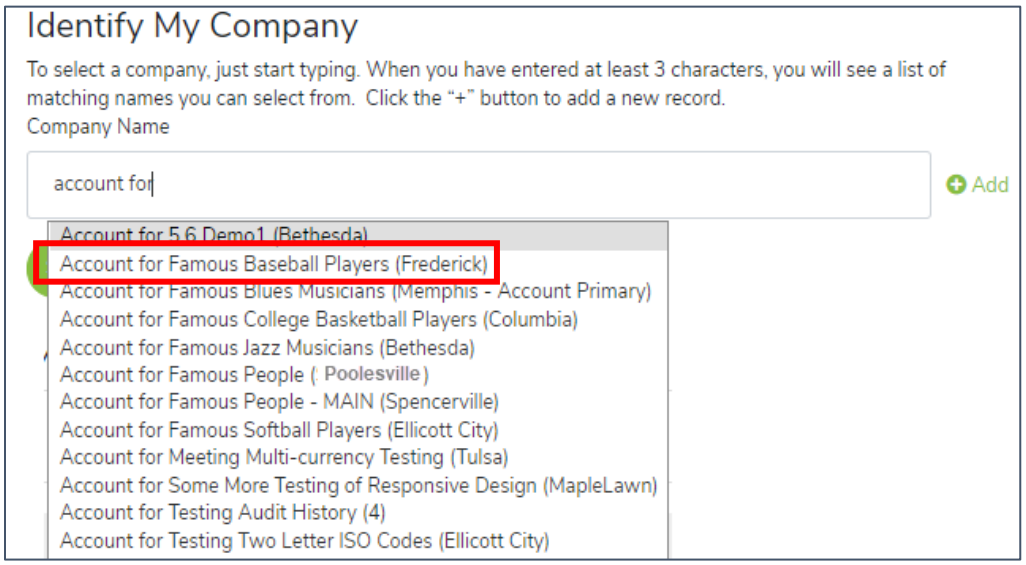
Done

In mobile mode, the cart components stack:

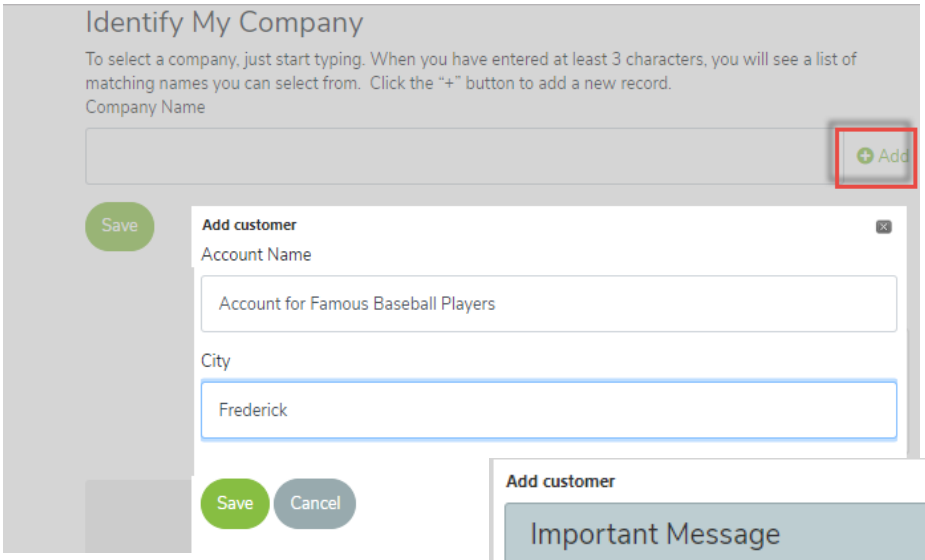


Auto-Fill for Contact/Account Lookups

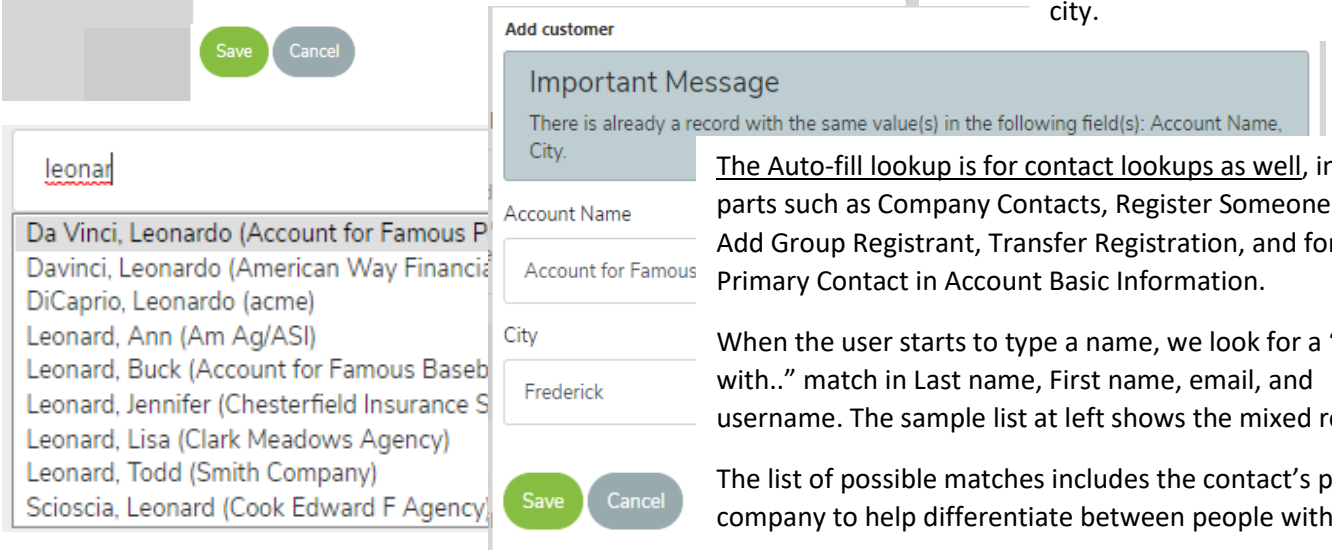
Auto-fill component replaces the Lookup popup for Contacts and Accounts



As soon as you have typed at least 3 characters, there is a dropdown list of possible matches to select from. If you continue to type, the list is reduced accordingly. The match for account names is based on "Begins with…" comparison with the Account Sort Name, and results are listed by sort name. City is in parentheses to help differentiate companies with similar name in different locations.



Click "+ Add" to create a new account, entering account name and city. City is used for duplicate checking to ensure that there is not already an account with the exact same name in the same city.

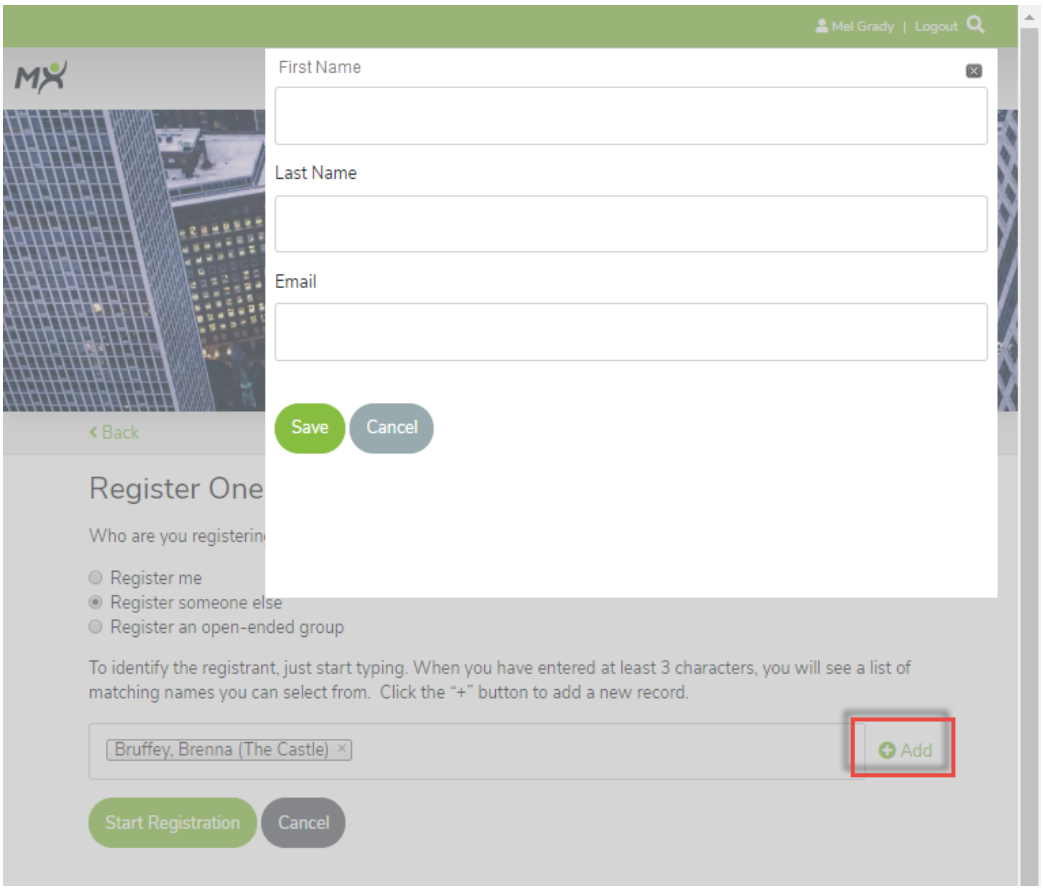


The Auto-fill lookup is for contact lookups as well, in web parts such as Company Contacts, Register Someone Else, Add Group Registrant, Transfer Registration, and for Primary Contact in Account Basic Information.

When the user starts to type a name, we look for a "Begins with.." match in Last name, First name, email, and username. The sample list at left shows the mixed results.

The list of possible matches includes the contact's parent company to help differentiate between people with similar names.

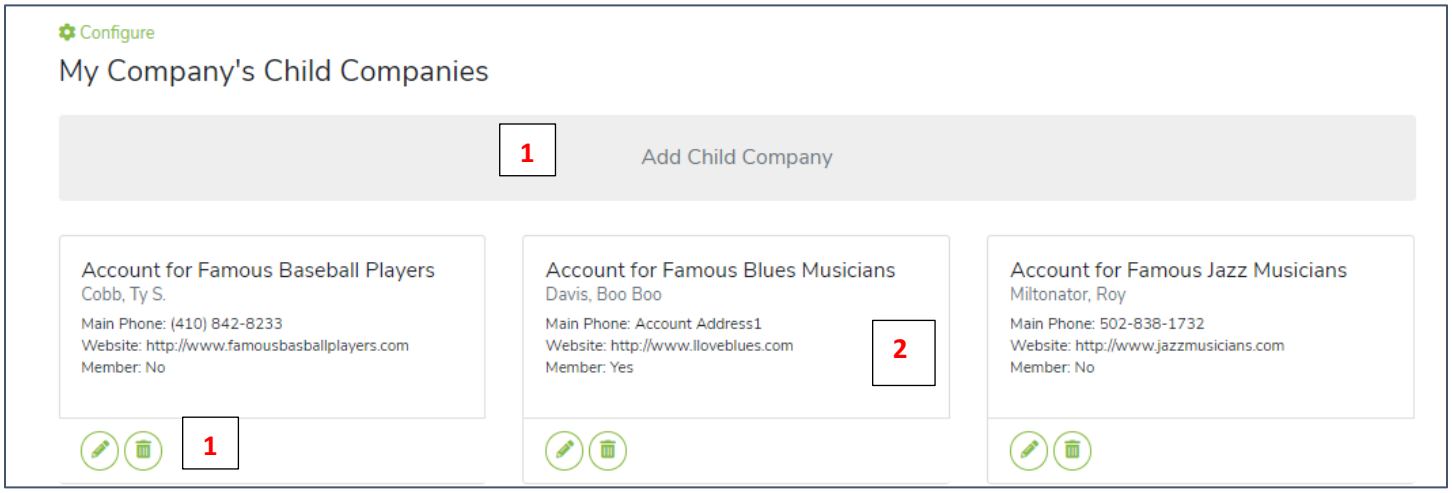
To add a new contact, just enter First name, Last name, and Email. Duplicate checking enforces uniqueness of Email address, but the user can add a contact with the same first and last name as someone who already exists.


Mel Grady | Logout
First Name
Last Name
Email
Save
Cancel
Back
Register One
Who are you registerin
Register me
Register someone else
Register an open-ended group
To identify the registrant, just start typing. When you have entered at least 3 characters, you will see a list of matching names you can select from. Click the "+" button to add a new record.
Bruffey, Brenna (The Castle)
Add
Start Registration
Cancel

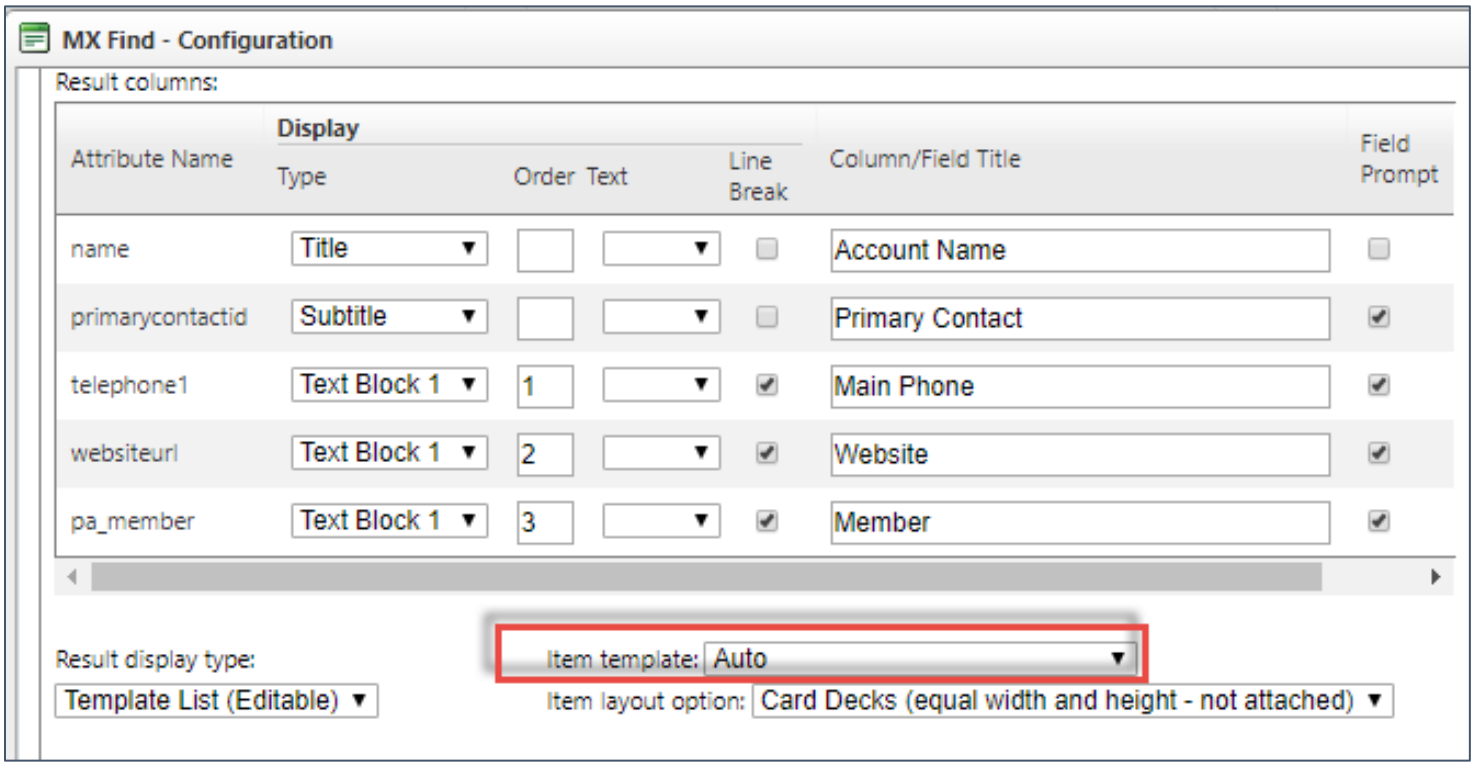
Auto Template

- Editable Template: Icons for Edit and Remove, and a large action button for “Add”. Editing options used to be available only for grids, but now they are available for templates as well. The Edit form is not a popup, but replaces the view mode until the user clicks Save or Cancel.

  Other limitations on template mode have been removed: now a template can also be a Child MX Find, being hidden instead of displaying all results if there is no URL parameter to filter by. And now with both grids and templates, if there are no results, the web part is completely hidden, including the web part title, instead of displaying a “no results” message.



2 Auto Template: You can now design a template on the fly, within the configuration settings form, without needing to rely on predesigned templates or on going into Visual Studio to code a new saved template for each Advanced Find. **Any MX Find result can be displayed in an Auto Template, without coding.**

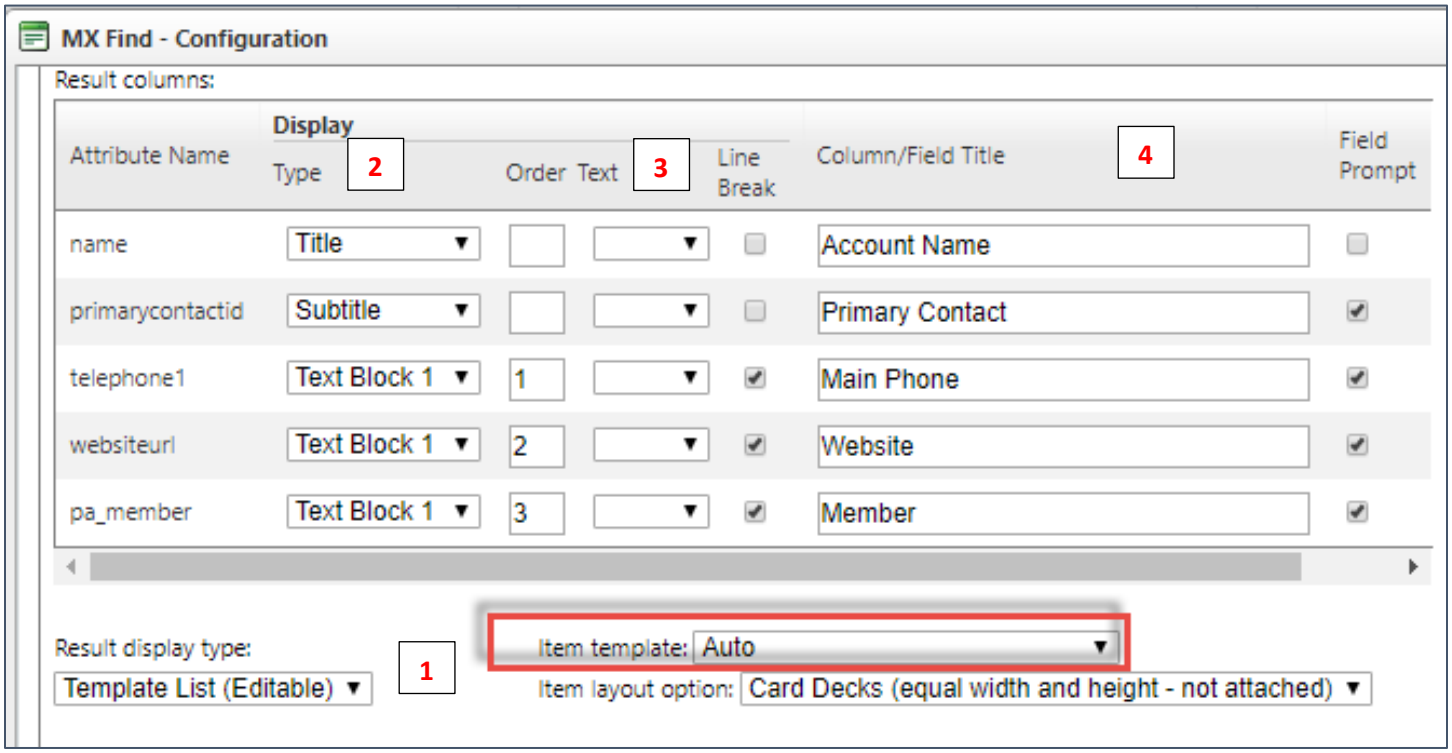


1 Select “Result display type” = “Template List” or “Template List (Editable)”. Then select “Item Template” = “Auto”. Auto is always listed first, before all other templates. The setting for “Item layout option” below the Item Template selection is a new setting that allows you to display the template as cards (3 across) or as a list, with each one stretching 100% of the width.

2 For each field that you want to display, select where you want it to display. Select one field as “Title”, another (optionally) as “Subtitle”. The field that is selected as Title will be listed first, bold and larger. The Subtitle will be listed below that field, in a font that is smaller than the title, but larger than the other text. There are 5 available text blocks – each is like a paragraph, with a space dividing it from the next block.

3 If you have more than one field within the same text block, enter the order of the fields. If you do not check the box for “Line Break”, then a divider line will display between the fields that are in the same text block. If you do check the box for “Line Break”, then the following field will be on the next line. You can also format any field as Bold, Italic, Small or Underline.

4 You can decide if you want to display a field prompt before the field value by checking the box for “Field Prompt”, and then enter the field title text.



Standardized Templates

All of the MX Find Templates and Control Templates deployed as part of the OOTB Template site have been redesigned, re-coded, renamed and standardized around new styling principles. The main goal is that every new template should be created in the same structure.

The following templates are installed as part of the template site and all 8.2 installations. These templates are used in the template site on the following pages:

Template	Template Site Page where it's used
Auto	/My-Account/My-Membership
Auto	/My-Account/My-Company/Related-Contacts
AccountDetails	/Directories/Company-Locations/Company-Location-Details
AccountDetails	/Directories/Member-Companies/Company-Details
AccountDirectory	/Directories/Member-Companies
AccountDirectorybyAddress	/Directories/Company-Locations
Benefits	/Membership/Join
Benefits	/Membership/Apply
CalendarEvents	/Events/Calendar-of-Events
CalendarEvents	/Get-Involved/Our-Chapters/Chapter-Home-Page
CalendarEvents	/Get-Involved/Our-Committees/Committee-Home-Page
ChapterDetails	/Get-Involved/Our-Chapters/Chapter-Home-Page
ChapterOfficer	/Get-Involved/Our-Chapters/Chapter-Home-Page
CommitteeDetails	/Get-Involved/Our-Committees/Committee-Home-Page
CommitteeListing	/Get-Involved/Our-Committees
CommitteeMember	/Get-Involved/Our-Committees/Committee-Home-Page
CommitteeMember	/Directories/Board-of-Directors
ContactDetails	/Directories/Member-Locations/Member-Location-Details
ContactDetails	/Directories/Members/Member-Details
ContactDirectory	/Directories/Members
ContactDirectorybyAddress	/Directories/Member-Locations
ContributionDetails	/Get-Involved/Donate
HomeNavigationPanel	/Home
HomeRenewalDue	/Home
Packages	/Membership/Member
ProductCategory	/Shop/Product-Catalog
ProductDetails	/Shop/Product-Catalog/Product-Details
ProductRelated	/Shop/Product-Catalog/Product-Details
ProductThumbnail	/Shop/Product-Catalog
PromotionalPackage	/Shop/Packages
PromotionalPackage	/Events/Calendar-of-Events/Registration-Start
PromotionalPackage	/Events/Calendar-of-Events/Meeting-Home-Page
PromotionalPackage	/Events/Courses
PromotionalPackage	/Events/Webinars
PromotionalPackage	/Membership/Packages
ShowHide-HideShow	/My-Account/My-Company
ShowHide-HideShow	/My-Account/My-Company/Related-Contacts
ShowHide-HideShow	/Events/Calendar-Of-Events/Quick-Register
SponsorshipPackage	/Shop/Packages
SubscriptionThumbnail	/Shop/Subscriptions

Structure of a Card Deck Template

Image on top:
<img class="card-img-top mx-image-contact" …>

Card Body:
_

Card Title with hyperlink:
<h5 class="card-title">

Card Subtitle (2 types):
<h6 class="card-subtitle text-muted">

<p class="card-text">

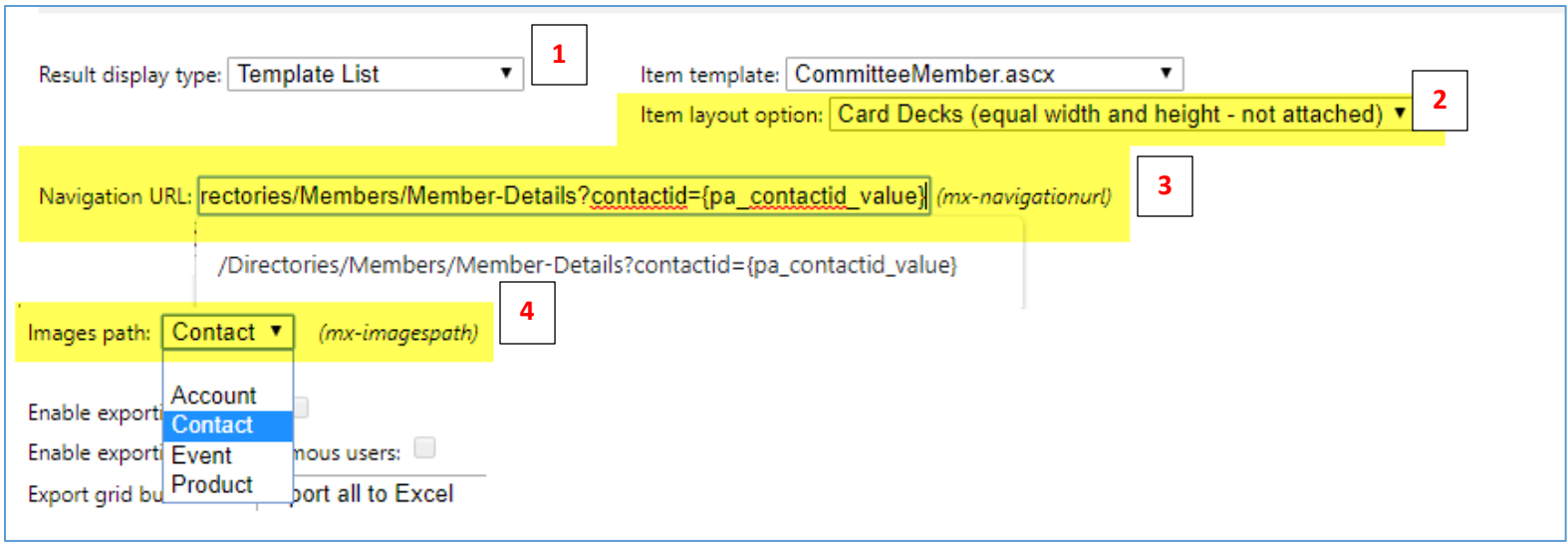
Card Text:
<p class="card-text">

Expand to see Details:
_<div class="collapse"…>

Card Footer with action icons:
<div class="card-footer…>

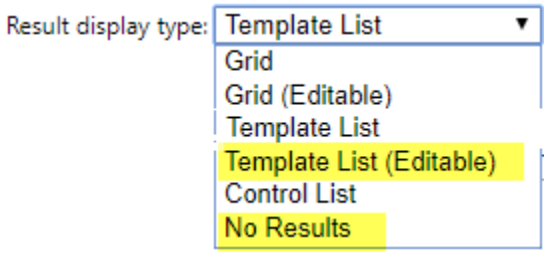
Structure of a Card List Template – designed to stretch across the page

New MX Find Template settings



New Result Type settings

1



- Now templates can be used for add / edit, not just grids.
- Now MX Find can be a standalone search form with results shown by other MX Finds.

2 The container for the template can be displayed in different layout options:

- Card Grids (columns and rows)
- Card Group (Equal width and height - attached)
- Card Decks (Equal width and height - not attached)
- Card Columns (Masonry Style)
- Card Lists (Full Width)

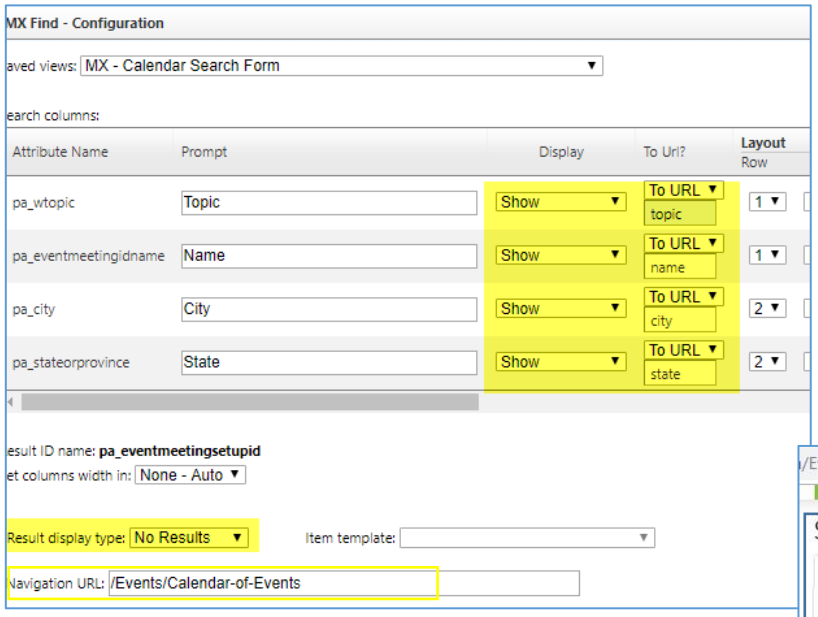
- The container type is not defined at the card level (Template file), it is part of the MX Find configuration
- Templates named "… Details" are designed for display in Card Lists, while "… Directory" and "… Thumbnail" templates are designed for display in Card Decks.
- All the containers are responsive. In core Bootstrap they are not, however we made the necessary changes to achieve it in MX.

3 Now the setting for "Navigation URL" is used in the Template for destination when user clicks the "Go" button or clicks the hyperlink that is built-into both Title and Image. You can also reference field names from the Advanced Find results as URL parameters to pass to the next page. Before you could only reference {0} = the selected recordID. In the Board of Directors MX Find, we pass the contactID field from the committee member record to the same member details page used when searching the contact entity directly.

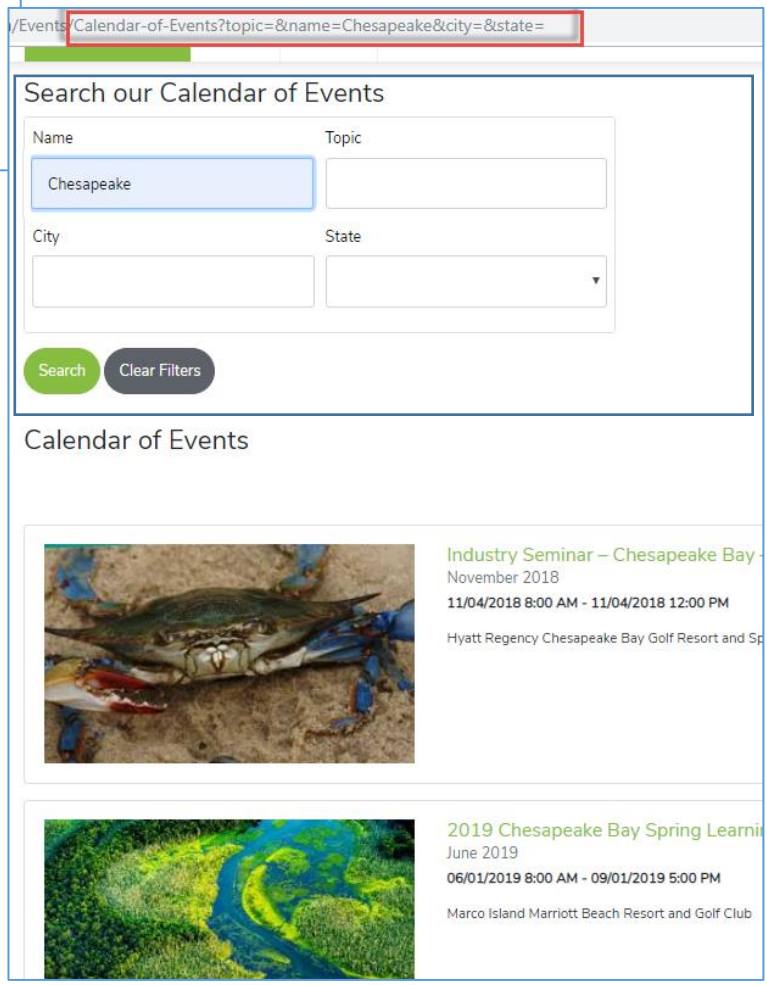
4 Now there are multiple image folders in the MX site structure, so images can be grouped by record type. Every MX Find instance can be configured with what type of image is applicable and where to find the images.

Standalone MX Find Search

- **Stand-alone Search form:** MX Find can be configured as a search form only with "No Results", allowing separate MX Finds to use its search values to filter results.
  Great power and flexibility have been added to MX search capabilities by providing the option to separate the MX Find search form from the results sets, so multiple instances of MX Find can share the same search criteria on their own results sets. MX Find now has the capability of being configured to add URL parameters into the URL for each of the search fields where the user enters a value. Then other MX Finds can search on those values in the same or different entities using "From URL" and the parameter name as a match for multiple fields.



Optional Search form for Calendar and Product Catalog: As an example, this new functionality allows you to add an optional search on the same page as the full Calendar of Events. The search form is optional, and the full calendar is displayed by default. This is because the Calendar MX Find is configured to look for these URL parameters as search criteria, and if they aren't in the URL, it means to show all. Only by executing the search in the separate search form are these parameter values added to the URL, so only then is the calendar filtered.



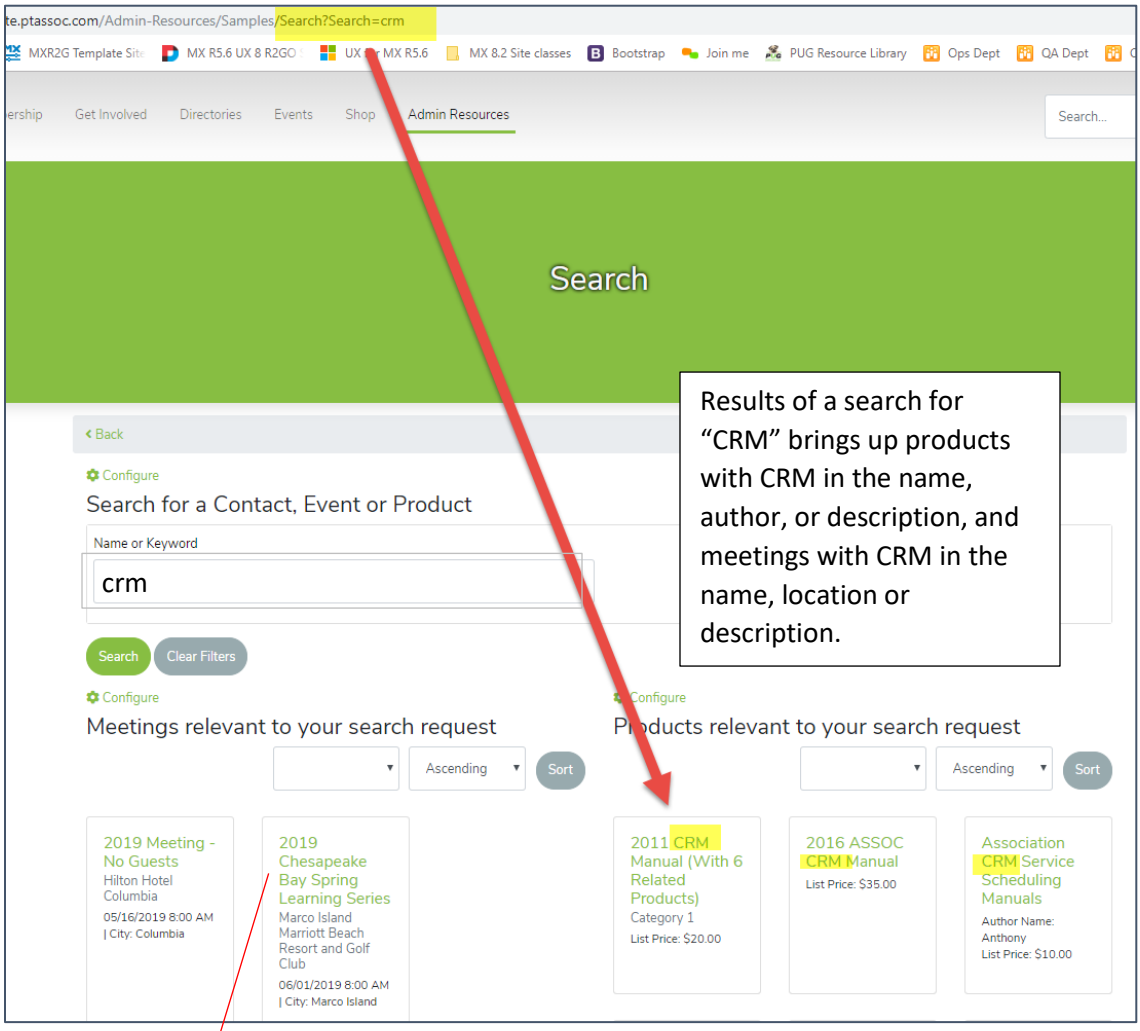
The MX Find becomes a stand-alone search form by setting "Result display type = "No Results" (see above). The parameter names for each search field are assigned in the Search Form's configuration settings in the new column "To Url?" They are automatically added to the Navigation URL, so the Navigation URL should just be the page URL, without any placeholder parameter names hard-coded in.

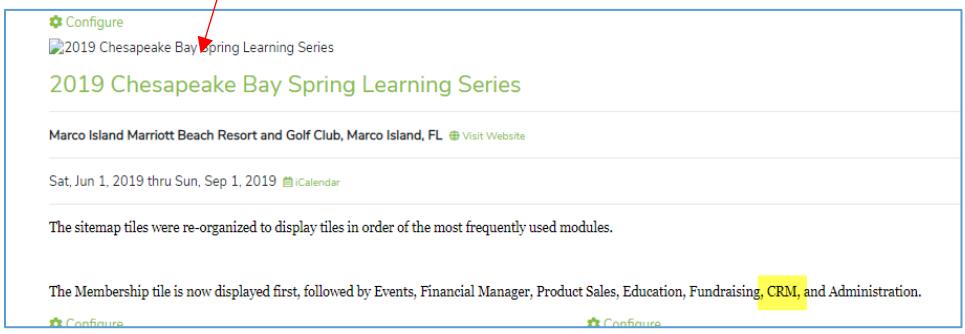
Note that because it is separate, the search form remains open even after results are shown, so the user can try another search immediately.

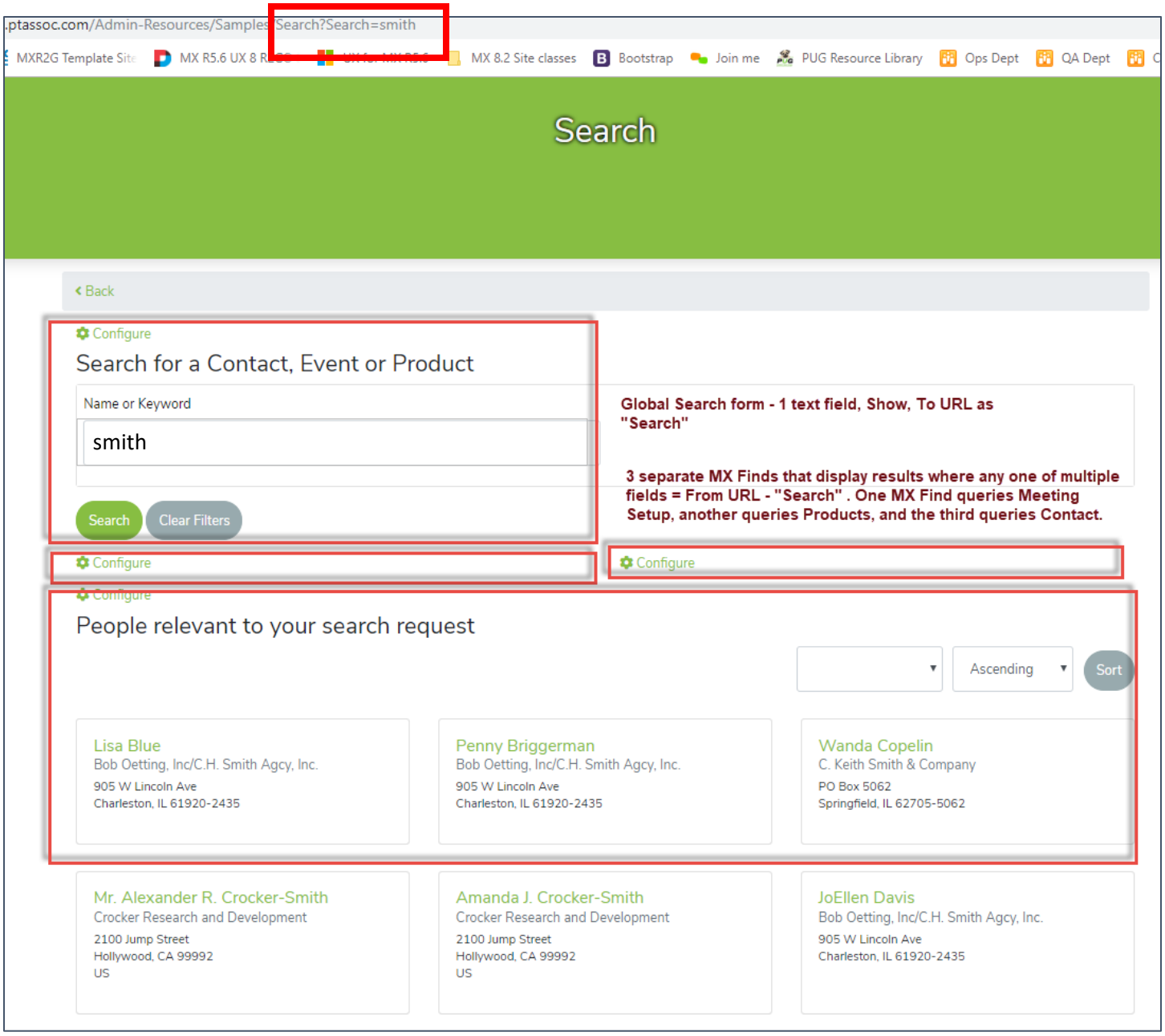
In the Template site we use this for both the Calendar and for the Product Catalog, so you can display the full catalog by default, but also include an optional search form on the same page. This was not possible before, but now it is, again because the catalog can use "From URL" to filter on the user's request only if a search parameter has been entered.

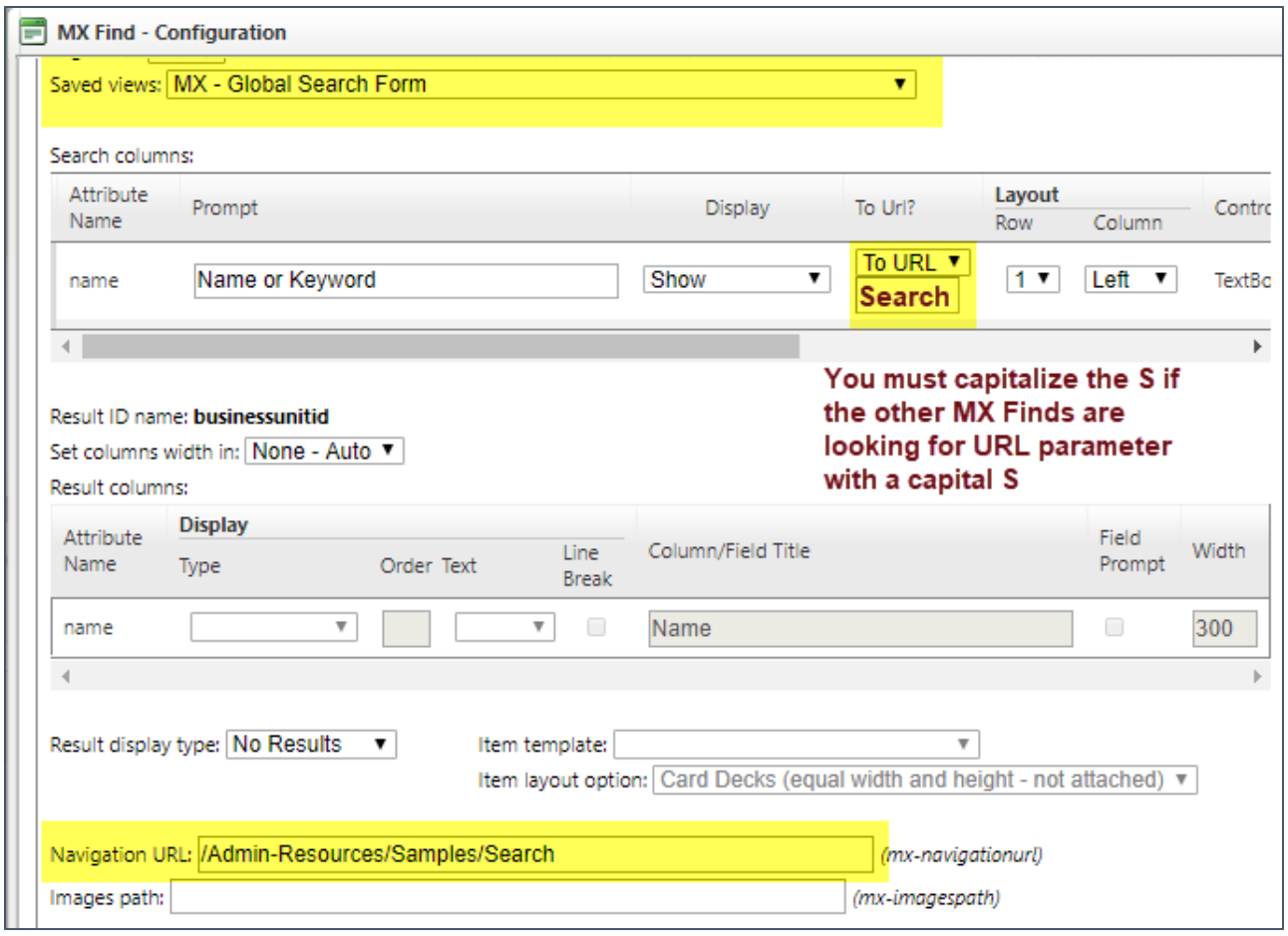
Global Search: A single search field can also be used in a simple Global search form for finding records in the database based on a match with multiple fields. For instance, when searching for a person, the user can enter any part of a contact name, either first or last name, or nickname, or email address. Normally, MX Find needs a separate search field for each field, binding one search form field to one contact record field, but the user only wants to enter the search value once in one field. When the search form is separated from the search results, the first search form can have just one field, separate from any particular database field. It doesn't search for results itself - executing the search just means adding the search value to the page URL as a generic parameter, such as "name". Then a separate MX Find could have all four fields automatically filter on that same "From URL" parameter= "name", in effect setting up a search where firstname = "name" OR lastname = "name" OR nickname = "name" OR emailaddress1 = "name.

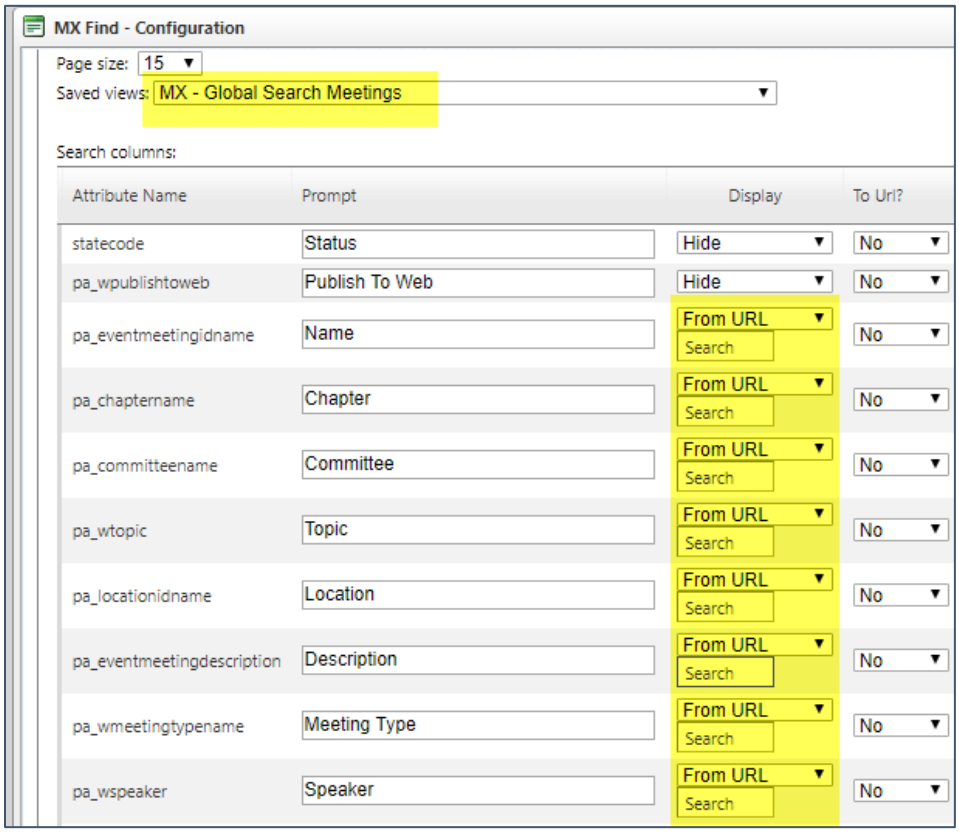
Global Search using Search form configured as "No Results", "To URL"

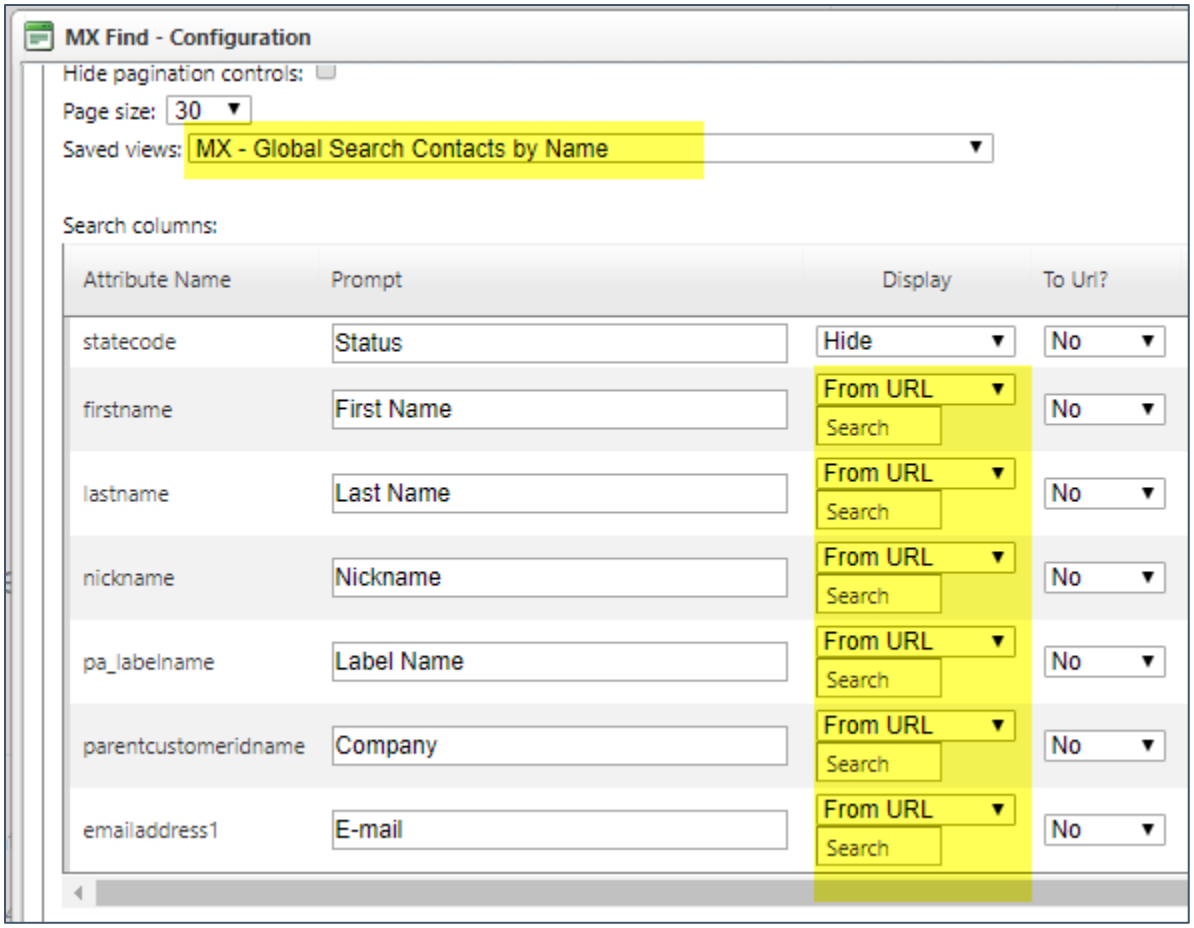


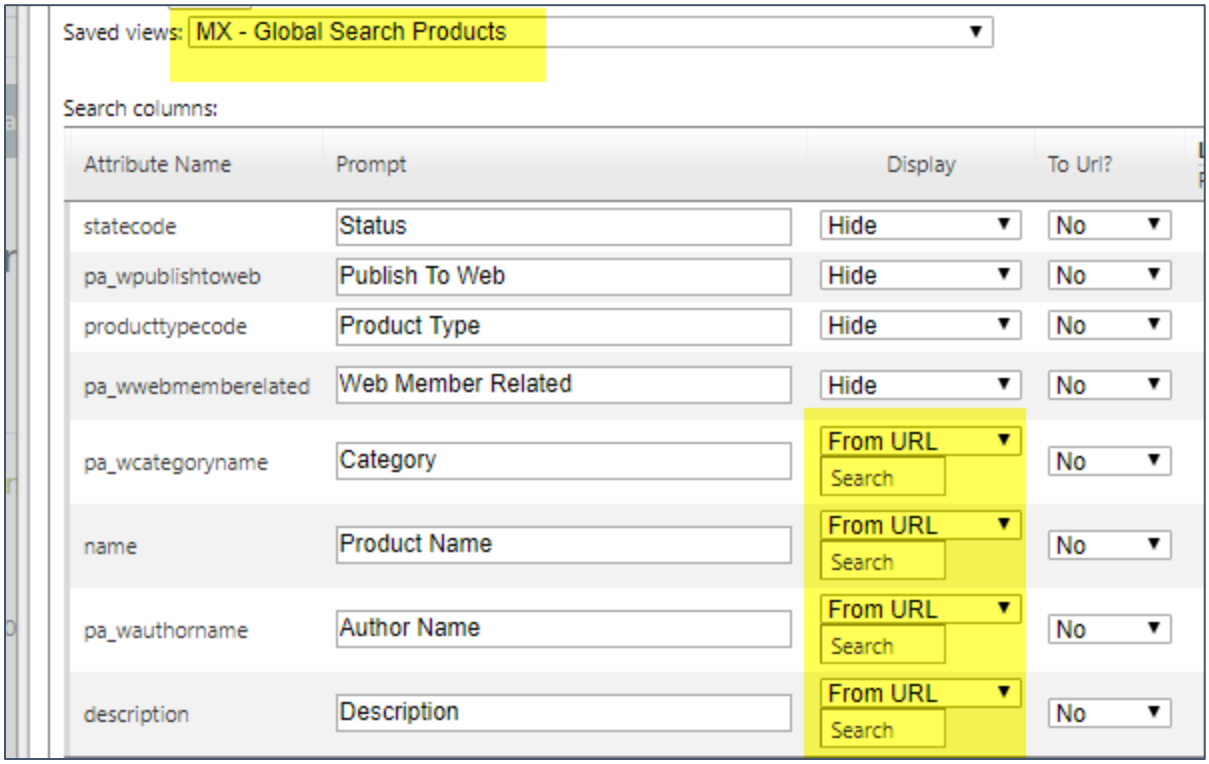



.ptassoc.com/Admin-Resources/Samples/Search?Search=smith
MXR2G Template Site
MX R5.6 UX 8
MX 8.2 Site classes
Bootstrap
Join me
PUG Resource Library
Ops Dept
QA Dept
Search
Back
Configure
Search for a Contact, Event or Product
Name or Keyword
smith
Search
Clear Filters
Global Search form - 1 text field, Show, To URL as "Search"
3 separate MX Finds that display results where any one of multiple fields = From URL - "Search" . One MX Find queries Meeting Setup, another queries Products, and the third queries Contact.
Configure
Configure
Configure
People relevant to your search request
Ascending
Sort
Lisa Blue
Bob Oetting, Inc/C.H. Smith Agcy, Inc.
905 W Lincoln Ave
Charleston, IL 61920-2435
Penny Briggerman
Bob Oetting, Inc/C.H. Smith Agcy, Inc.
905 W Lincoln Ave
Charleston, IL 61920-2435
Wanda Copelin
C. Keith Smith & Company
PO Box 5062
Springfield, IL 62705-5062
Mr. Alexander R. Crocker-Smith
Crocker Research and Development
2100 Jump Street
Hollywood, CA 99992
US
Amanda J. Crocker-Smith
Crocker Research and Development
2100 Jump Street
Hollywood, CA 99992
US
JoEllen Davis
Bob Oetting, Inc/C.H. Smith Agcy, Inc.
905 W Lincoln Ave
Charleston, IL 61920-2435


MX Find - Configuration
Saved views: MX - Global Search Form
Search columns:
Attribute Name
Prompt
Display
To Url?
Layout
Row
Column
name
Name or Keyword
Show
To URL
Search
1
Left
You must capitalize the S if the other MX Finds are looking for URL parameter with a capital S
Result ID name: businessunitid
Set columns width in: None - Auto
Result columns:
Attribute Name
Display
Type
Order
Text
Line Break
Column/Field Title
Field Prompt
Width
name
Name
300
Result display type: No Results
Item template:
Item layout option: Card Decks (equal width and height - not attached)
Navigation URL: /Admin-Resources/Samples/Search
(mx-navigationurl)
Images path:
(mx-imagespath)


MX Find - Configuration
Page size: 15
Saved views: MX - Global Search Meetings
Search columns:
Attribute Name
Prompt
Display
To Url?
statecode
Status
Hide
No
pa_wpublishtoweb
Publish To Web
Hide
No
pa_eventmeetingidname
Name
From URL
Search
No
pa_chaptername
Chapter
From URL
Search
No
pa_committeename
Committee
From URL
Search
No
pa_wtopic
Topic
From URL
Search
No
pa_locationidname
Location
From URL
Search
No
pa_eventmeetingdescription
Description
From URL
Search
No
pa_wmeetingtypename
Meeting Type
From URL
Search
No
pa_wspeaker
Speaker
From URL
Search
No


MX Find - Configuration
Hide pagination controls:
Page size: 30
Saved views: MX - Global Search Contacts by Name
Search columns:
Attribute Name
Prompt
Display
To Url?
statecode
Status
Hide
No
firstname
First Name
From URL
Search
No
lastname
Last Name
From URL
Search
No
nickname
Nickname
From URL
Search
No
pa_labelname
Label Name
From URL
Search
No
parentcustomeridname
Company
From URL
Search
No
emailaddress1
E-mail
From URL
Search
No


Saved views: MX - Global Search Products
Search columns:
Attribute Name
Prompt
Display
To Url?
statecode
Status
Hide
No
pa_wpublishtoweb
Publish To Web
Hide
No
producttypecode
Product Type
Hide
No
pa_wwebmemberelated
Web Member Related
Hide
No
pa_wcategoryname
Category
From URL
Search
No
name
Product Name
From URL
Search
No
pa_wauthorname
Author Name
From URL
Search
No
description
Description
From URL
Search
No

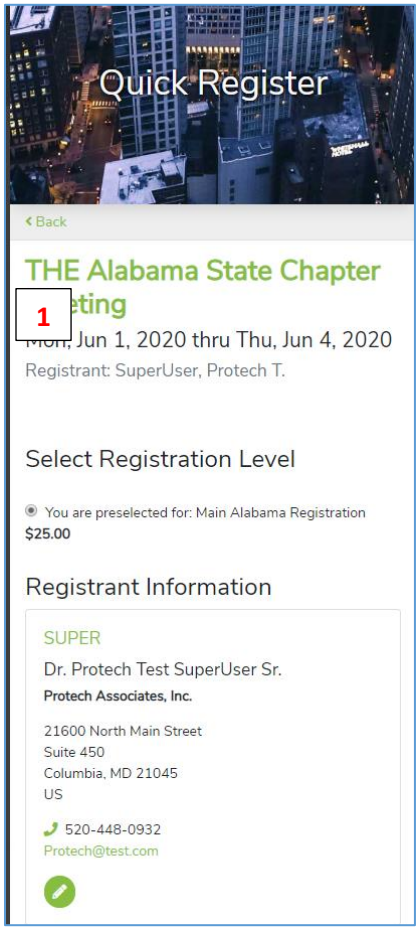
Search on one page – filter results on another: Another application of this ability to output search criteria as URL parameters only would be to have the Search button automatically navigate to a separate page with the filtering parameters, so an MX Find on that destination page will display the search results. This could be valuable where the MX Find is part of a process. It is also helpful where one search is a step, dependent on a previous one.

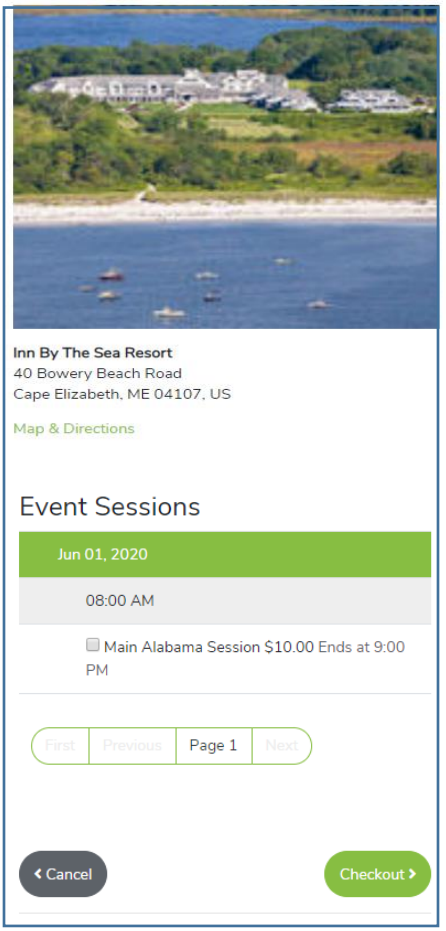
Editable results vs. View only results: Another scenario using multiple MX Finds tied to a stand-alone search form allows the results sets to be configured with different permissions than the search form. The search form MX Find could be visible to all, and then one MX Find with results would display for Members only with edit buttons, while another MX Find would display results for Non-members without edit capabilities. Both MX Finds would be child finds that would be invisible until the search form has added parameters to the URL.

Quick Register (/Events/Calendar-of-Events/Quick-Register)

Click on meeting name in either of these calendars takes you directly to a one-page registration, without going first to a home page. By default, this page includes:

- Registration Controller
- Registration Header – NEW Functionality shows Registrant
- Location
- Select Registration
- Registrant Information
- Sessions
- Navigation Bar - NEW Functionality





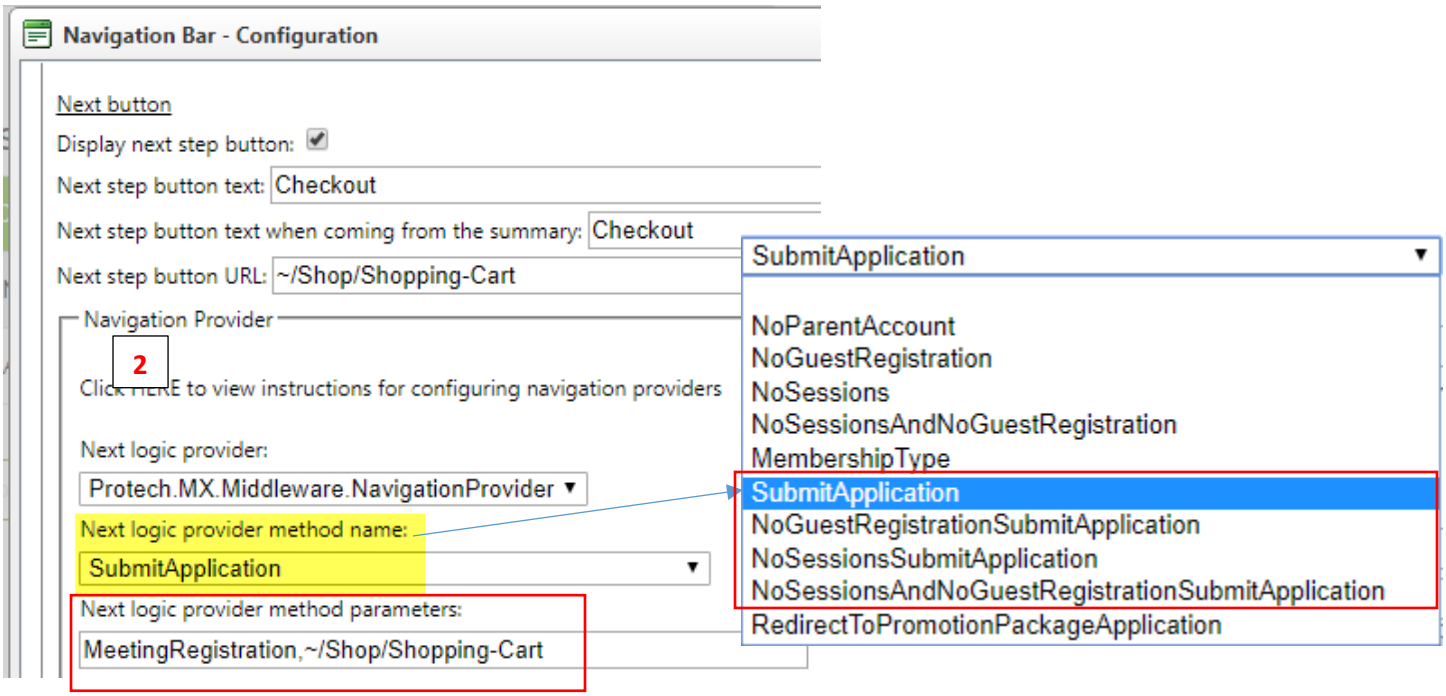
Submit to Cart in Navigation Bar

The one-page registration no longer needs to have a hidden Registration Summary web part in order to add to the cart. In 8.2 we added a new feature to the Navigation Bar that allows it to automatically add to the cart as part of its navigation action.

The two parameters needed for this new logic are:

1) module = MeetingRegistration
2) destination URL = /Shop/Shopping-Cart

Variations for this new logic are where there is a different destination depending on whether you need to skip pages for guest registrations, sessions or both.



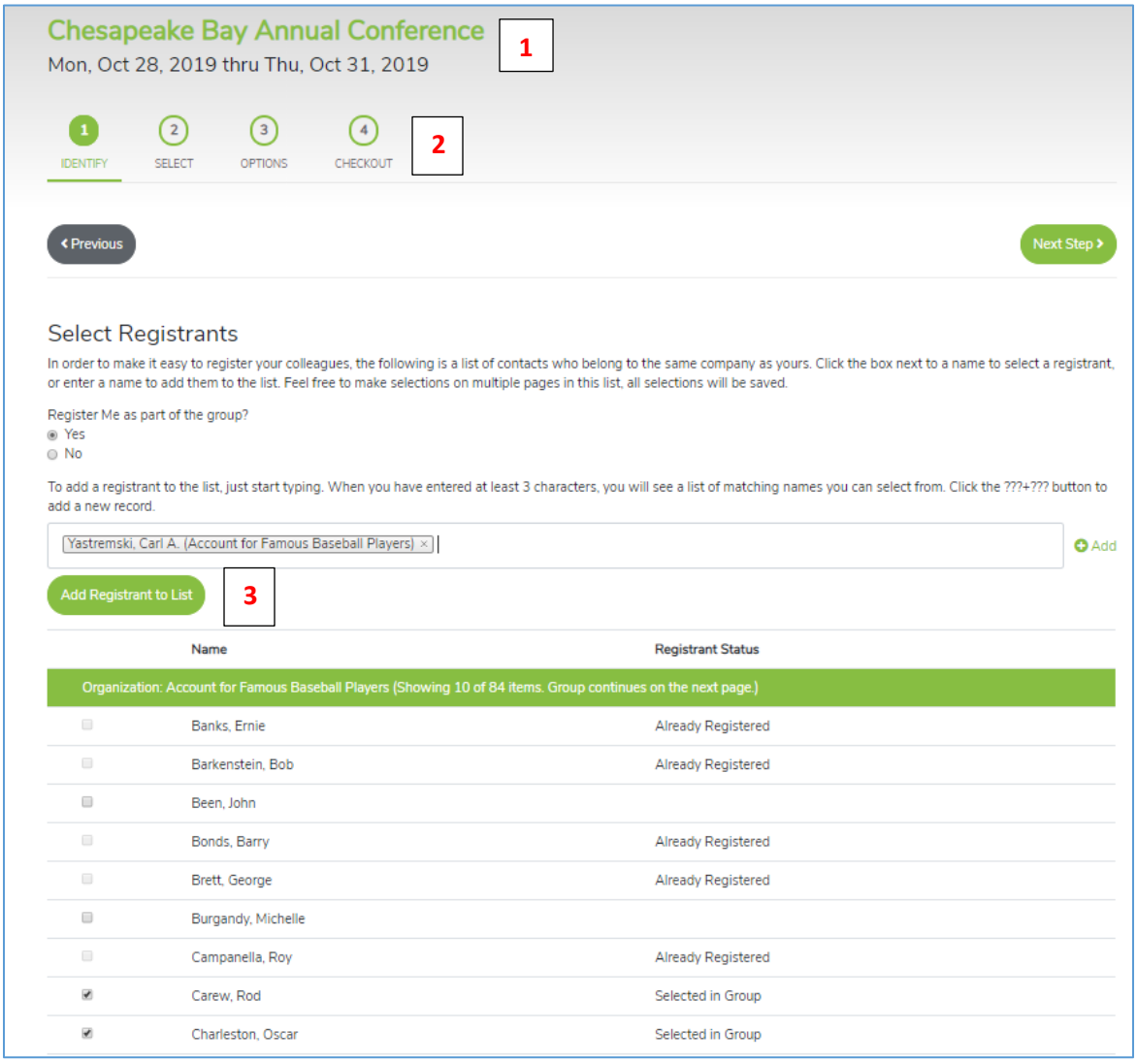
Group Registration

Group Registration has changed significantly in R8.2. Most of the Group Registration web parts were based on grids and popups, and could not be made responsive so instead, we have changed the approach for group registration. The process is now as follows:

1. Select Registrants. (same as previous versions)
2. Select Registration Level for each Registrant. (same as previous versions)
3. Review Group Registration Summary: (new web part)
    - If you don't want to add more registration information for the group, checkout to cart immediately.
    - Optionally, for each registrant, one at a time, provide additional registration information - badge, questions, add guests, and sessions - in a one-page registration details page, using single registration web parts.
4. Check out to Cart (shopping cart).

---

1. Select Registrants (/Events/Group)

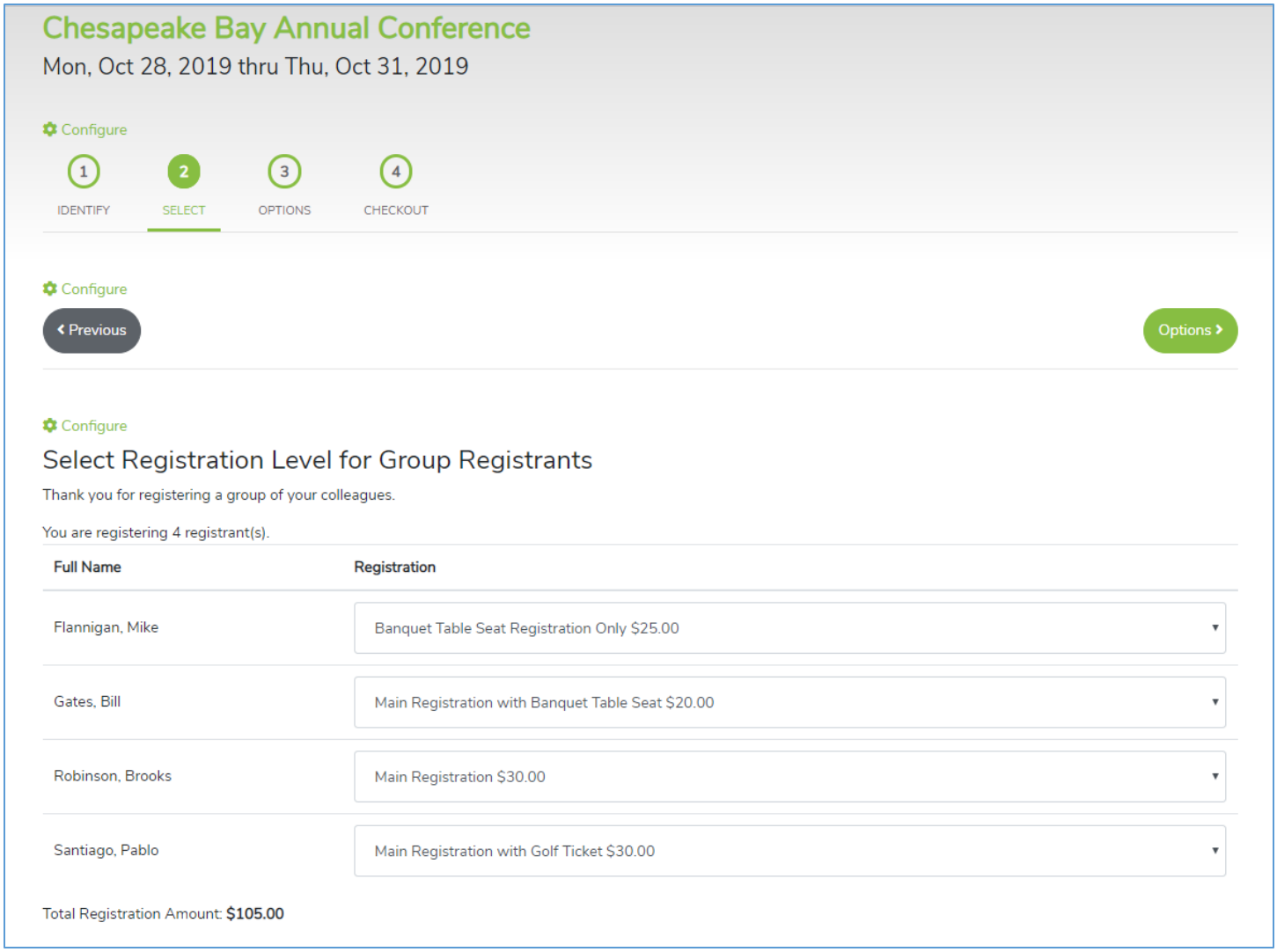


1 The Registration Header is styled to be a page title.

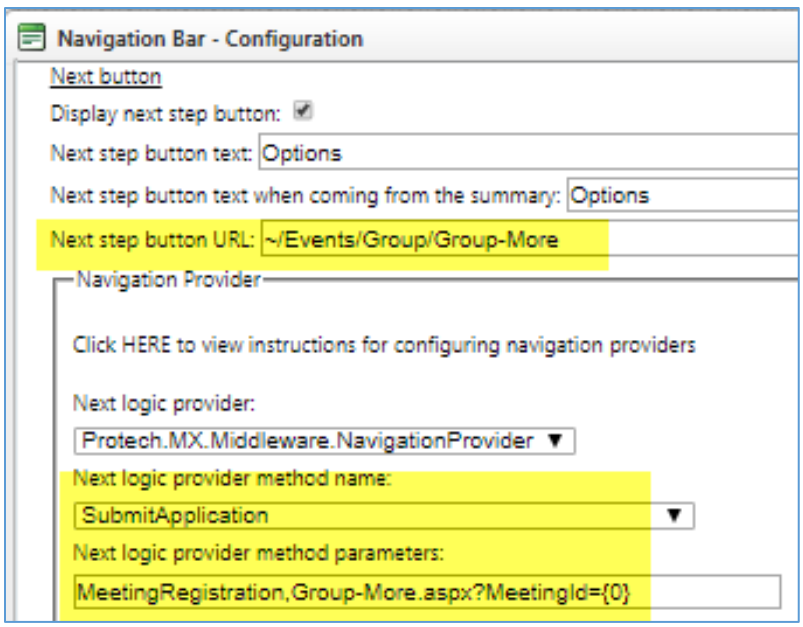
2 The process is always these 4 steps. Different registration options are just added to step 3.

3 The major change in this web part is that the Auto-fill input field has replaced both of the search/popup forms used to search for someone and add a registrant. Just type a name and select it from the dropdown, or click "Add" and enter a name. Then click "Add Registrant to List".

2. Select Registration (Events/Group/Group-Registrations) is functionally the same as in earlier versions.



But the Navigation bar for this step is different now.

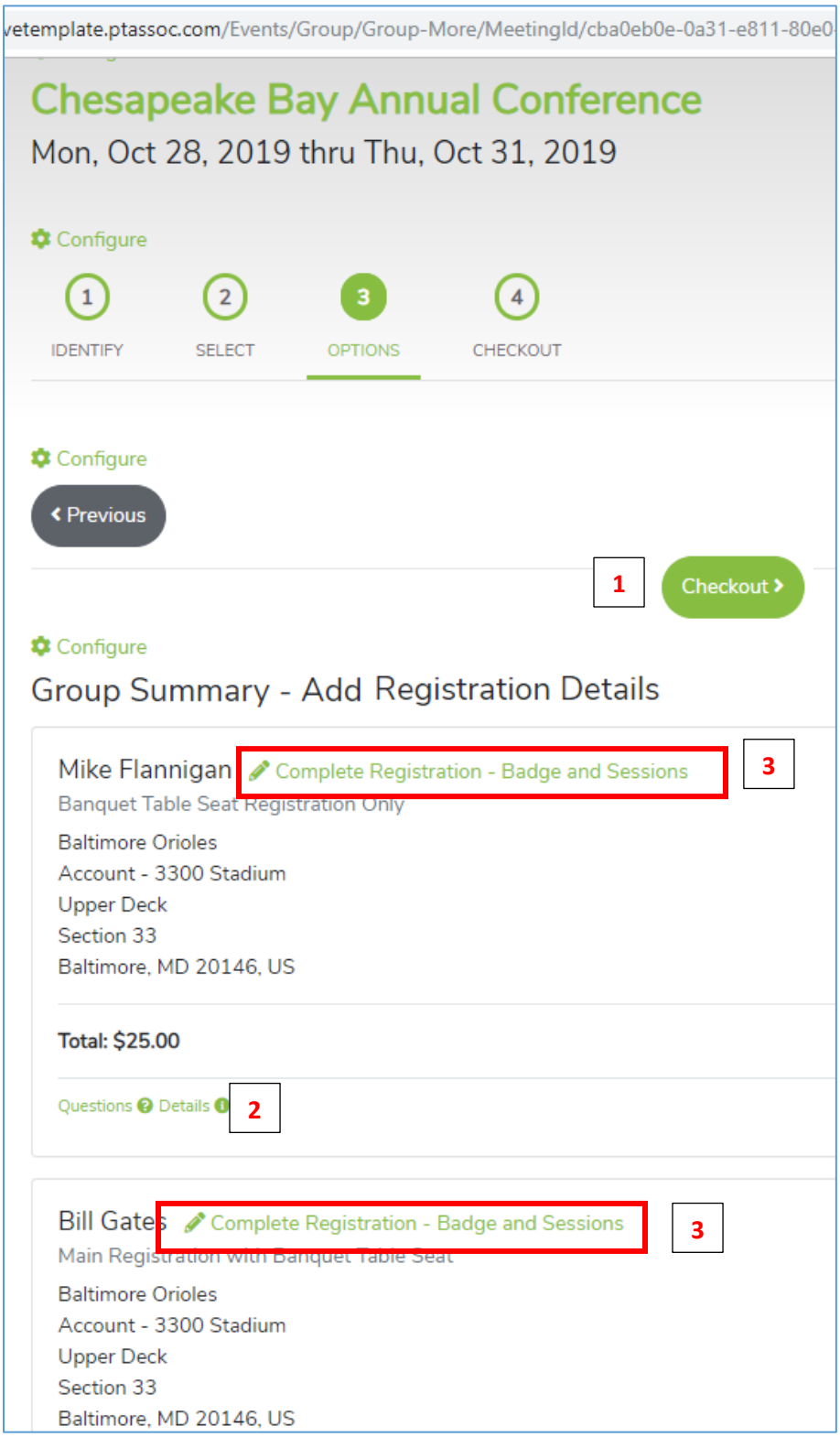


It uses the new SubmitApplication logic to add the group registrations to the cart. This makes it possible for the user to checkout immediately without adding individual options, if desired.

Even though the registrations are in the cart, the Navigation Bar takes the user to a new page called “Group-More”, where they can continue with the group registration as desired, until they are ready to go to the cart.

3. Options for each Registrant. (/Events/Group/Group-More)

This page has a new web part called "**Registration Summary Group**", which replaces the original Registration Summary for groups.



1 **The Navigation Bar** is configured to go to Cart with the Next button, called "Checkout". Since the registrations are already in the cart, this button does not add to the cart, but just navigates to the cart.

2 Review details: Like the individual Registration Summary web part, the user can click a hyperlink to view "Questions" and session registration "Details".

3 Add to a group registration: Unlike the single Registration Summary web part, which is for review only and has no actions, this one has a link for each registrant called "**Complete Registration – Badge and Sessions".**

- Configuration for this web part identifies the page where additional registration information can be provided. By default the "Edit button primary registrant URL" setting is "/Events/Group/Group-Details?ShoppingCartDetailId={0}"

  The parameter passed to the details page is not registration ID, but "ShoppingCartDetailID", because these registrations are already in the cart, so modifying them is like modifying registrations directly from the cart.

  The details page is a quick registration page, with multiple registration web parts that can be filled out for any group registrant.

4. Add Registration Details (/Events/Group/Group-Details)

This page has the following web parts – all regular Single Registration web parts.

- Registration Controller – in single mode
- Registration Header – showing the group registrant who was selected
- Navigation Tabs – with "Options" as the step number

1 Navigation Bar – This Next button is configured with "Submit application" logic to add to cart, so all registration changes are automatically updated in the cart, not the MX Registration tracking record. But the Navigation URL goes back to the Summary page. The Previous button also goes back to the Summary page, but without updating the cart.

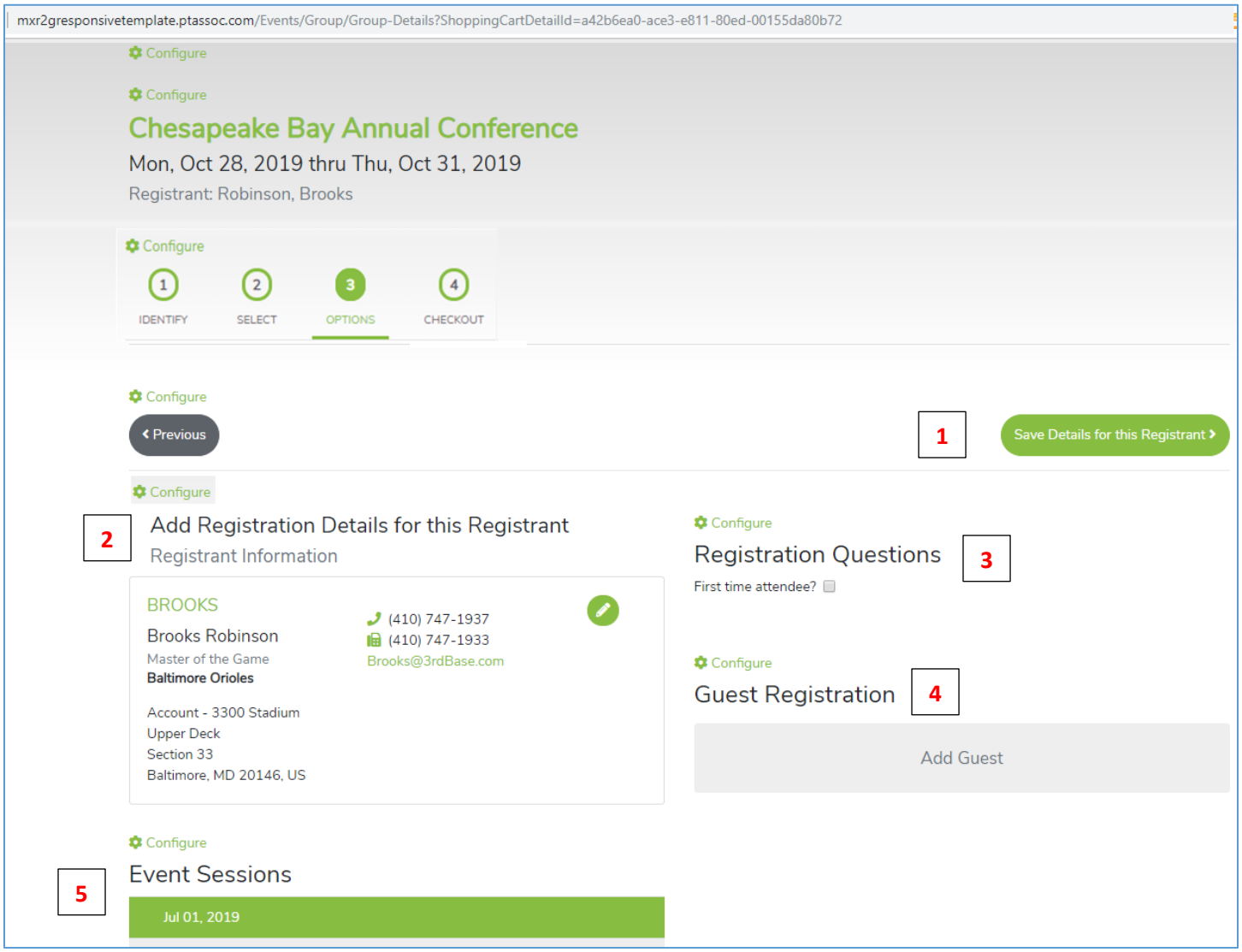
2 Registrant Information (Badge)

3 Registration Questions

4 Guest Registration – note that this means that any group registrant can now have guests.

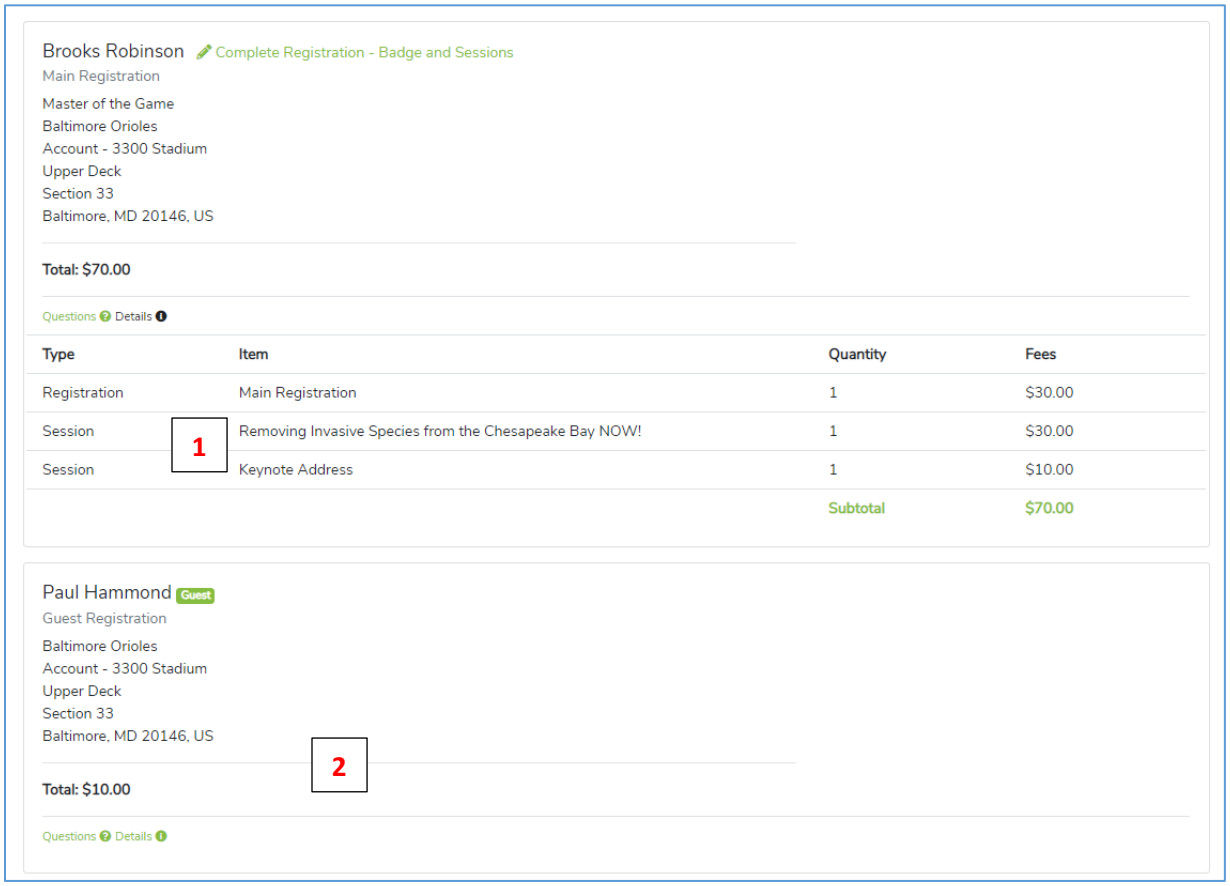
5 Sessions

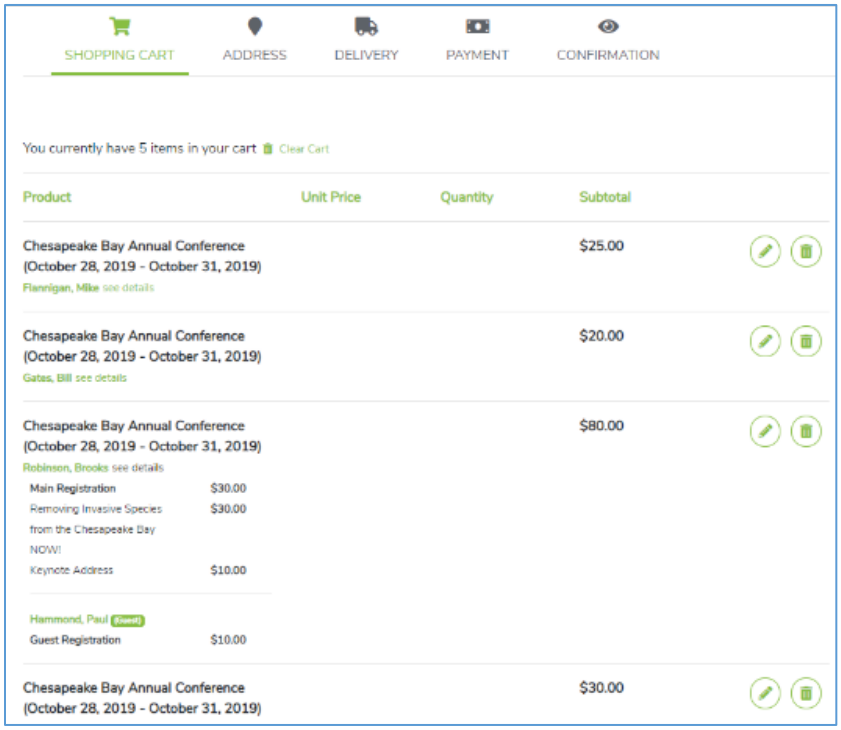
**Both the Guest Registration and Sessions web parts have significant changes, to be discussed.



When the user clicks the Next button, called “Save Details for this Registrant”, they are returned to the Summary page (Group-More). The refreshed summary web part shows all of the details added through this Group-Details page for that registrant when you click the hyperlink for “Details”:

1. Sessions
2. Guests

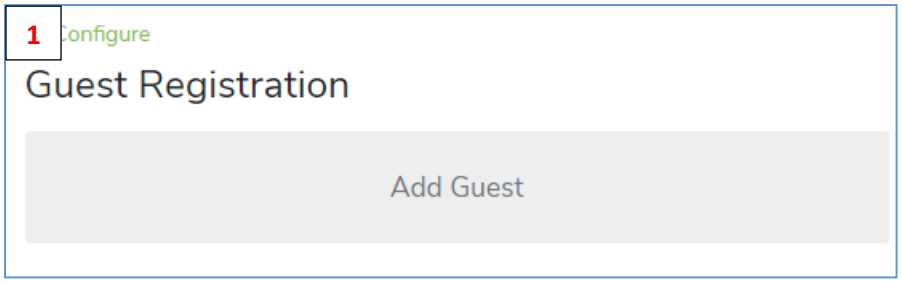




When you click the Checkout button, the items are displayed in the cart in the same way as in the Group Summary, because they have already been updated by the Details page.

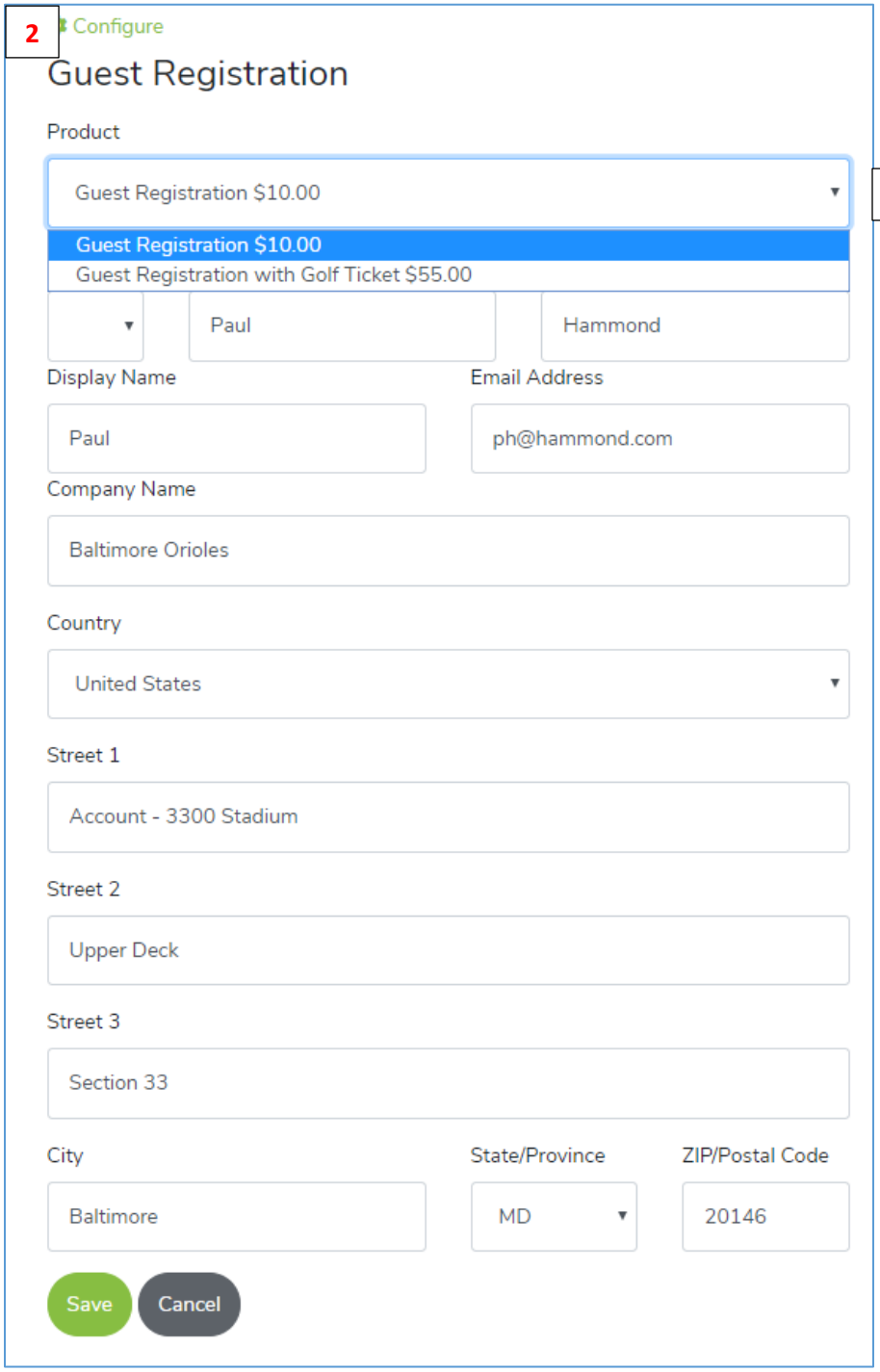
Guest Registration

The Guest Registration web part has been redesigned from the previous grid-and-popups UI to a clear, clean UI that alternates between View mode and Edit mode.

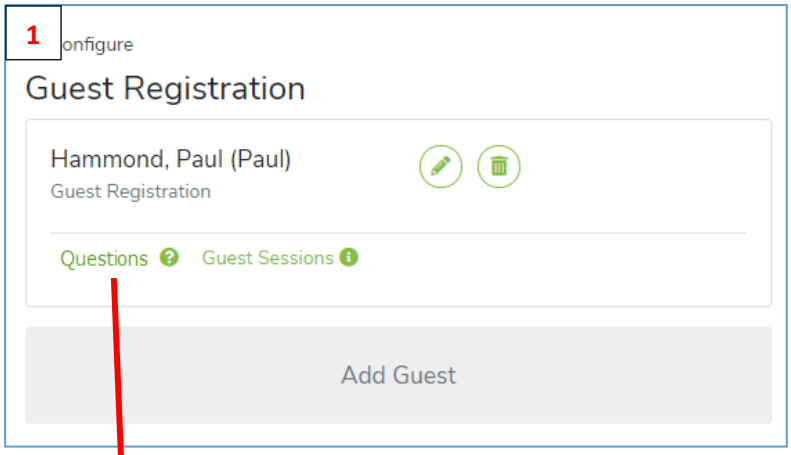


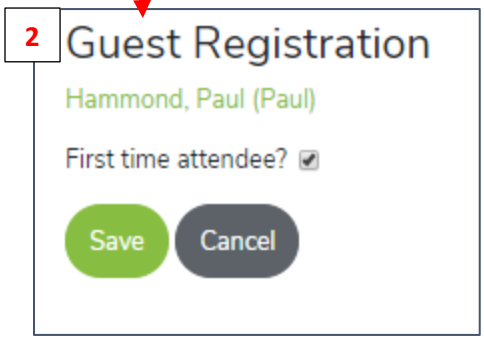
1 When you first see this web part, since there are no guests initially, what you see is the large action button labelled "Add Guest".

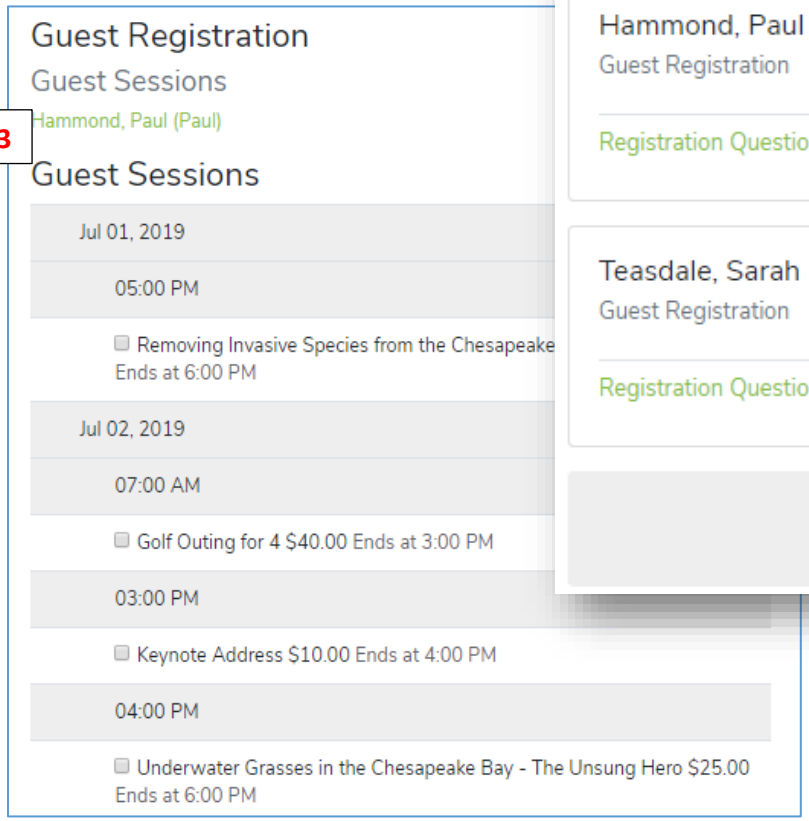
NOTE: OOTB the Guest Registration web part displays when it is part of the one-page quick registration even when there are no guest registrations. It is advisable to add ShowHide for automatic hiding if there are no guest registrations in the current meeting.

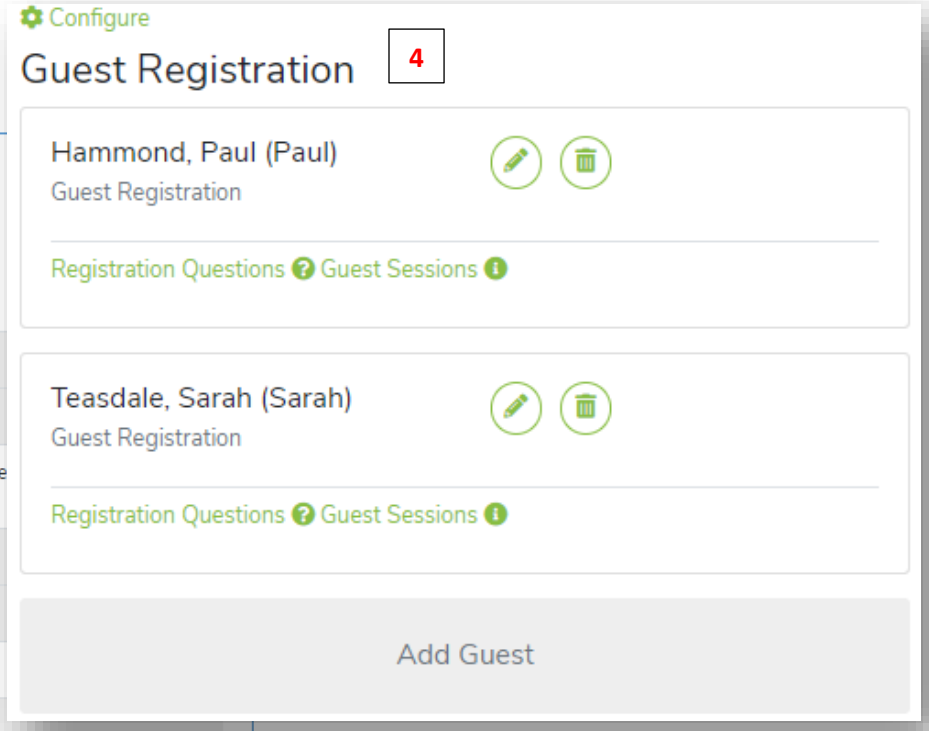


2 When you click the button, a simple edit form replaces the button, and you can add as much of the guest information as you like. Address is pre-filled.









1 When you save the guest entry form, the guest name displays in a similar way to the Registration Summary.

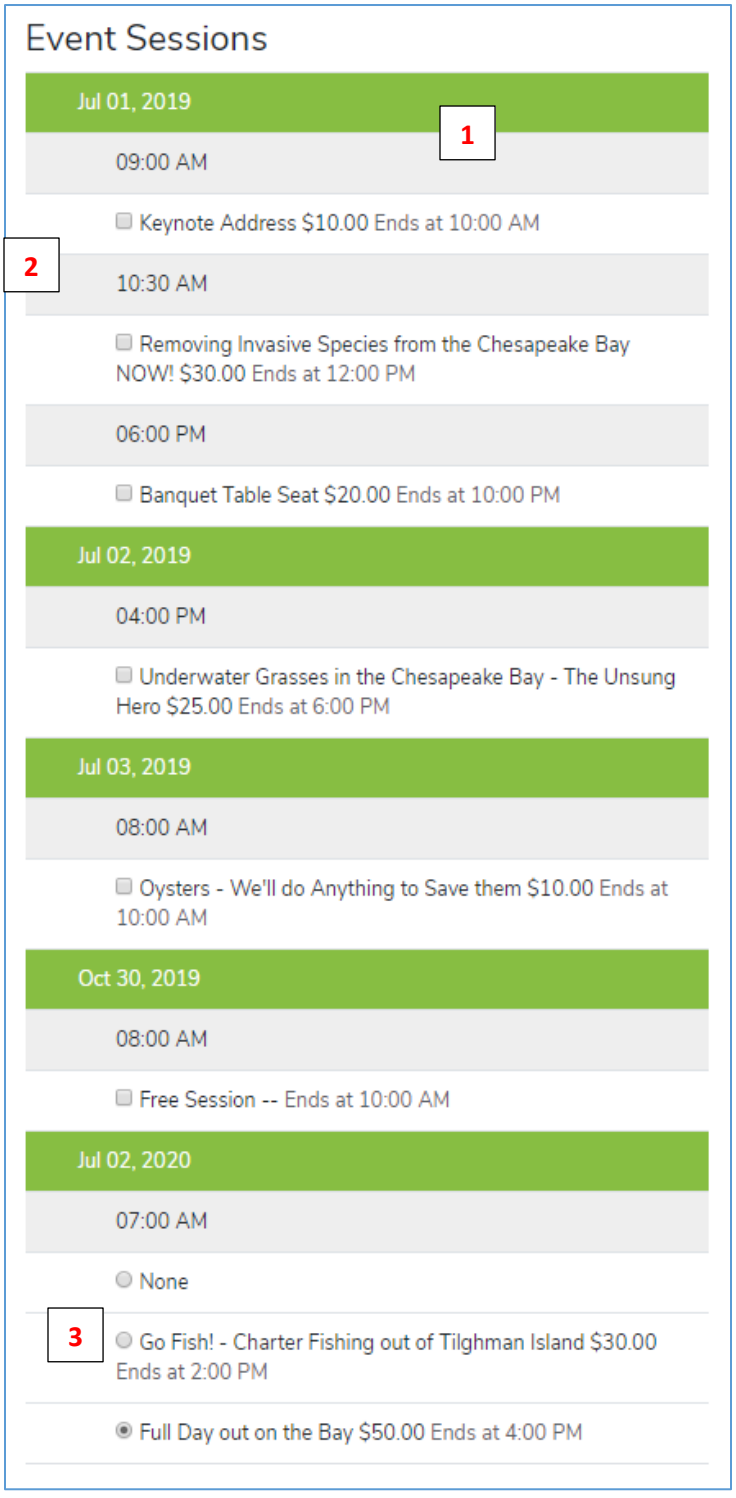
2 To add answers to questions, click the "Questions" link. Save.

3 To add guest sessions, click the "Guest Sessions" link. (Remember to make Guest Registrations Restricted as a rule, so guests won't be able to register for all sessions.) Again, Save (there is a Save button at the bottom of this form.) Guest details are not automatically saved by the Navigation Bar, so you must Save.

4 When you have added multiple guests, they are displayed in a list, not a grid, just as with the new layout of the Registration Summary web part.

Sessions

The Sessions web parts have been significantly changed. The Group-Sessions web part has been deprecated, and the Single-Sessions web part has been given a new user interface and new functionality.



1 When grouping by date AND time, we have a new non-grid look and feel. Different color headers (dictated by styling) break up the list by date, then start time. All session details are listed in the same column, so they wrap perfectly when viewed in a mobile device.

Note that this new look and feel only applies when you configure the Sessions web part to group by date AND time. Grouping by date only or by topic retains the same look and functionality as previous versions of MX.

- **2** Sessions are displayed with a checkbox for selecting ONLY if they do not conflict with other sessions in the same time slot. Session conflicts are where their start and end times overlap, but you can disable timeslot conflicts by setting the field "Exclude from conflict checking" = Yes.

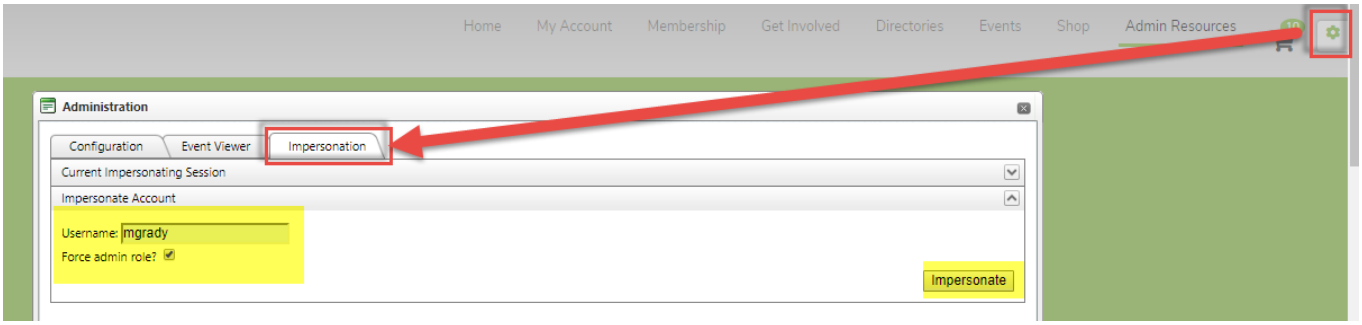
- **3** **NEW – Select sessions via radio buttons**: If more than one session is listed in a timeslot where there is a conflict, they are listed with radio buttons, so only one choice is possible. An additional radio button is included for "None", so no default selection is made for the user.

Selection by radio buttons is only enabled when grouping by date AND time. Other groupings do not group conflicting sessions in the same set, so radio buttons would not clearly indicate where the choices are.

Impersonate other users

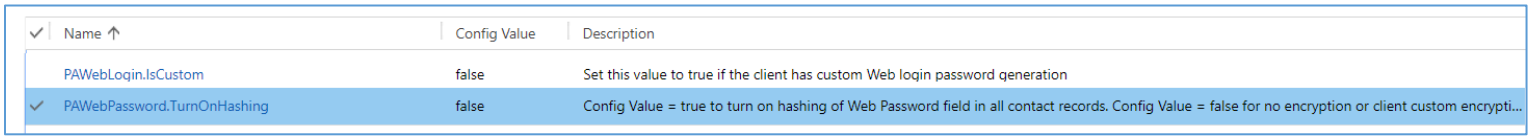
Admin Toolbar "Impersonator" lets an admin access the site as if they were another user, while retaining admin rights. Because it would be impossible to lookup a contact's password when hashing is enabled, admin users would no longer be able to login as someone else for testing and troubleshooting what different users see in MX. In order to address that need, we have developed a new Admin-only function: an admin now has the ability to impersonate another user in order to test the behavior of web parts for different web roles, just by entering the username. This functionality is available regardless of whether or not hashing is enabled.

- Click the Admin link at the top right of the screen (visible only to Admin users), and then click on the "Impersonation" tab. Then enter the USERNAME of the contact you want to test with, and check the box below for "Force admin role" in order to retain your access to configuration settings and the Admin link. This gives you the ability to see what the user can see with their web roles, but you can also access the configuration link while still logged in as that regular user. In addition, when you have finished testing with that user, you can access the Admin - Impersonate function again to end the impersonation and return to your own admin identity. You can then impersonate another contact without having to logout and login.



Password Hashing:

- Authenticate against hashed passwords when UX has enabled password hashing.
  In UX8.1.4, we added the capability to hash passwords in the contact record, so nobody can see them via UX or in SQL reports. Once hashed, they cannot be decrypted. This is an option in UX, so not all clients need to use it. UX hashing is enabled via a new application configuration parameter called PAWebPassword.TurnOnHashing.

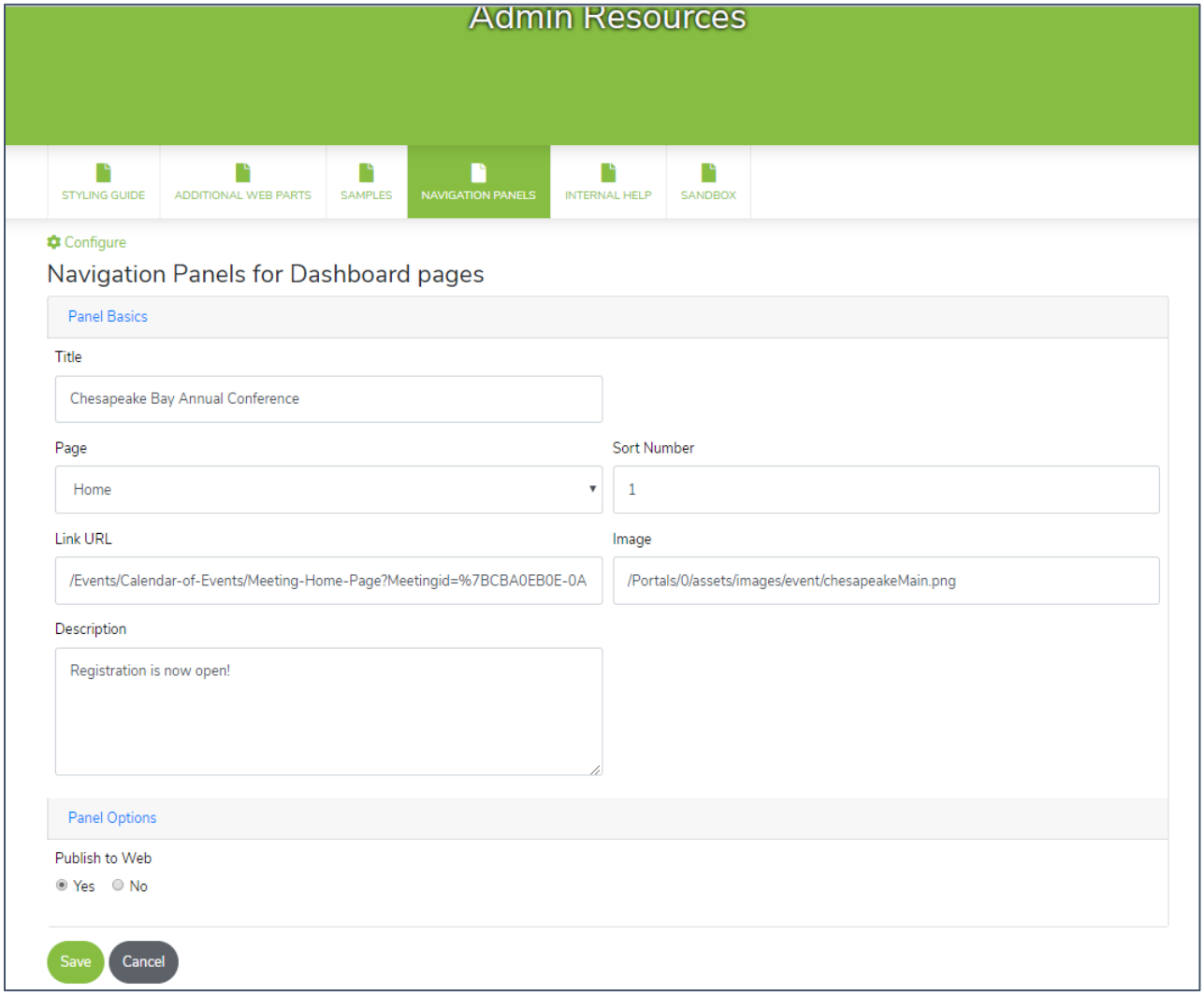


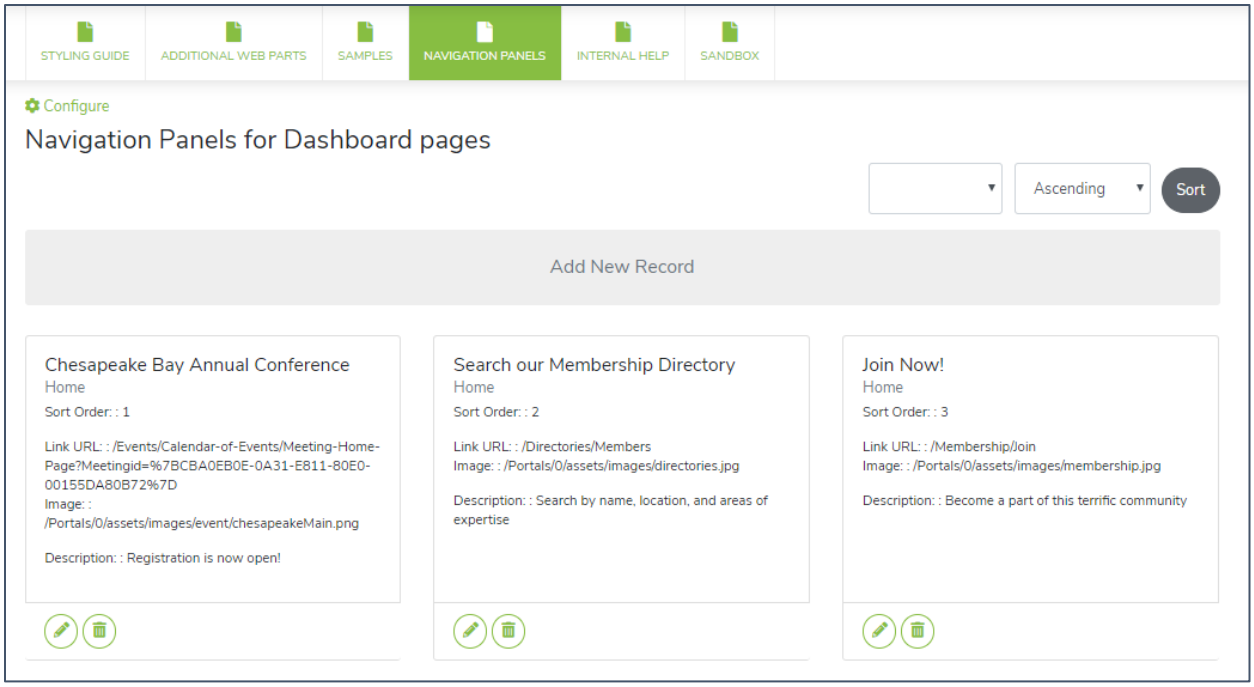
Name	Config Value	Description
PAWebLogin.IsCustom	false	Set this value to true if the client has custom Web login password generation
PAWebPassword.TurnOnHashing	false	Config Value = true to turn on hashing of Web Password field in all contact records. Config Value = false for no encryption or client custom encrypti...

MX had to modify its authentication functionality accordingly, so if it is configured to use password hashing, it will automatically hash the user's entry for password, using the same algorithm used by UX, and compare that encrypted value with the encrypted value in the user's password field in UX. This same logic is used for SSO.

Navigation Panels for Home Page Dashboard

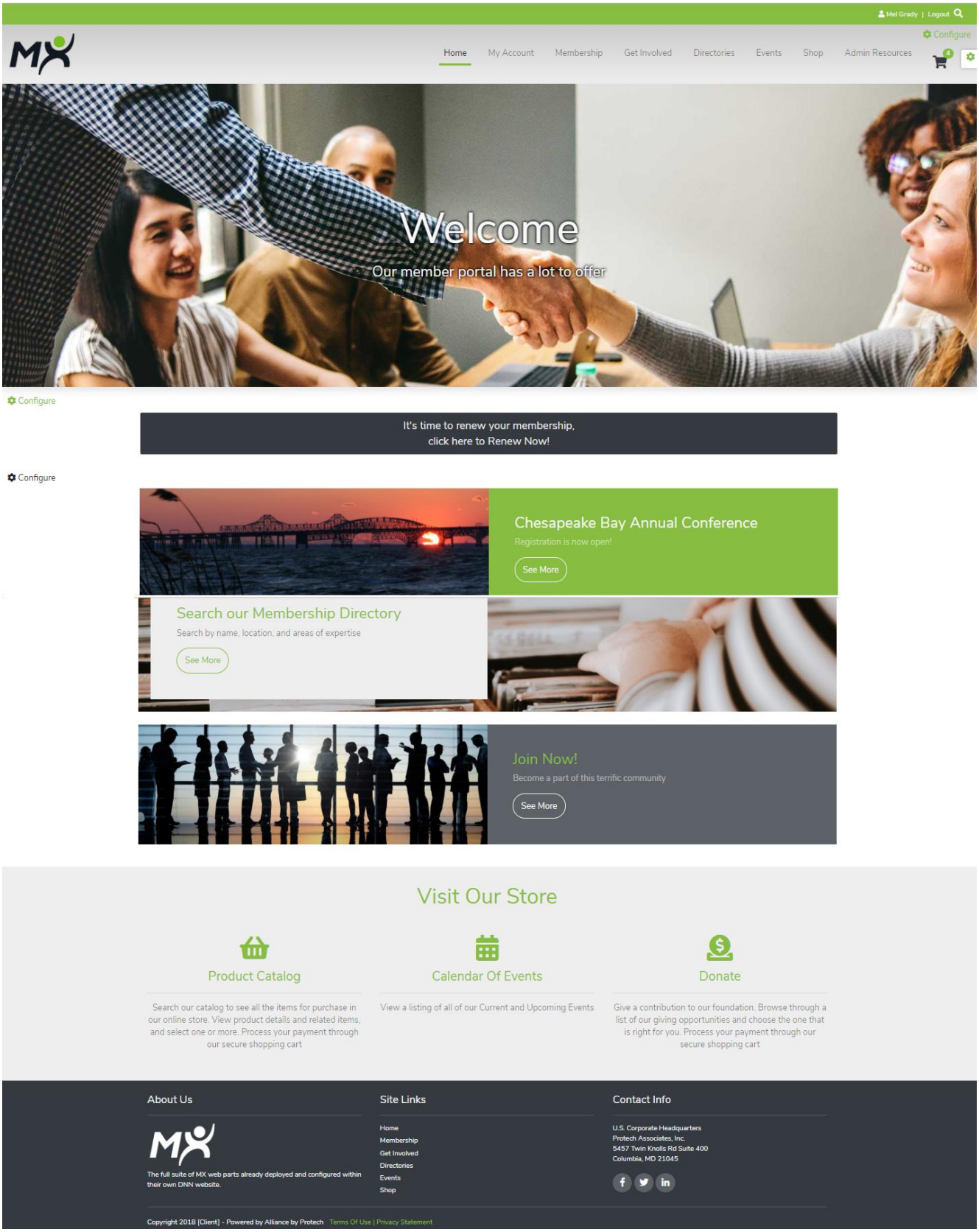
- Configure Navigation Panels in an Administrative setup page. Copy-paste the Link URL and Image. Be sure to click Publish to Web = yes if you want to include this panel in the page display.



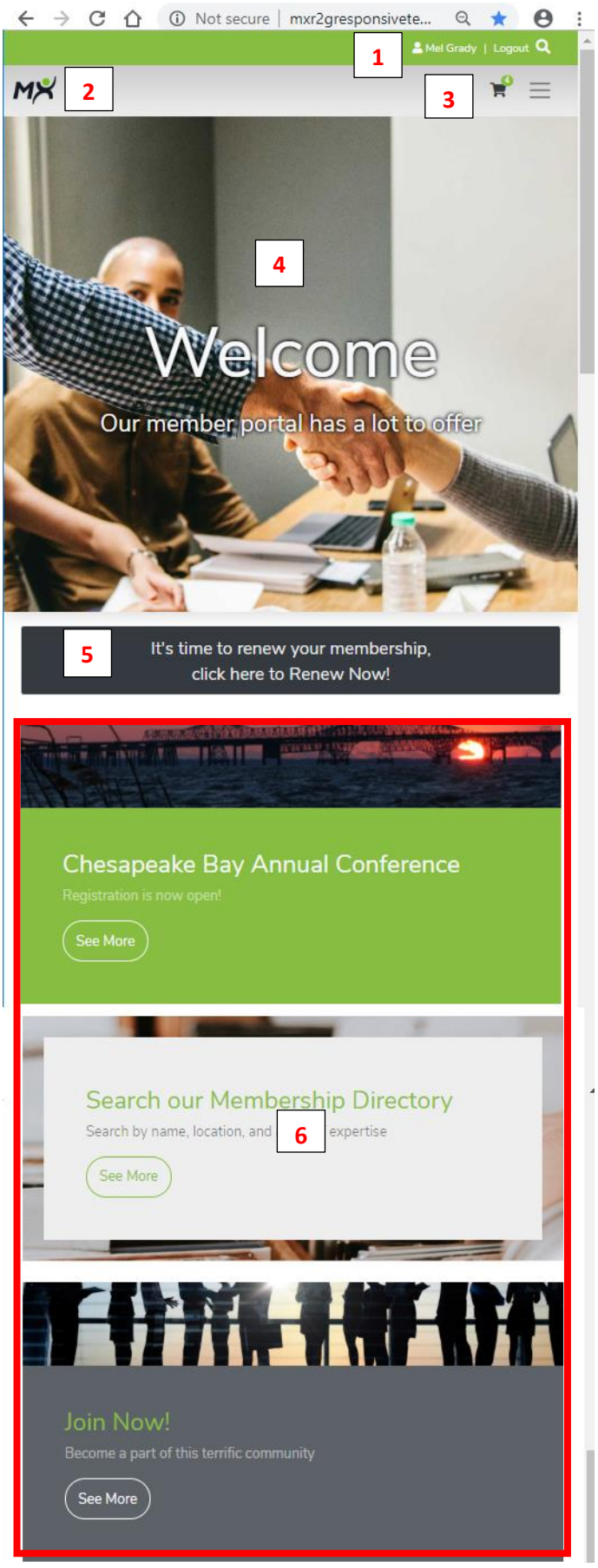


MX 8.2 Template Site – A Guided Tour

Home Page (/Home)



Home Page – Enhancements to note



The home page is fully responsive for use on a mobile device. Images automatically compress to fit the device width without horizontal scroll bars, individual components stack on top of each other, and the navigation menu automatically becomes a hamburger icon.

1 DNN Login/Logout replaced Welcome web part. Instead of adding the Welcome web part in a banner zone, we have added MX functionality to the inherent DNN login, view profile, and DNN logout functionality. This allows for a smaller footprint in the banner and better integration with core DNN.

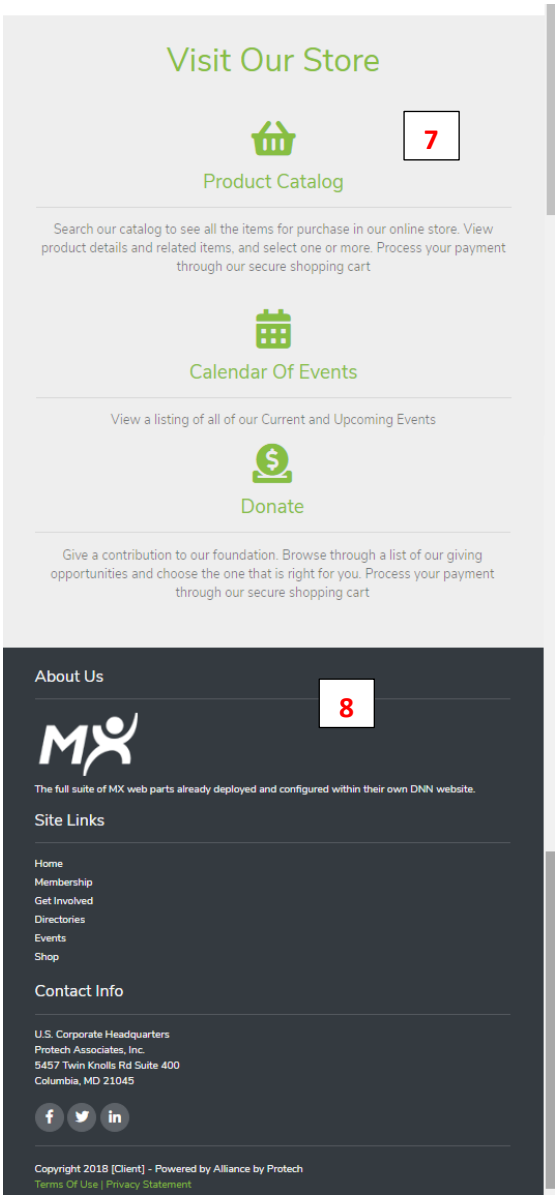
2 DNN Logo identified in Site Settings automatically redirects to an external www home page. Now a web.config setting allows us to use inherent DNN site settings without losing the ability to redirect it to an external site.

3 Shopping Cart link is an icon. The Shopping Cart Summary web part now has an "Icon" mode, that displays as just a cart icon with number of items in the cart.

4 Page title is displayed within a "hero" image. Now all page layouts support images and icons as an integral part of the page, and the default page layout includes an image overlay for page titles.

5 Automatic Renew Now Alert when the user has an unpaid renewal invoice for current or upcoming membership cycle. It is completely invisible at any other time.

6 Dashboard navigation panels are fully configurable. For each page where you want a dashboard, you can define the panels of the dashboard in a table by entering a Title, URL, and Image for each. Description text is optional. A predefined dashboard template automatically displays it in an attractive list, filtered to show only the panels that you have defined for that page.



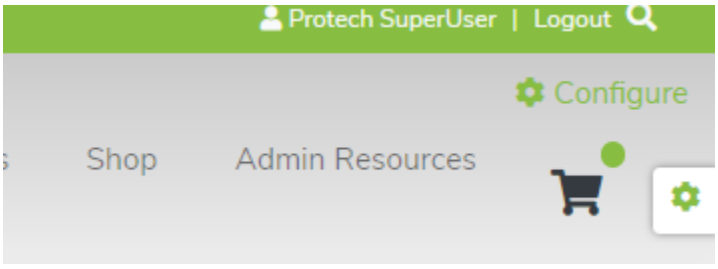
7 An Icon menu at the bottom of the home page is an html web part that provides shortcuts to the most popular e-commerce pages. It is formatted to mimic the built-in landing page menu for the Online Store, but is independent of the secondary menu structure, so it can contain only the pages that are most important. This web part can be copied onto as many pages as desired.

8 A fully informative website footer is an option for the site as a whole. A setting in the web.config identifies which footer layout to apply to the client site, either one of the predefined footers or a completely custom footer. The default footer has a list of easy access to site links for each of the top navigation pages, so it duplicates the top menu navigation bar without any hard-coding. The contact info includes social media links that are defined globally for the whole site, defined once in the web.config.

Like the footer, the header and navigation layout is also fully customizable. It is a self-contained layout form.

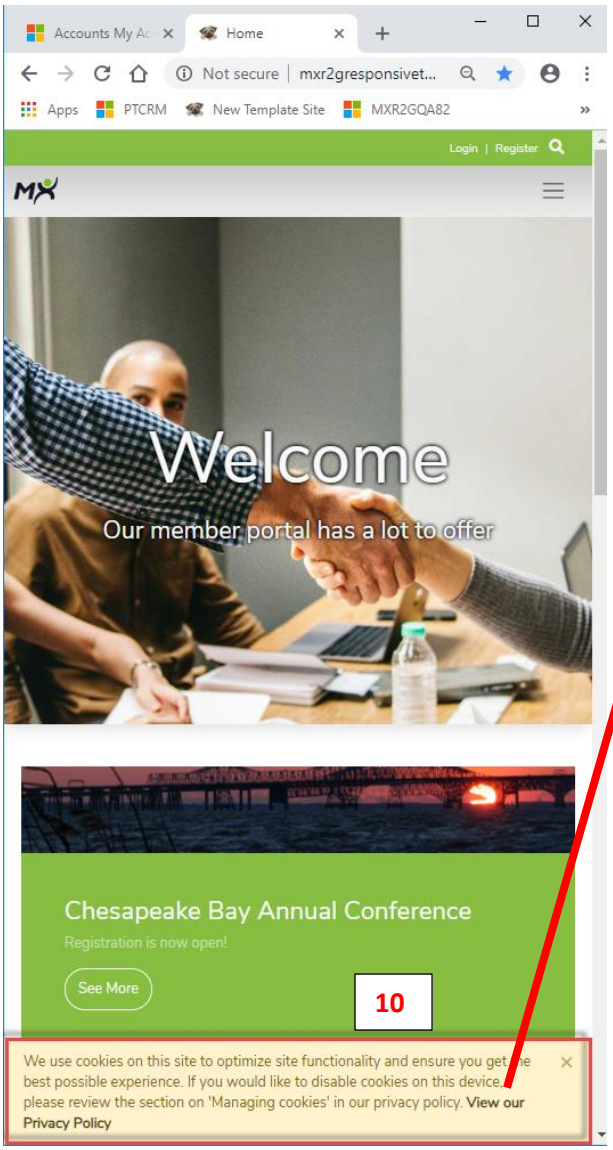
New Administrator Form link

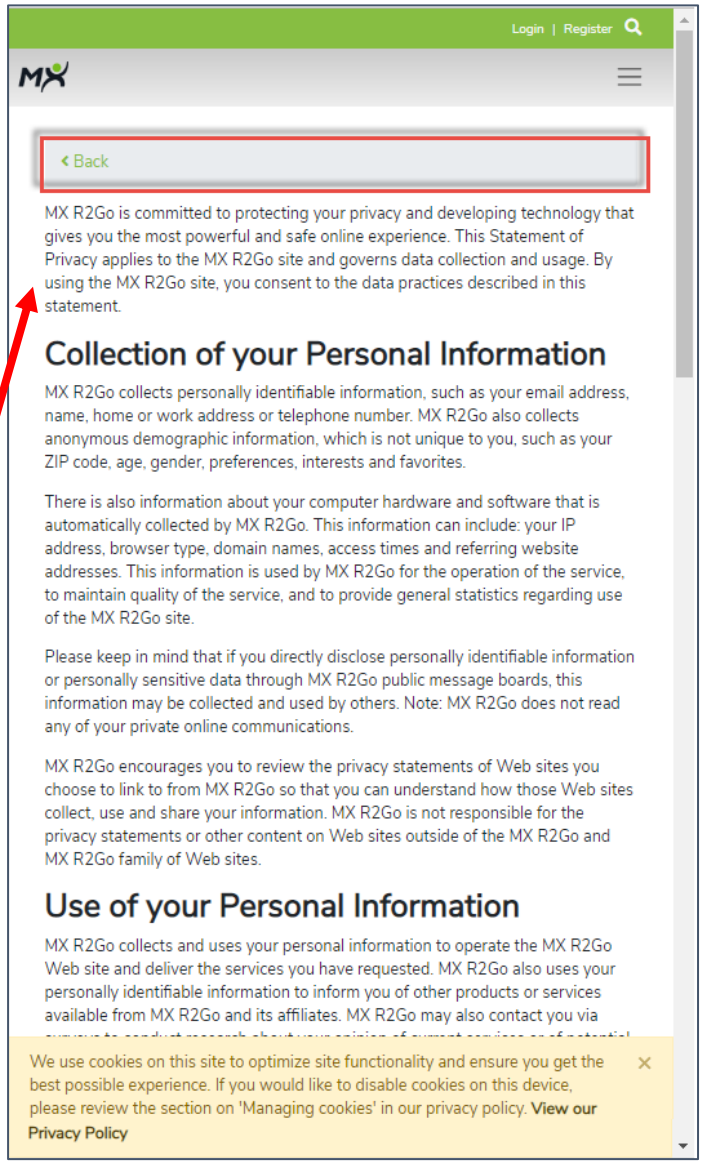
The link for accessing the Administrator form has been changed. Instead of the word “ADMIN”, it is now visible at the top right of the screen as a gear icon on a white tab. It is not part of the menu styling, so it should no longer be subject to styling changes that unintentionally omitted it in the previous version.



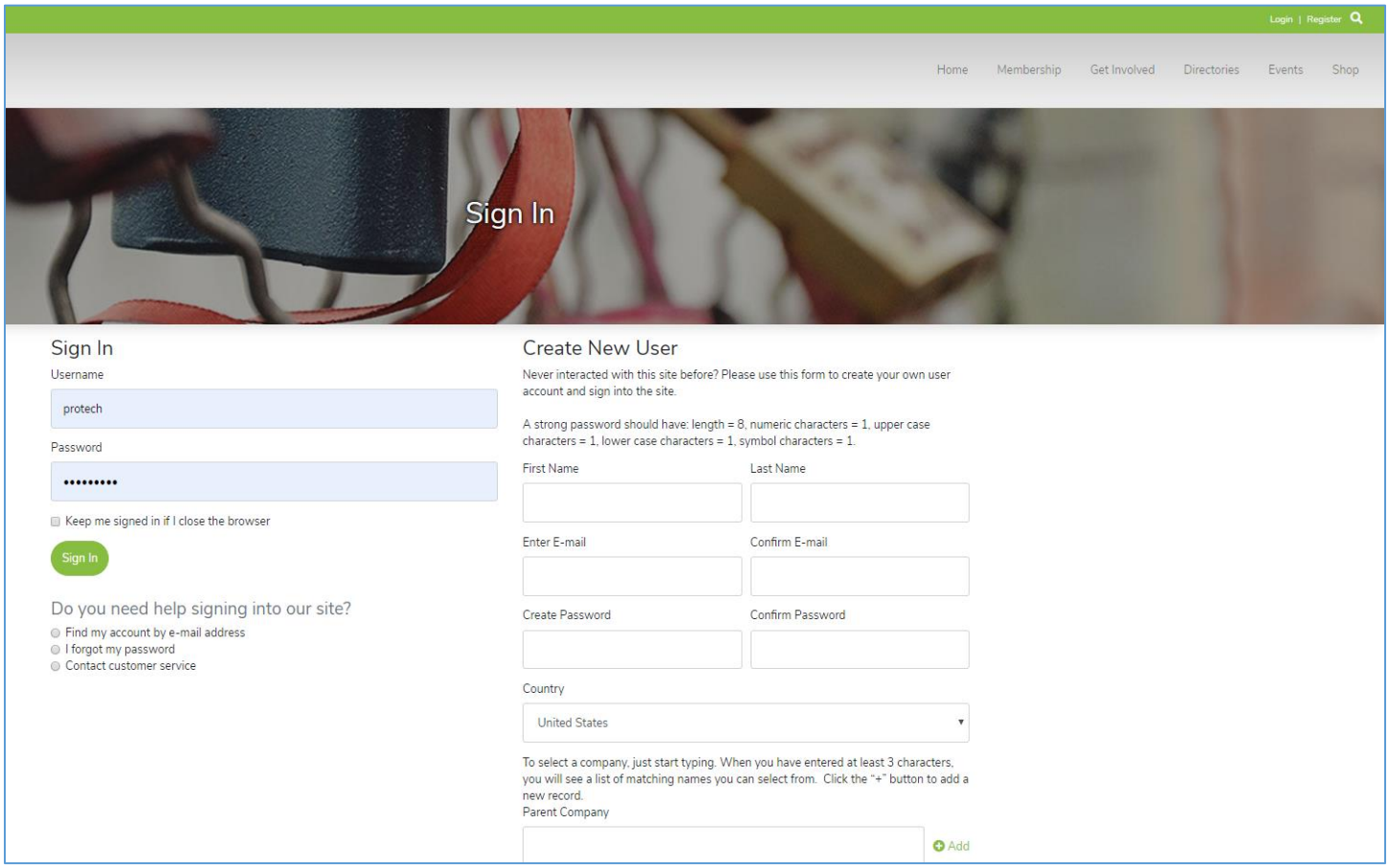
10 GDPR security alert. A ribbon pops up at the bottom of the screen when the user first accesses the site. It is not related to login.

- The words “View our Privacy Policy” navigates to a fully styled page called “Privacy” in the site, where the user can view the full text of the privacy policy, including the use of cookies by MX. There is a “Back” link at top and bottom to return to the original page.
- The “X” at the top right of the ribbon closes the ribbon and it will not reappear.
- A setting in web.config enables or disables this feature.

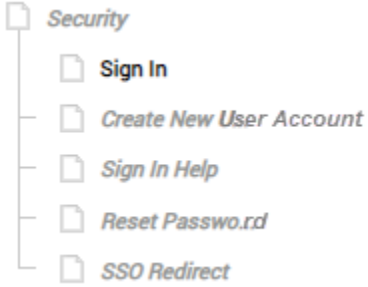




Security Module (/Security/Sign-in)



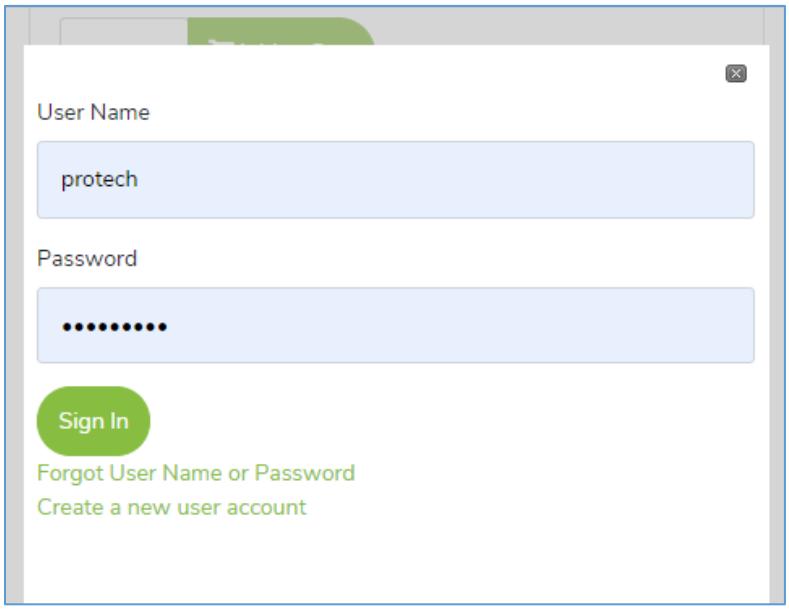
The pages for Sign In, Create New User, etc. are now in the page hierarchy under the top level page called “Security”, instead of under “Home”. None of them are visible via menu. Many of the pages related to SSO, for Token Redirect and Sign Out, for example, are no longer needed, because the SSO functionality has been built into the security module architecture.



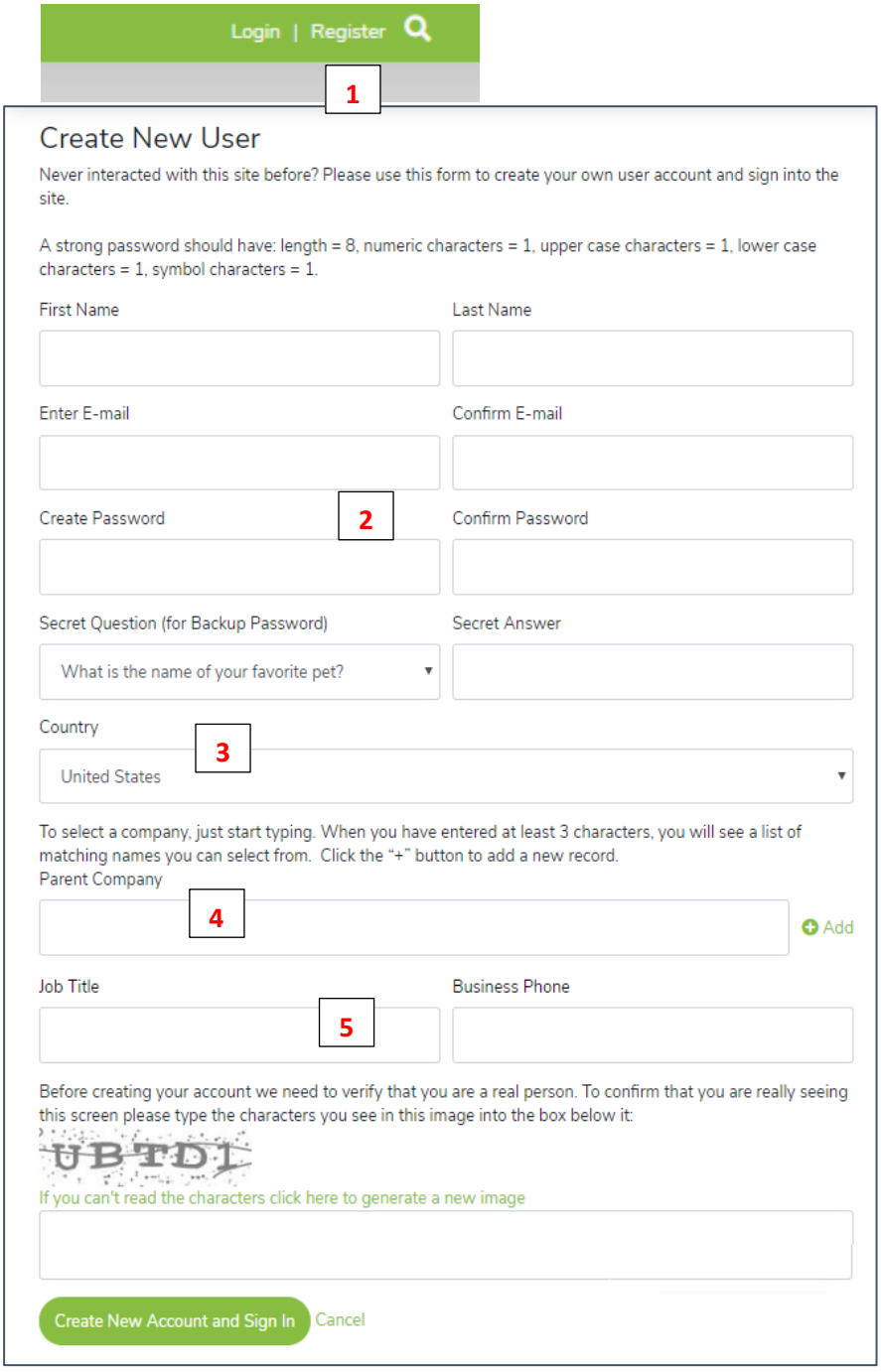
- Create New User and Sign In Help are on the same page as Sign In, so no extra redirection is needed. Dedicated pages exist for both, for direct navigation from elsewhere.
- Functionality has not changed for Sign In Help and Reset Password.
- Automatic sign out for SSO. Sign Out no longer needs separate pages with the Logout web part button and hard-coded redirect. Instead the external site just redirects to this invisible page for automatic logout and redirect to the www site home page. This hidden page is the same one that is used by the DNN Logout link in the header. An external user must redirect to this unpublished page and include a returnurl.
  .../Portals/_default/Skins/MXOnline/pages/SignOut.aspx (“...” must be replaced by the full site name)
- SSO Redirect is a page that contains a new web part called “MX - Security - Token Passing Redirector”, which applies built-in logic to redirect either to the Sign in page or return with a token to an external site, depending on whether the user is already logged in or not. Previously this was done using an MX Find-driven work-around. Now this invisible web part performs that automatically just by having an external site redirect to this page when a login is needed.
- The Sign in web part now also incorporates this logic, so if an external site redirects to it for login and the user already has a session, the Sign in web part automatically returns the token, just like the SSO Redirect.

Sign in Popup

The Sign-in popup is now responsive. By reducing it to its core function, which is just signing in, it is now easily displayed in a responsive popup that fits within a mobile device:



Create New User (/Security/Sign-In and /Security/Create-New-User-Account)



1 The "Register" link in the header is the DNN function for new users, and it is now mapped via Site Settings to the dedicated Create New User page, just as DNN maps its sign in function to the MX Sign in page. The web part here is re-using the same configurations as the instance that is in the Sign In page, so changing the configuration in one page automatically reflects in both pages.

2 Two column layout makes better use of space and pairs the key input fields with the "confirm" field that it goes with. There is no longer a need to confirm Secret Answer.

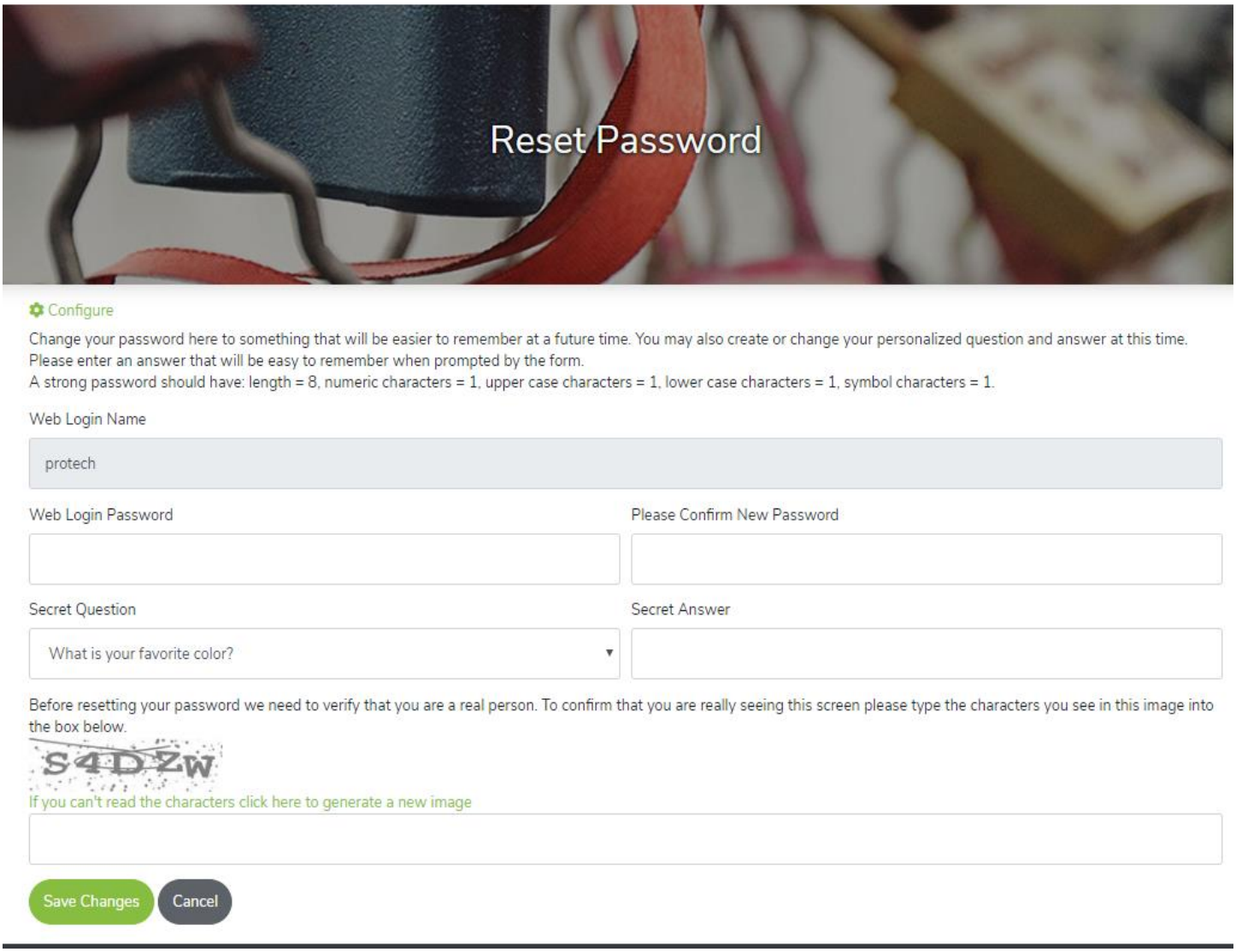
3 Default country: There is now a default setting for default country in the Admin form for the entire site. The default is United States, and it can be changed for Canadian organizations. This means that the user can skip over the country if the default is correct, instead of having to search through the entire list of countries, and there is no NULL option anymore.

4 Identifying your parent company is no longer dependent on multiple popup forms and searches. All lookups for account and contact use the new Auto-fill control, where the user just begins to type, and can select from a dropdown of possible matches. Adding a new company record requires just clicking the "+ Add" button and entering company name and city. Duplicate checking is performed on the combination of name and city.
(see next page for details)

5 Form fields added to Create New user are now fully integrated with the rest of the form.

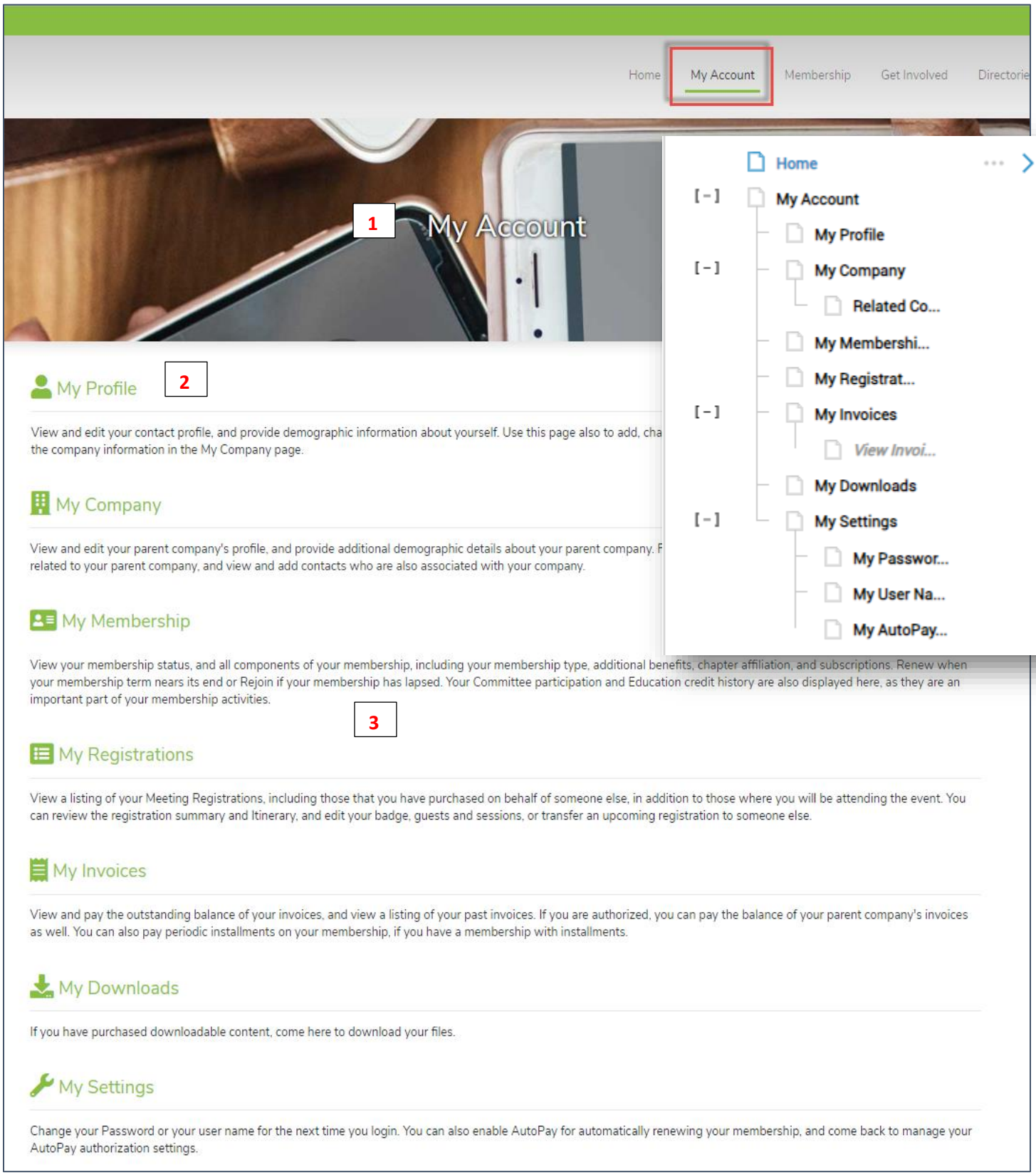
Reset Password (/Security/Reset-Password) vs. Change Password (/My-Account/Change-Password)

The same “Security – Password” module is on two pages, one for anonymous users as “Reset Password”, and the other for logged in users, as “Change my password”. These are configured differently, so they are not sharing one instance the way Create New User does. For more details, see My Account module.



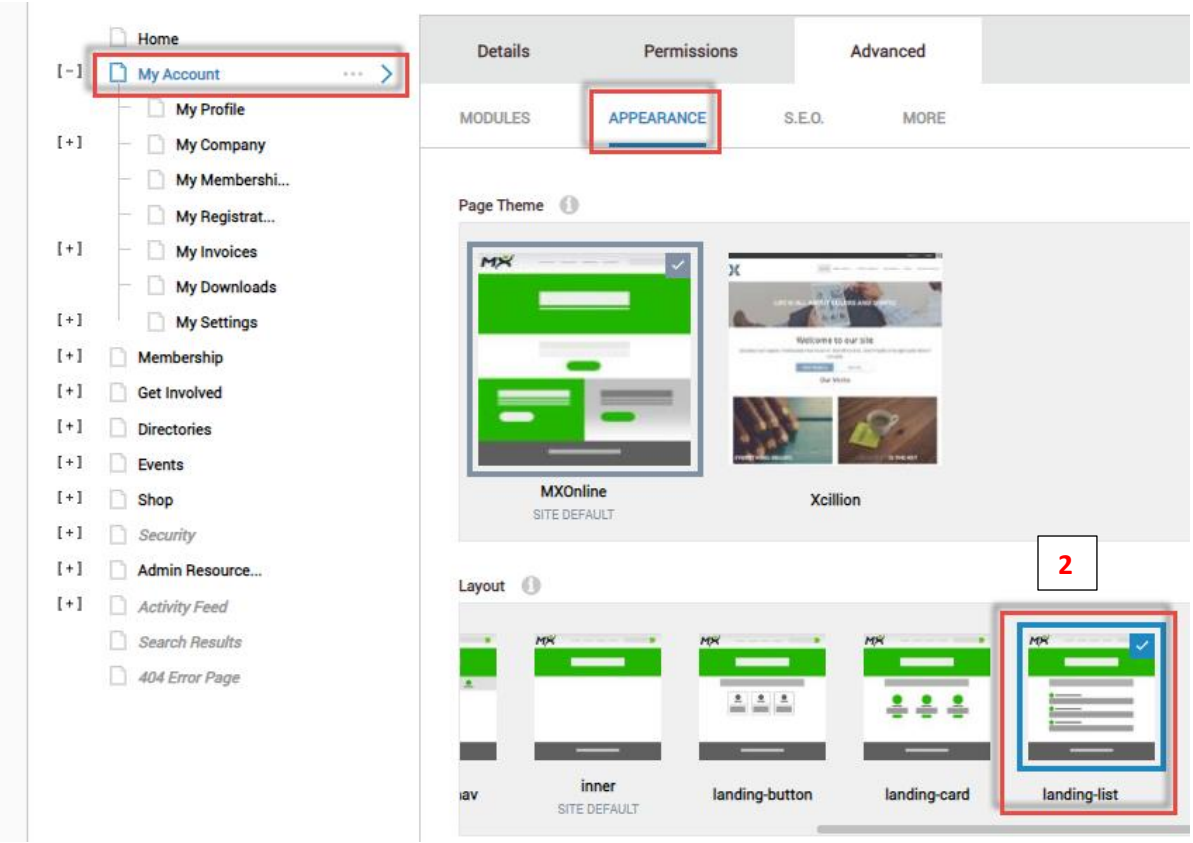
My Account (/My-Account)

Landing Page

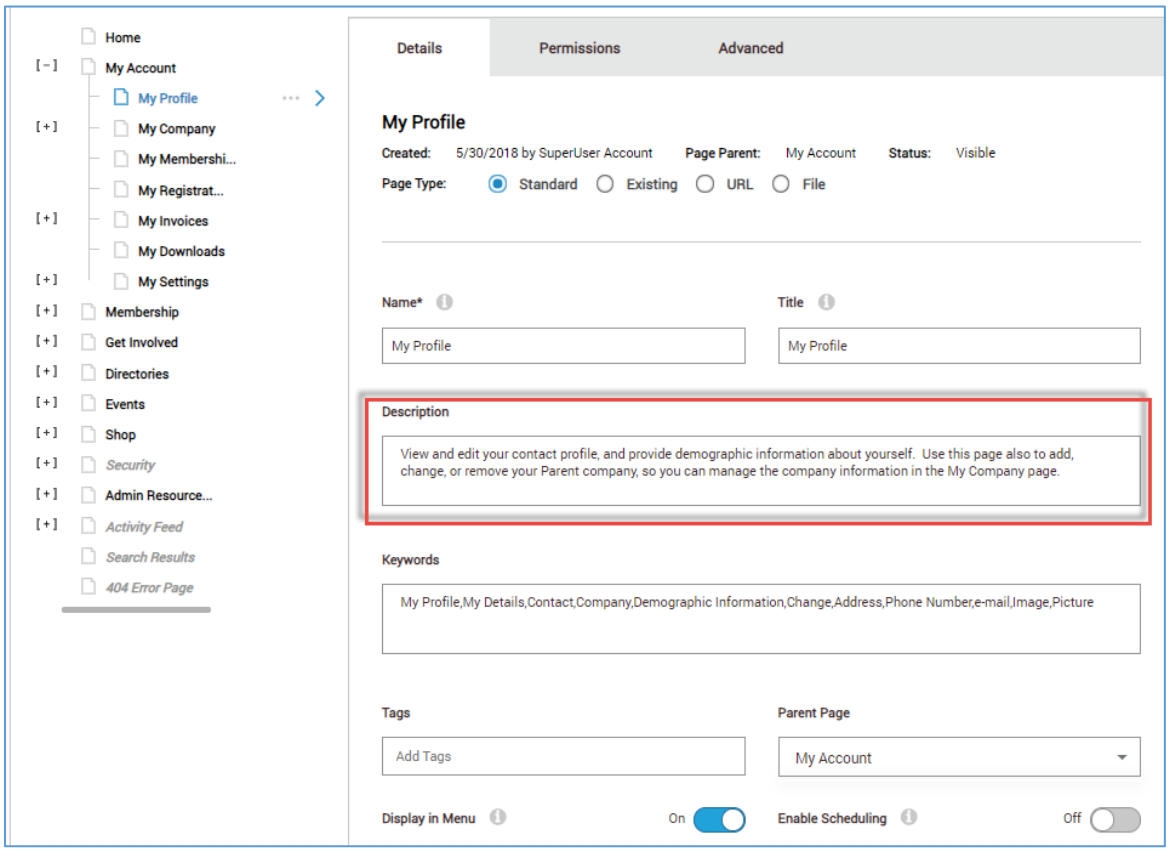


1 Every module – every top level primary navigation menu item - now has a landing page with an image or color background for the page title. All of the Secondary Navigation menu items below that primary page that are setup to display in the menu are presented automatically as a list to select from.

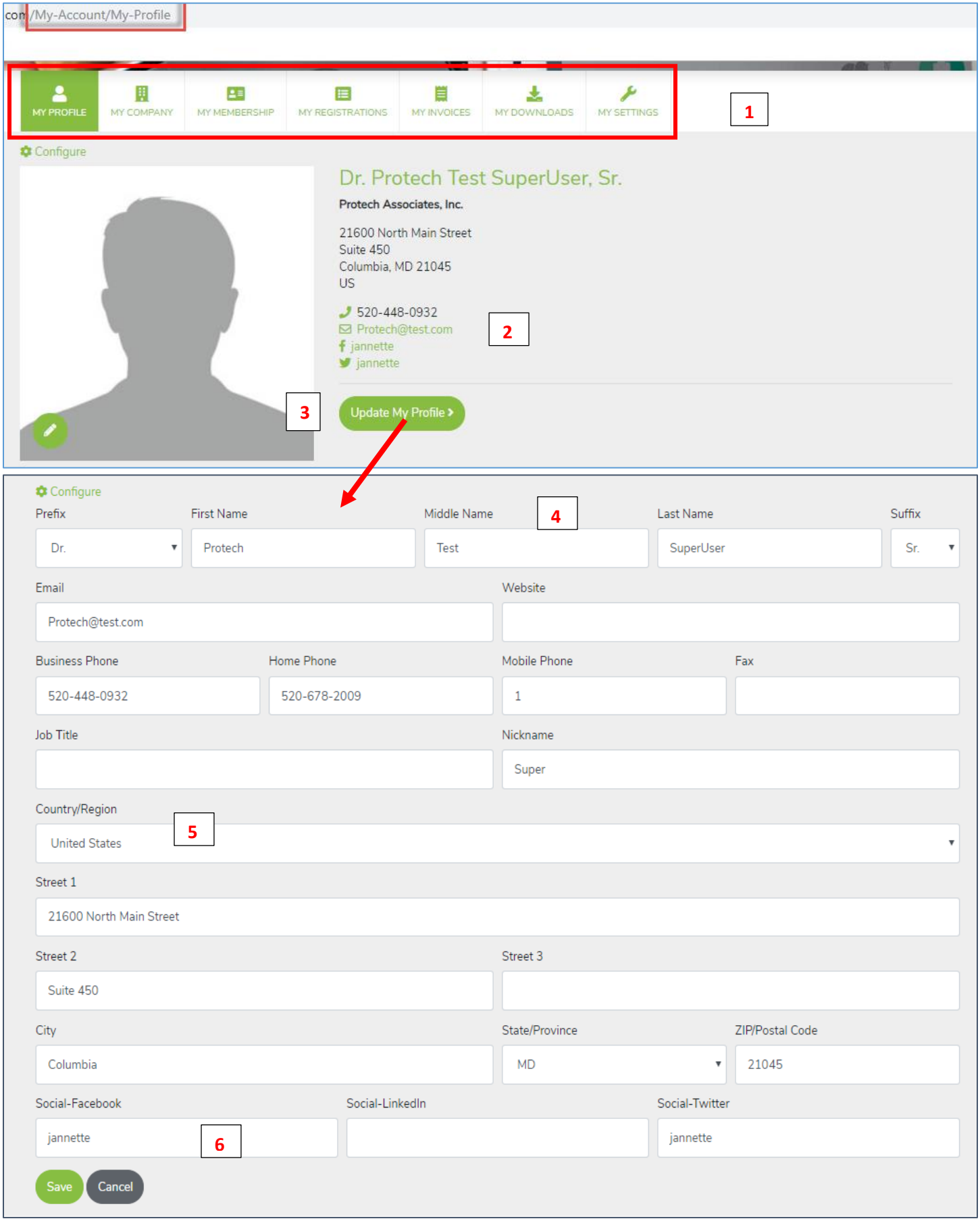
2 Pages under that top level landing page are listed with (optional) page descriptions and navigable links. The landing page layout is the page theme, and there are 3 different layout options – landing-list, landing-button and landing-card.



3 The page description for each secondary menu option comes from the DNN page setup for that page.



My Profile (/My-Account/My-Profile)

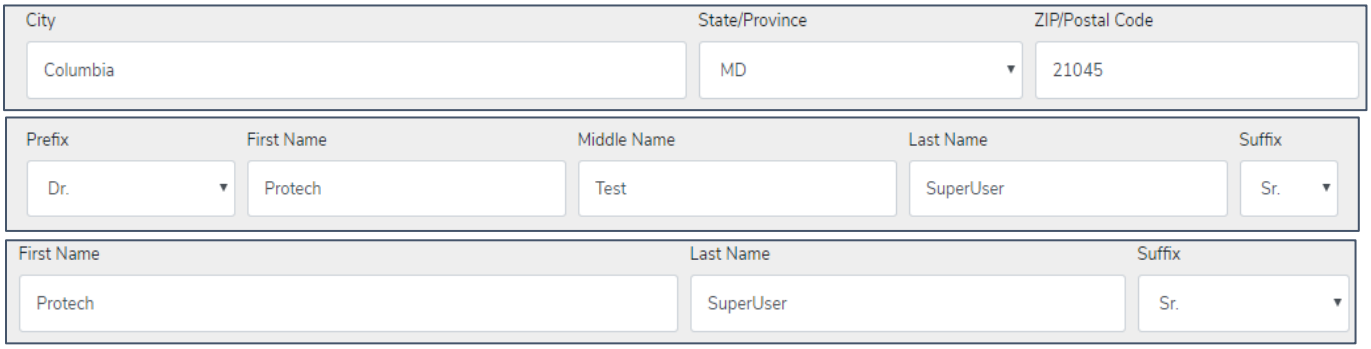


1 My Account module page layout: All of the child pages of the My Account module are configured with a page layout that lists the secondary menu options as tabs across the top, instead of on the left, so they are presented clearly as subsets within the same "My Account" menu option. The user can easily jump from one My Account page to another without leaving the "My Account" universe. Again, these tabs are automatically generated from the secondary navigation setup in DNN – nothing is hard-coded.

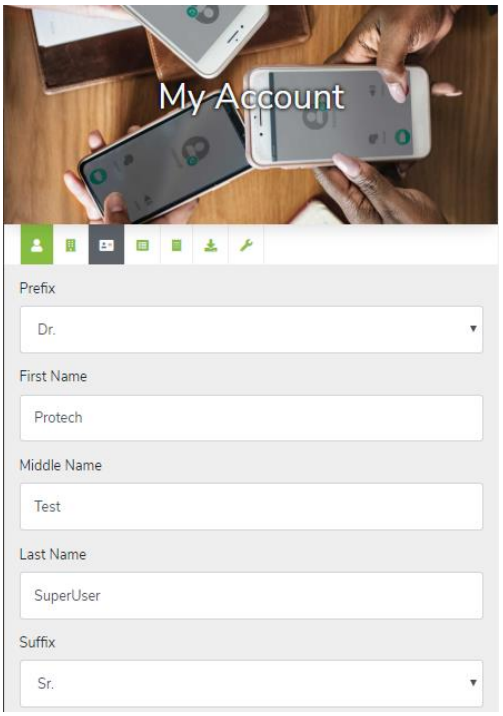
2 The Contact Basic Information web part has been completely redesigned. It is designed now to present the equivalent of a person's business card. The View mode fields are not configurable, but they now reflect what all business cards have on them: address, phone, email, and social media links. If a social media link is empty, the icon is hidden as well. The image is editable via its own Edit icon, so a user who wants only to update the image does not have to edit everything.

3 The Edit form is not a pop-up, it replaces the View mode on the same page, when the user clicks "Update My Profile". There are several noteworthy changes - most importantly, every item displayed on the View mode is editable, including Primary Address and social media links. In previous versions, address was only editable via My Addresses.

4 The form now supports more than two columns, as needed for information that extends over multiple fields, such as name and address. so it has the flexible, intuitive look of a paper form. The 5 fields for name parts are all displayed on the same row. If you configure the Basic Form Fields to exclude fields like Prefix, Suffix and/or Middle Name, the field widths automatically re-adjust to divide the available space among the displayed fields. Similarly, phone fields extend 4 across, and address groups City, State and Zip on a single row.

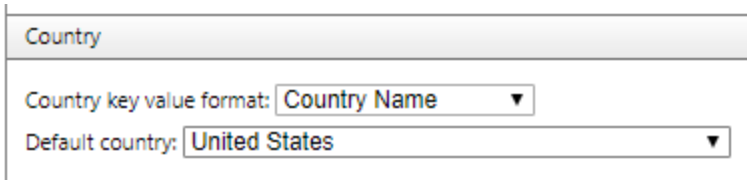


- Note that in mobile mode, all fields stack in a single column.



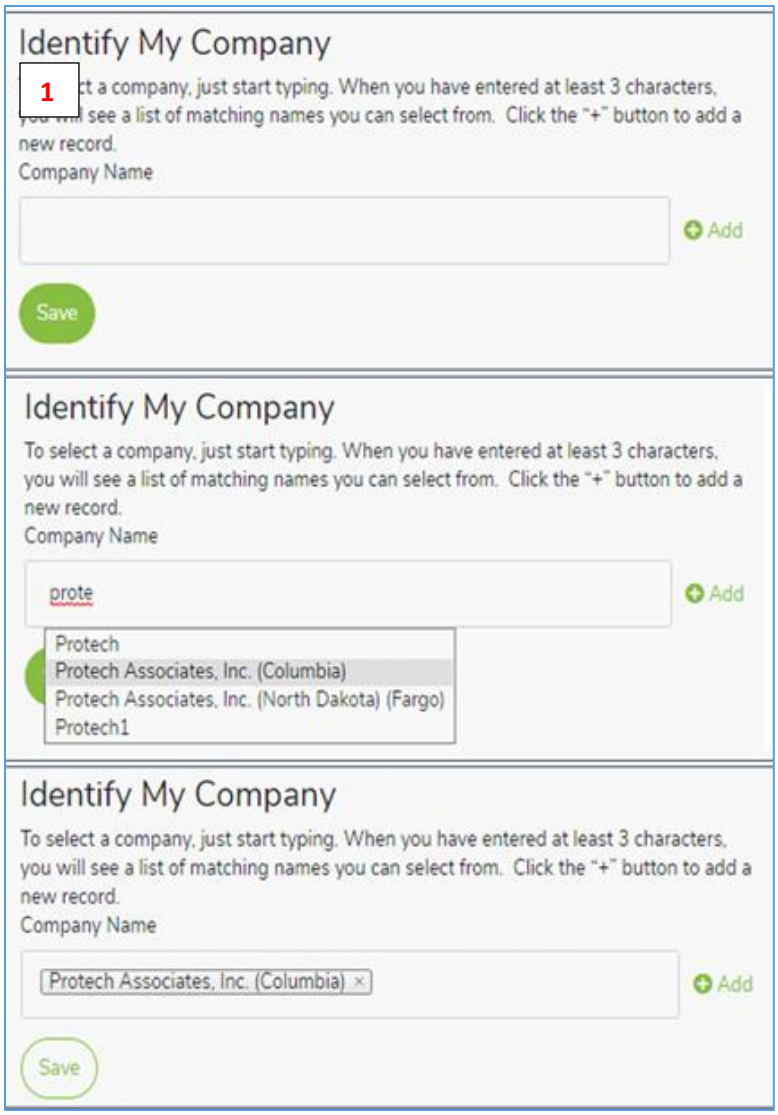
5 There is now a default country, which is defined in the Admin form. This means that country is not NULL when the user comes to edit the address, and the state/province field assumes a dropdown if the default country is United States or Canada. You select a country from a dropdown of records in the Countries table, not String map.

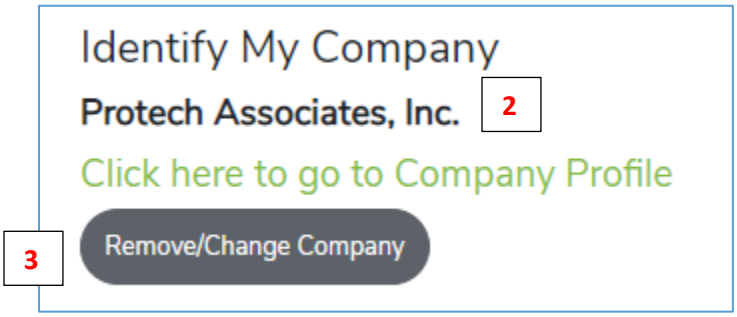
There is also a choice of how to store the country, either as "Two Letter ISO Code", which is the standard default, or as the full "Country Name". Choosing Country Name enables you to override the standard value for United States from "US" to "United States" or, if you edit the country name in the Countries Table, to "USA".



My Company web part

The My Company web part has been completely redesigned to use the Auto-fill component. Instead of a two-popup process of searching for a company and then adding the company profile, there is now one "Auto-fill" control, just as in the Create New User web part.





1 Auto-fill component**.** This input field replaces the lookup window for all contexts where the user is entering a record for a contact or account. It functions similarly to the Google search, so it allows you to search for an account record or contact record by name without a popup window.

As the instruction text explains, you just start typing the name of the company you are looking for, and a list immediately drops down from the input field when you have typed at least 3 characters. Upon clicking on a list item, the selected name is displayed in the Auto-fill field, and the user clicks Save.

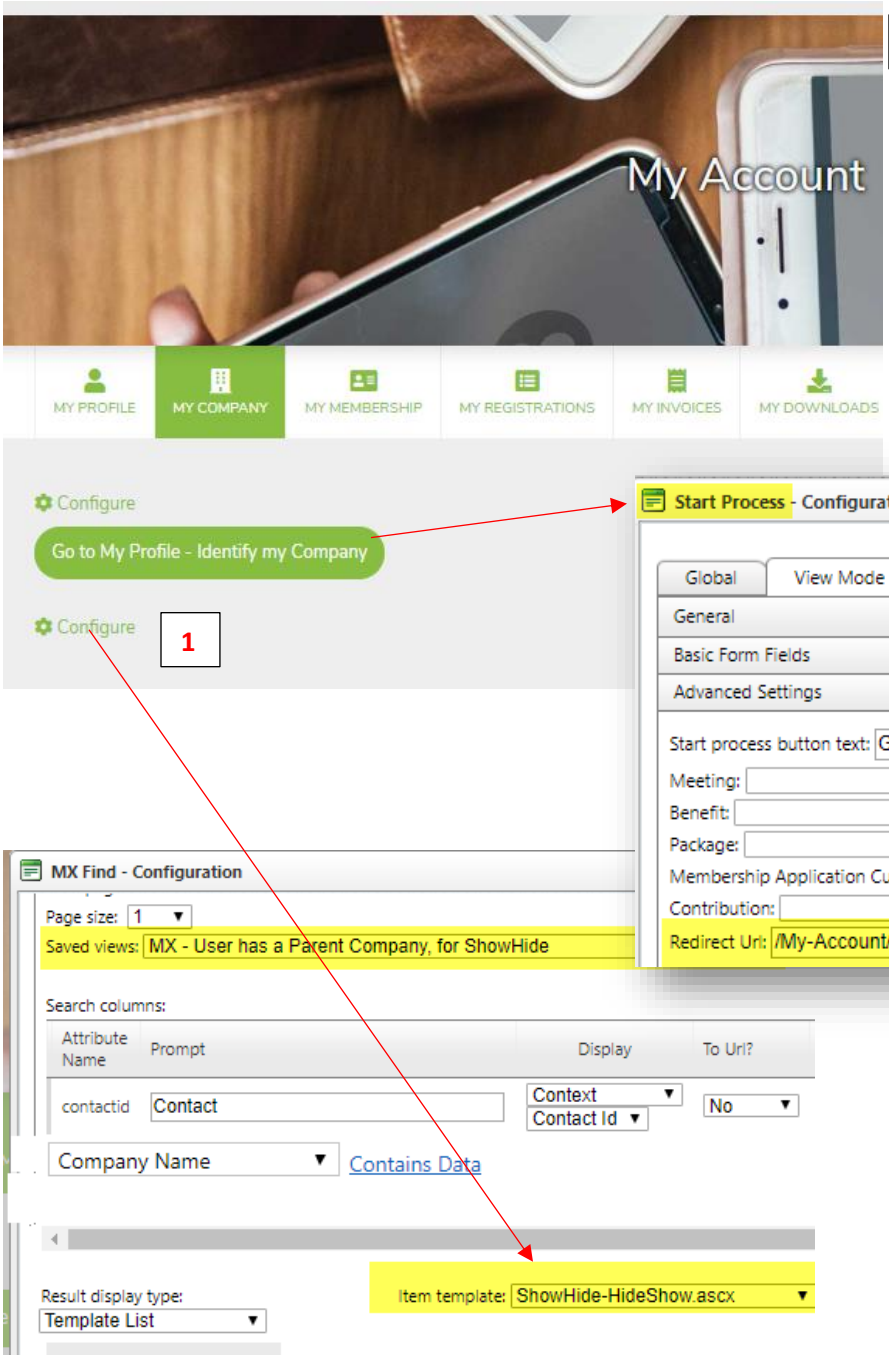
Add a new account. If you click the "+ Add" icon, a modal form opens for creating a new account, prompting for only the Account Name and City. This form automatically readjusts to the size of the screen, so it will always fit into a mobile device.

Duplicate checking compares the new entry with existing accounts where Account Name AND City are the same. This is why city is a required field for creating a new account. No other fields are required at this point – they will all be populated in other web parts on the My Account – My Company page.

2 In View mode, only the selected/added parent company name is displayed, because the default view is simple mode. Full mode is still supported, and looks just like the Account Basic Information view mode.

3 Instead of a button for "Company Details", we are using a hyperlink to go to the My Account – My Company page, where the user can provide the account profile information, addresses, and demographics. This way it is clear to the user that only the Remove/Change button is an action button.

My Company page (/My-Account/My-Company)

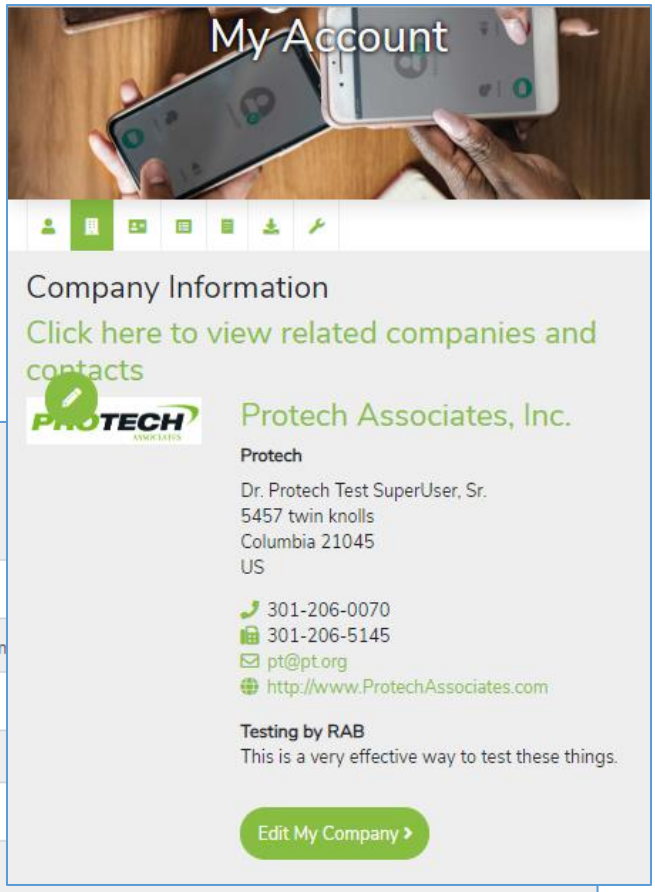


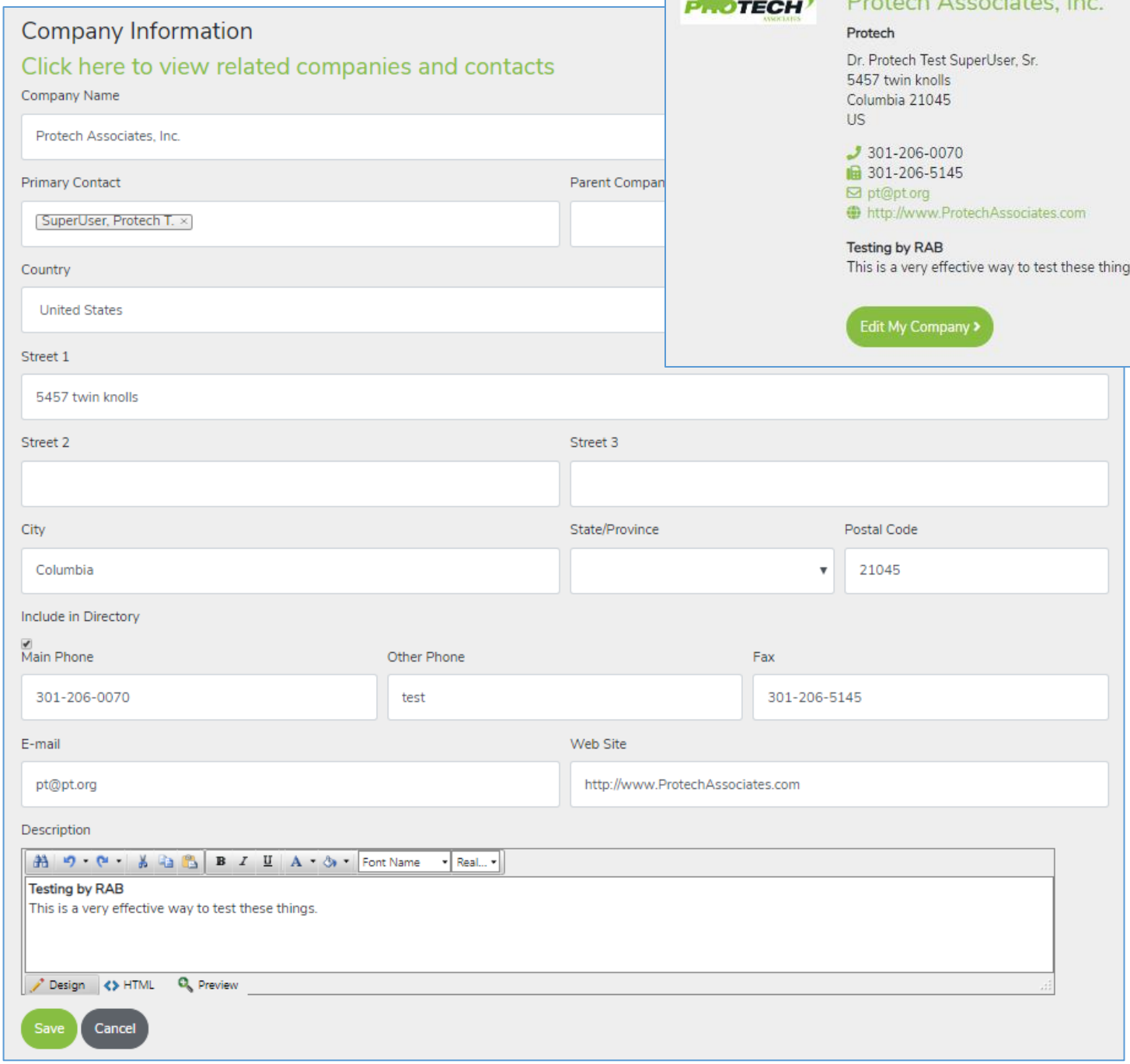
1

No Parent Company Logic: By default, this page displays the Account profile, addresses, and multiple MX Forms for any account record data entry. However, if the user has no parent account, we have added a Show-Hide MX Find template which hides all account web parts and shows only a Start Process button to go back to the My Profile page where the user can use My Company.

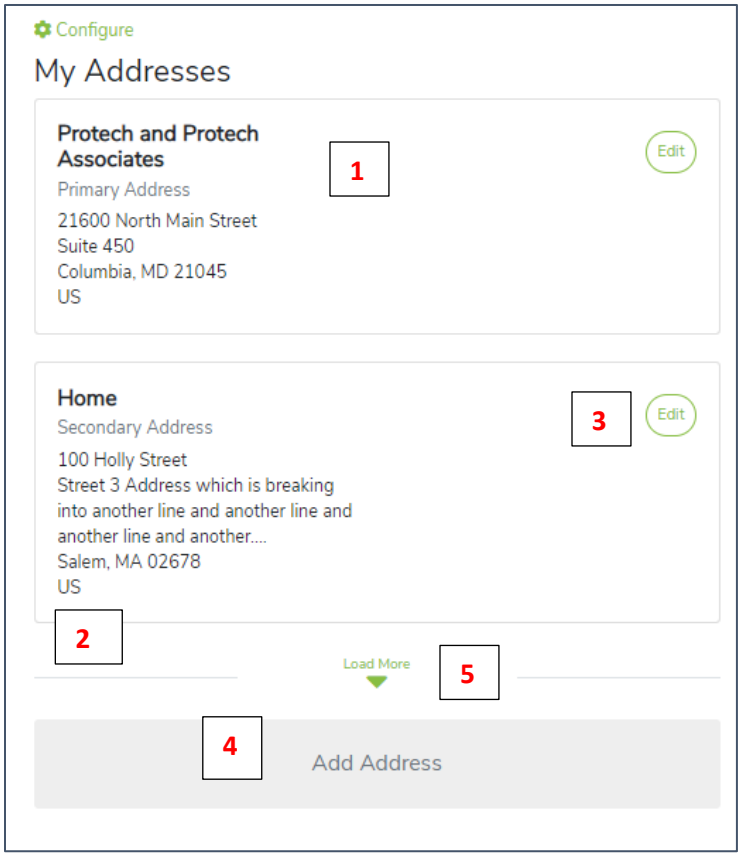
- Display Company web parts: Because the show-hide logic is based on a query of the contact record, and not on web roles, the Account web parts immediately display as soon as the user has identified a parent account and returns to the My Account – My Company page.
- NOTE: With Show-Hide even the Admin cannot see the web parts that are hidden based on the results of the ShowHide query. You will only know that hidden web parts exist if you alternate between removing the Admin user's company and adding it back again.

- The Account Basic Information web part has been redesigned, along the exact same lines as the Contact Basic Information web part.
- It provides all business card type of contact information, and allows the user to edit company name, acronym, logo, address1, phones, and the wysiwyg company description field.



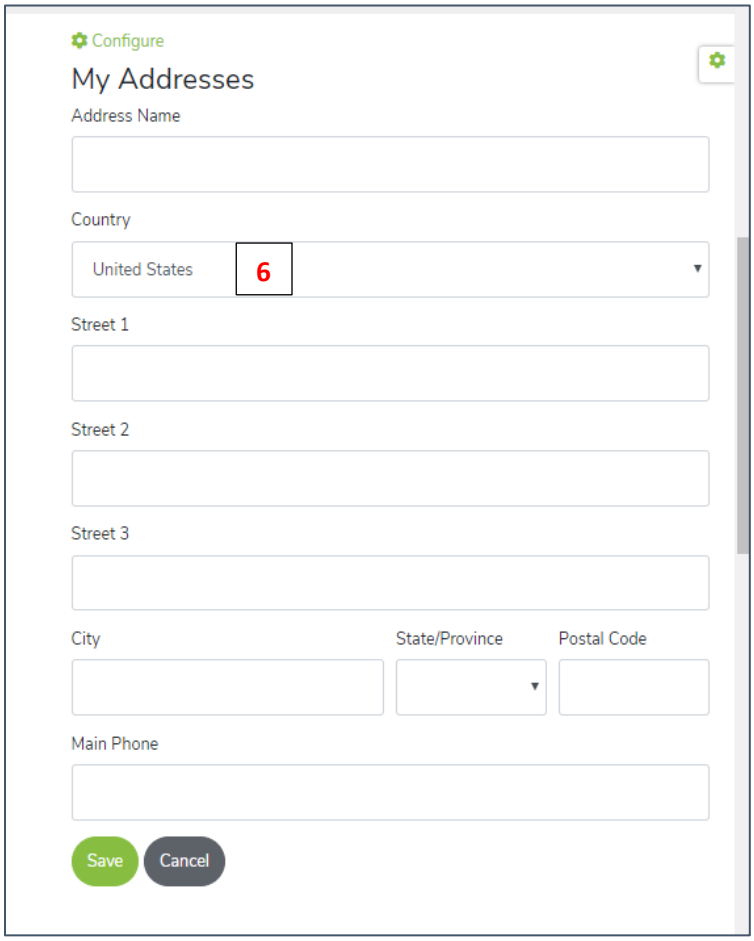


My Addresses



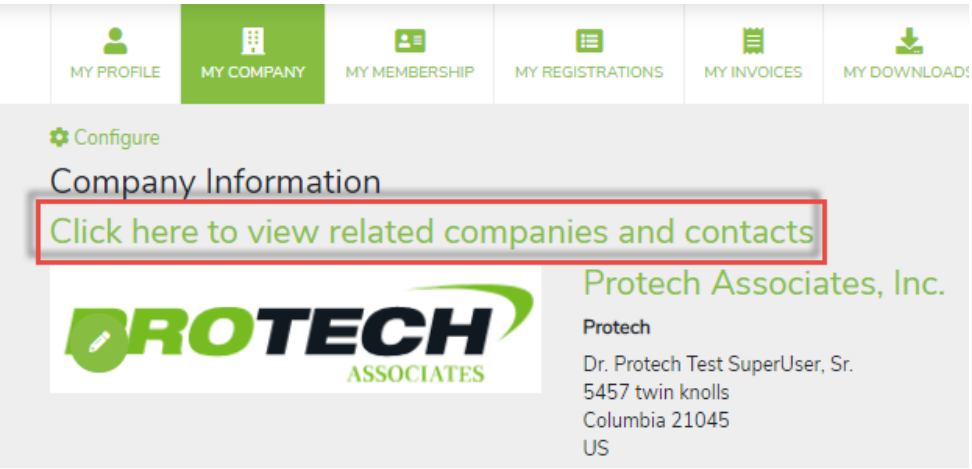
My Addresses has a new look and feel that is completely responsive and does not require any popups.

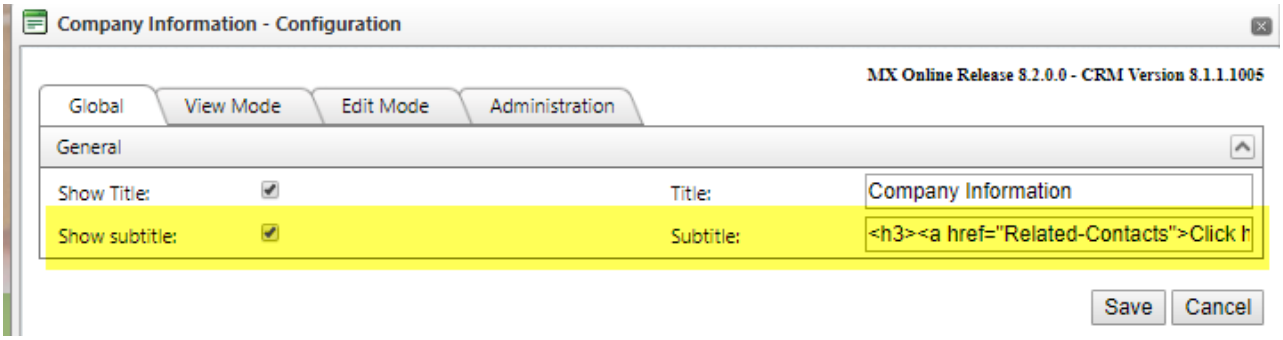
1. Address Listing, instead of tiled, and the Edit button is displayed in-line.
2. Address Type, which was problematic because of the many different option sets it maps to, is now omitted, so there is no display of "Bill To" or "1", which was inappropriate for an address listing.
3. Edit button switches the web part from View mode to Edit mode to modify an address, without any popup.
4. Add Address button mode does the same thing, but for adding a new address. Again, no popup.
5. "Load More" link displays additional addresses optionally, Instead of an action button.
6. Note that the default country is pre-populated, and because it is United States, the State field is a dropdown.



Related Contacts and Companies page (/My-Account/My-Company/Related-Contacts)

- New Page name and path: This page, which used to be called “My Colleagues”, is now a **sub-page** of My Account – My company. The URL is a third level path: **/My-Account/My-Company/Related-Contacts**.
- Accessing this sub-page from Company Information: This page is not included on the secondary menu, because it is a third-level page. Instead of using the secondary menu, the link that takes you to this page is in the Account Basic Information web part. This link is configured using a new configuration setting that has been added to every web part: **Subtitle.** In this case we have populated Subtitle as a hyperlink by default.

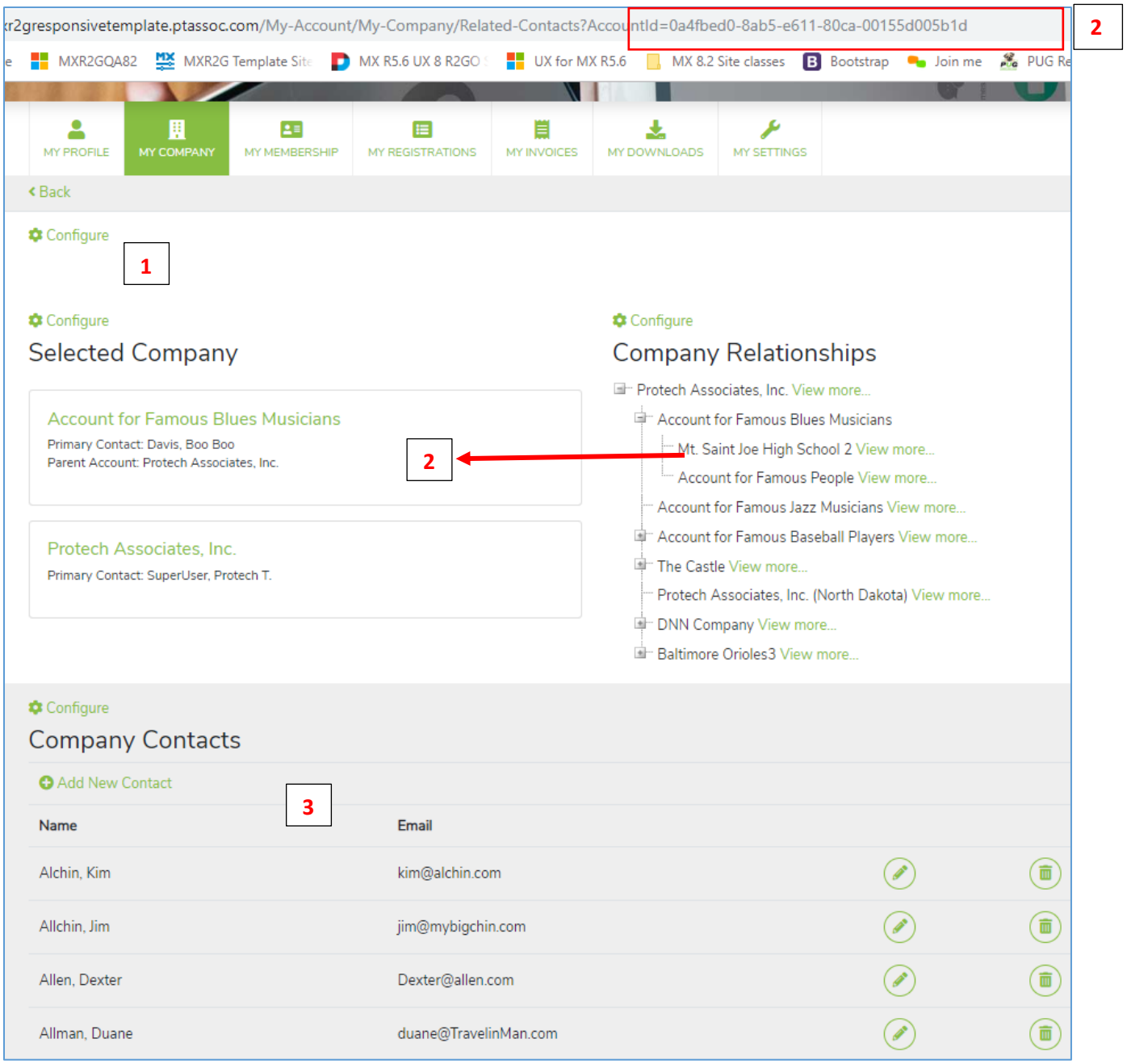




- NOTE: You will find, when you open the Configuration Settings form, that its initial behavior has changed: it now opens directly in the View Mode tab, with Advanced Settings expanded. You then click to the global tab in order to edit Title and Subtitle.
- NOTE: Another change in behavior of the Configuration Settings is that the Admin’s links to “Configure” are automatically hidden when the site is viewed on a mobile device, because these configuration forms are not yet designed to be responsive. All configuration must occur on a pad or full width screen.
- The web parts on the Related Contacts and Companies page are Company Contacts, Company Relationships, an MX Find for Sub-Accounts, an MX Find for Show-Hide, and an MX Find to show the selected company. (screenshot on next page)

1. The MX Find for Show-Hide is exactly the same as on the My Account – My Company page. If there is no parent company, there will be no link to come to this page because that parent page would not display the Account Basic Information web part that contains the link, but even if the user has bookmarked the page, the Show-Hide on this page will hide all of the Account module and MX Find web parts and show only the Start Process button that returns to My Profile.

2 AccountID Parameter: Several web parts on the Related Contacts and Companies page are governed by the accountid parameter in the URL, if there is one. This means that if you select a related company from the tree Relationships web part, you will see that company's name and contacts. By default, AccountID = the user's parent company, and even when a related company is selected, the user's company continues to be displayed, along with the selected company.

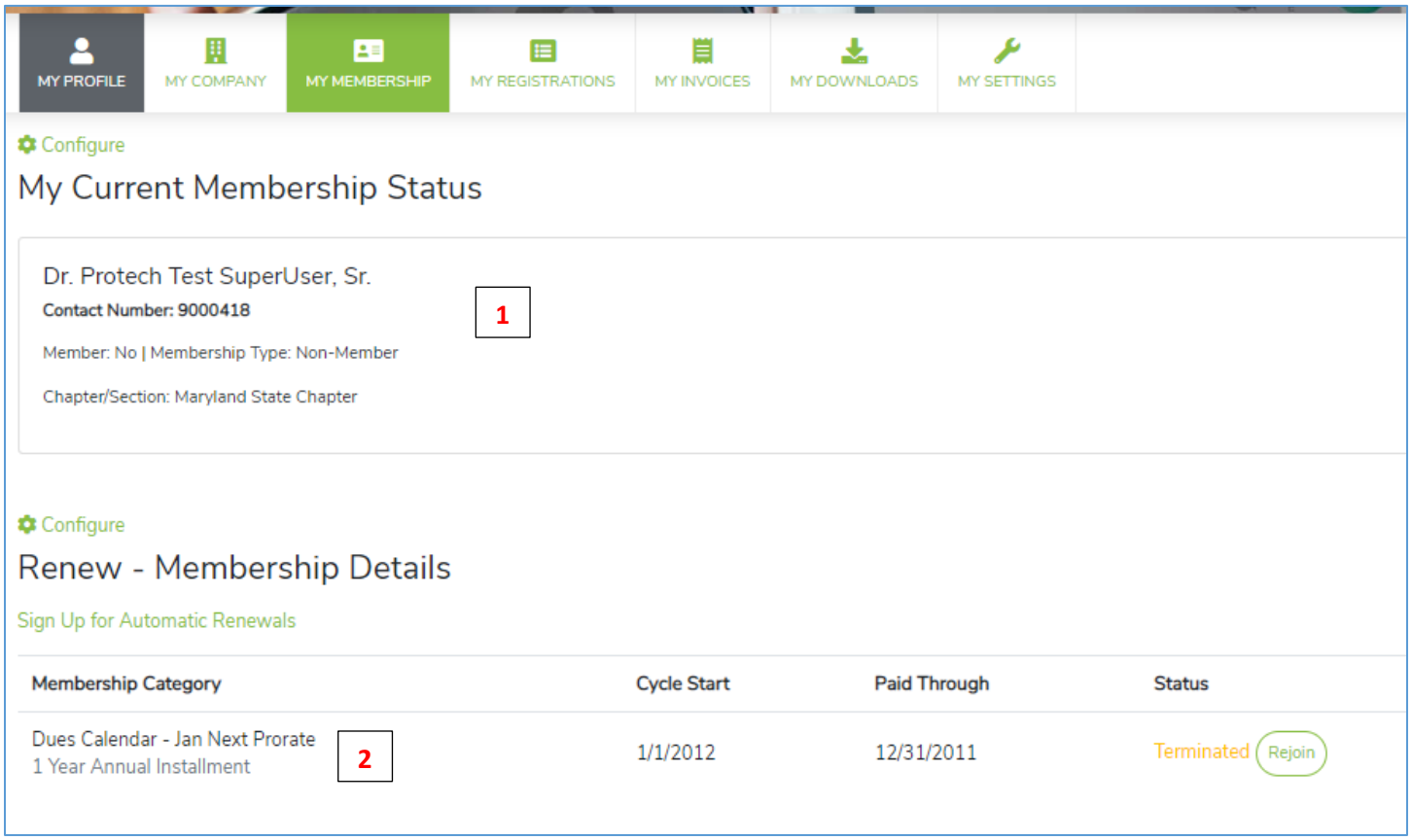


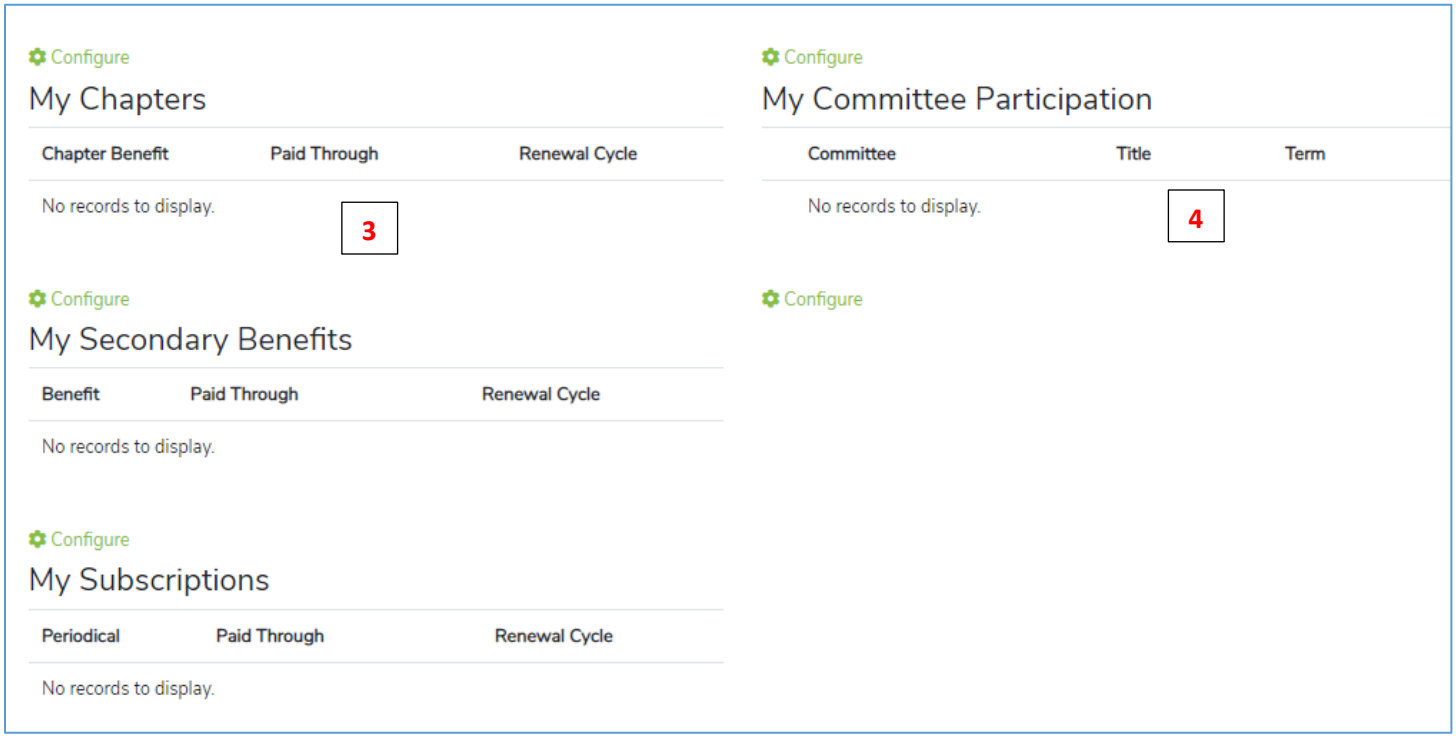
3 **Company Contacts** web part has not been redesigned, and it does continue to use popups for Add new contact and Edit contact. But the popups are now responsive, so they will fit whatever size screen the user has. Other changes for responsiveness include icons for Edit and Remove, and display of only the name and email, so the grid also fits any size screen. This will be revisited for redesign in the next release.

- The MX Find for Sub-Accounts ("My Company's Child Companies") at the bottom of the page is designed to show child companies only for the user's parent company, so it does not change when a related account is selected as "AccountID". This web part is a prime example of two major new features in MX Find: the new **Editable Template** option and the new **Auto Template**.

My Membership (My-Account/My-Membership)

The My Membership page contains 1) MX Find for “My Current Membership Status”, 2) the Customer – Membership web part for “Renew – Membership Details”, 3) three instances of the Secondary Benefits web part for Chapters, Secondary Benefits and Subscriptions, and 4) My Committees.

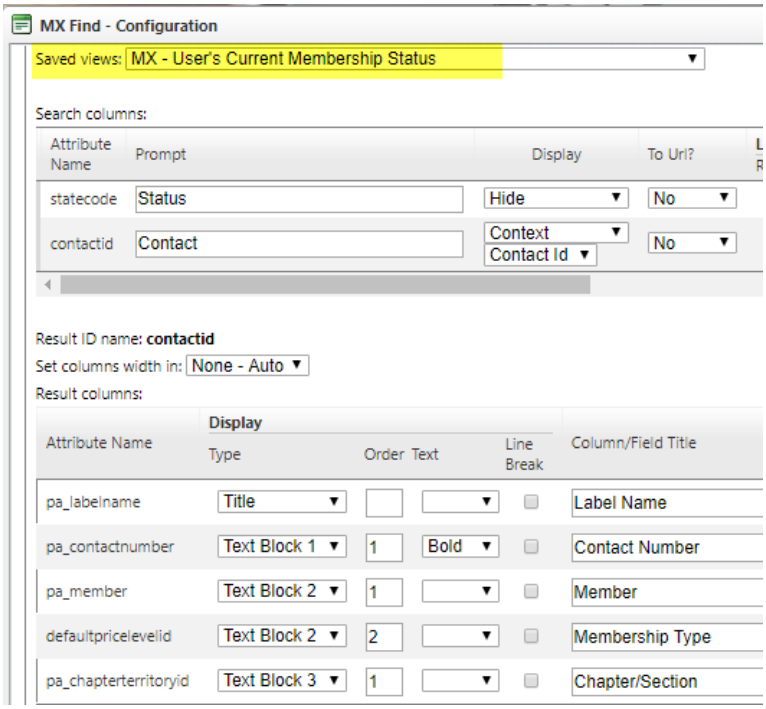




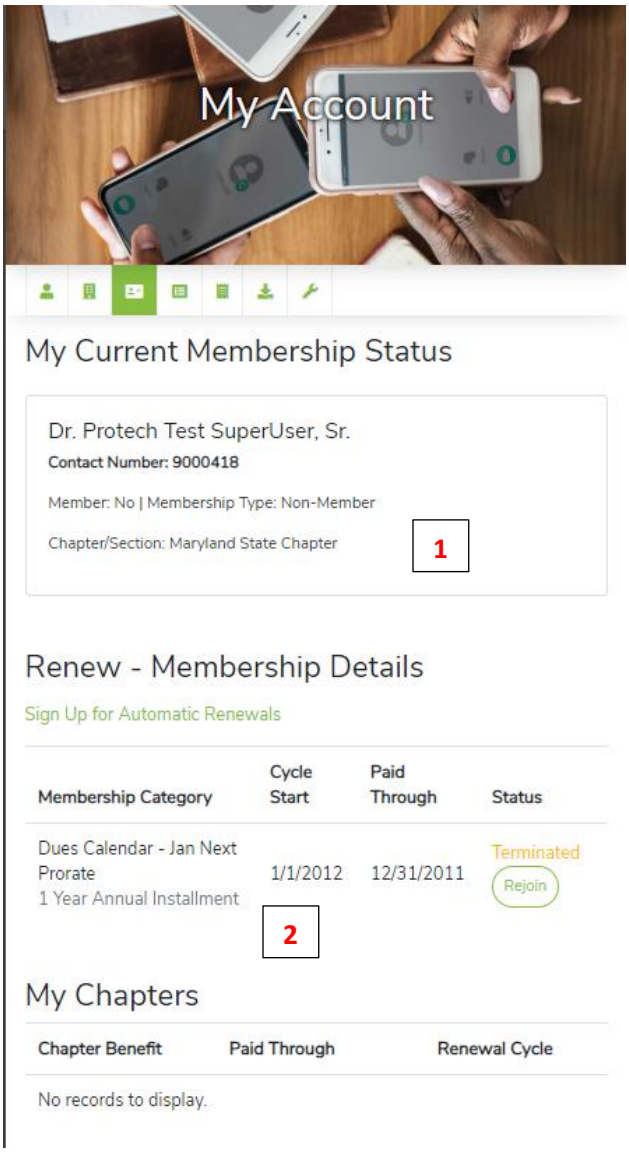
My Membership

1 In MX 8.2, we have stripped away the text above the grid where contact number and member status was displayed. That form was too rigid and limited to meet clients' needs. Instead we have added an MX Find that can be modified as needed to display whatever membership information the client wants.

The default MX Find configuration for this purpose is using an Auto Template. Changing the output fields and Auto Template layout options is all that is needed to adapt it to the client's requirements:



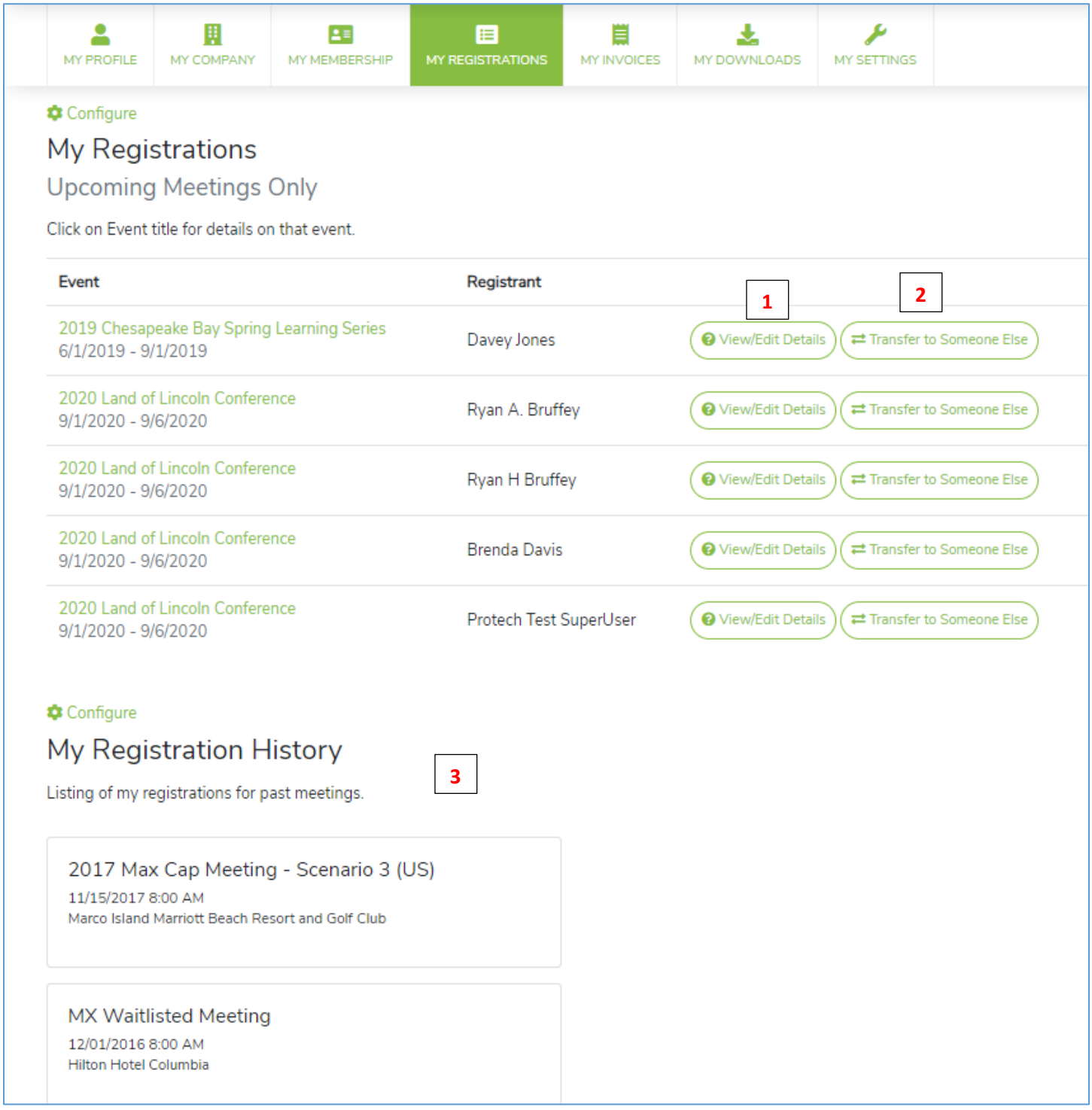
2 All of these web parts are responsive and fit well into a mobile device screen (see right). We have reduced the number of columns displayed in all of these grid-based web parts by moving more than one data element in the same column, including Benefit and Rate in the column called "Membership Category".



My Registrations (/My-Account/My-Registrations)

My Registrations – this web part reduces the number of columns in the grid, so it fits on any device. Functionally, it now has two new functions embedded in it:

1. View registration details ("View/Edit Details"), which leads to the Edit option.
2. Transfer registration to someone else.
3. In addition to My Registrations web part, by default this page also includes an MX Find with Registration history, to fill in the previous gap where the user could not see any registrations except the upcoming ones. This also uses Auto template for the list of meetings registered for, so it can easily be changed.

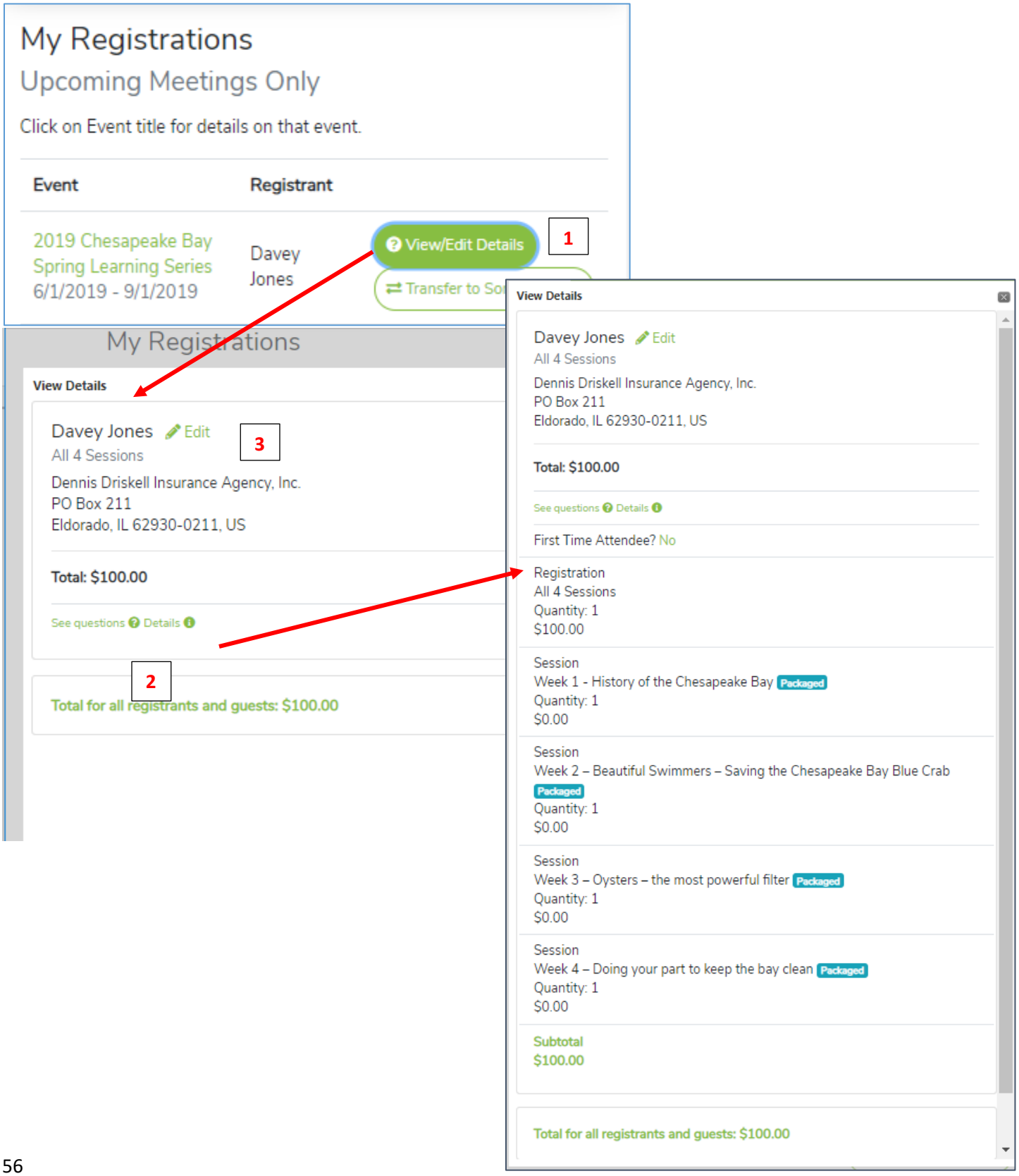


1 The button to “View/Edit Details” of the registration opens a modal popup that is responsive . It displays the registration using the new layout for Registration Summary. (Screenshots below are on mobile device)

2 Questions and Sessions are hidden by default. These details are displayed when the user clicks on “See Questions” and “Details”. The links act as toggles to hide/show details – there are no additional popups.

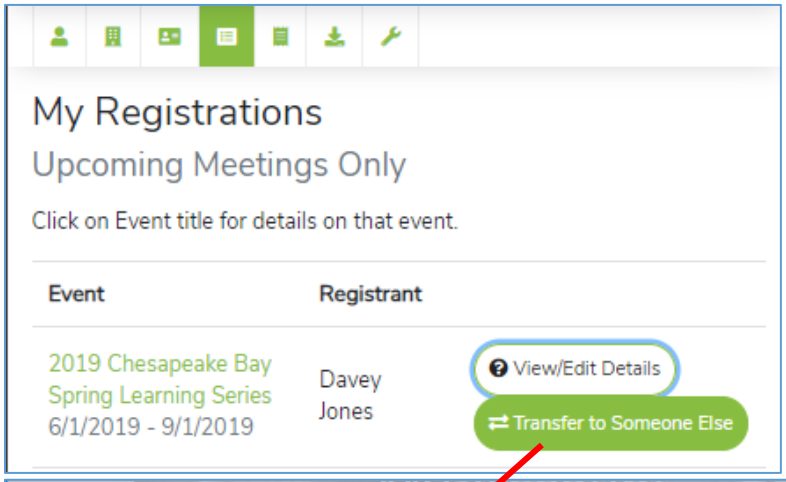
3 The Edit link on this form takes the user to the Edit Registration process.

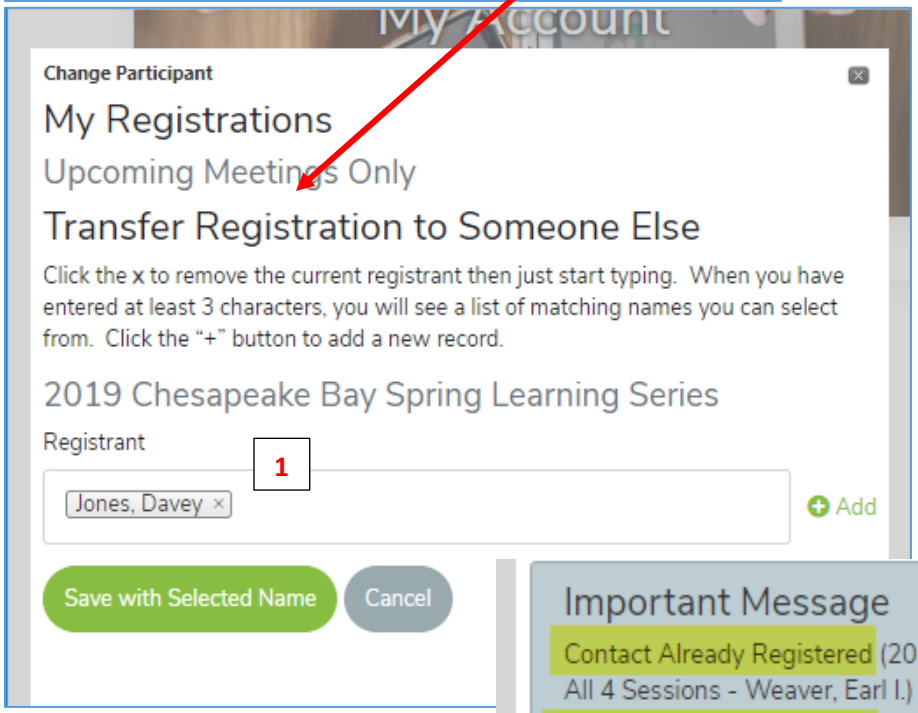
4 Close the details form to return to the list and optionally view details on another registration.



1 The button to "**Transfer to Someone Else**" of the registration opens a modal popup that is responsive . It uses the same Auto-fill functionality to select a user. You just need to click the "x" on the existing name to remove it from the Registrant field, and type in a different name. When a registration is transferred to someone else, all sessions are automatically transferred to the new contact, along with the registration

2 Validation ensures that it cannot be a registrant who has already registered. The other restriction on transferring registration is that UX prohibits transfers involving sessions attached to courses. This is because Professional Development has rules about who can register for different courses, and education credits cannot be transferred to someone else.

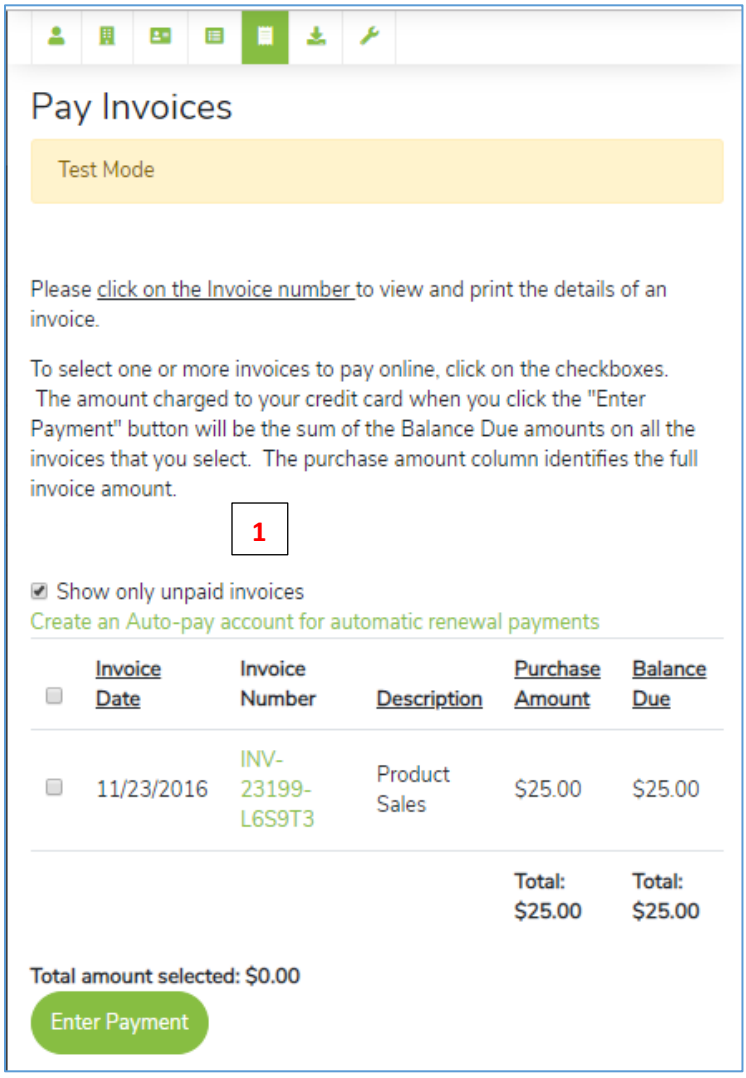




My Invoices (/My-Account/My-Invoices)

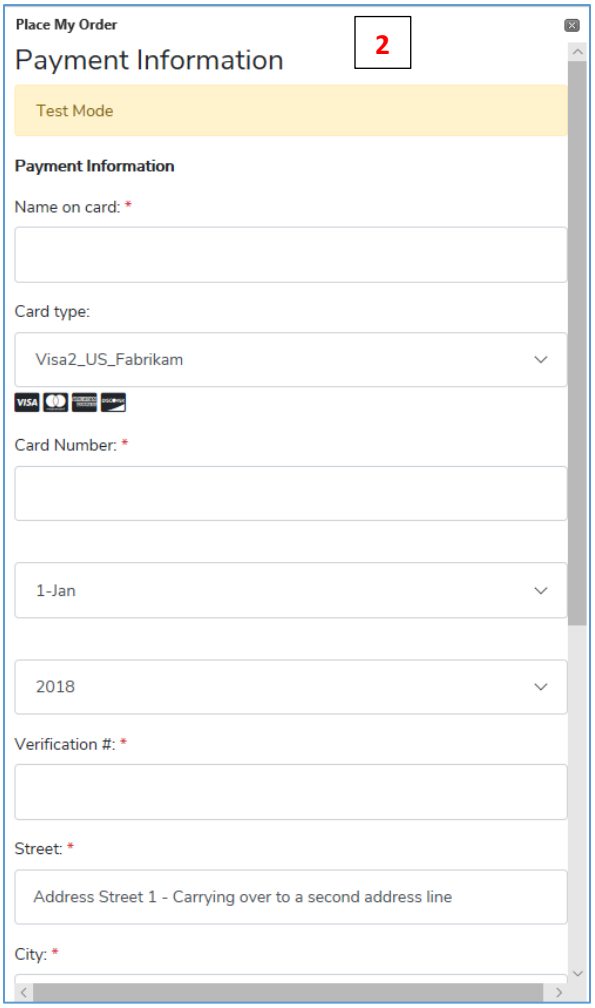
The "My Invoices" page contains 3 web parts – Pay Invoices, Pay Renewal Installments, and an MX Find for My Invoice History. "Invoice History" displays as a grid by default, but it can be changed as desired, because it is MX Find.

Pay Invoices



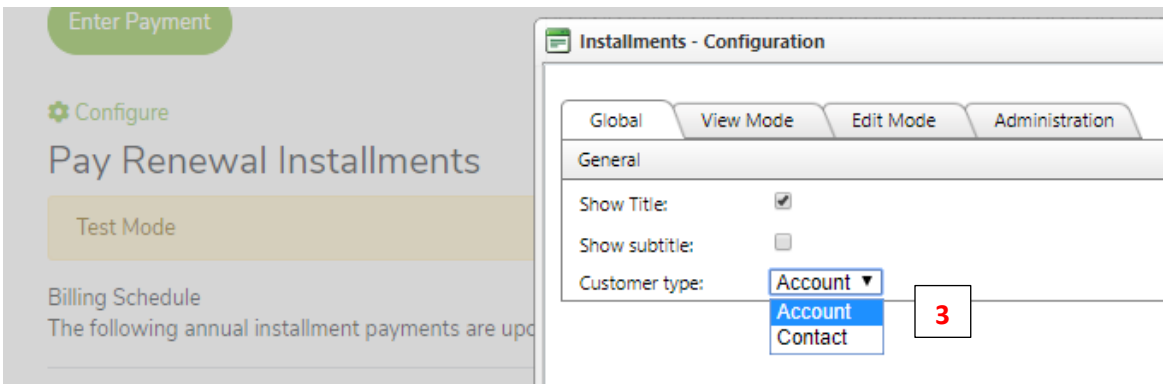
1 The grid is responsive, and fits on a mobile device.

2 When you select "Enter Payment", a responsive popup form overlays the page for entering credit card entry.



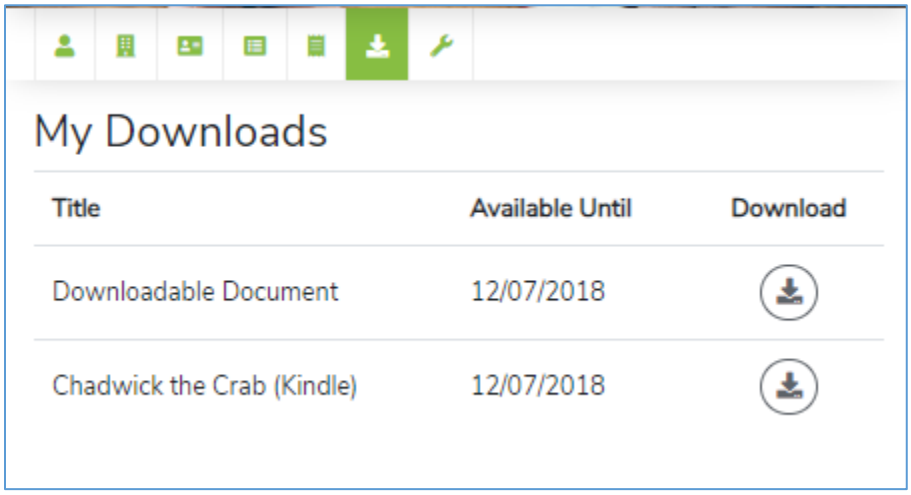
Pay Installments

3 Functionality has been added to allow you to configure this web part for Account Memberships.

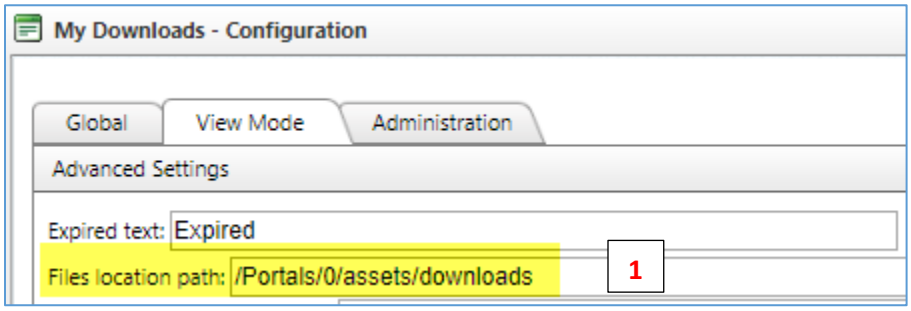


My Downloads (/My-Account/My-Downloads)

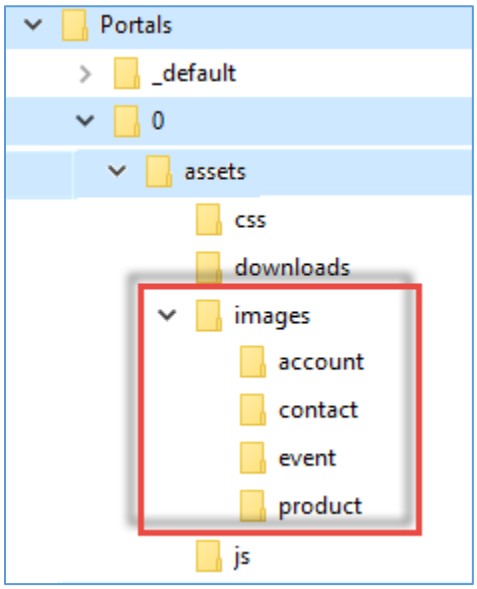
This web part's functionality has not changed. The My Downloads web part is alone on the page so it can be accessed from the Shopping Cart's "Download now" hyperlink.

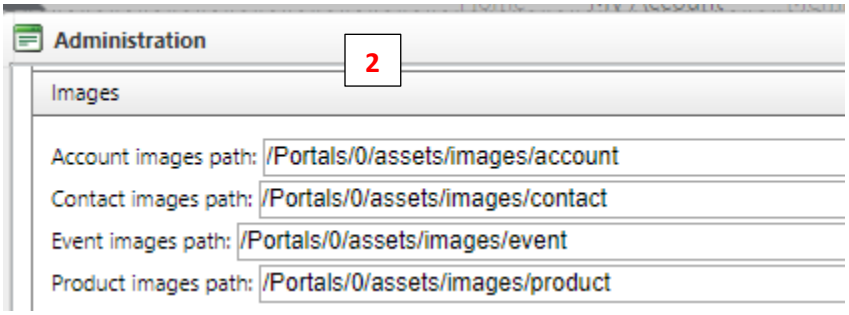


1 The default path for download documents has changed: it is now /Portals/0/assets/downloads. In the past, the default portal for MX Ready2Go was /Portals/1, but now we use the default Portal for the base website, so the R2G portal is Portal 0. This path can be changed, if needed, by configuring the web part path setting.



2 Images: Aside from the downloads folder, the "assets" directory holds all of the image files that MX uses. Instead of having just one path for all images in the web.config file, we now have a new section in the global Administration form that identifies where the images for each type of record are to be found.





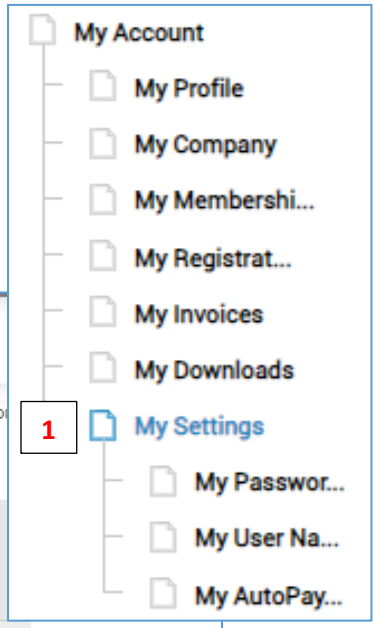
My Settings (/My-Account/My-Settings)

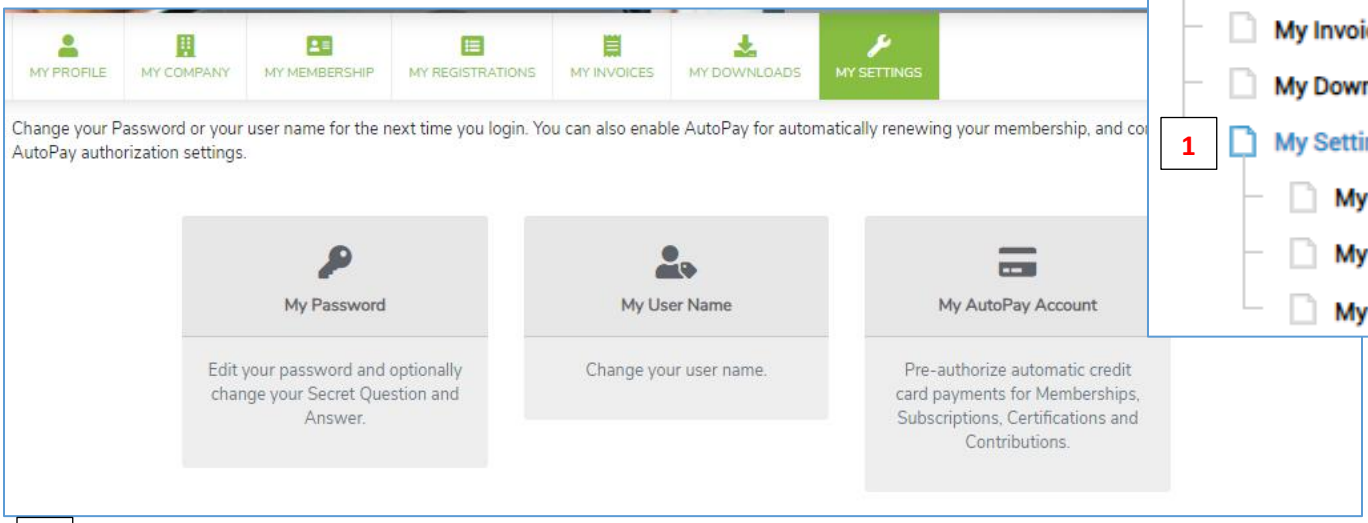
My Settings is a new page created to group account settings pages together.

1

The pages for Change Password, Change Username and My AutoPay Account have been moved to a third level, under the landing page called “My Settings”. At right you see the new page hierarchy for the My Account module.

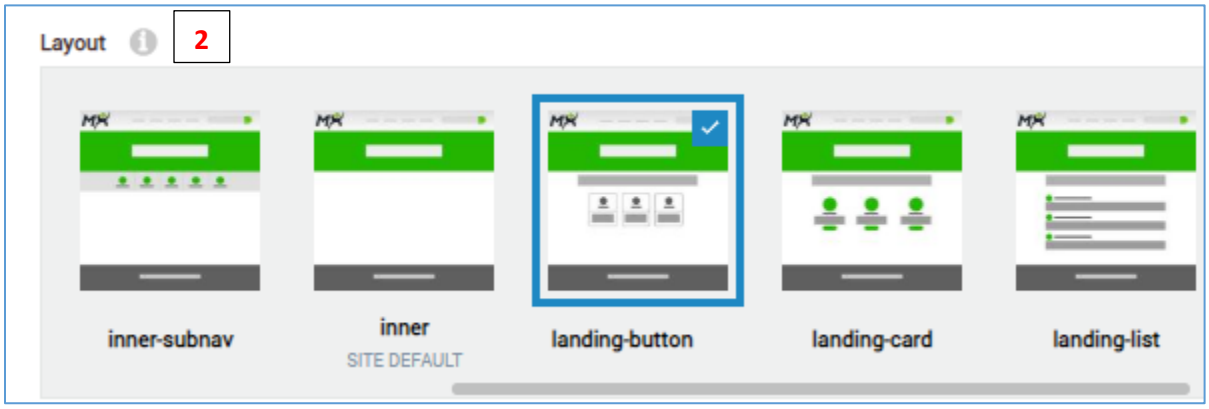
The reason for creating this third level was to reduce clutter in the My Account Secondary navigation menu, since this type of account maintenance rarely needs to be accessed. Many sites use this approach.





2

My Settings is a second level Landing Page, whereas the My Account page is a first level Landing page. To make the hierarchy clear, the page layout used for this page is “landing-button”, while My Account uses “landing-list”.

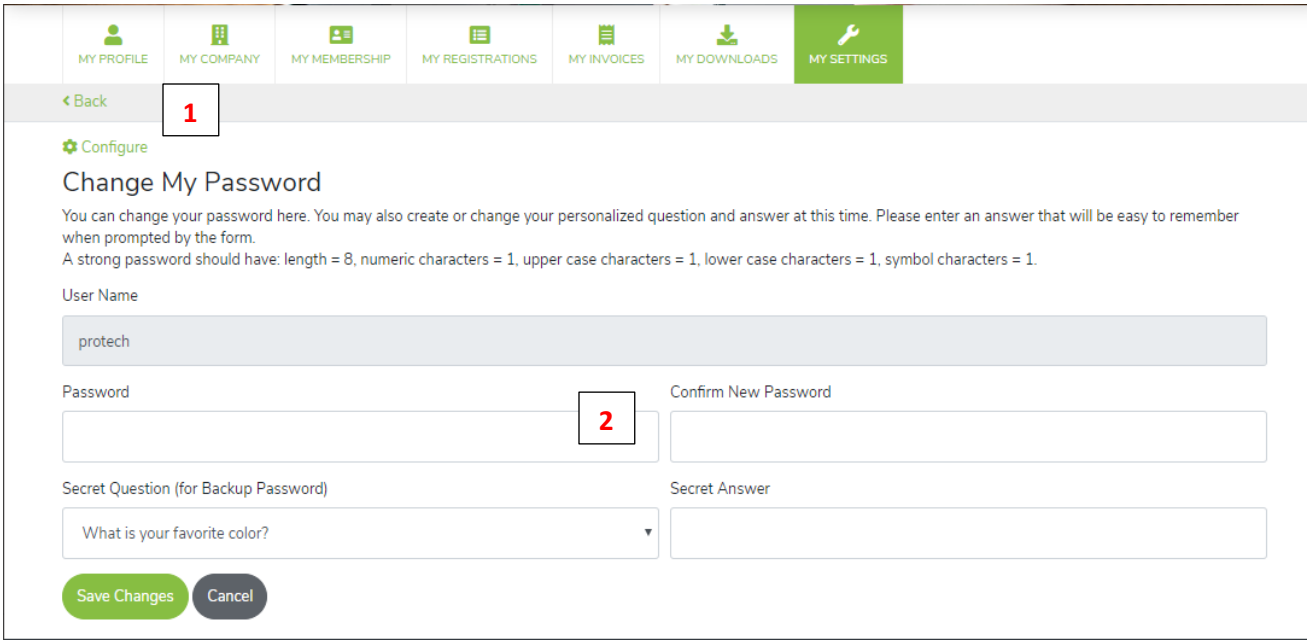


My Password (/My-Account/My-Settings/My-Password)

The My Password web part is configured for logged in users, as it was in previous versions. What's new:

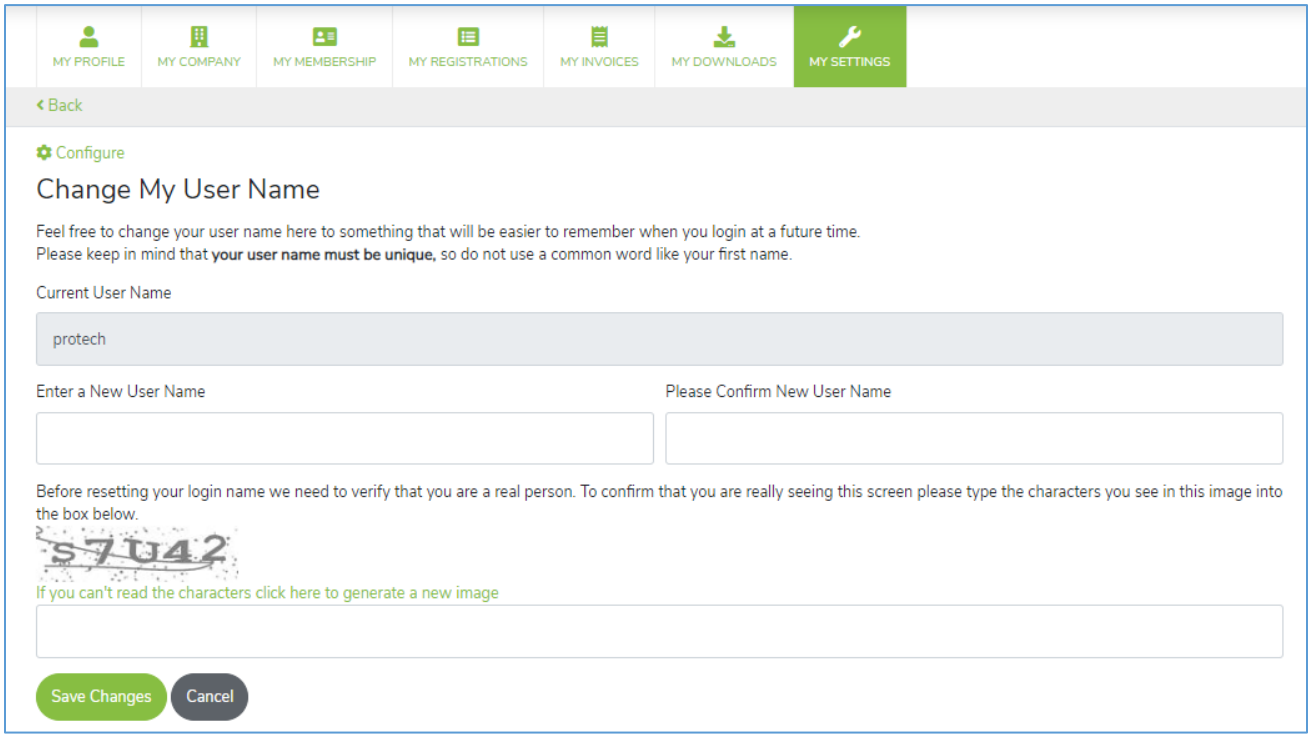
1. "Back" link: This page includes a "Back" link that functions like a breadcrumb. Actual breadcrumbs are not used at all in this site. But any page that is a third level automatically has this return option, so the user can return easily to the context where they drilled down to this page. So in this case, since My-Password is level3, below level1 My-Account and below level2 My-Settings, it has the Back button to return to the previous page, in this case, My-Settings.

2. The form uses two columns, whereas the previous version dedicated a whole row to each input field.



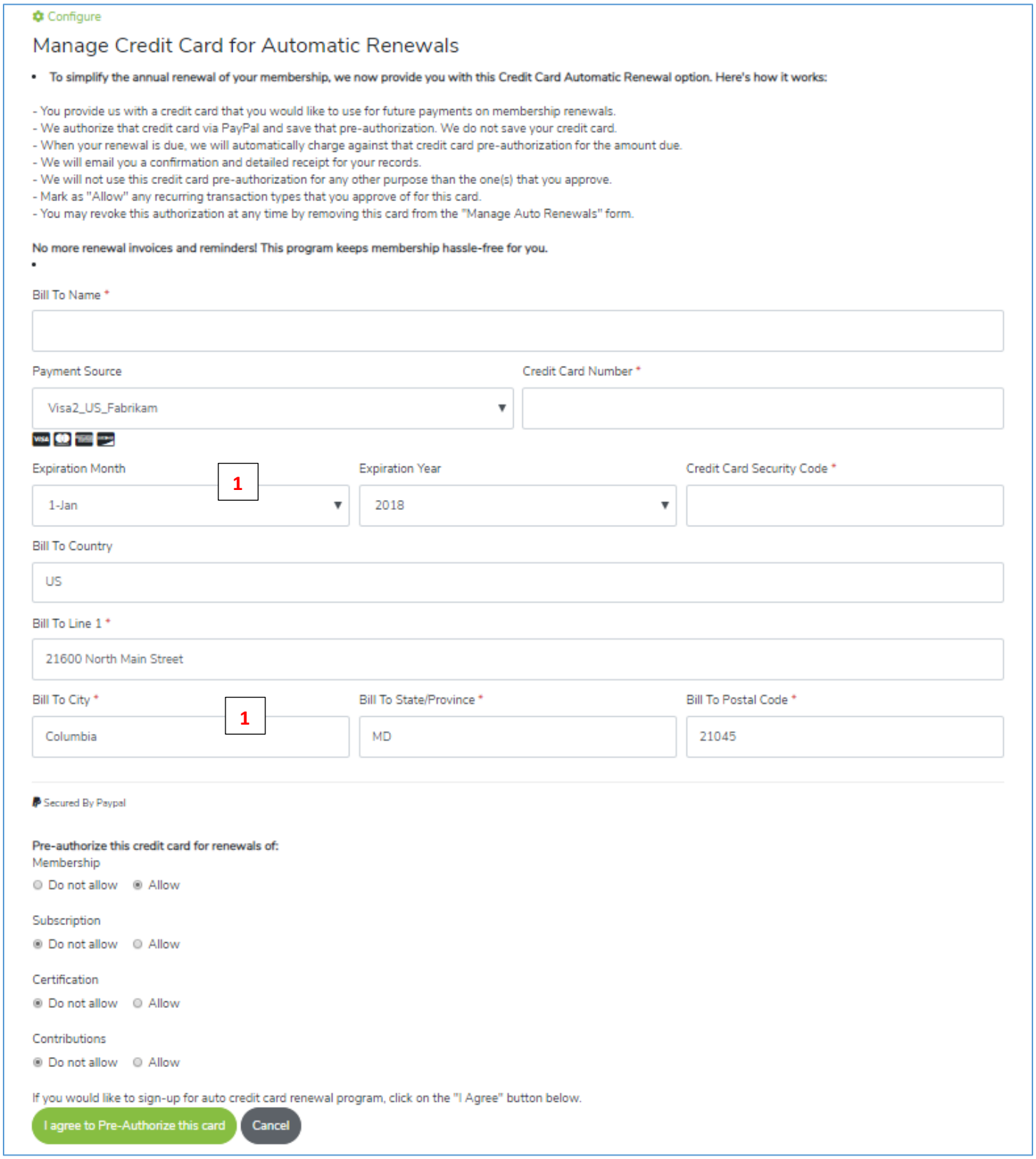
My User Name (/My-Account/My-Settings/My-User-Name)

The same observations apply to this page.



My AutoPay Account (/My-Account/My-Settings/My-AutoPay-Account)

1 The layout of the form fields, utilizing three-across fields where appropriate, is the main change in this web part.

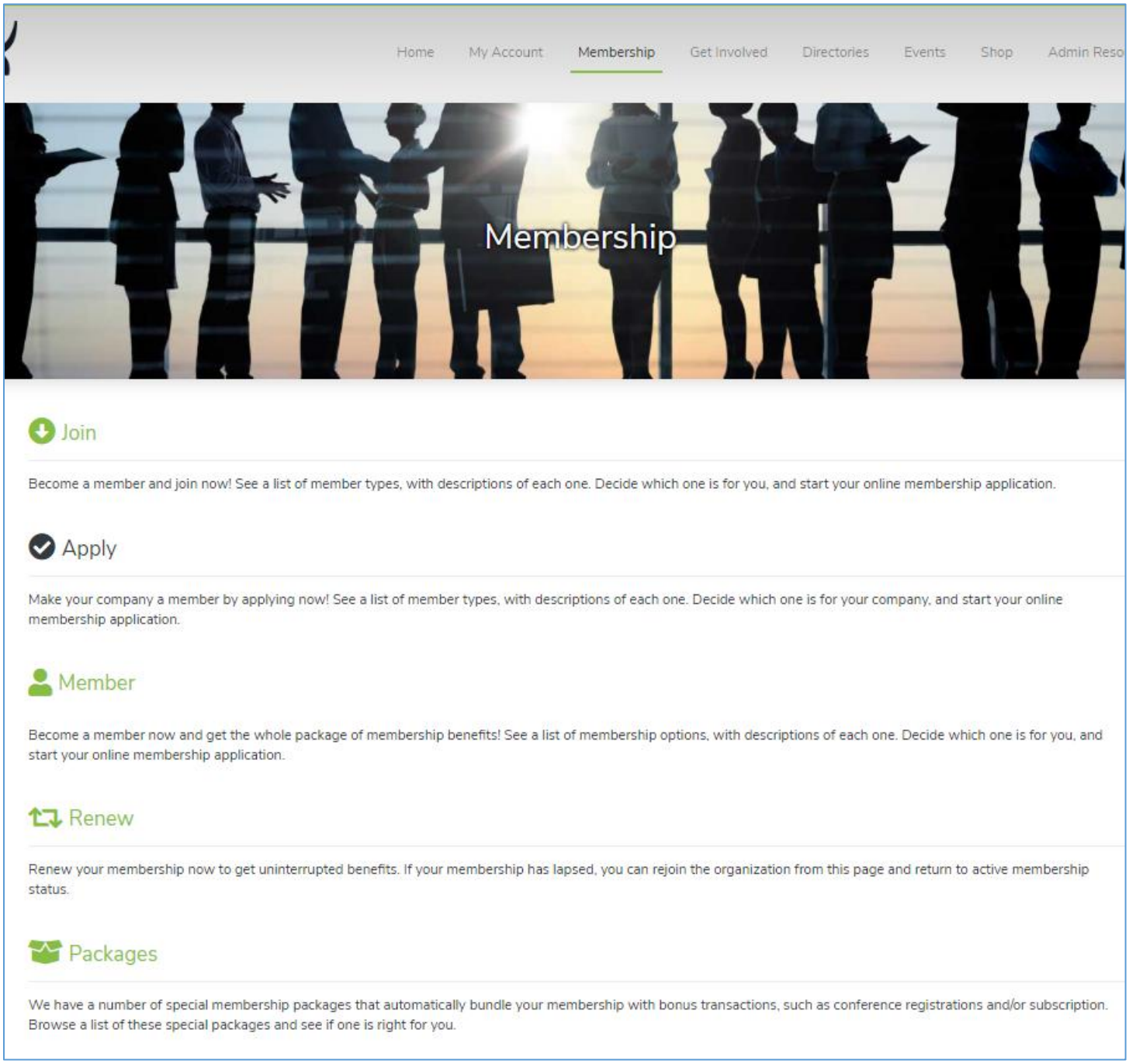


Membership (/Membership)

Landing Page

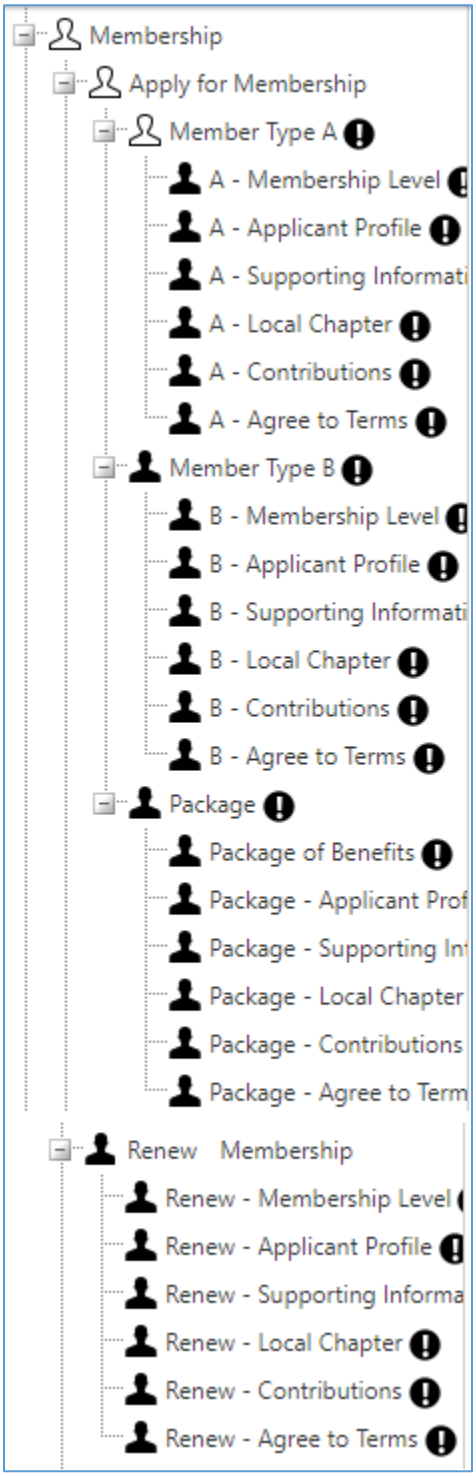
There are some very predictable variations for the online membership application process that require specific configuration changes in combinations of MX modules, so as much as possible we want to address those configurations in advance. The challenge with the Membership module is to provide multiple pre-configured paths for each of these predictable variations, as part of the OOTB site deployment, while leaving lots of flexibility for redesigning any or all of these paths to accommodate the very unpredictable client requirements that arise in each implementation.

This landing page is designed to make it easy to navigate to the appropriate predefined path, when there are multiple options, by providing your own client-specific names and descriptions for each of the paths, while leaving the path and page names generic and applicable to multiple situations.

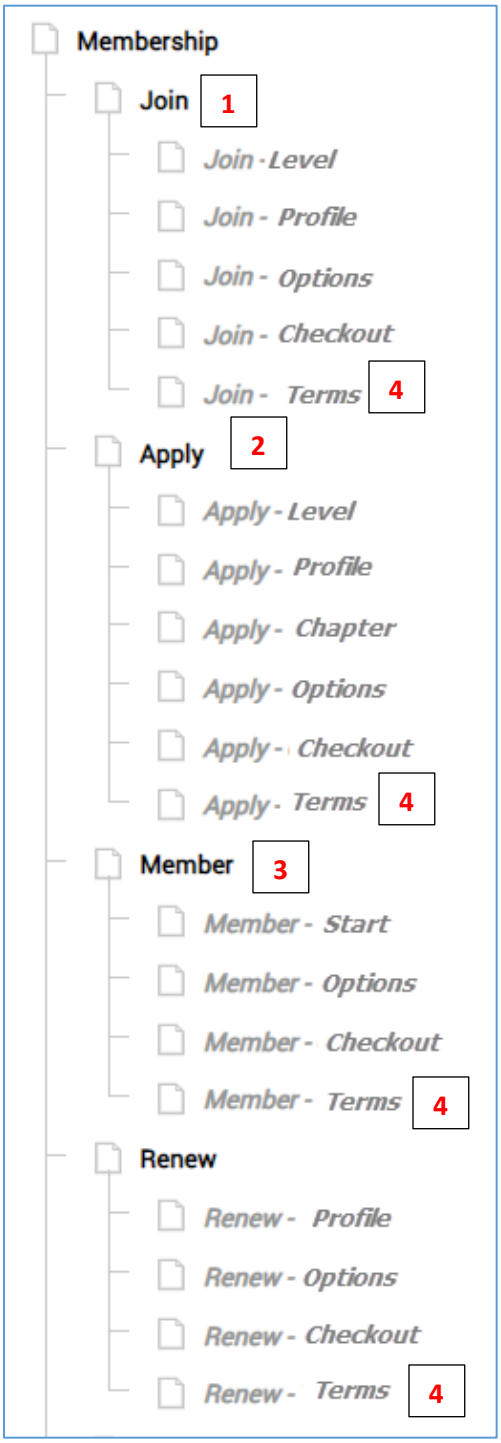


- Paths and Page names: In MX 5.6, we created paths for “Member Type A”, “Member type B”, “Package” and “Renew”. But those long and awkward page names were carried over into every process page name, making the naming inappropriate for all situations. The new site streamlines both the directory hierarchy and the page names. For instance, a full page name in 5.6 was: /Membership/Apply-for-Membership/MemberTypeA/A-Applicant-Profile.
  By contrast, the corresponding page in the new 8.2 page hierarchy is now: /Membership/Join/Join-Profile

MX R2Go Version 5.6



MX R2Go Version 8.2



1 **Join:** This path is configured by default for Individual membership applications, so CustomerType is set to “Contact” in the Controller. It is defined as a 4 page process, with virtually all secondary options combined onto the “Options” page, ending with Checkout.

2 **Apply:** This path is configured by default for Company membership applications, so CustomerType is set to “Account” in the Controller. It is defined as a 5 page process, with a separate “Chapter” page added to the “Options” page, ending with Checkout.

3 **Member:** This path is configured by default for Membership Packages, so the first page (“Start”) has the Package Controller in place of the regular controller and rates.

4 **Terms:** The Terms page is not a step in the application process. The page for “Terms” is pure html, accessible via hyperlink from the Checkout page of each path, so the client can copy-paste whatever text they want to display. Because it is a third-level page, it automatically includes the Back button to return to the Checkout page that it came from.

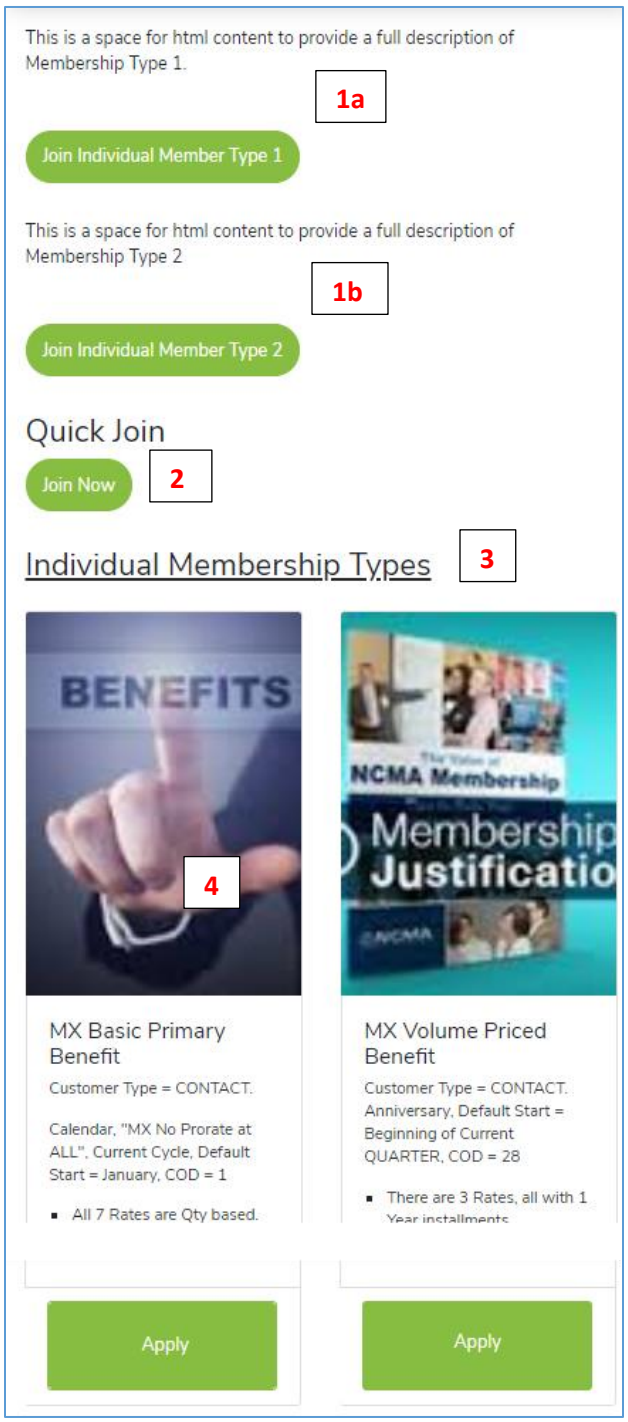
Individual "Join" (/Membership/Join)

Landing Page

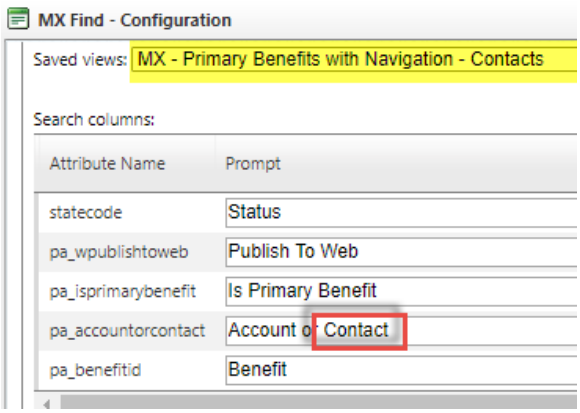
Each path has a Landing page, where you can add starting points for one or more membership applications, using whatever web parts are appropriate for the client. By default, the Join Landing page has the following web parts:

1 • Start Process – 2 instances of this web part, with an html description web part above each of the buttons. The Navigation URL goes to the first page of the "Join" path, Join-Level.

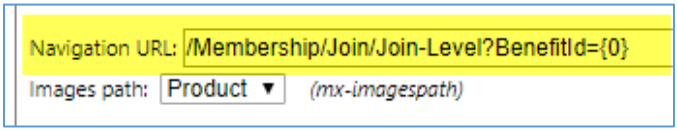
2 • Quick Join – the one click Join Now that goes straight to the cart with a predefined rate as well as benefit.



3 MX Find - The MX Find for listing membership options on this page is configured using the Advanced Find for Primary Benefits where "account or contact" = Contact.



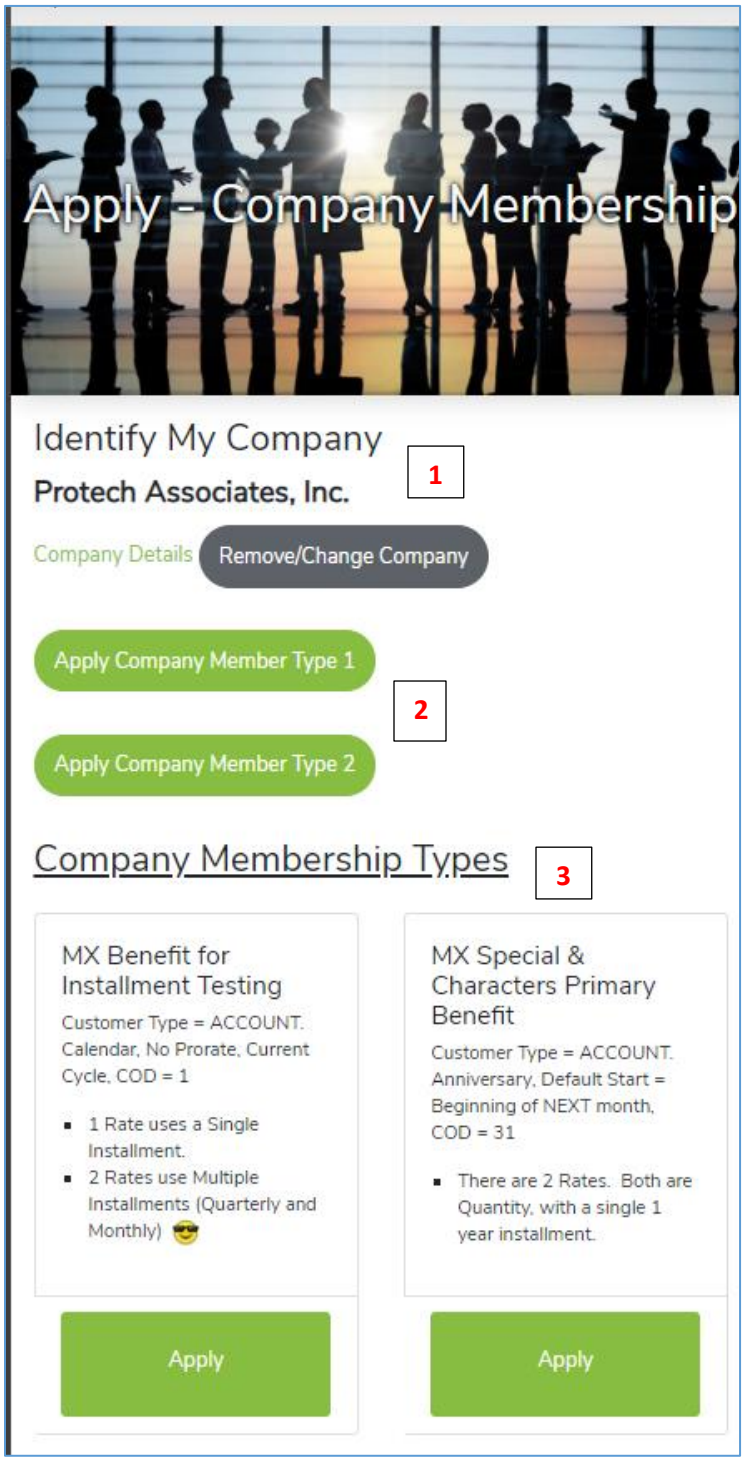
4 The MX Find Template is the OOTB template called "Benefits". Instead of having to use a path that must be entered into the Benefit Setup record, The Navigation URL is configured to go to the first page of the "Join" path, Join-Level.



The Benefit Image displayed in the Benefits template is configured by default to be read from the "Product" directory, because there is no need for a dedicated directory for membership-related images.

Company "Apply" (/Membership/Apply)

Landing Page



Because the "Apply" Landing page is configured for company memberships, it is setup differently by default.

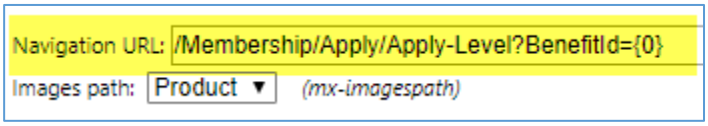
1 My Company web part. Because you need a parent company in order to proceed, the step of identifying your company has to be before you get to the Controller page. So we have placed it here, on the landing page, to be completed before you click one of the Start Process buttons or click the "Apply" button as part of the MX Find Benefits Template.

2 Two instances of Start Process, configured by default with CustomerType = Account. The Navigation URL goes to the first page of the "Apply" path, Apply-Level. The html web parts for descriptions are on the page, but we did not enter any default text, so they do not appear to be there. You will see the placeholders when you Edit the page.

There is no Quick Join web part by default for company memberships, because generally company memberships are too complex for one click.

3 MX Find - The MX Find for listing membership options on this page is configured using the Advanced Find for Primary Benefits where "account or contact" = Account.

The Navigation URL is configured to go to the first page of the "Apply" path, Apply-Level.

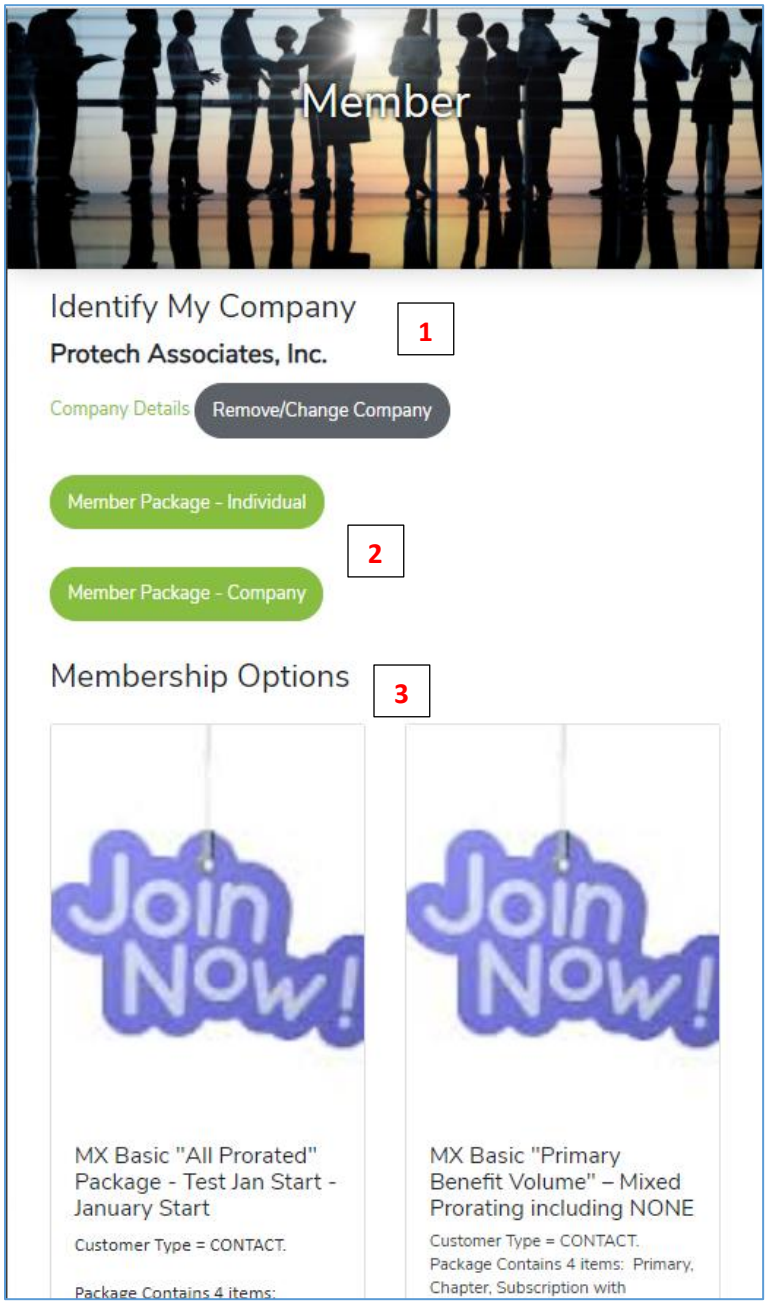


The Template is again "Benefits". Note that Benefits may or may not have images defined.

Membership Packages “Member” (/Membership/Member)

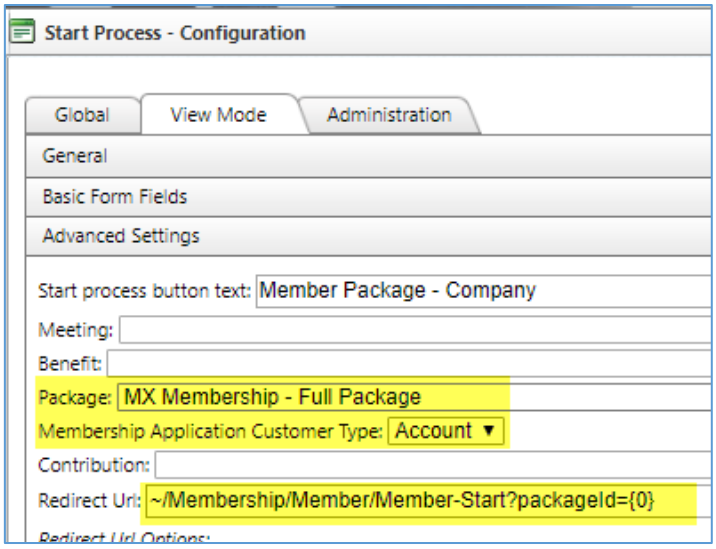
Landing page

Because Membership packages can be either individual or company memberships, this landing page is setup to handle both types.



1 The My Company web part is here, in case the membership package selection could be for a parent company.

2 The two Start Process instances are configured differently – one for Contact memberships and the other for Account memberships. Both default to a Package selection, not a Benefit.



3 The Navigation URL takes the user to the first step of the “Member” application process, Member-Start.

- The Advanced Find for the MX Find listing of packages is different, because the query is on the Membership Packages entity. The Advanced Find is “MX – List of Membership Packages”, filtering where published to web = yes. The Template is called “Packages”.

Join Level (/Membership/Join/Join-Level)

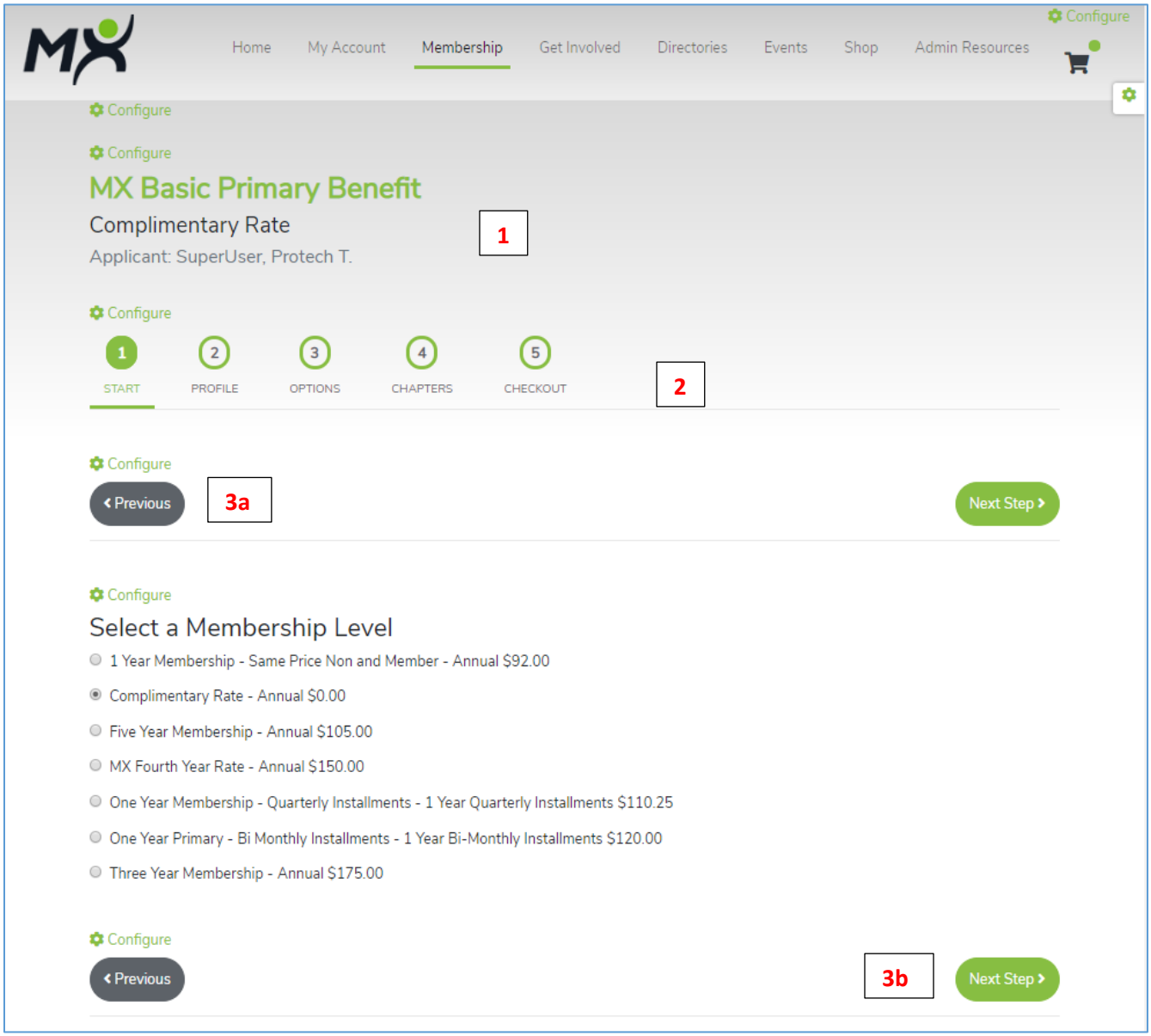
Step 1 of the Membership Application

The “Level” page is the first step of both “Join” and “Apply”, because this is the page with the Controller and Rates web parts. There are some new features to note:

1 **Application Header:** The page layout for process pages does not display a big “hero” image and page title, because the page title is dynamic - the type of Membership you are applying for, and the applicant. So there is a new “Application Header” web part that displays benefit, rate and applicant formatted as a page title.

2 **Navigation Tabs:** The look and feel of the tabs has changed to take less space and adapt better to mobile screens. Instead of the big colored bars, the tab numbers are all circled, and the current step is accented.

3 **Navigation Bar:** The navigation buttons are now separated, and more clearly point in the direction that they go, either backward (< Previous) or forward (Next >). We have also placed these navigation buttons on both the top of the content area of the page and on the bottom of the content area, so the user can always easily see how to proceed, as soon as they land on the page, and again, after they have scrolled all the way to the bottom of a long page.

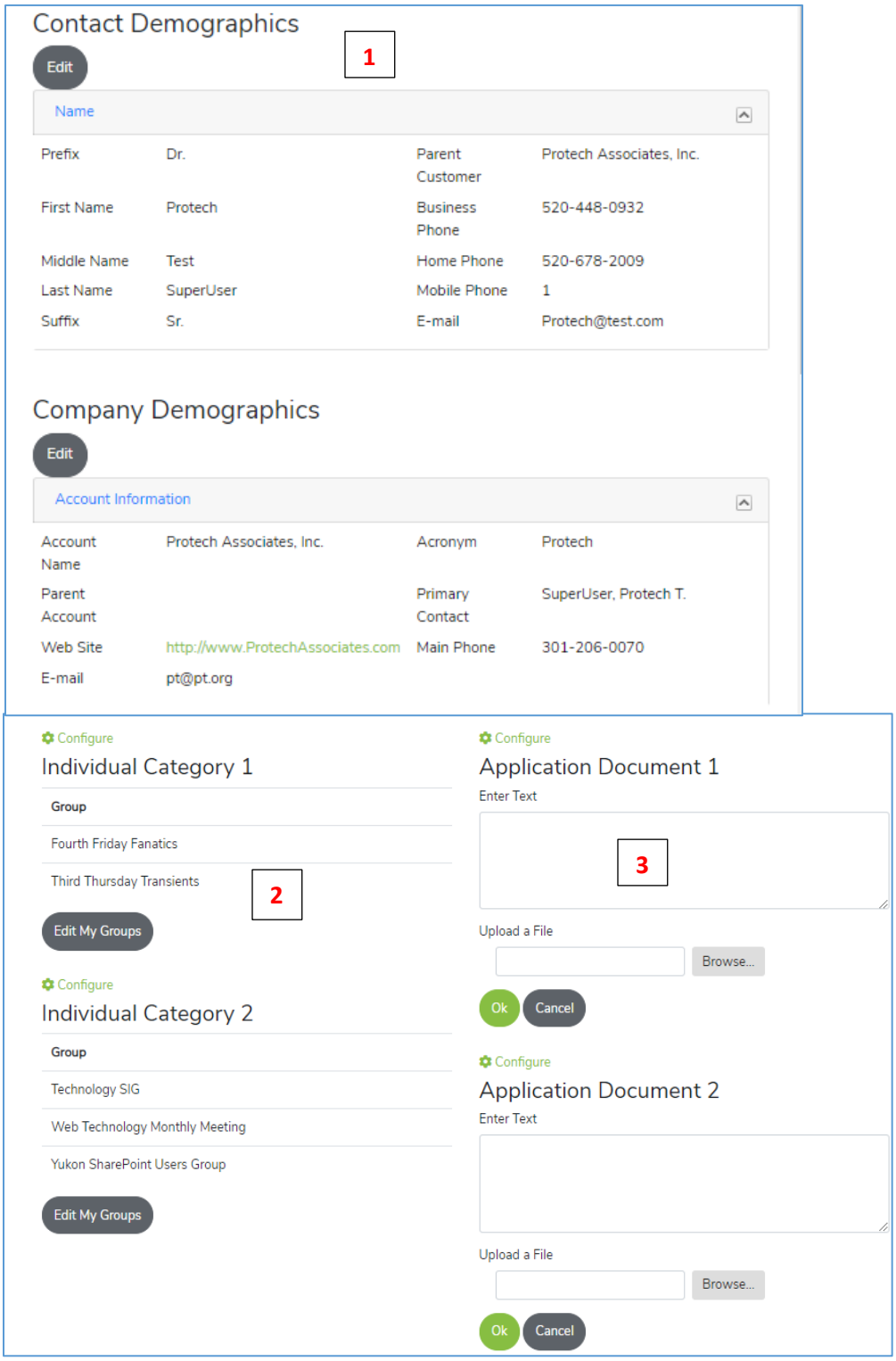


Join Profile (/Membership/Join/Join-Profile)

Step 2 of the Membership Application

The “Profile” page is the second step of both “Join” and “Apply”. In addition to the common elements (Application Header, Navigation Tabs and Navigation Bar (2 instances), the web parts that are on this page by default are:

1. MX Form, two instances
2. My Groups, two instances
3. Note Detail, two instances



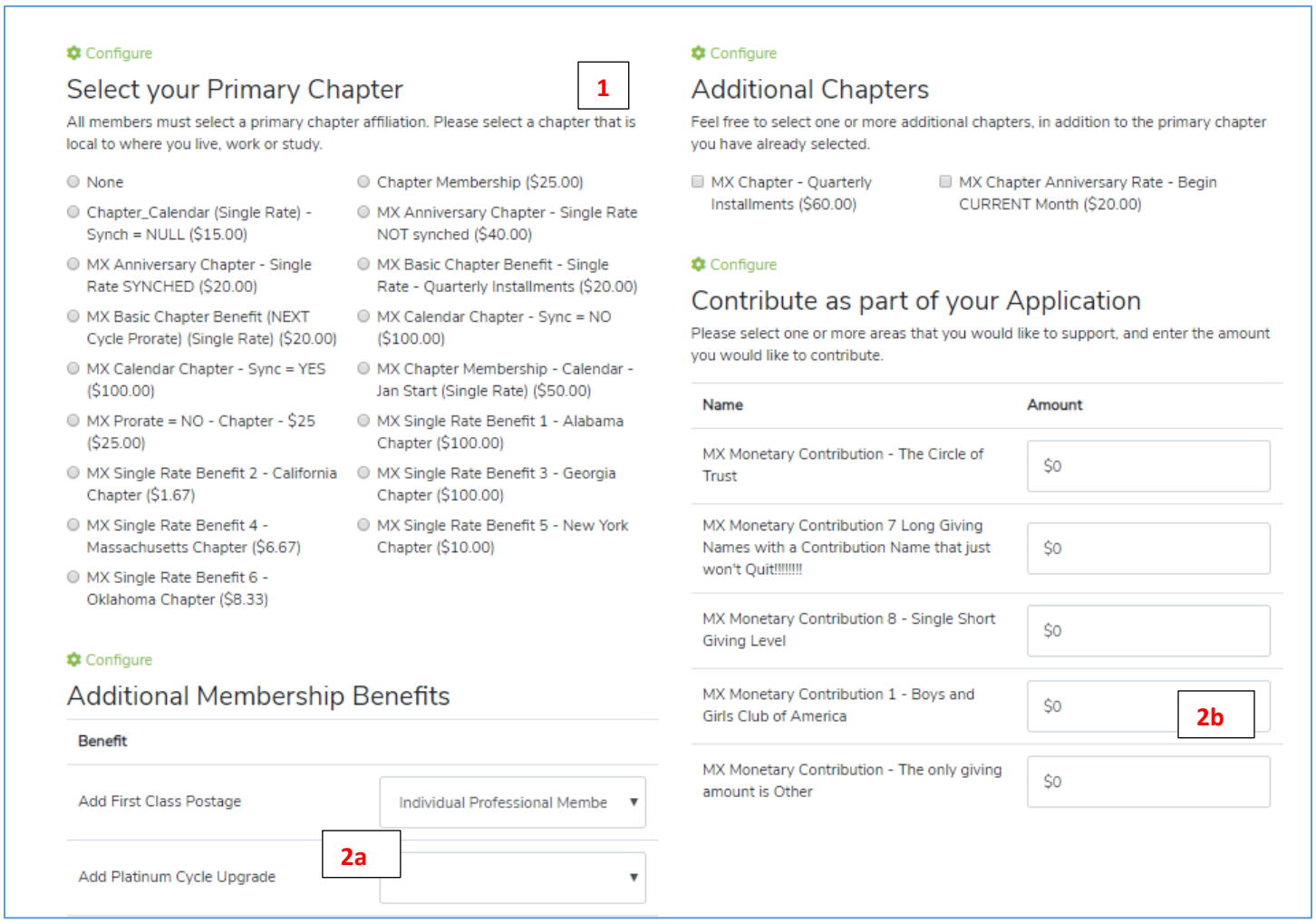
Join Options (/Membership/Join/Join-Options)

Step 3 of the Membership Application

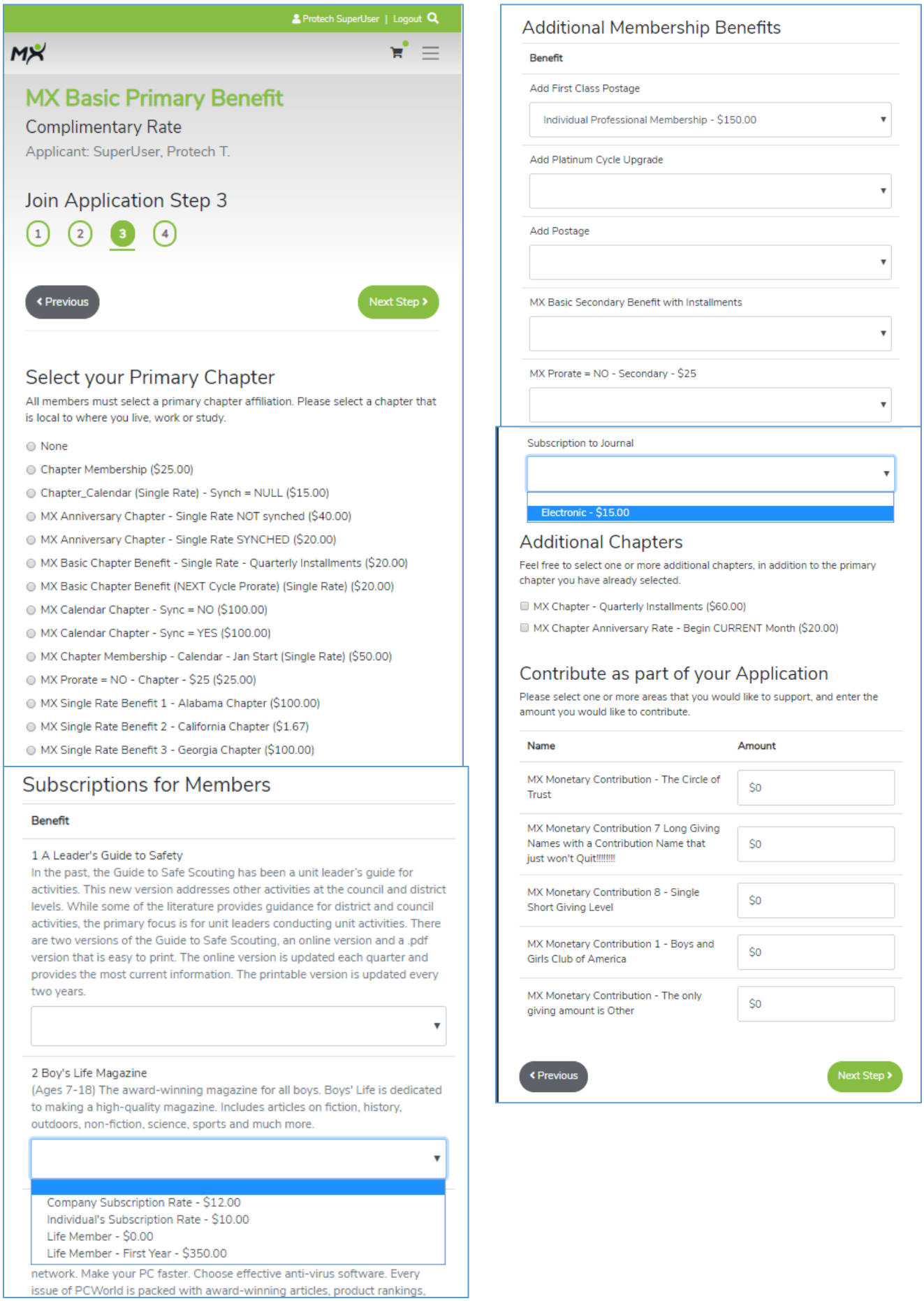
The “Options” page is the third step of “Join” and the fourth step of “Apply”. In addition to the common elements (Application Header, Navigation Tabs and Navigation Bar (2 instances), the Join process includes by default all of the secondary benefits web parts and also contributions on this one page. The expectation is that you will be removing those that don’t apply, but feel free to add another step if this makes for too much on one page.

1 Primary Chapter web part and Secondary Chapters web part, 2 instances of the Secondary Benefits, with one for Subscription, and Membership Contributions. The Chapter web parts are on a separate page called Apply Chapters in the “Apply” 5-step path. Feel free to re-purpose the Apply path for any more complex application process.

2 NEW: No checkboxes in Secondary Benefits and Contributions. Both Secondary benefits and Contributions have removed the extra keystroke required to check a box and then select a rate or enter an amount. The user just selects a rate or enters a contribution amount in order to add that selection to the membership.



- All of these web parts are fully responsive:



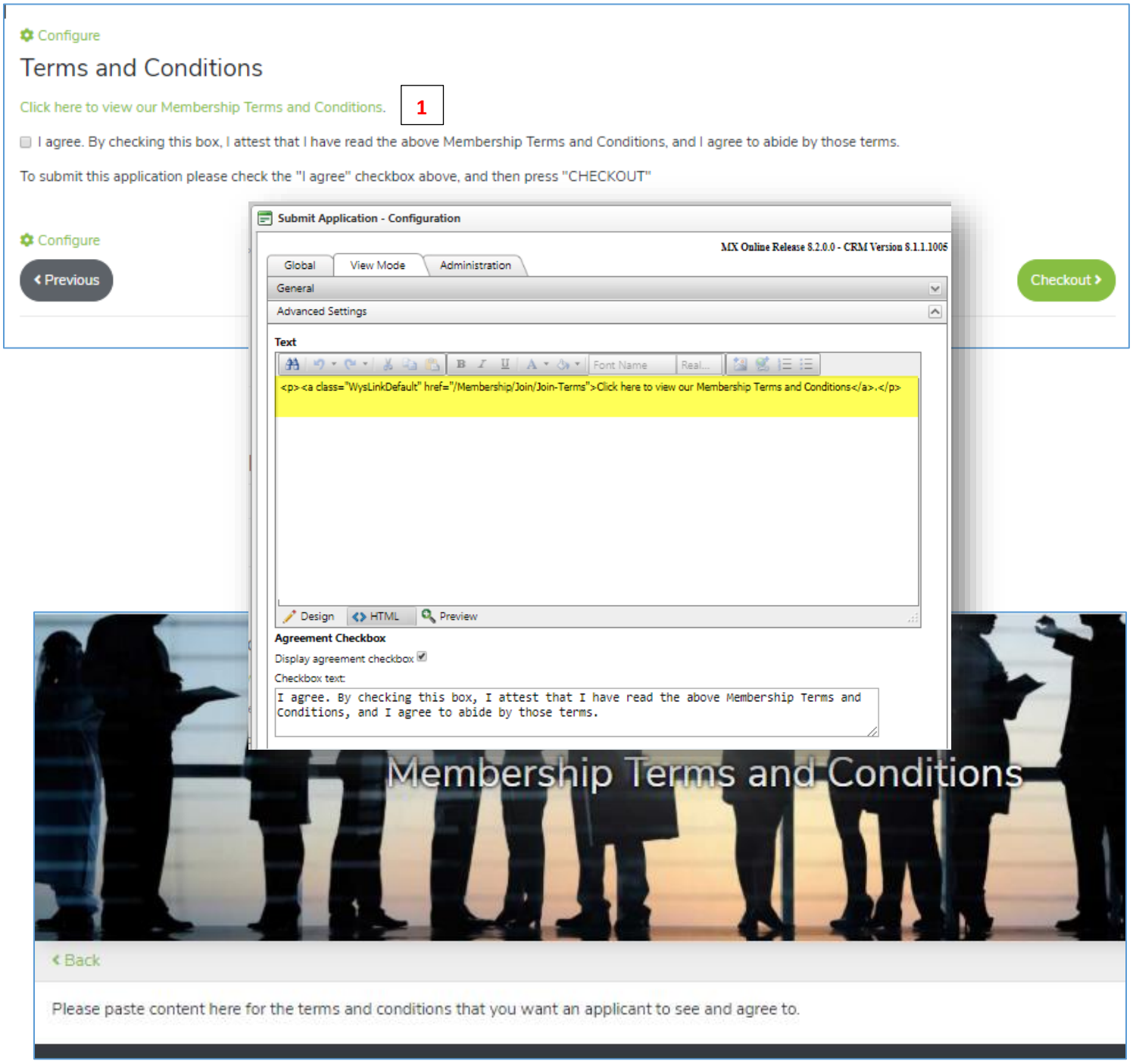
Join Checkout (/Membership/Join/Join-Checkout) and Terms (/Membership/Join/Join-Terms)

Last Step of the Membership Application

The "Checkout" page is the last step of "Join", "Apply", "Member" and "Renew". In addition to the common process web parts, this page contains only the Membership Summary web part and the Submit Application (Agree to Terms) web part.

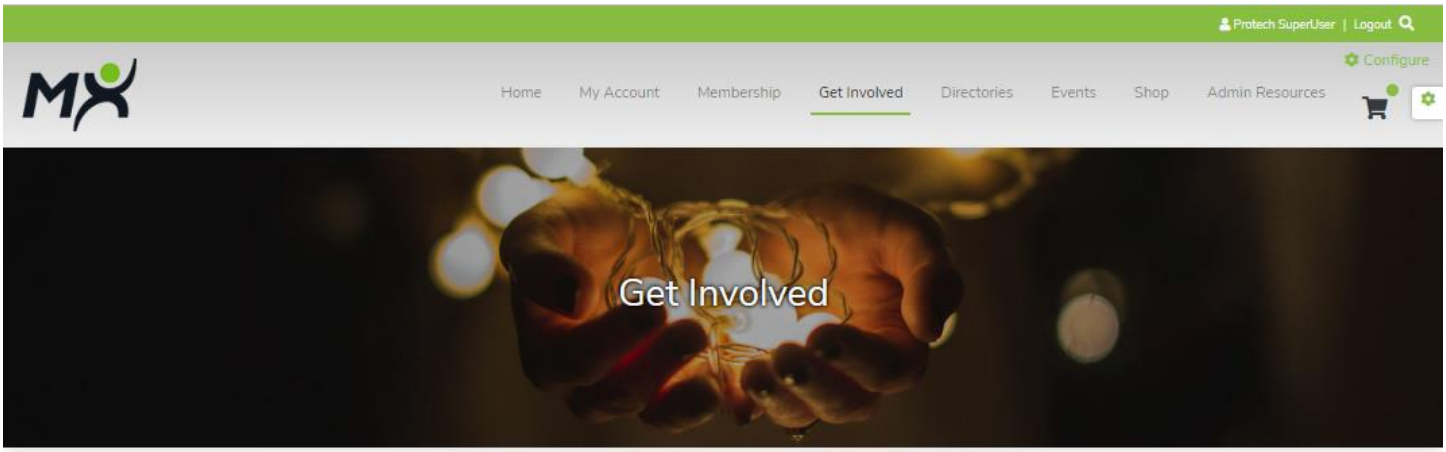
1 Hyperlink to Terms page: Instead of asking the client to copy-paste the full text of their terms into the Submit Application web part, we have defined that text just as a hyperlink to a separate page called /Membership/Join/Join-Terms. There is no need to change the default configuration for the client's Terms.

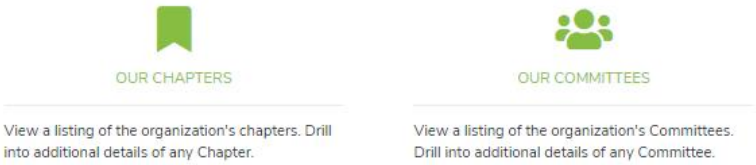
2 Join-Terms (and its companion pages Apply-Terms, Member-Terms, and Renew-Terms) contains one html web part, where the client can past a whole document's worth of text. Because it is a third-level page, there is automatically a Back button that takes the user back to the Checkout page.



Get Involved (/Get-Involved)

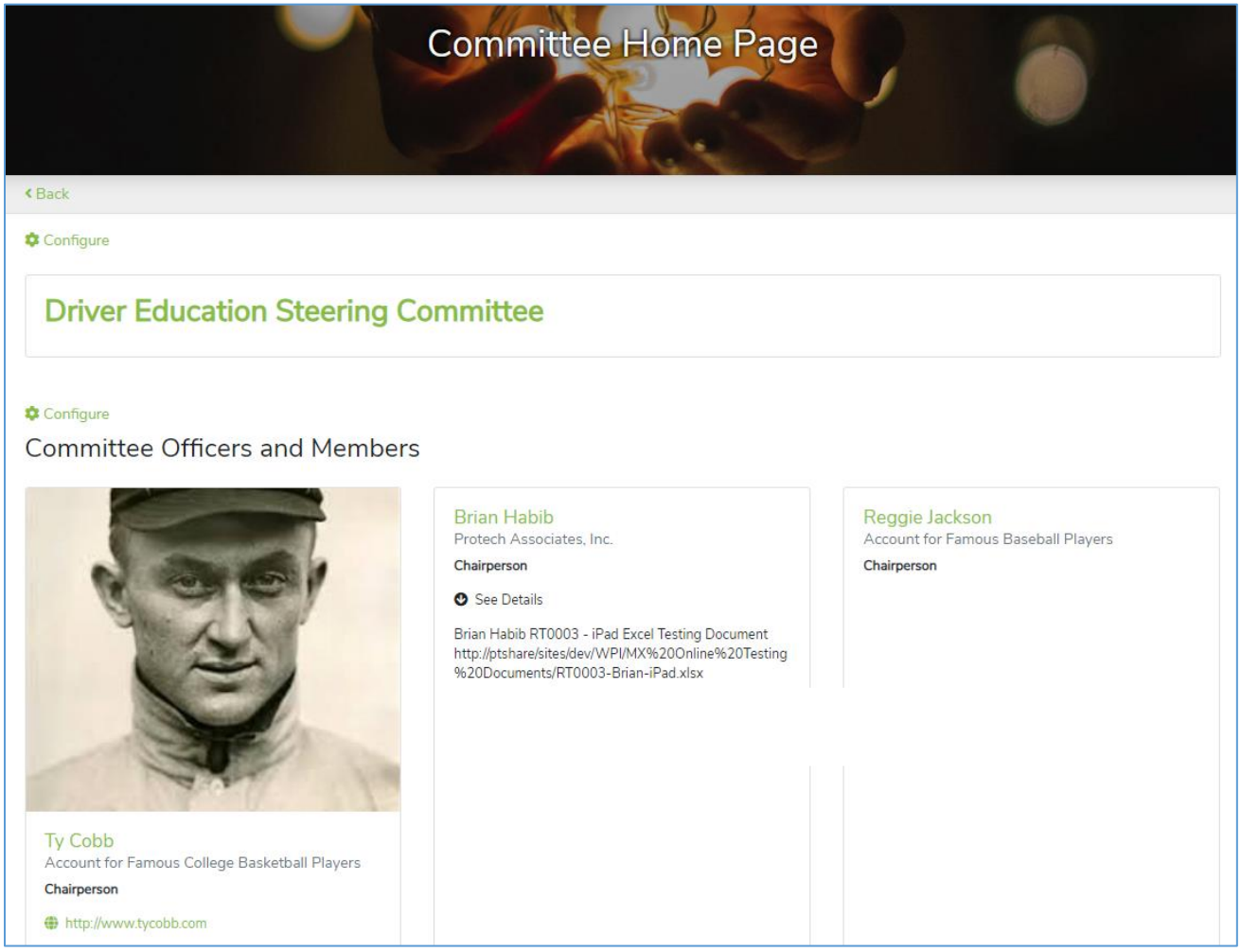
Landing Page

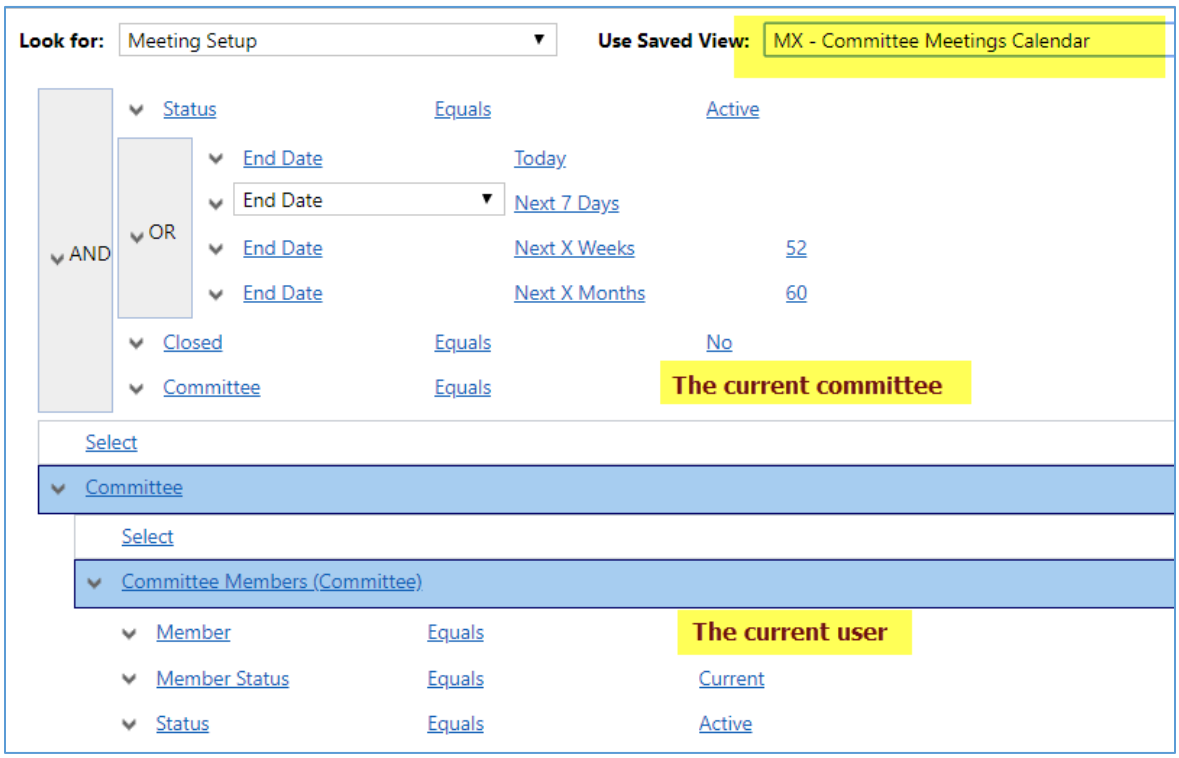




Committee Home Page (/Get-Involved/Our-Committees/Committee-Home-Page)

MX Finds for Committee Name, Committee Officers, Committee Members, and Committee Meetings

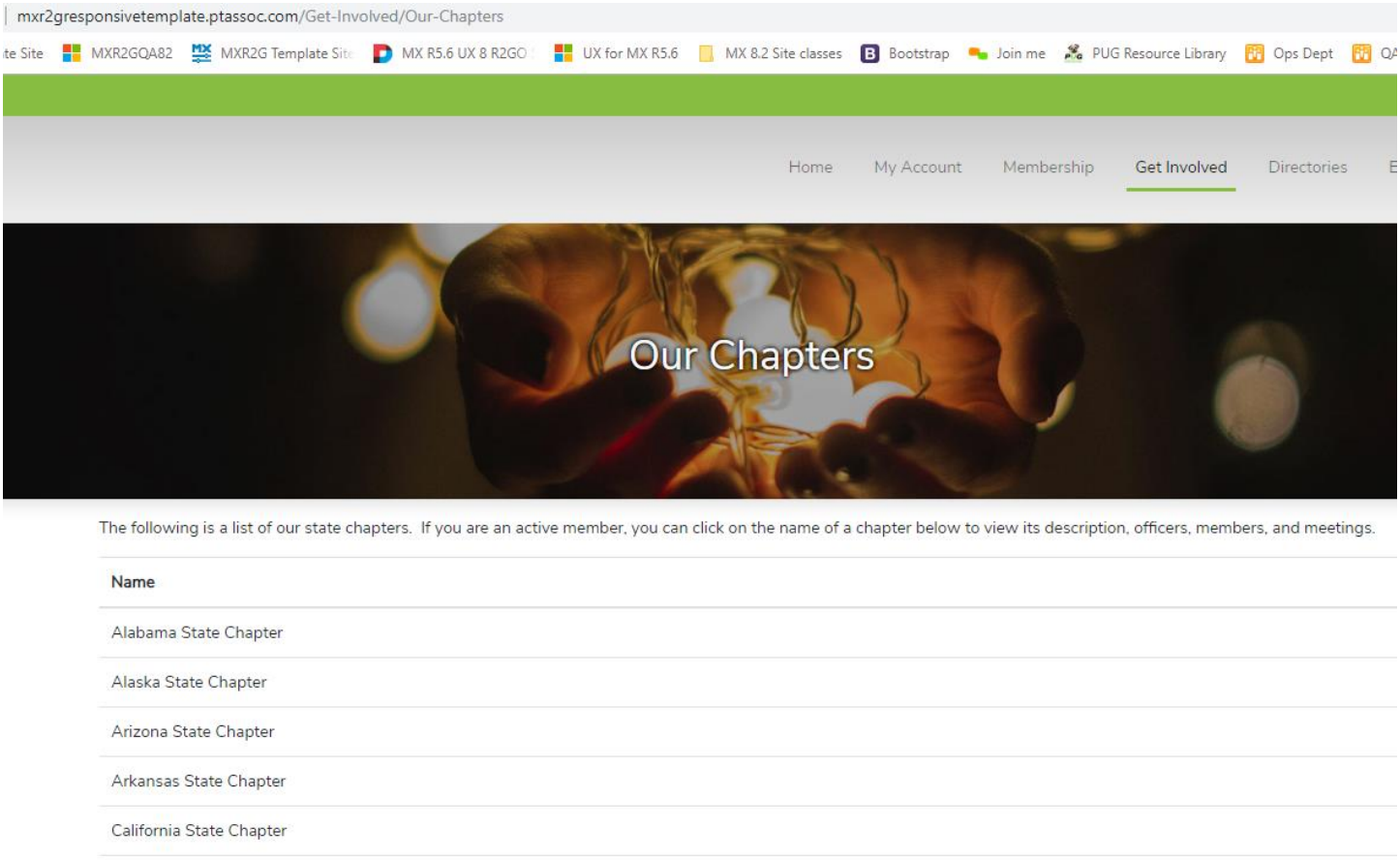




The committee calendar is filtered to be visible only to members of that specific committee.

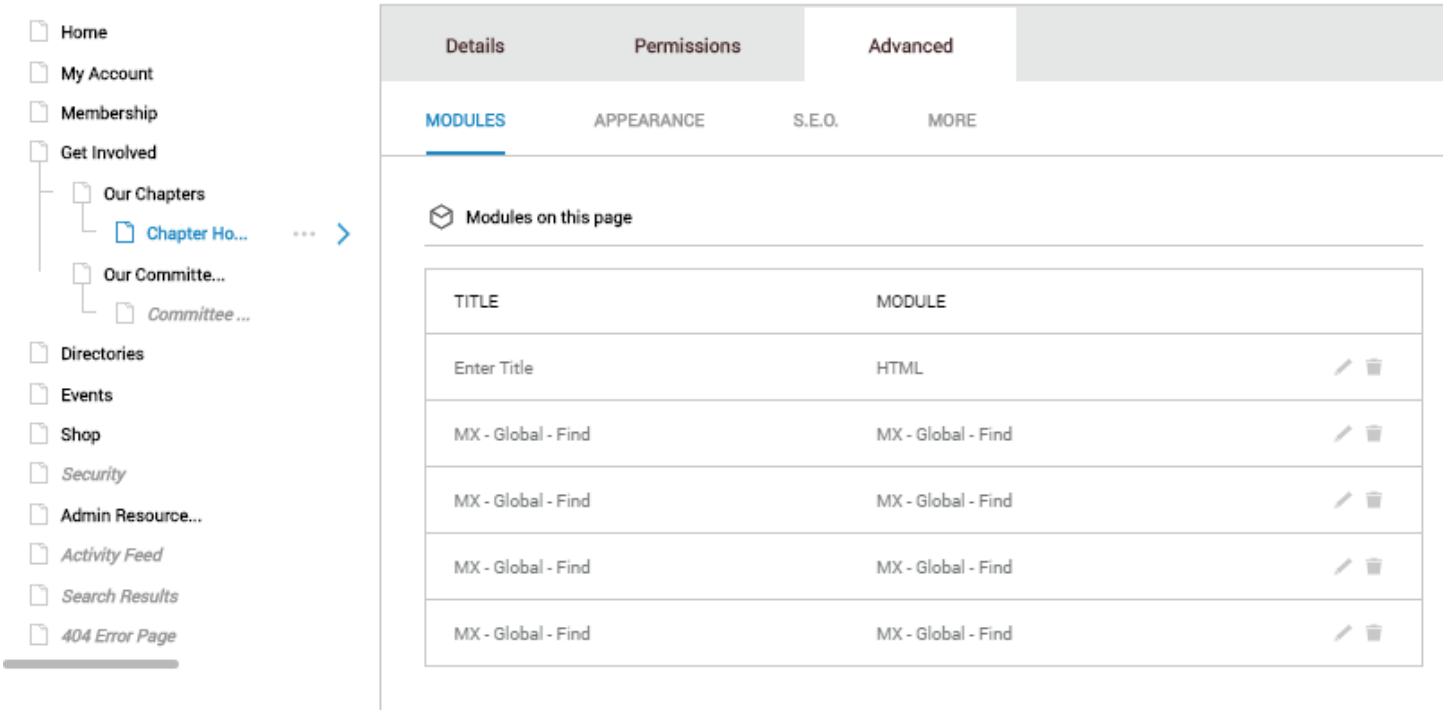
Our Chapters (/Get-Involved/Our-Chapters)

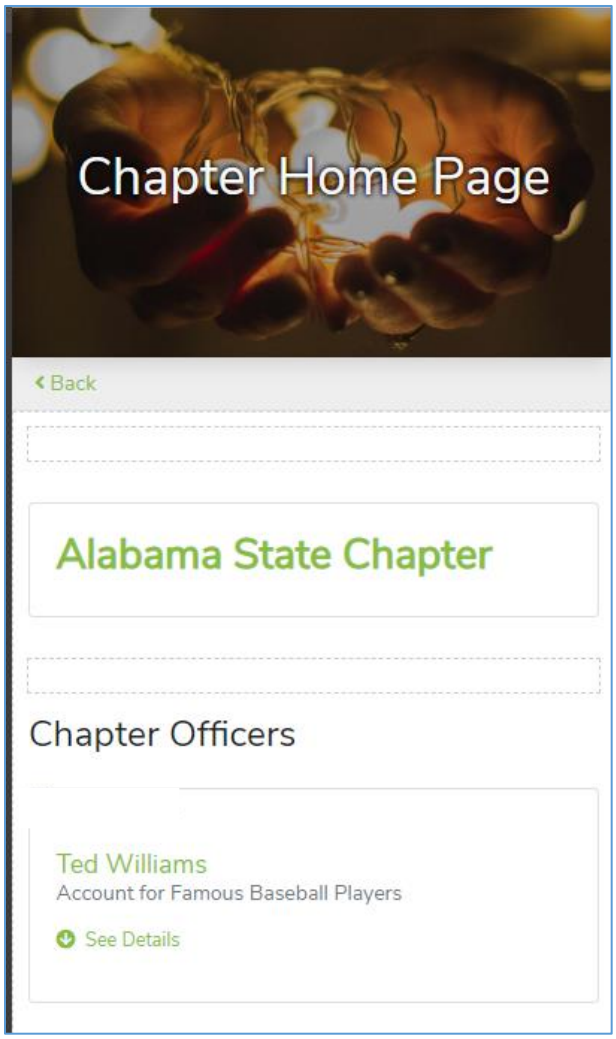
MX Find



Chapter Home Page (/Get-Involved/Our-Chapters/Chapter-Home-Page)

MX Finds





Chapter Meetings

This is a list of meetings sponsored by this chapter. If the meeting has been defined with a link to a page in the chapter's own website, you can click on the meeting name to navigate to the chapter meeting detail page in that site. Otherwise it will navigate to the chapter home page here in this site. Registration for a chapter meeting takes only one page.

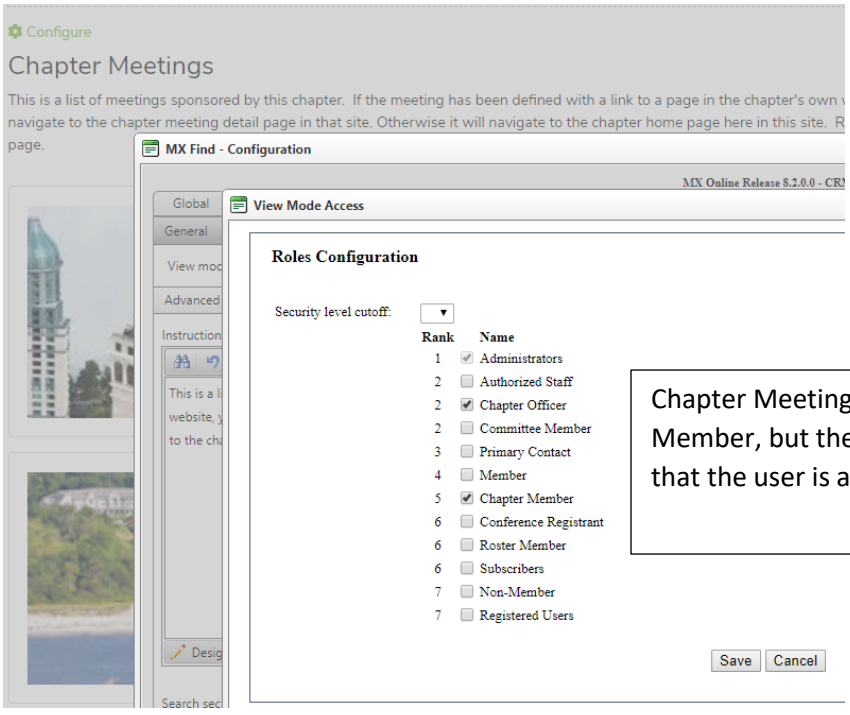
MX June 2019 Seminar
June 2019
06/01/2019 8:00 AM - 06/01/2019 4:00 PM

Hilton Hotel Columbia
Columbia, MD

Configure

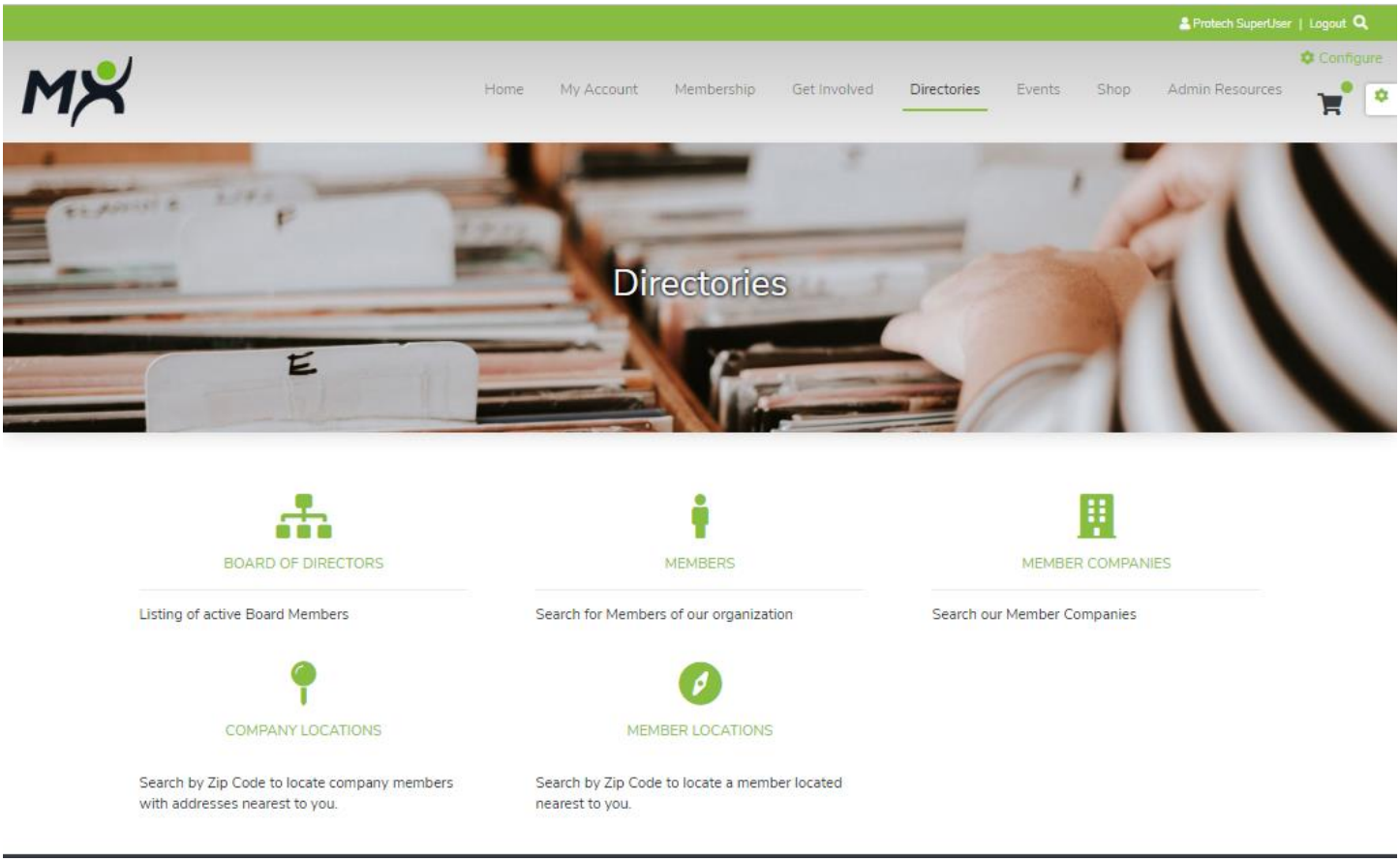
Chapter Members

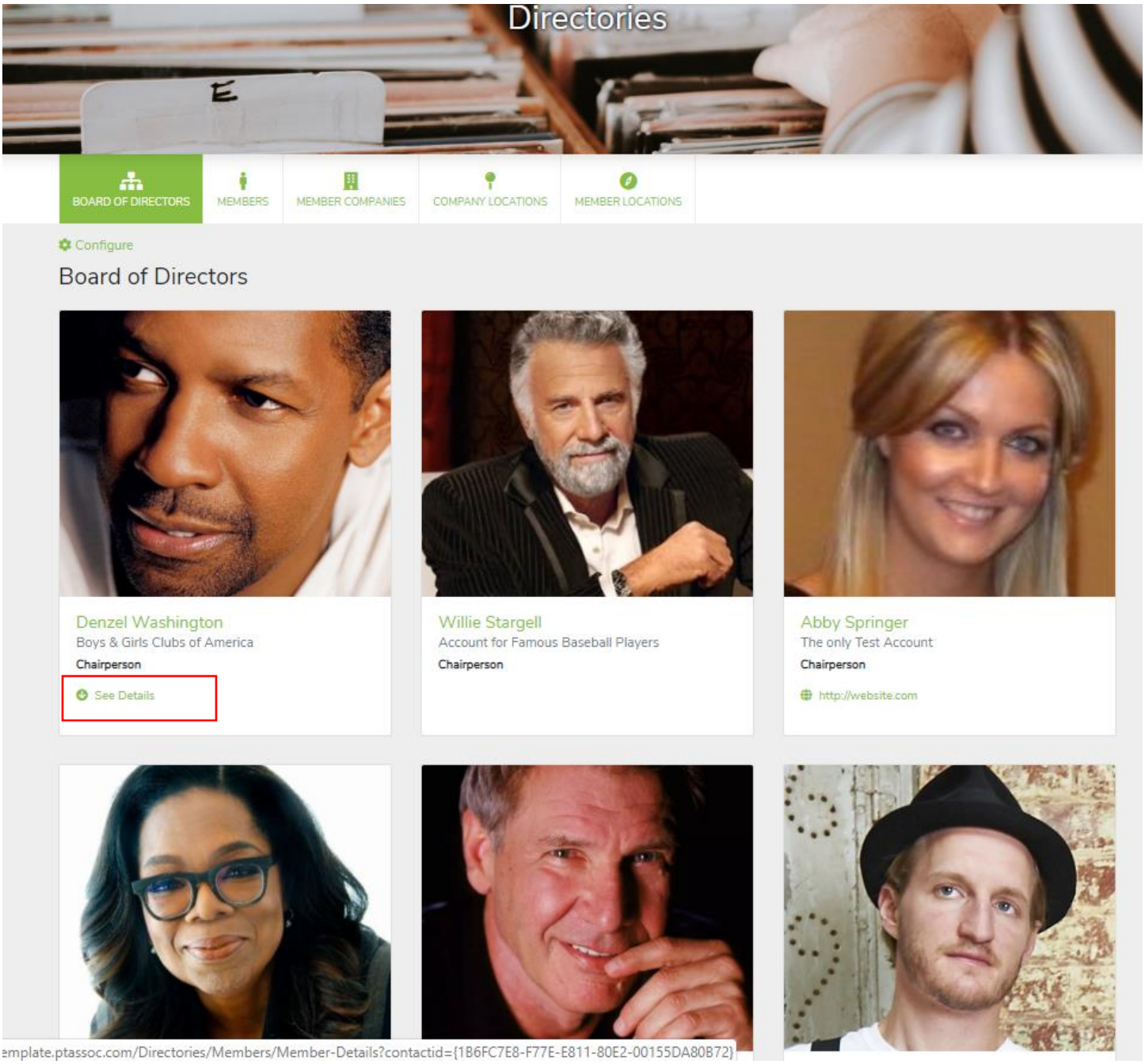
Full Name
Belcher, Bob
Belcher, Gene
Brown, Clarence "Gatemouth"
Brown, Roy
Cusic, Eddie
Dylan, Roberta



Chapter Meetings are configured to be visible only to a Chapter Member, but there is no default filter at this point to ensure that the user is a member of this chapter.

Directories (/Directories)




Directories
BOARD OF DIRECTORS
MEMBERS
MEMBER COMPANIES
COMPANY LOCATIONS
MEMBER LOCATIONS
Configure
Board of Directors
Denzel Washington
Boys & Girls Clubs of America
Chairperson
See Details
Willie Stargell
Account for Famous Baseball Players
Chairperson
Abby Springer
The only Test Account
Chairperson
http://website.com
emplate.ptassoc.com/Directories/Members/Member-Details?contactid={1B6FC7E8-F77E-E811-80E2-00155DA80B72}

Board of Directors

Denzel Washington

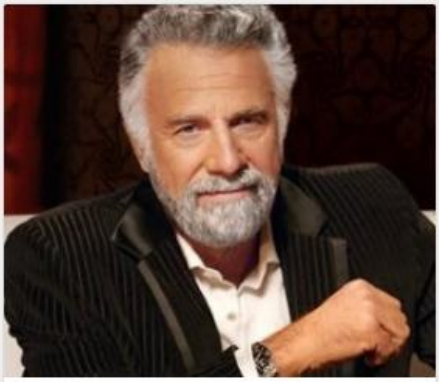
Boys & Girls Clubs of America

Chairperson

See Details

Denzel Hayes Washington Jr. (born December 28, 1954) is an American actor, director, and producer. He has received three Golden Globe awards, a Tony Award, and two Academy Awards: Best Supporting Actor for the historical war drama film Glory (1989) and Best Actor for his role as a corrupt cop in the crime thriller Training Day (2001).

Washington has received much critical acclaim for his film work since the 1980s, including his portrayals of real-life figures such as South African anti-apartheid activist Steve Biko in Cry Freedom (1987), Muslim minister and human rights activist Malcolm X in Malcolm X (1992), boxer Rubin "Hurricane" Carter in The Hurricane (1999), football coach Herman Boone in Remember the Titans (2000), poet and educator Melvin B. Tolson in The Great Debaters (2007), and drug kingpin Frank Lucas in American Gangster (2007). He has been a featured actor in the films produced by Jerry Bruckheimer and has been a frequent collaborator of directors Spike Lee, Antoine Fuqua and Tony Scott. In 2016, Washington was selected as the recipient for the Cecil B. DeMille Lifetime Achievement Award at the 73rd Golden Globe Awards. In 2002, Washington made his directorial debut with the biographical film Antwone Fisher. His second directorial effort was The Great Debaters, released in 2007. Washington's third directorial effort, Fences, in which he also starred, was released on December 16, 2016, and was nominated for the Academy Award for Best Picture



Willie Stargell

Account for Famous Baseball Players

Chairperson

Abby Springer

The only Test Account

Chairperson

http://website.com

BOARD OF DIRECTORS | MEMBERS | MEMBER COMPANIES | COMPANY LOCATIONS | MEMBER LOCATIONS

Configure

Search our Member Directory

Search again by clicking this bar

Last Name

First Name

Country

State/Province

Address Label Name

City

Within

Miles of zip code

Search | Clear Filters

Dr. Neal A. Aaron, II

Research Physicist

Crocker Research & Development Inc.

1840 Camden Ave Apt 106
Columbia, MD 21045
US
858-555-1001

Patricia N. Abbot

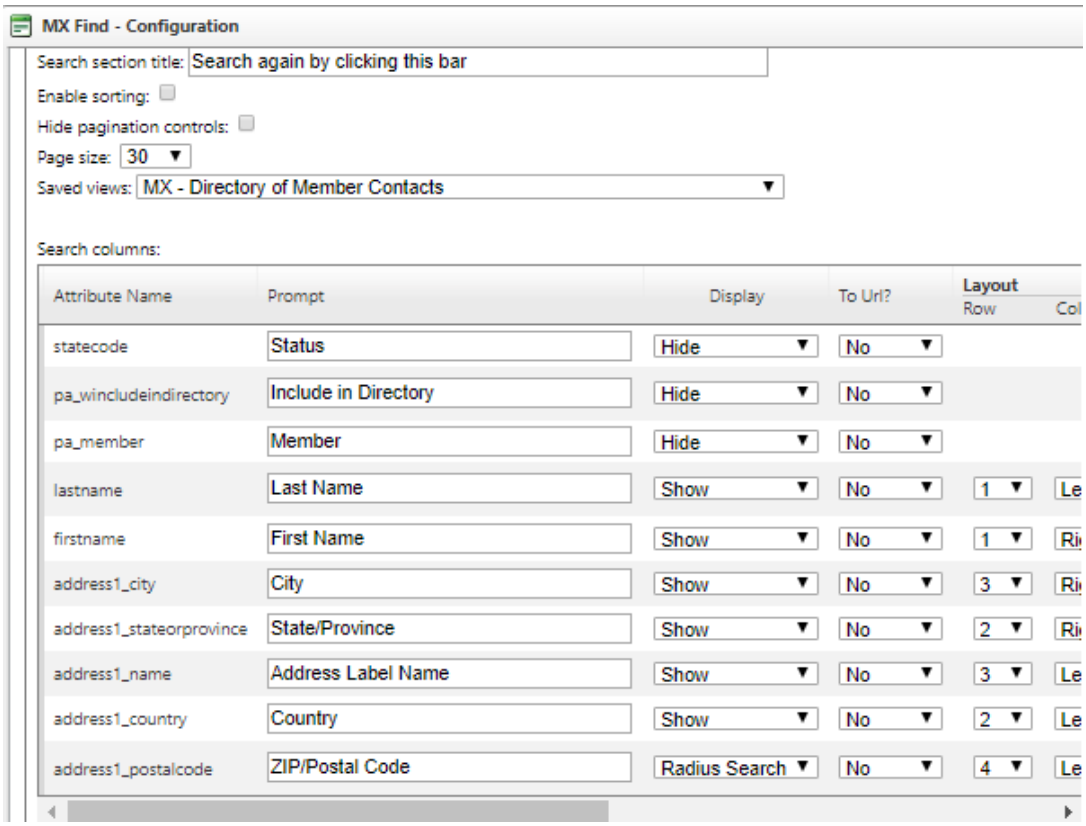
The Great Gatsby

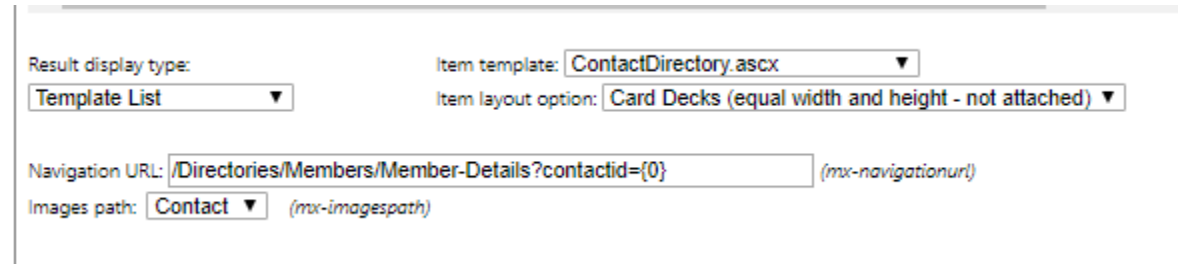
5457 Twin Knolls Rd Ste 400
Columbia, MD 20707
US
312-934-8686

Elise R Adams

BEW Enterprises

1200 Lee St
Des Plaines, IL 60018-1513
US


MX Find - Configuration
Search section title: Search again by clicking this bar
Enable sorting:
Hide pagination controls:
Page size: 30
Saved views: MX - Directory of Member Contacts
Search columns:
Attribute Name
Prompt
Display
To Url?
Layout
Row
statecode
Status
Hide
No
pa_wincludeindirectory
Include in Directory
Hide
No
pa_member
Member
Hide
No
lastname
Last Name
Show
No
1
firstname
First Name
Show
No
1
address1_city
City
Show
No
3
address1_stateorprovince
State/Province
Show
No
2
address1_name
Address Label Name
Show
No
3
address1_country
Country
Show
No
2
address1_postalcode
ZIP/Postal Code
Radius Search
No
4


Result display type:
Template List
Item template: ContactDirectory.ascx
Item layout option: Card Decks (equal width and height - not attached)
Navigation URL: /Directories/Members/Member-Details?contactid={0}
(mx-navigationurl)
Images path: Contact
(mx-imagespath)

A A L

Campbell, Randy
631 W Oak Dr
2
2
Chester, IL 62233-
US

Locate
608-826-4777
https://www.google.com

Allstate Insurance Company

Allstate Insurance Company

Scott, Michael
2801 Lakeside Dr
Deerfield, IL 60015-1211

Locate
800-354-2167

Baltimore Orioles

Baltimore Orioles

Memorial Stadium
Weaver, Earl I.
Account - 3300 Stadium
Upper Deck
Section 33
Baltimore, MD 20146
US

Locate
410-548-1000
410-548-1002
http://baltimore.orioles.mlb.com

See Details

Heller and Spear, Inc.

Heller Primary Address2
Maneely, Paul C.
2344 Fairway Wood Cir2
Castle Rock, CO 80109-4526
US

Locate
BUS-232-3333
FAX-205-2344
http://www.heller.abc

Marvin Mandel's Private Account

Marvin Mandel's Private Account

Hideout
Victrolla, Victor
8484 wendell Ct.
Topeka, ks 20383
us

Locate
030-919-9393
030-919-9395
www.heythere.com

See Details

PolySteel Concrete Building Systems

PolySteel CBS
Scott, Rosemary B.
122 Wading Bird Dr
Venice, FL 34292-2473
US

Locate
222-333-4444
333-444-5555
http://www.ps.abc

MX Find - Configuration

Saved views: MX - Directory of Member Accounts Members Only

Search columns:

Attribute Name	Prompt	Display	To Url?	Layout Row	Layout Colu
statecode	Status	Hide	No		
pa_member	Member	Hide	No		
address1_city	City	Show	No	2	Left
address1_postalcode	ZIP/Postal Code	Radius Search	No	3	Left
address1_stateorprovince	State/Province	Show	No	2	Rigl
pa_wincludeindirectory	Include in Directory	Hide	No		
pa_accountnamesort	Organization name	Show	No	1	Botl
lastname	Last Name	Show	No	4	Left
firstname	First Name	Show	No	4	Rigl

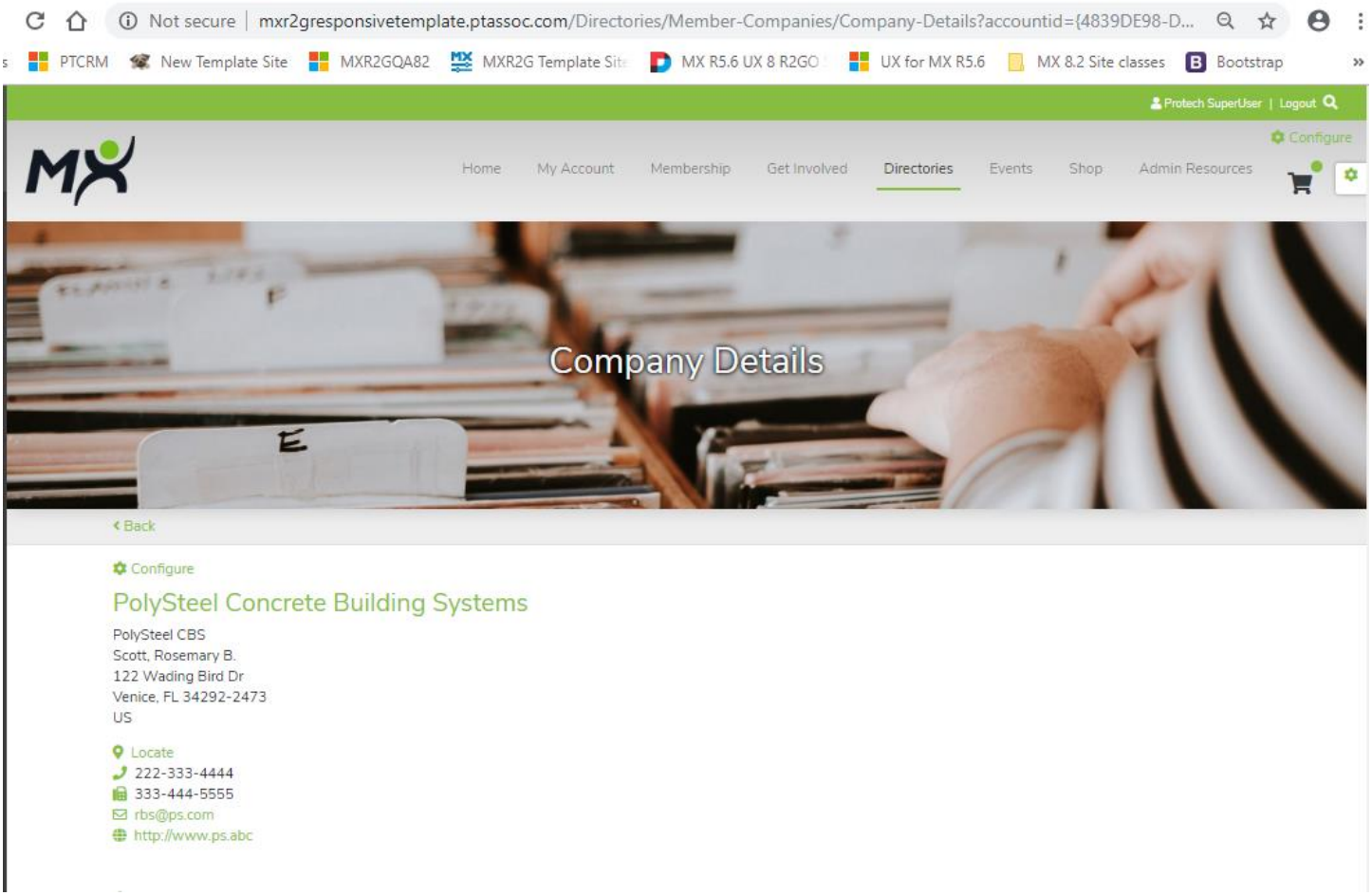
Result display type: Template List

Item template: AccountDirectory.ascx

Item layout option: Card Decks (equal width and height - not attached)

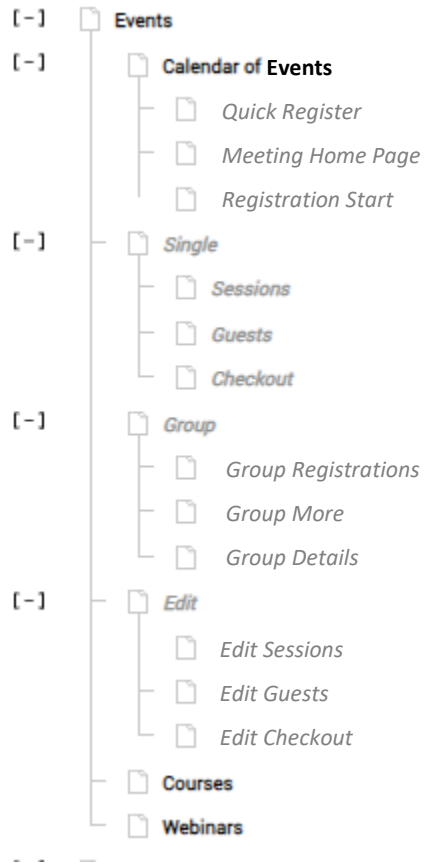
Navigation URL: /Directories/Member-Companies/Company-Details?accountid={0} *(mx-navigationurl)*

Images path: Account *(mx-imagespath)*


Not secure | mxr2gresponsivetemplate.ptassoc.com/Directories/Member-Companies/Company-Details?accountid={4839DE98-D...
PTCRM
New Template Site
MXR2GQA82
MXR2G Template Site
MX R5.6 UX 8 R2GO
UX for MX R5.6
MX 8.2 Site classes
Bootstrap
Protech SuperUser | Logout
Configure
Home
My Account
Membership
Get Involved
Directories
Events
Shop
Admin Resources
Company Details
Back
Configure
PolySteel Concrete Building Systems
PolySteel CBS
Scott, Rosemary B.
122 Wading Bird Dr
Venice, FL 34292-2473
US
Locate
222-333-4444
333-444-5555
rbs@ps.com
http://www.ps.abc

Events (/Events)

Landing Page

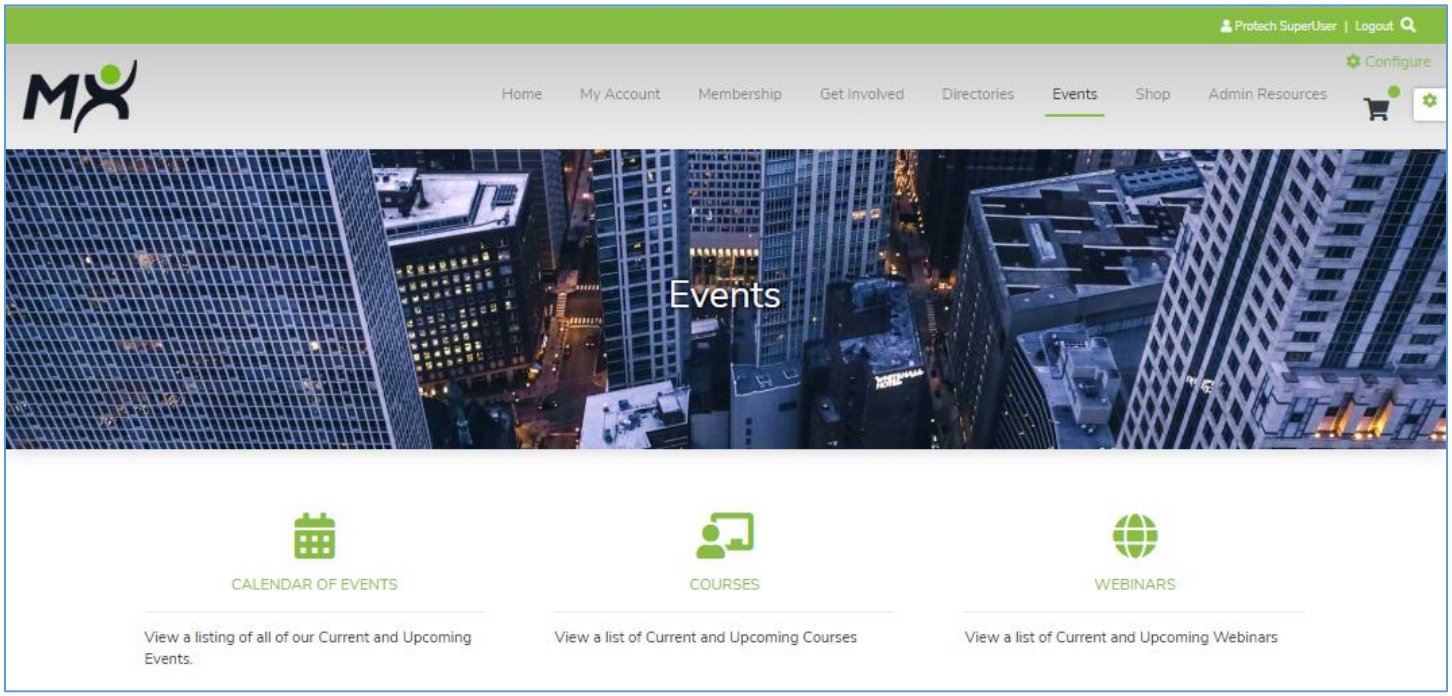


The page structure for the Events module has been significantly simplified and standardized. The page names are shorter, and there are fewer levels.

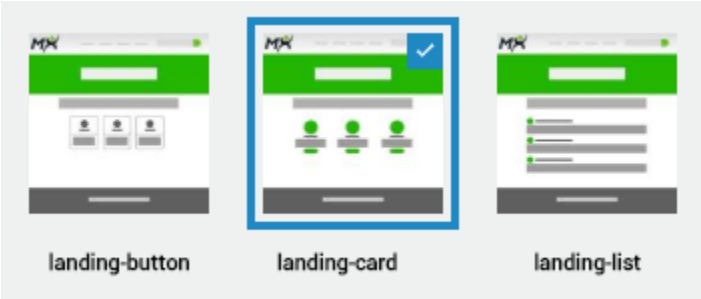
Calendar of Events navigates either to Quick Register or Meeting Home Page, so those are the sub-pages of the calendar. Registration Start is in the same top level because it is arrived at before selecting which branch of registration to go to.

The first step of each registration process is the page group name.

- For instance, when you go from the Registration Start Page to a single registration, you go to the page called “Single” (/Events/Single) for the controller page, and then proceed through the sub-pages until checkout.
- The Select Registrants web part is on the first page of “Group” (/Events/Group).
- Coming from the My Registrations web part, Edit Participant is on the page called “Edit” (/Events/Edit).

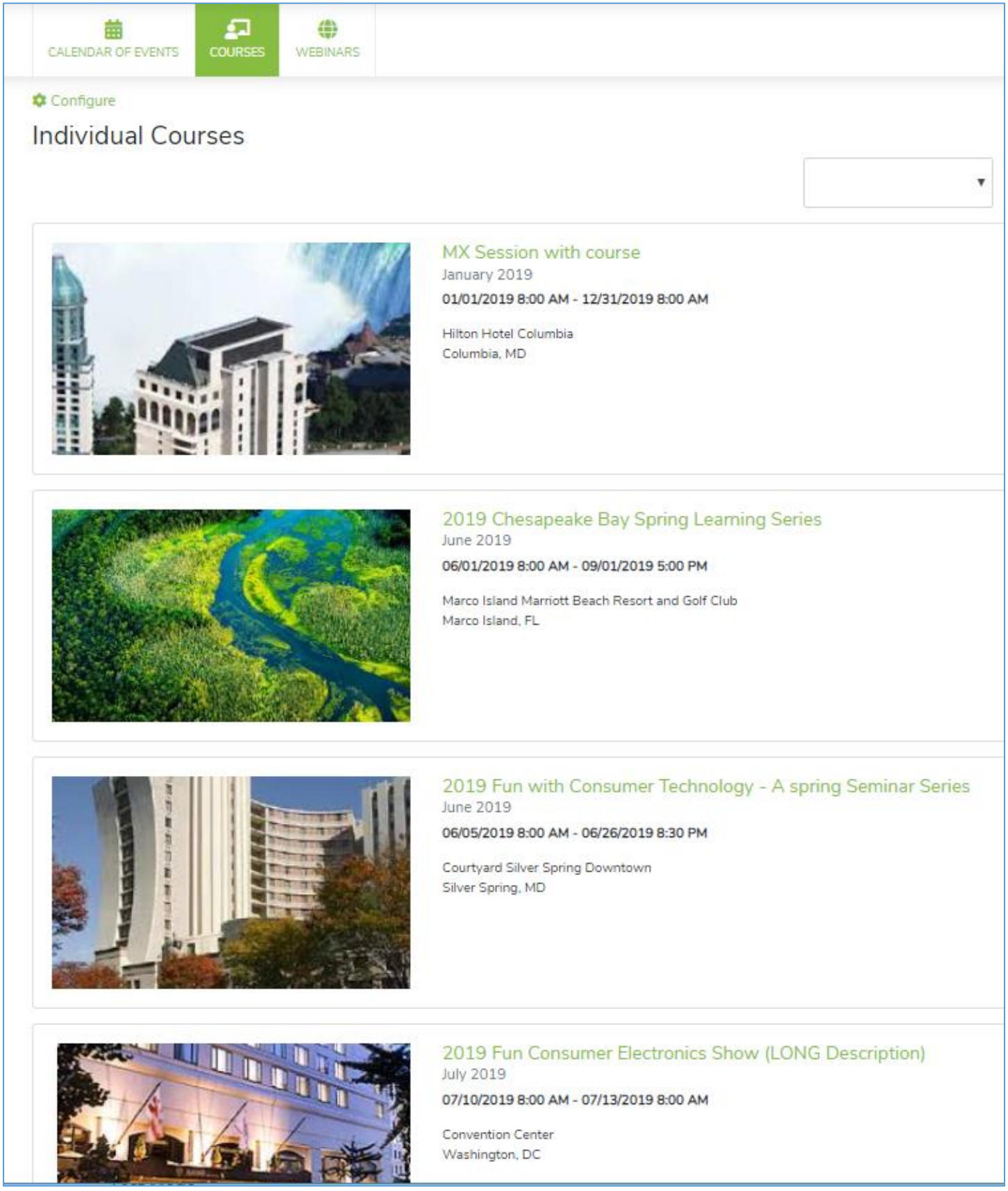


The page layout for this landing page is “landing-card”:



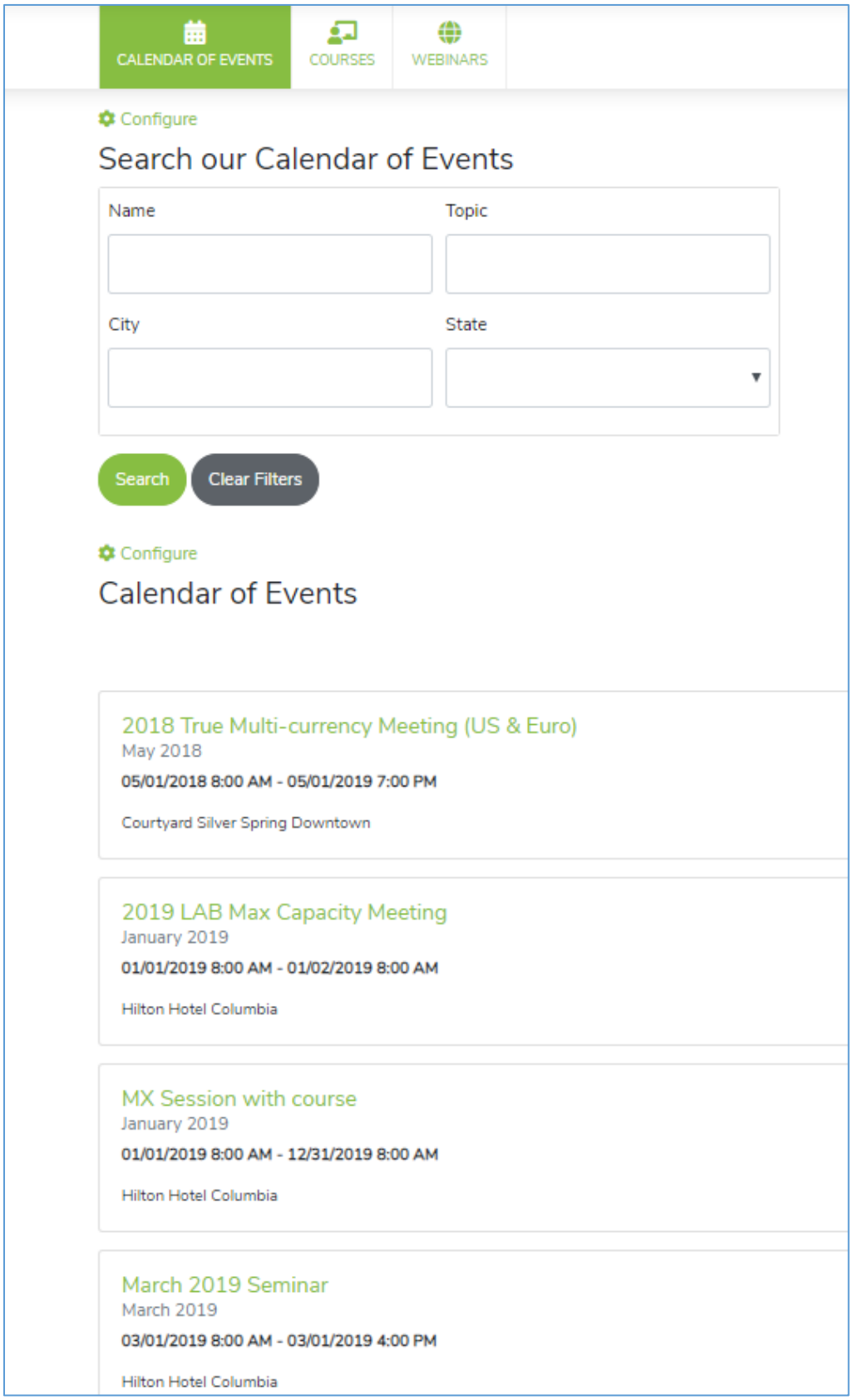
Courses (/Events/Courses) and Webinars (/Events/Webinars)

MX Find – filtered Calendar of Events. Same calendar template as the list of Webinars and the full Calendar of events.



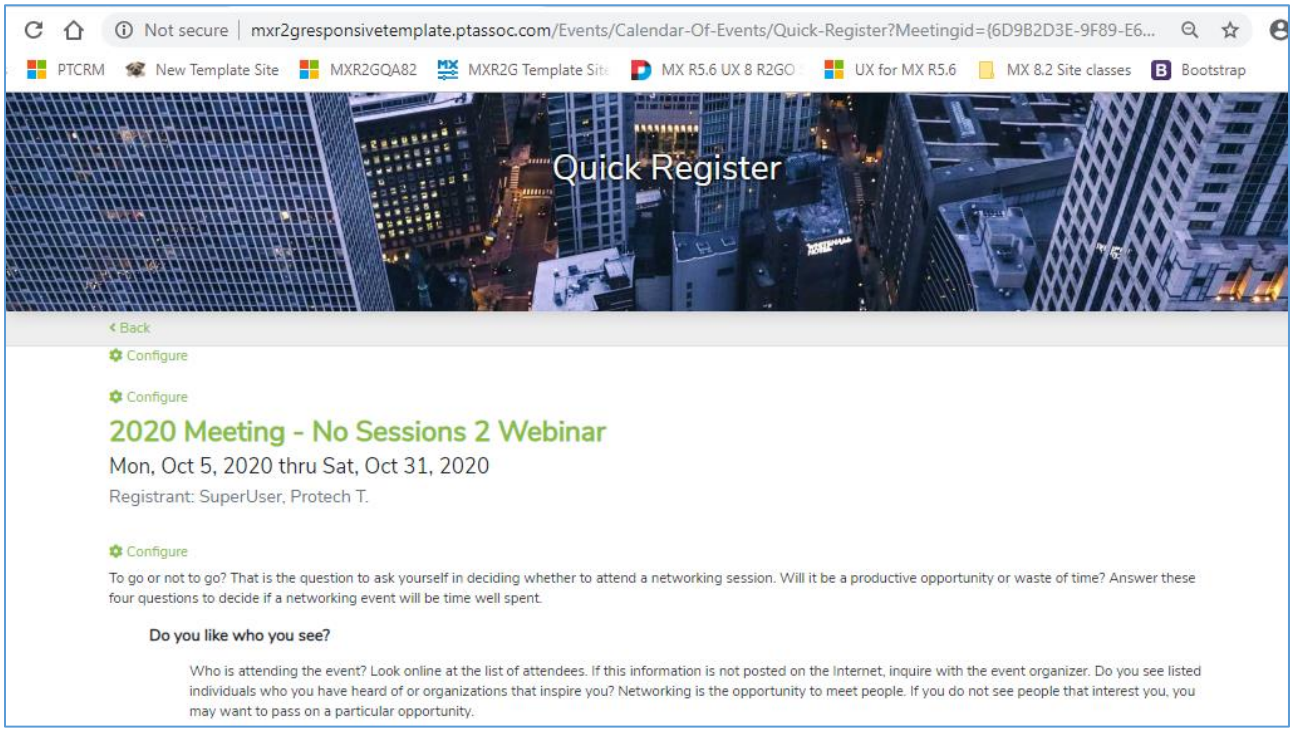
Calendar of Events (/Events/Calendar-of-Events)

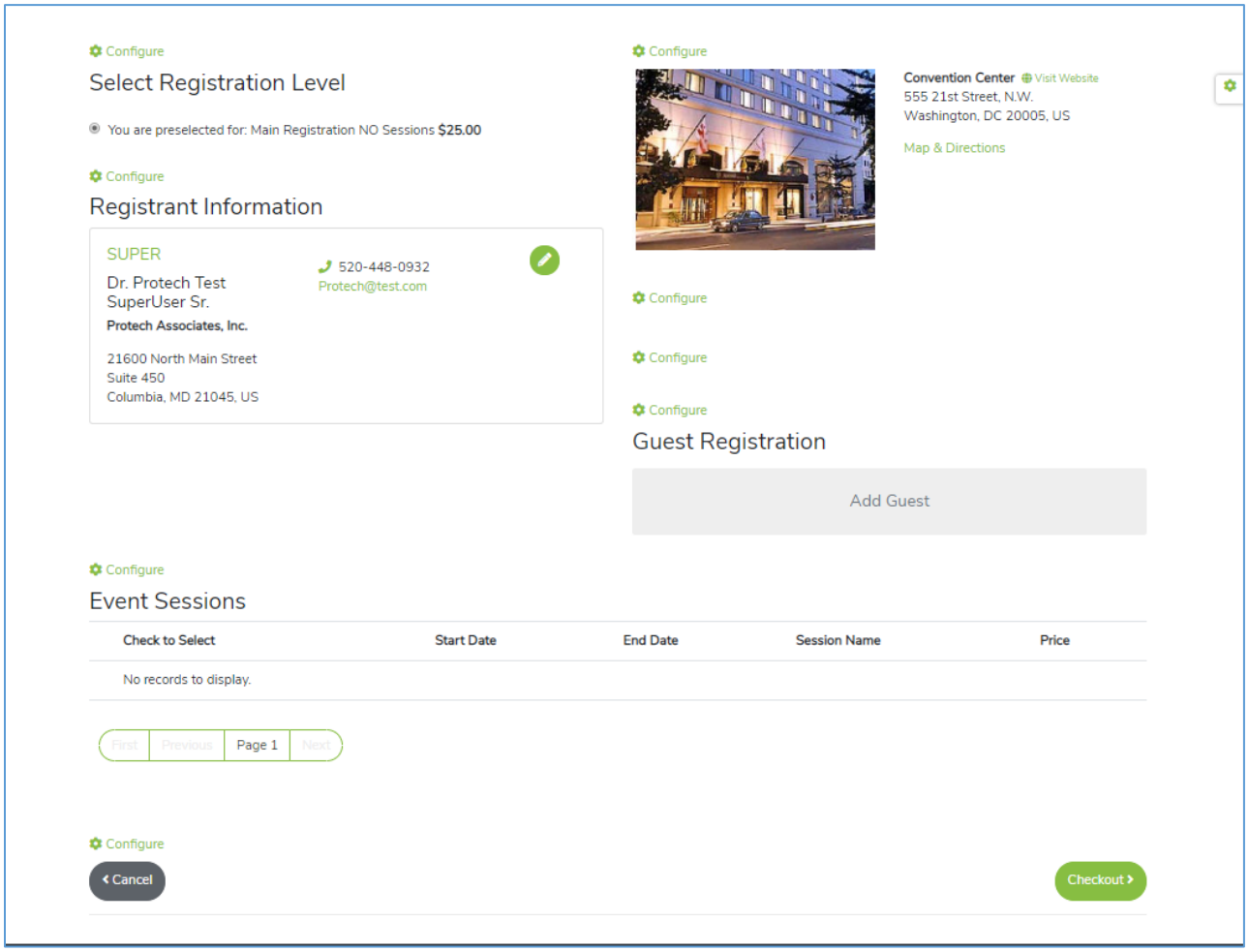
This central page has both the full calendar listing, using the dedicated Template, and a stand-alone MX Find Search form that allows the user to search for an event without having to browse the whole list. The calendar automatically filters by whatever search term the user enters.



Quick Register (/Events/Calendar-of-Events/Quick-Register)

This page is a sub-page of the Calendar of Events because it is an alternative to the Meeting Home Page, if the event has limited complexity in its registration. It combines some Event information web parts as well as registration web parts.

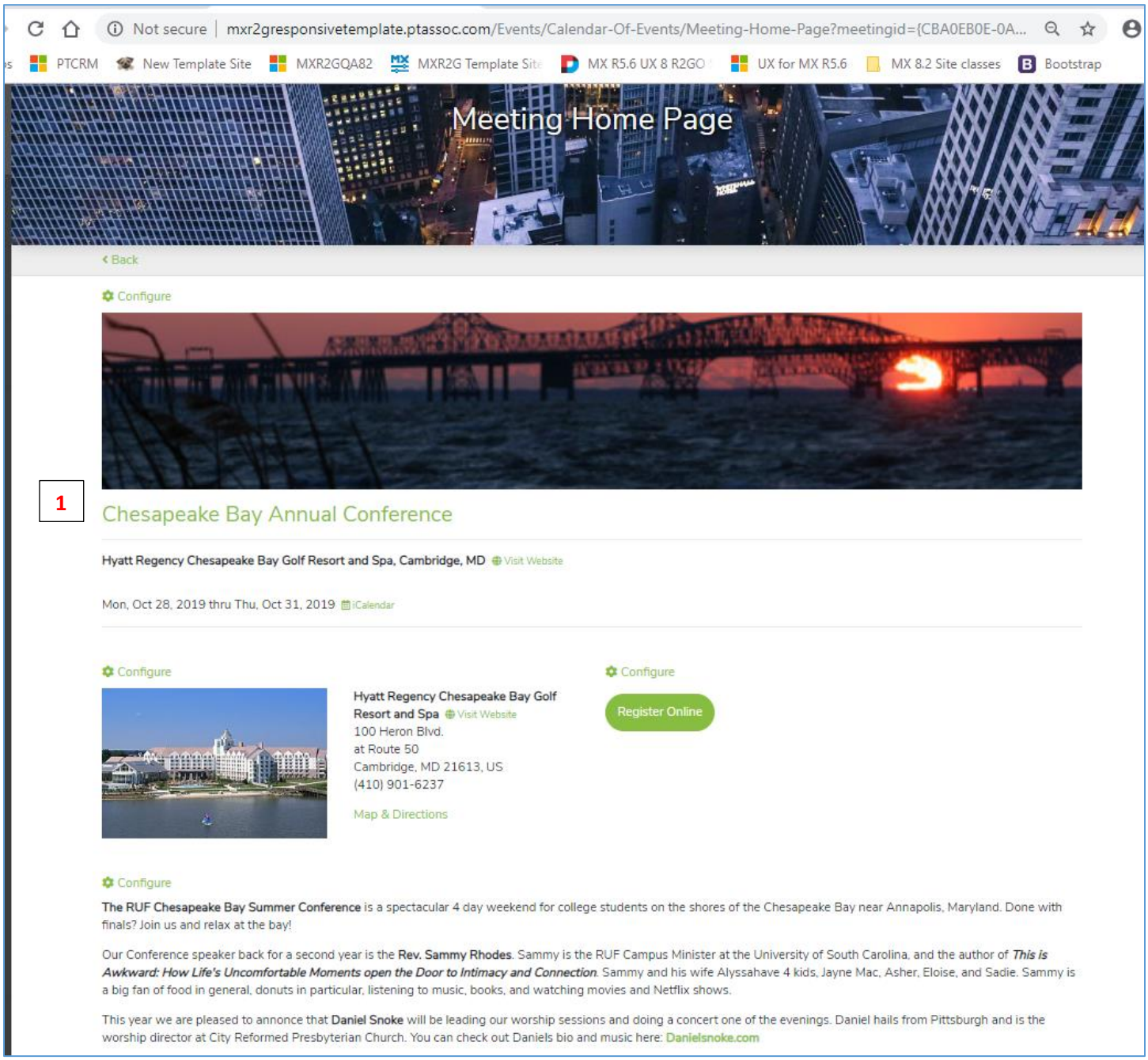




Meeting Home Page (/Events/Calendar-of-Events/Meeting-Home-Page)

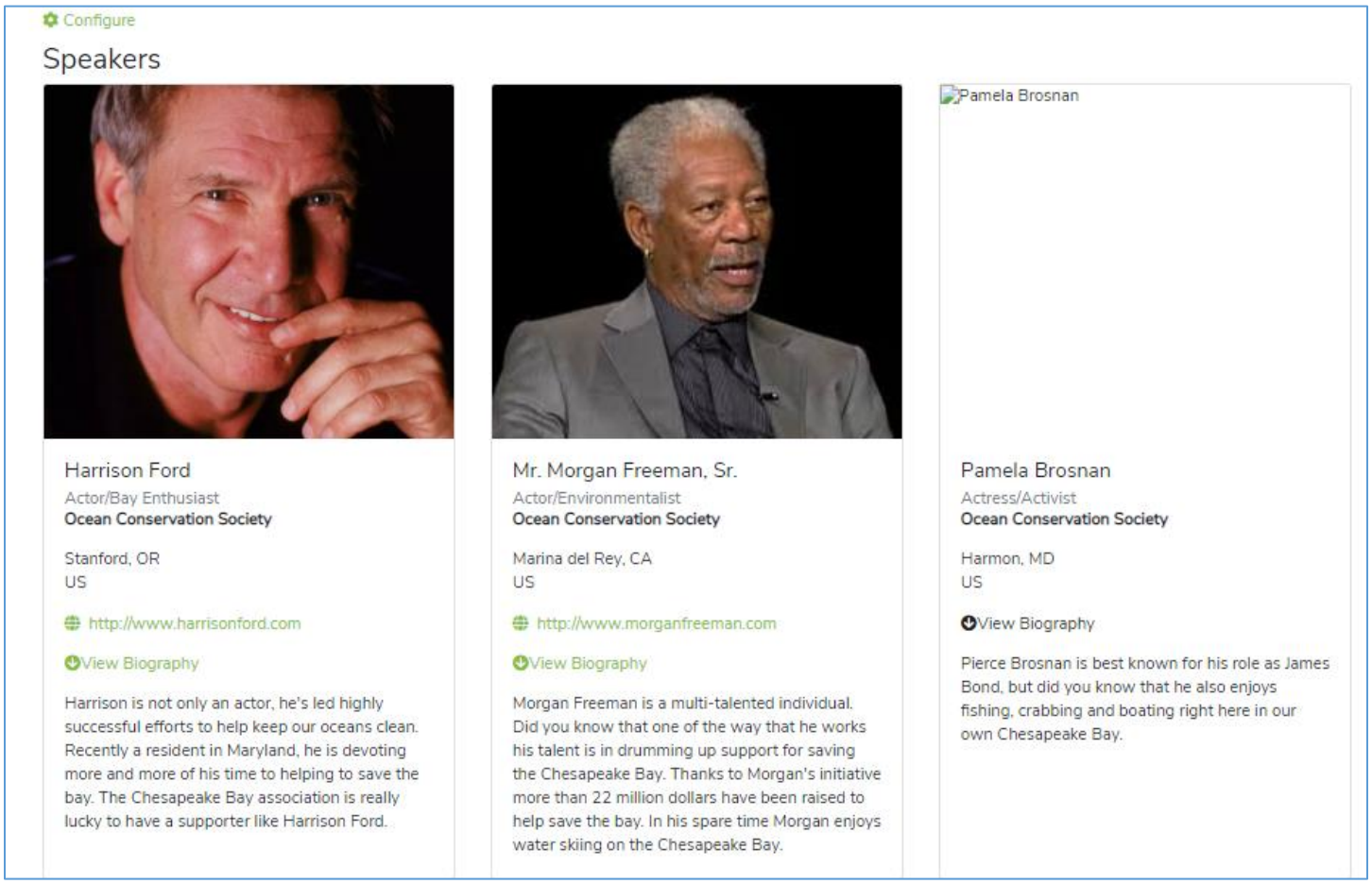
What is new in this page is primarily the redesigned **Event Details** web part. 1

This web part is designed to look like a real page title. Note that the banner image is not the same as the location image. We have added into UX two Meeting Setup image filenames, and the Event Details web part uses image1. If there is no image1 in the Meeting Setup, it will use the location image. The same rule is applied in the Calendar of Events template. In order to make it stretch across the page without distortion, the dimensions are automatically carved from the center of the image.



Redesigned Speakers web part

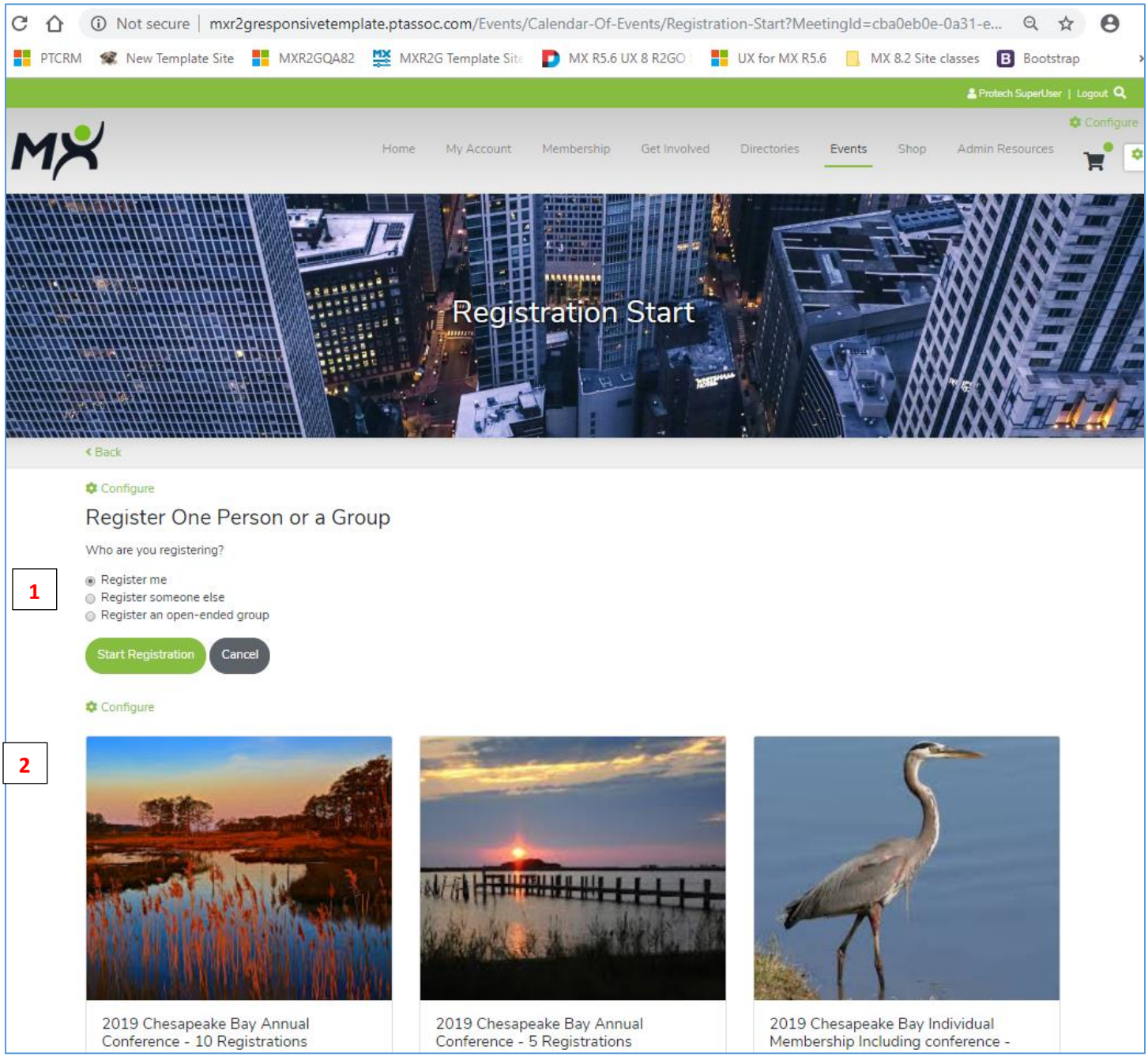
The Speakers web part now presents the speakers in a card template, similar to directory listings. The Biography is accessed as details, which are displayed when the user clicks on the “View Biography” hyperlink.



Registration Start (/Events/Calendar-Of-Events/Registration-Start)

1 This page has the web part for **Register Me, Someone else or a Group**. This web part is different because Register someone else replaces the Search/Add contact with the Auto-fill name field.

2 The **Promotional Packages Catalog** web part is also displayed on this page. The packages are filtered to show only those that relate to the selected meeting. This web part is relevant at this point in the registration process, because packages may provide a fixed number of group registrants at a discounted price, as an alternative to registering an open ended group.



Single Registration – Step 1 (/Events/Single)

This page has the standard set of Registration web parts, in addition to the global registration process web parts.

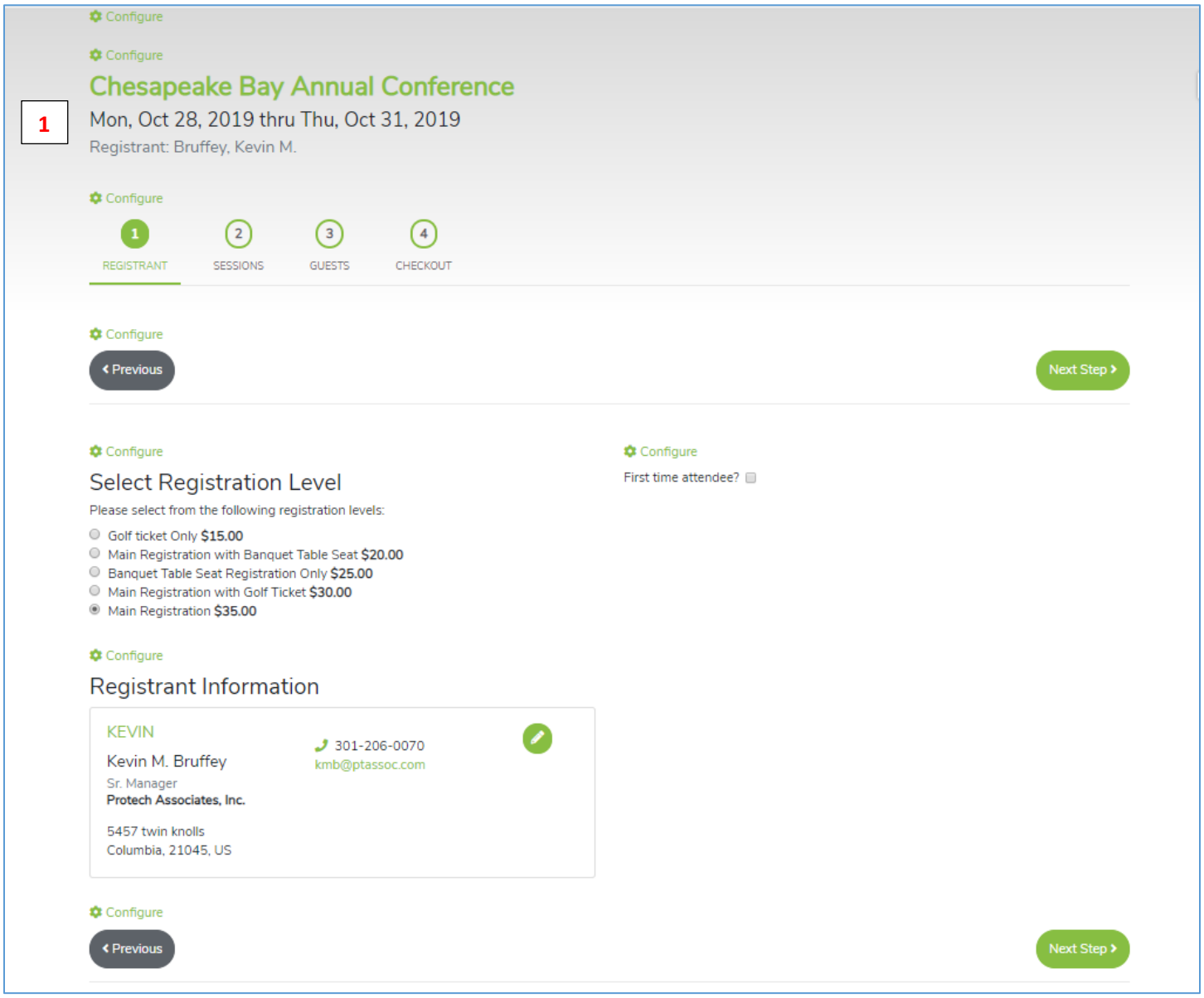
Global registration process – like the Membership Application, there are common web parts on each page:

1

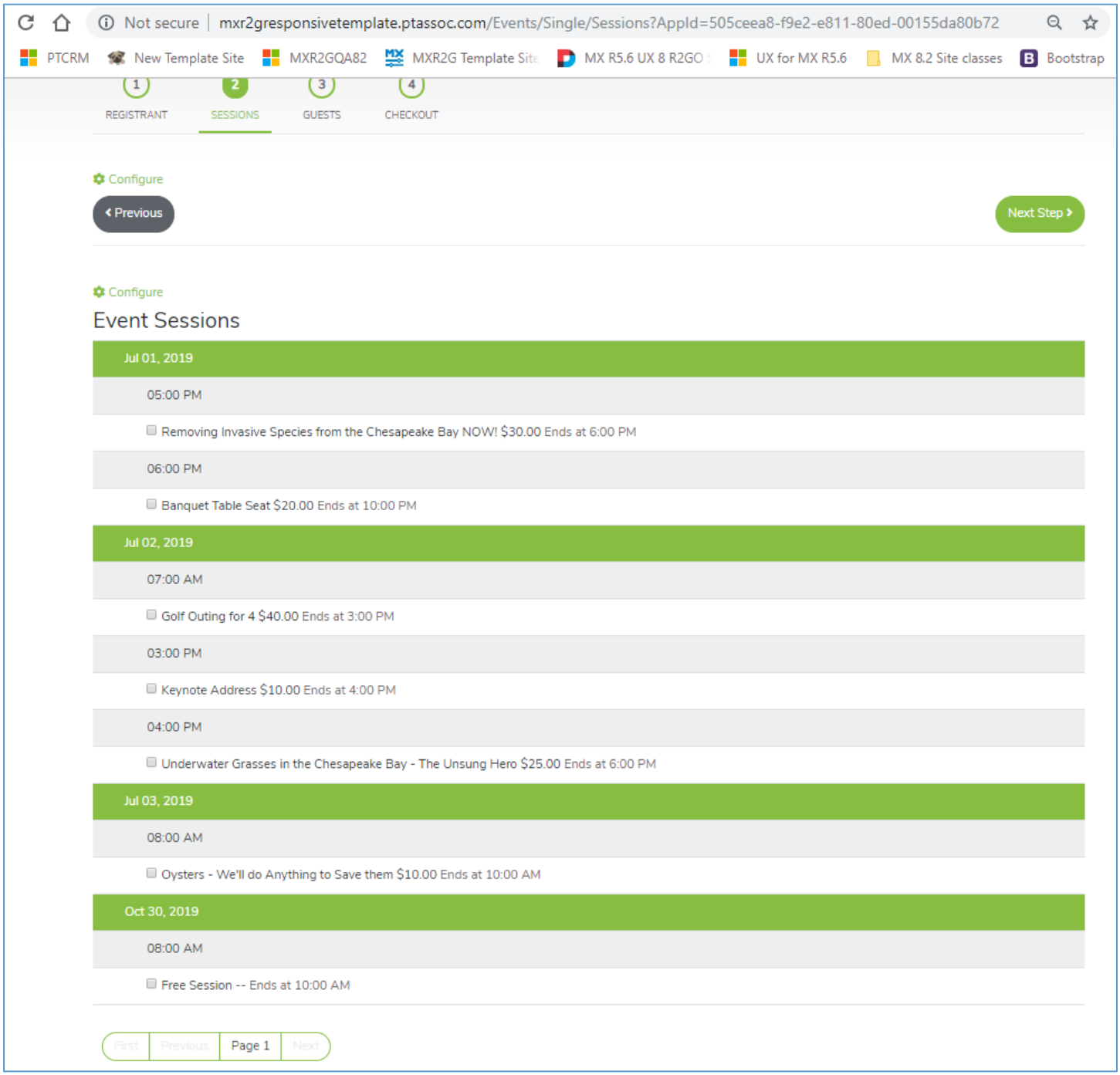
- Registration Header – this web part has been redesigned so it is no longer the same as the Event Details web part, but is now a page header that identifies the event and the registrant.
- Navigation Tabs
- Navigation Bar – 2 instances, configured exactly the same. Includes redirection logic based on whether the meeting has sessions and/or guests.

First page registration web parts:

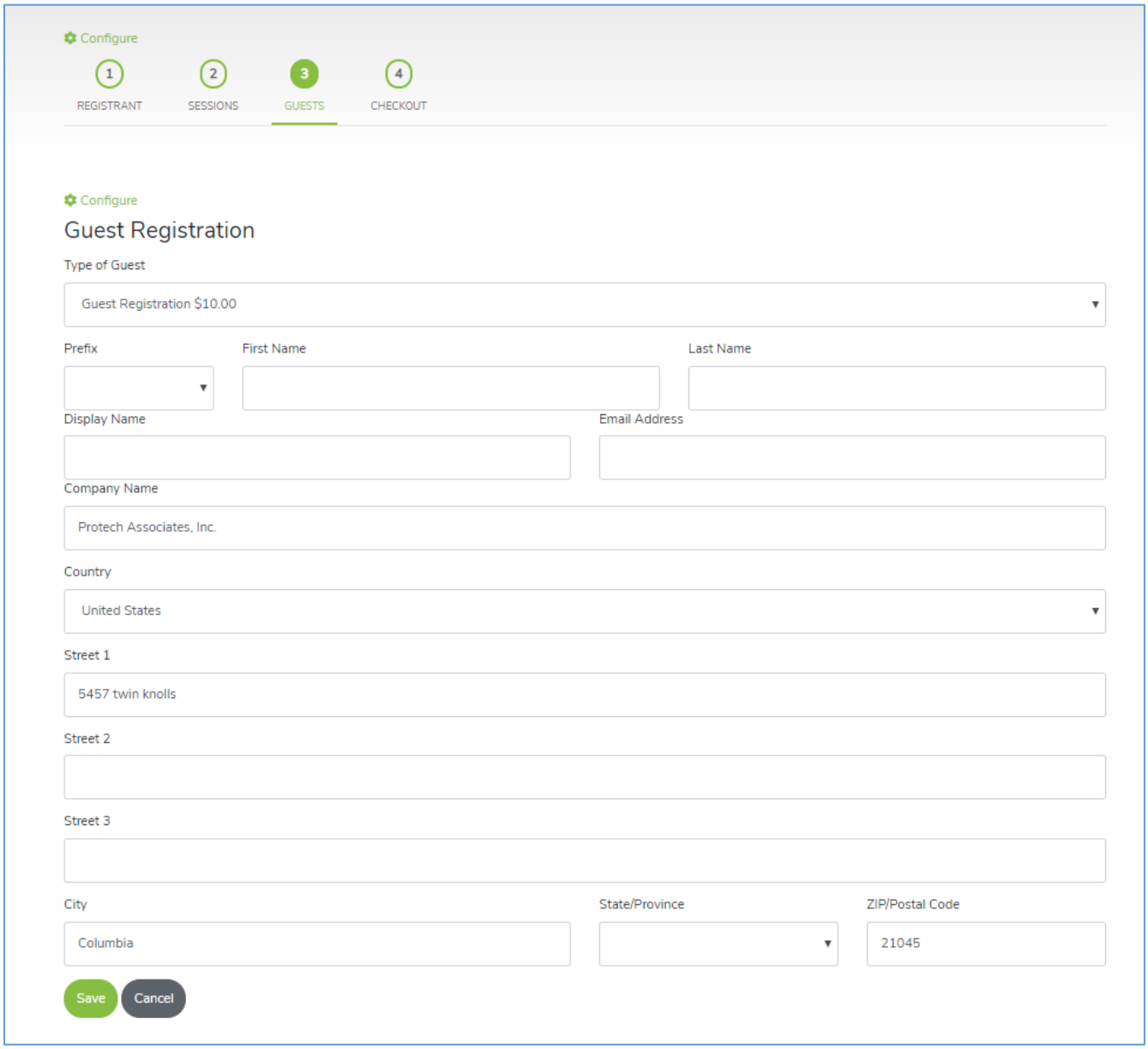
- Registration Controller
- Select Registration
- Registration Questions
- Registrant Information (Badge)

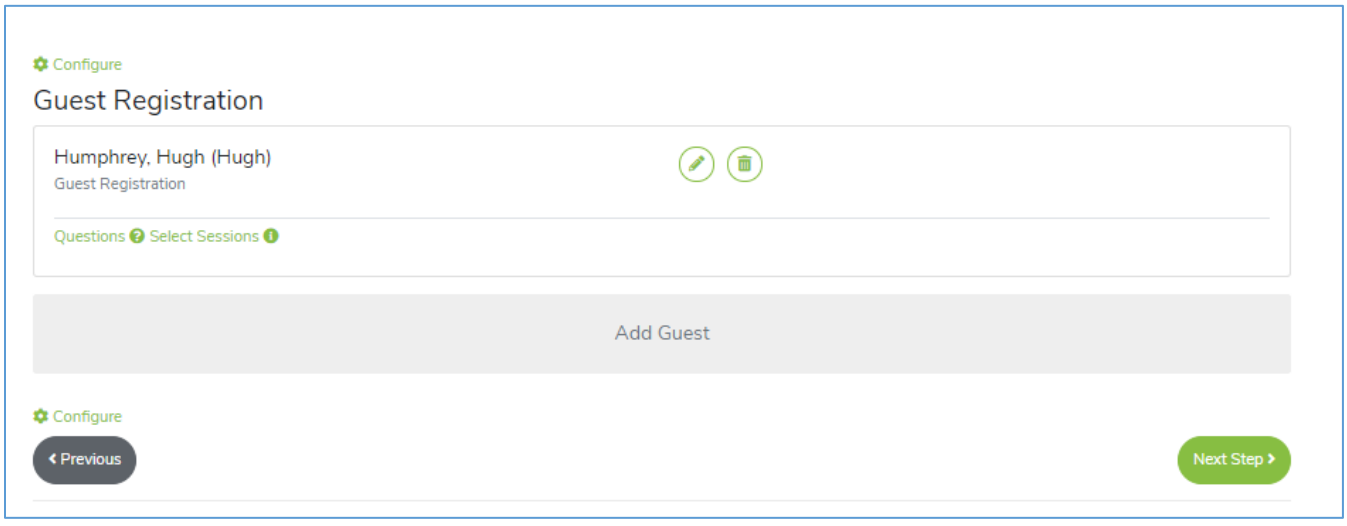


Single - Sessions (/Events/Single/Sessions)

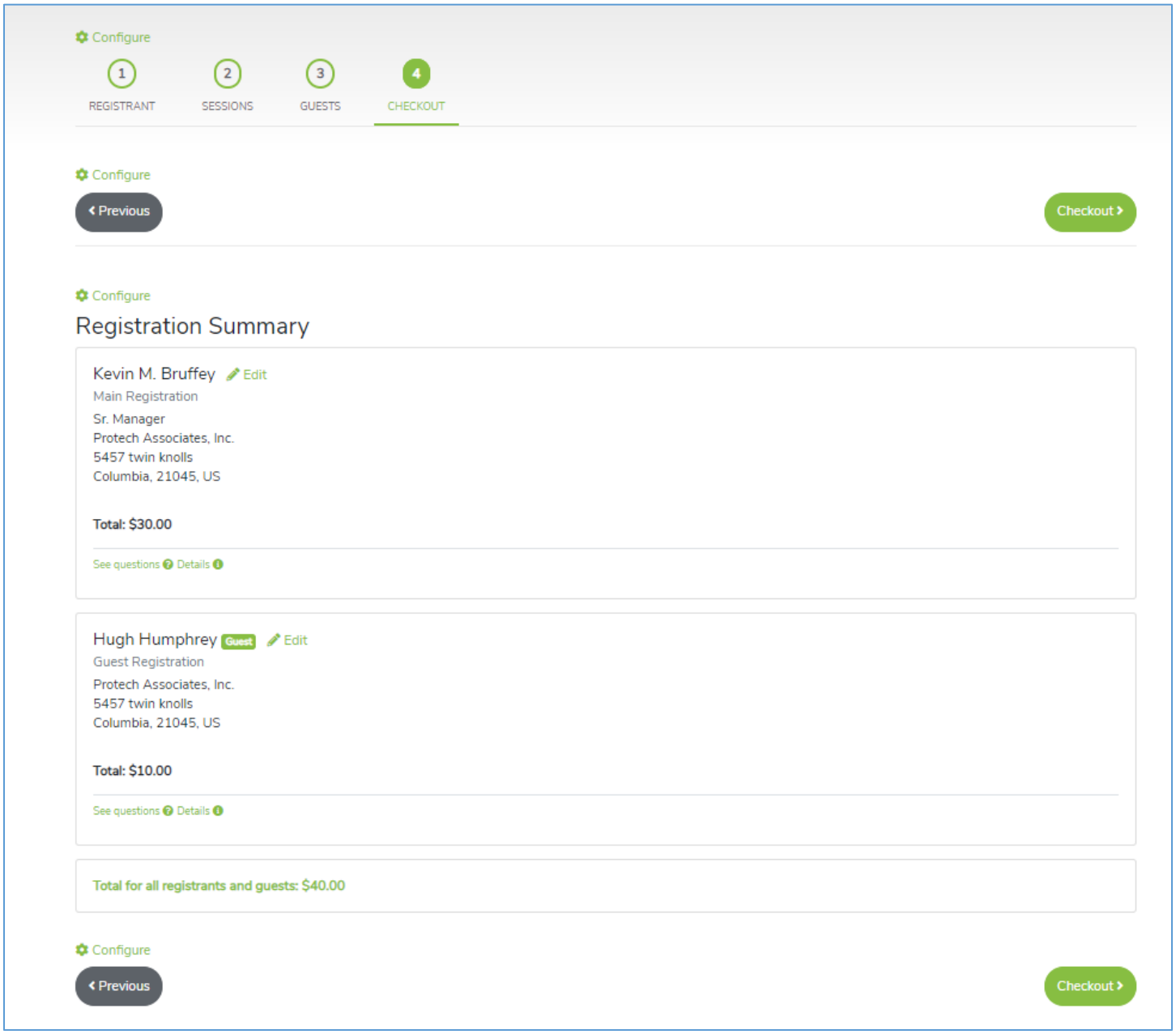


Single - Guests (/Events/Single/Guests)



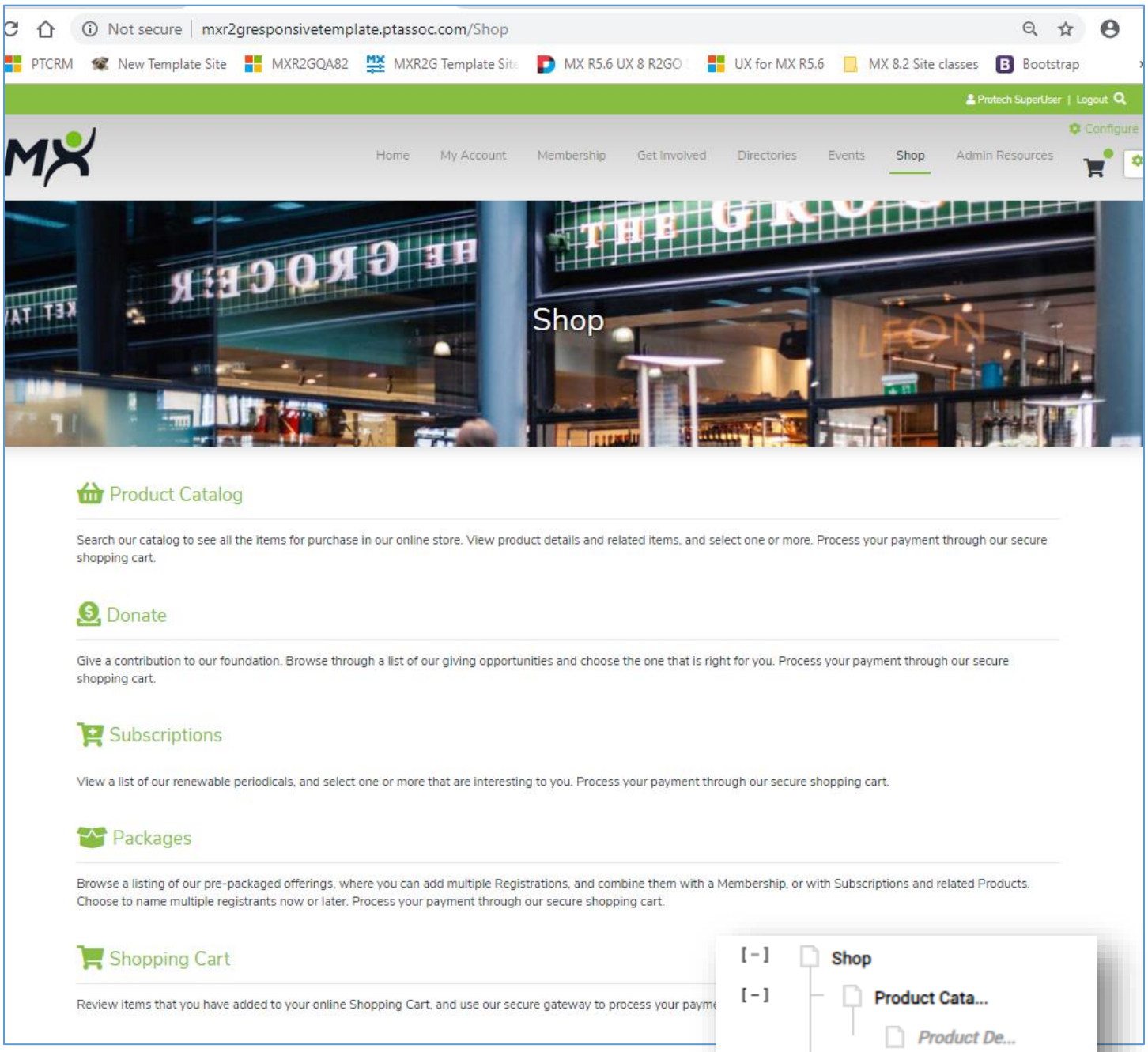


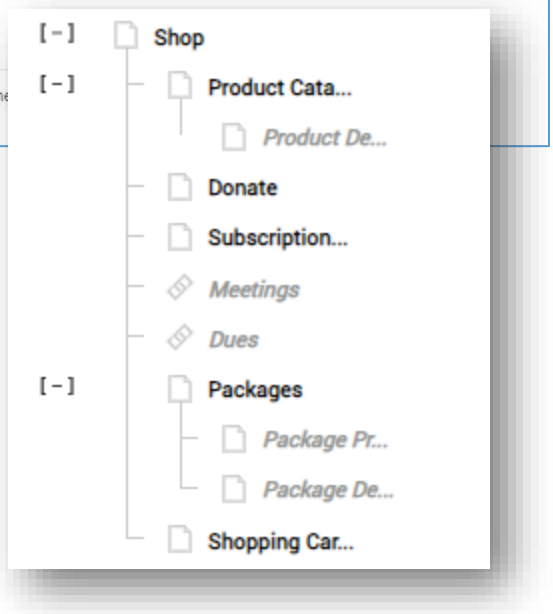
Single - Checkout (/Events/Single/Checkout)



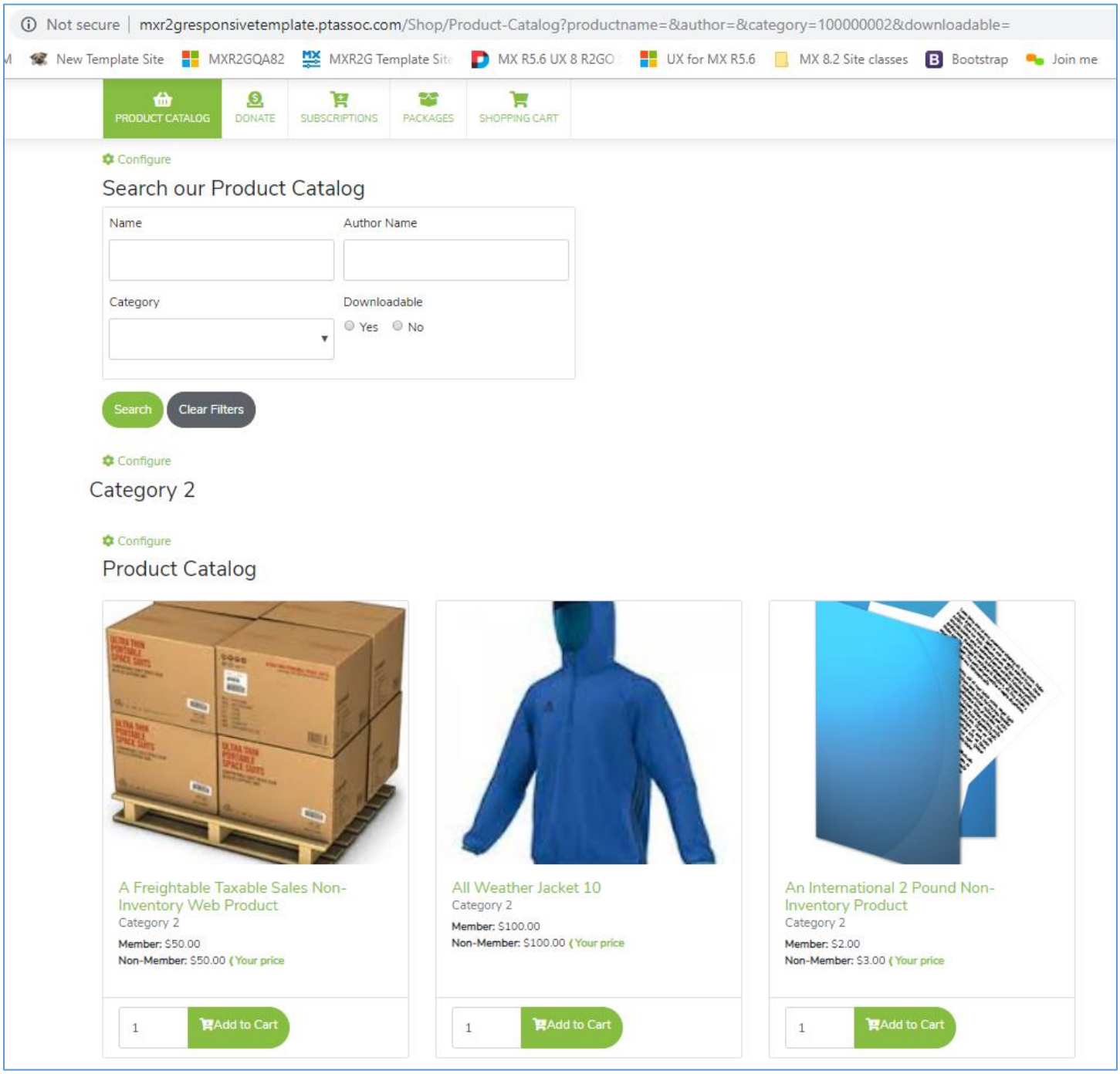
Shop (/Shop)

Landing Page

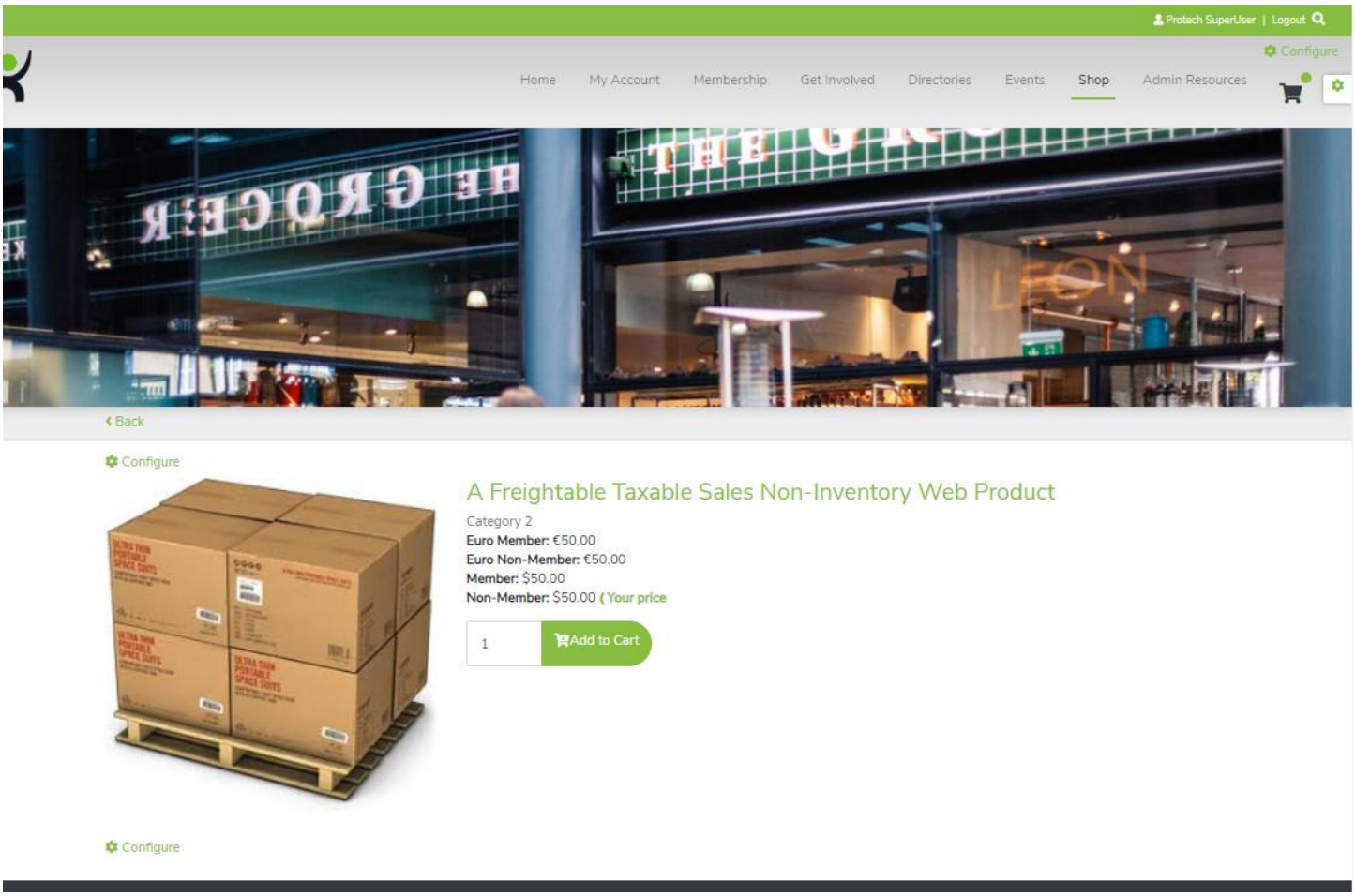




Product Catalog (/Shop/Product-Catalog)



Product Details (/Shop/Product-Catalog/Product-Details)



Donate Now (/Shop/Donate)

secure | mxr2gresponsivetemplate.ptassoc.com/Shop/Donate

w Template Site | MXR2GQA82 | MXR2G Template Site | MX R5.6 UX 8 R2GO | UX for MX R5.6 | MX 8.2 Site classes | Bootstrap | Join n

Configure

Donate Now

Please select one or more worthy causes to contribute to

MX Monetary Contribution - The Circle of Trust

As funny as the scene may be, Jack's Circle of Trust is no laughing matter. Trust is the foundation of every relationship. It influences interactions with our spouse, our kids, our parents, our siblings, our friends, our neighbors, our colleagues, our clients, and yes, even our employees. The more that trust exists, the better the relationship.

Similar to Jack, each of us has a circle of trust. Some people are inside our circle, others are not. Likewise, every employee has a circle. Some bosses are inside the circle, others are nowhere close.

Now ask yourself this, "Are my managers and supervisors in our employees' circle of trust? Am I?"

If not, you might be in trouble.

Now I know what some of you are thinking: "Employees should be concerned about being in OUR circle. Why should we care about being in their circle?"

Great question.

Employees should be concerned about being in your circle, but trust is a two-way street. It cannot be demanded from employees. You have to earn it, just as an employee has to earn your trust. You don't give it away to just anyone and neither do they.

In its 2010 Ethics & Workplace Survey, Deloitte concluded that the recession has greatly impacted employee trust – and not for the better. The survey found that 48% of employees who plan to look for a new job when the economy stabilizes cite a loss of trust as a driving force.
And the C-suite knows it, too.

In fact, according to the survey, 65% of executives believe that trust will be a leading factor in voluntary turnover in the coming months.

Select Amount:

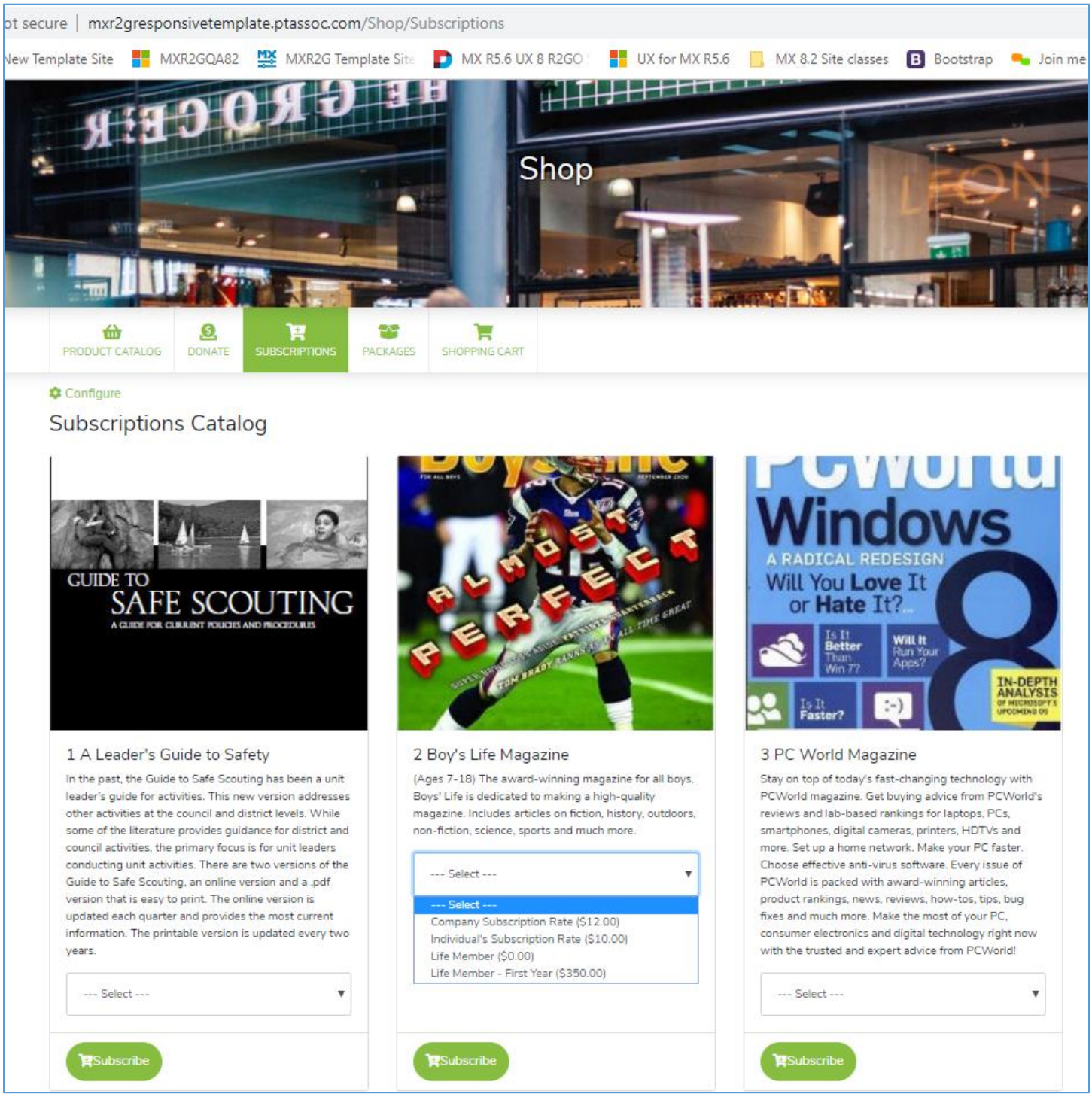
- (•) Semi-trust ($10.00)
- ( ) Trust ($25.00)
- ( ) Super Trust ($100.00)
- ( ) Blind Trust

Amount:

$10.00

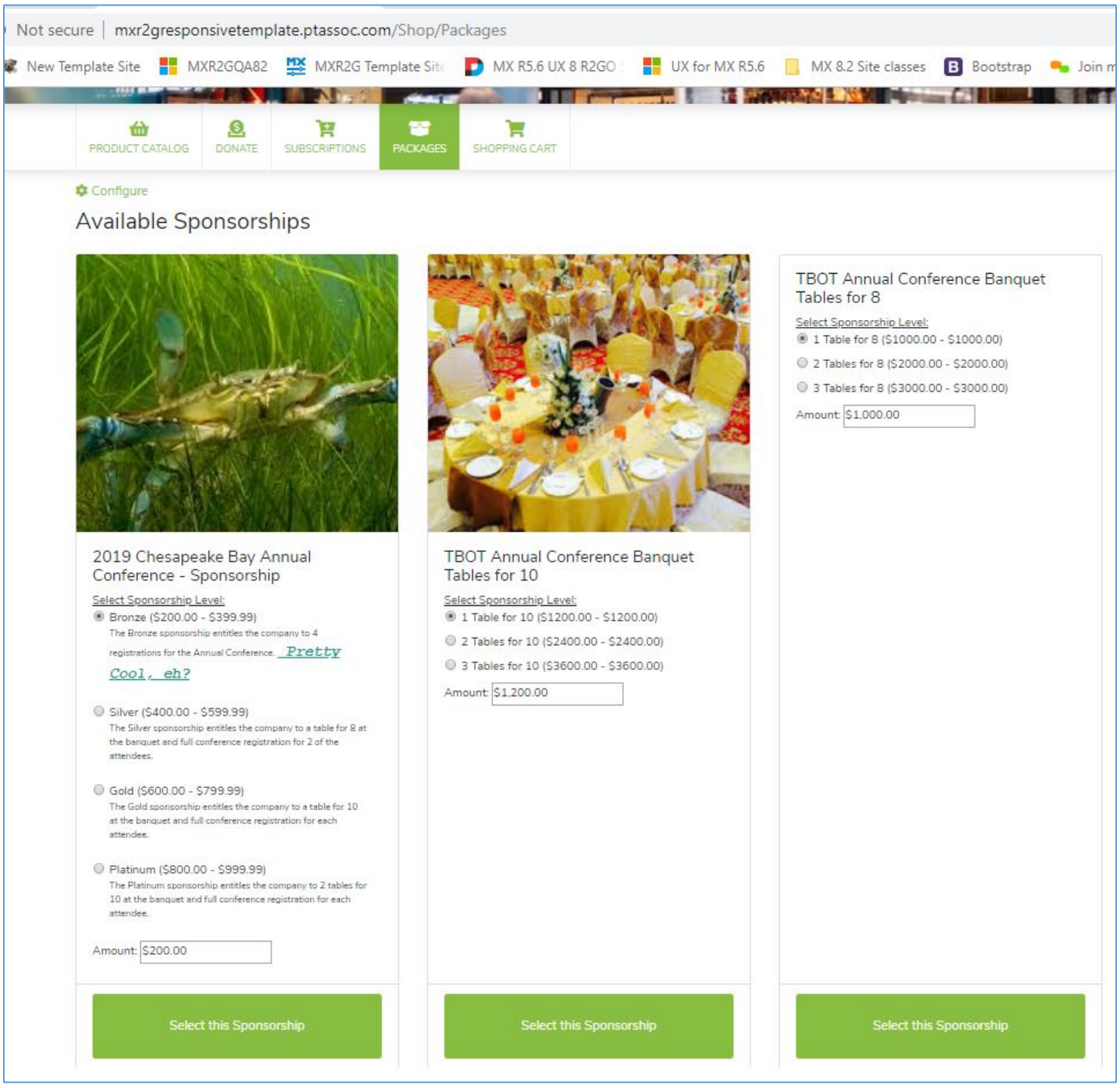
Add to Cart

Subscriptions Catalog (/Shop/Subscriptions)

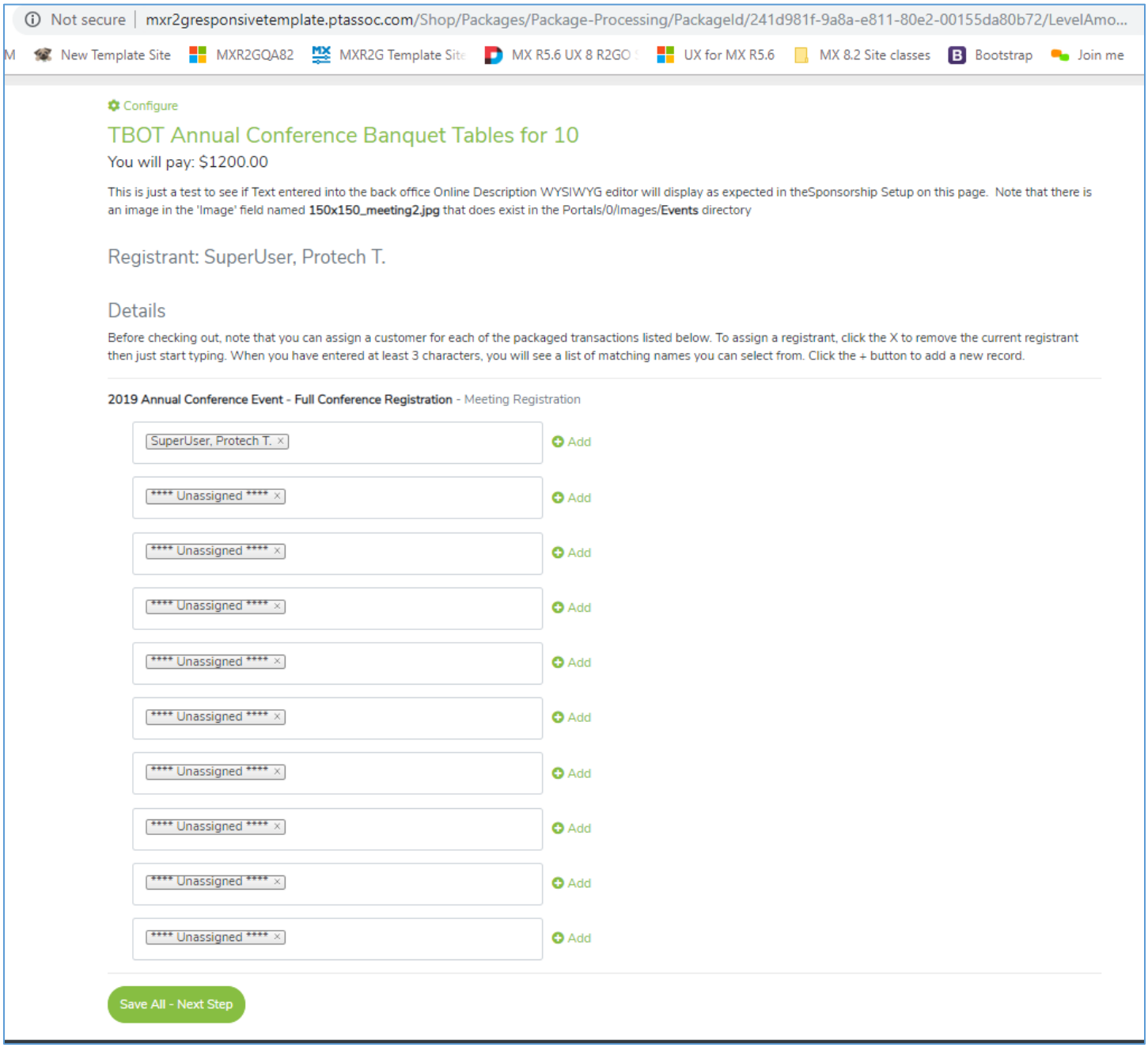


Available Sponsorships (/Shop/Packages)

For details on the Promotional Packages, module, click here.



Package Processing (/Shop/Packages/Package-Processing)



Configure

TBOT Annual Conference Banquet Tables for 10

You will pay: $1200.00

This is just a test to see if Text entered into the back office Online Description WYSIWYG editor will display as expected in theSponsorship Setup on this page. Note that there is an image in the 'Image' field named **150x150_meeting2.jpg** that does exist in the Portals/0/Images/**Events** directory

Registrant: SuperUser, Protech T.

Details

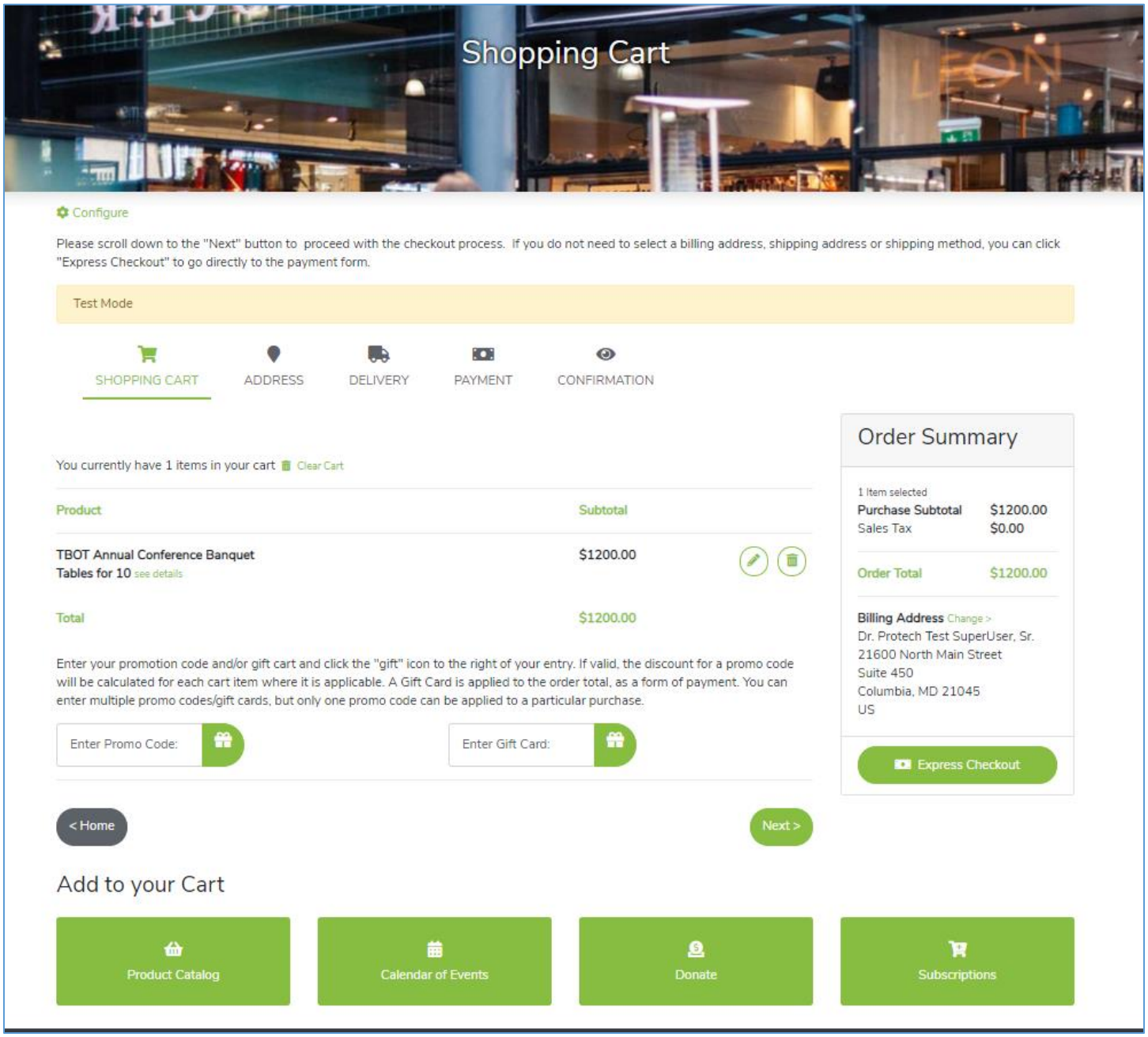
Before checking out, note that you can assign a customer for each of the packaged transactions listed below. To assign a registrant, click the X to remove the current registrant then just start typing. When you have entered at least 3 characters, you will see a list of matching names you can select from. Click the + button to add a new record.

2019 Annual Conference Event - **Full Conference Registration** - Meeting Registration

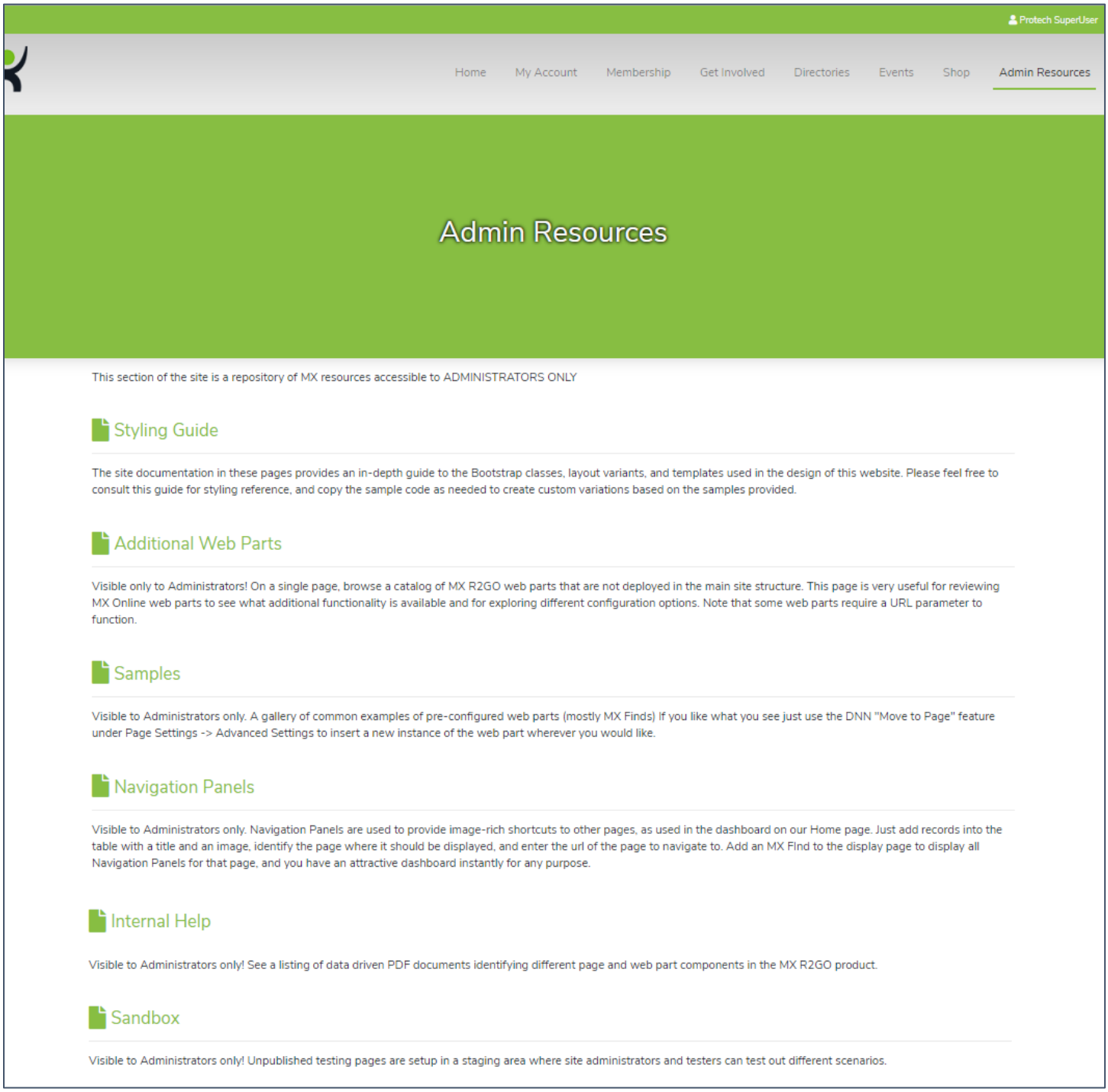
SuperUser, Protech T.	⇄ Assign Registrant + Additional Options
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant

Checkout

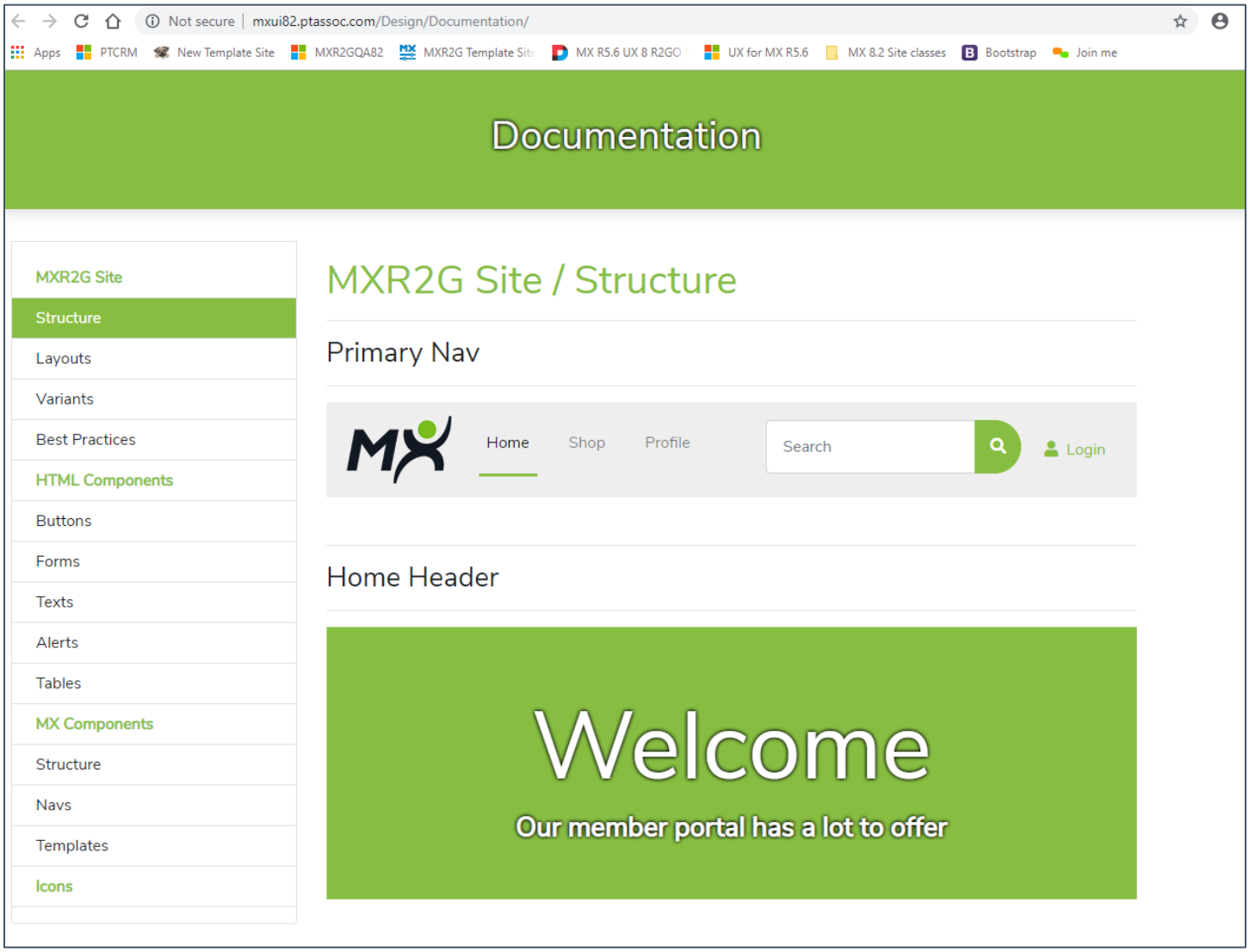
Shopping Cart (/Shop/Shopping-Cart)



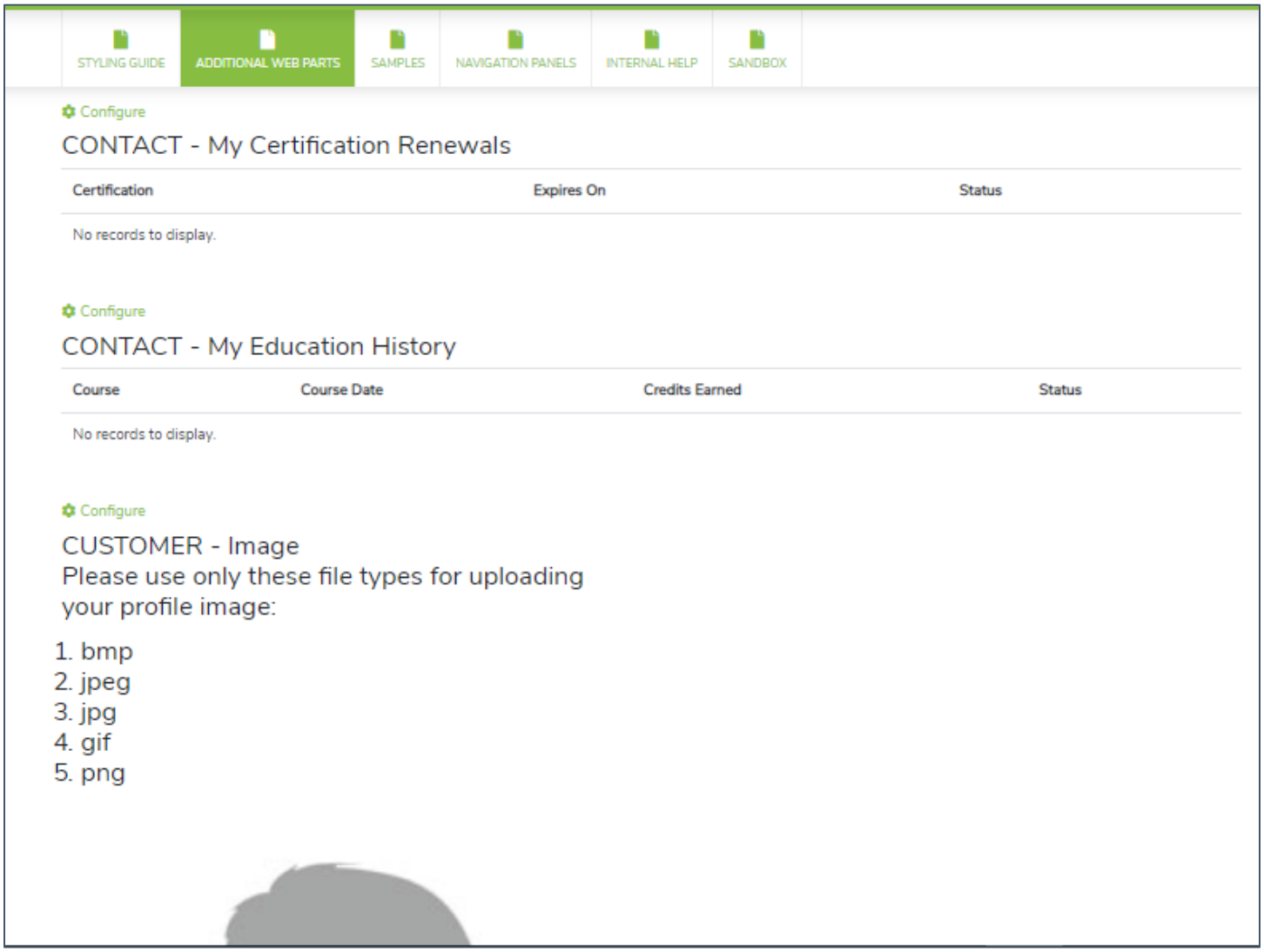
Admin Resources (/Admin-Resources)



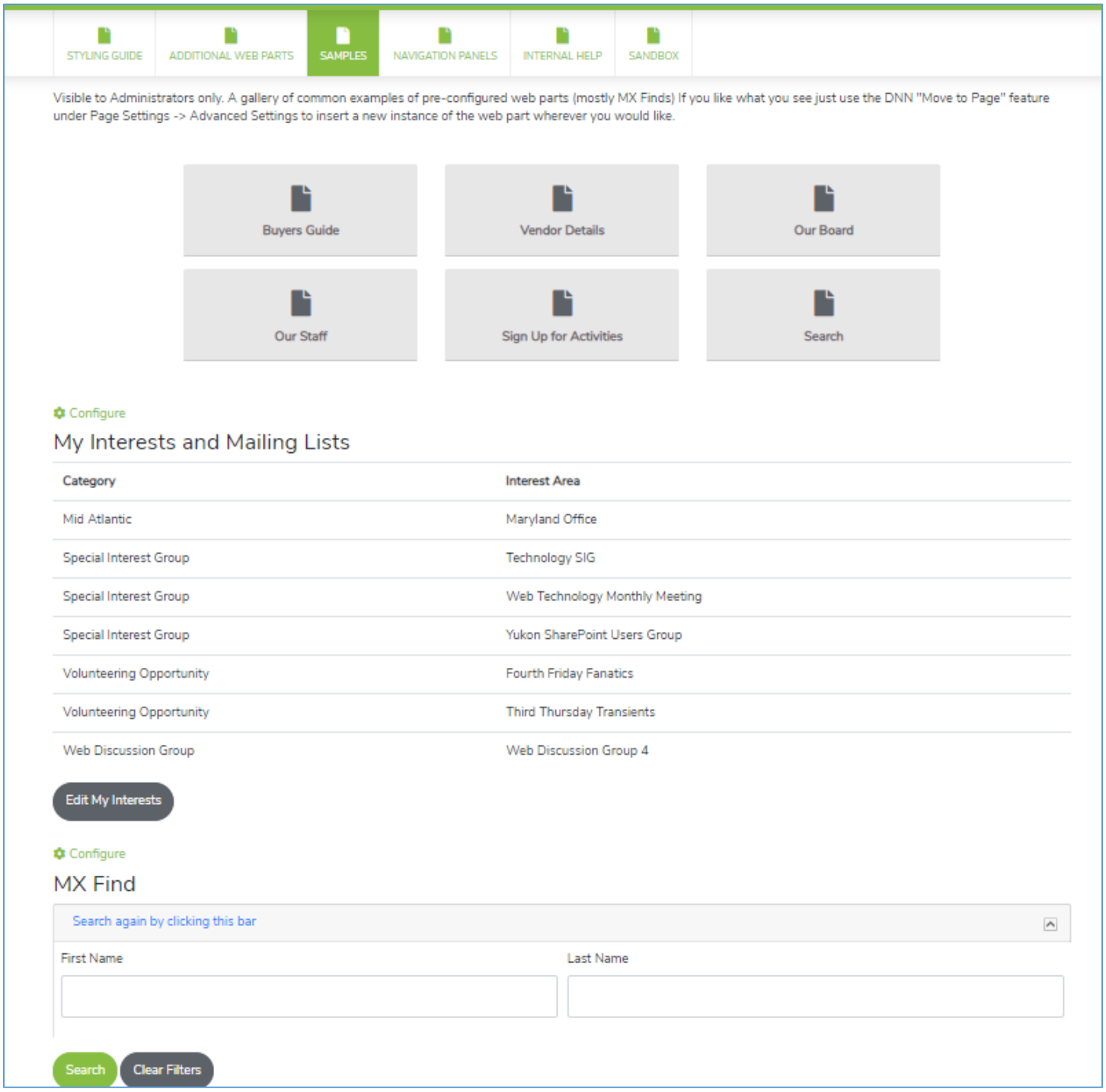
Styling Documentation (/Admin-Resources/Documentation)



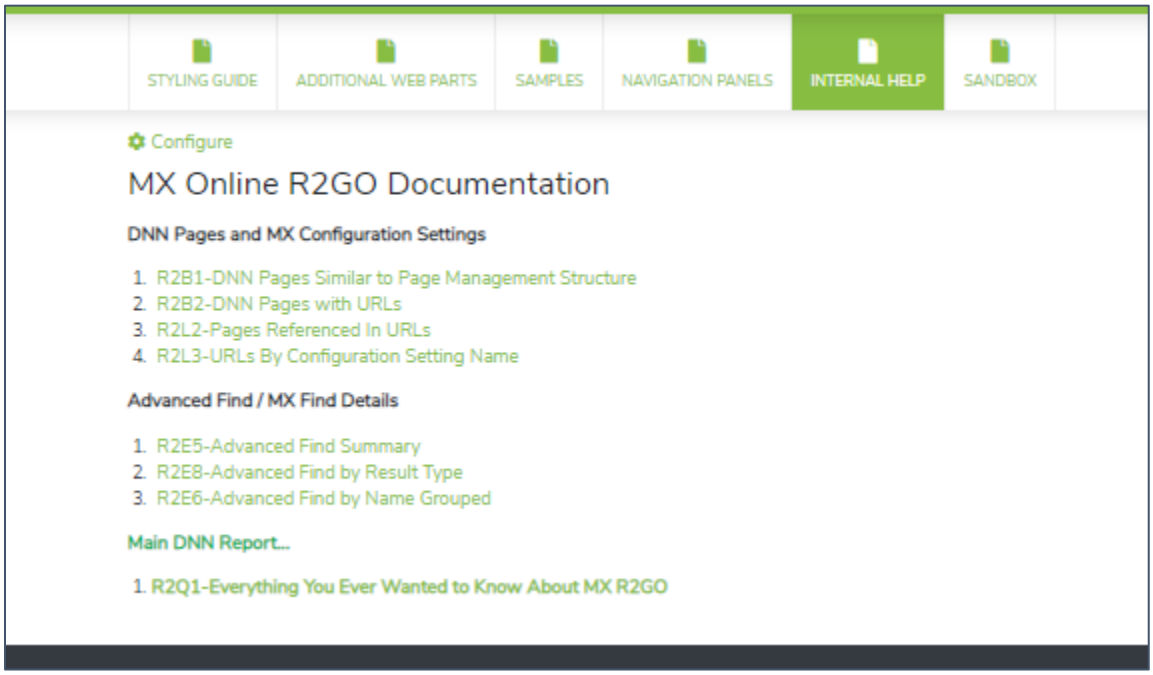
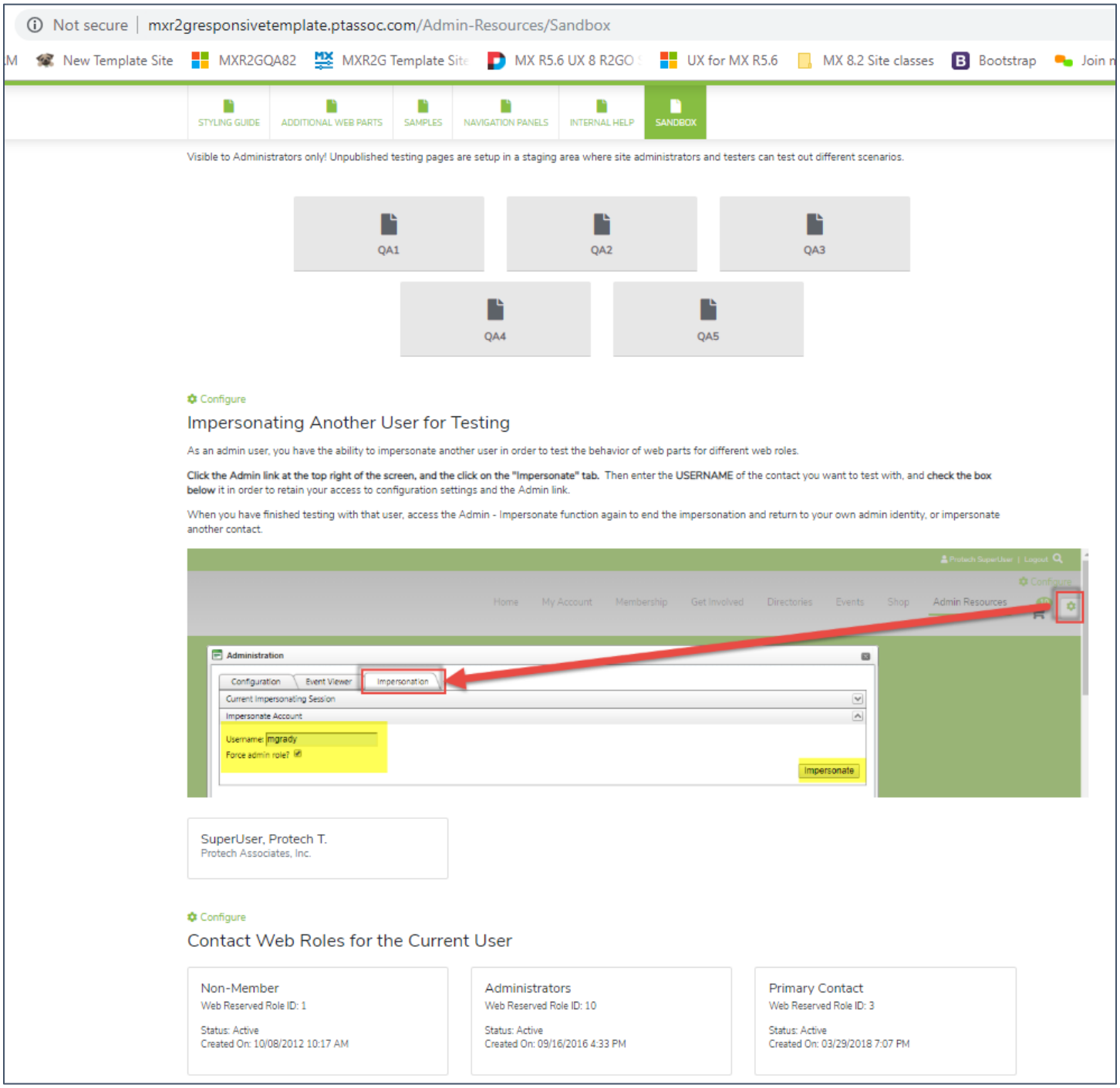
Additional Web Parts (/Admin-Resources/Additional-Web-Parts)



Sample Solutions (/Admin-Resources/Samples)



Ready2Go Documentation (/Admin-Resources/Internal-Help)



Sandbox (/Admin-Resources/Sandbox)