

# MX 8.2 and the New Template Site

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# Highlights Promotional Packages



Not secure | mxr2gresponsivetemplate.ptassoc.com/Shop/Packages

New Template Site

MXR2GQA82

MXR2G Template Site

MX R5.6 UX 8 R2GO

UX for MX R5.6

MX 8.2 Site classes

Bootstrap

Join m

PRODUCT CATALOG

DONATE

SUBSCRIPTIONS

PACKAGES

SHOPPING CART

Configure

Available Sponsorships

2019 Chesapeake Bay Annual Conference - Sponsorship

Select Sponsorship Level:

Bronze (\$200.00 - \$399.99)
The Bronze sponsorship entitles the company to 4 registrations for the Annual Conference.
Pretty Cool - eh?

Silver (\$400.00 - \$599.99)
The Silver sponsorship entitles the company to a table for 8 at the banquet and full conference registration for 2 of the attendees.

Gold (\$600.00 - \$799.99)
The Gold sponsorship entitles the company to a table for 10 at the banquet and full conference registration for each attendee.

Platinum (\$800.00 - \$999.99)
The Platinum sponsorship entitles the company to 2 tables for 10 at the banquet and full conference registration for each attendee.

Amount: \$200.00

Select this Sponsorship

TBOT Annual Conference Banquet Tables for 10

Select Sponsorship Level:

1 Table for 10 (\$1200.00 - \$1200.00)

2 Tables for 10 (\$2400.00 - \$2400.00)

3 Tables for 10 (\$3600.00 - \$3600.00)

Amount: \$1200.00

Select this Sponsorship

TBOT Annual Conference Banquet Tables for 8

Select Sponsorship Level:

1 Table for 8 (\$1000.00 - \$1000.00)

2 Tables for 8 (\$2000.00 - \$2000.00)

3 Tables for 8 (\$3000.00 - \$3000.00)

Amount: \$1000.00

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 Setu

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

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

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

\*\*\*\* Unassigned \*\*\*\*

Assign Registrant

\*\*\*\* Unassigned \*\*\*\*

Assign Registrant

Checkout

3

## 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.

Test Mode

1

SHOPPING CART

ADDRESS

DELIVERY

PAYMENT

CONFIRMATION

You currently have 4 items in your cart 

3

Clear Cart

Product	Unit Price	Quantity	Subtotal	
2019 June Seminar - Trends in fun Consumer Technology (June 1, 2019 - June 1, 2019) <a href="#">SuperUser, Protech T. see details</a>			\$25.00	<div></div> <div></div>
CRM for Members for Dummies - German Version	\$115.00	<div>1</div>	\$115.00	<div></div> <div></div>
MX Monetary Contribution 6 - The Circle of Trust			\$25.00	<div></div> <div></div>
TBOT Annual Conference Banquet Tables for 10 <a href="#">see details</a>			\$1200.00	<div></div> <div></div>
Total			\$1365.00	

Enter your promotion code and/or gift card and click the "gift" icon to the right of your entry. If valid, the discount for a promo code will be calculated for each cart item where it is applicable. A Gift Card is applied to the order total, as a form of payment. You can enter multiple promo codes/gift cards, but only one promo code can be applied to a particular purchase.

Enter Promo Code:

Enter Gift Card:

Promo Code 10off

6

- \$14.00

< Home

1

Next >

Add to your Cart

7

Product Catalog

Calendar of Events

Donate

Subscriptions

Order Summary

4 Items selected

Purchase Subtotal	\$1365.00
Shipping and Handling	\$21.00
Sales Tax	\$23.00
Order Total	\$1409.00

Billing Address [Change >](#)

Dr. Protech Test SuperUser, Sr.  
21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

4

Shipping Address [Change >](#)

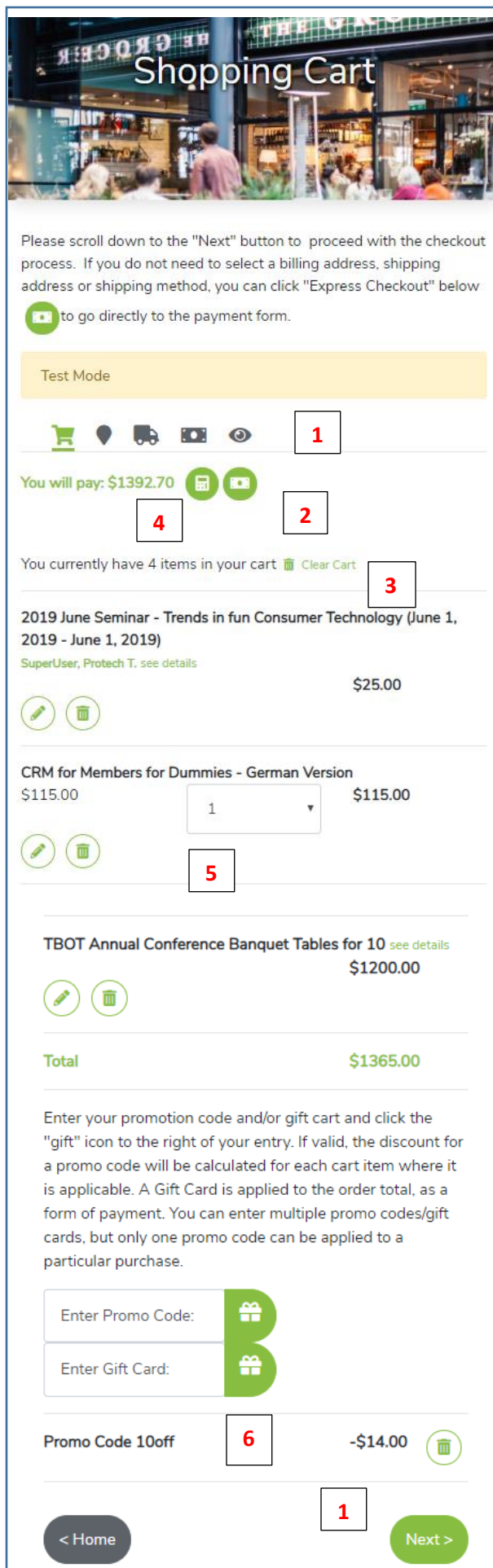
Joe Barton  
21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US  
Freight: Standard Freight Flat Rate

Express Checkout

2

4





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.

**You will pay: \$1392.70**

Please select the address you want to bill this purchase to, or add a new address.

### Billing Address

**Protech and Protech Associates** Selected

Bill To Attention Dr. Protech Test SuperUser, Sr.  
21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

Edit Bill to this Address

**Home**

100 Holly Street  
Street 3 Address which is breaking into another line and another line and another....  
Salem, MA 02678  
US

Edit Bill to this Address

**Address Name**

9876 street 1  
Street 2  
Street 3  
Columbia, AA 0987, US  
222-333-2222

Edit Bill to this Address

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.

### Billing Address

Bill To Attention 3

Dr. Protech Test SuperUser, Sr.

E-mail

Protech@test.com

Address Name (e.g. Company Name)

Protech and Protech Associates

Country

United States

Street 1

21600 North Main Street

Street 2

Suite 450

City

Columbia

State/Province

MD

Postal Code

21045






Phone



2

Bill to this Address Cancel

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

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



You will pay: \$1392.70 

Please select the address you want to send this purchase to, or add a new address, and select a shipping method for delivery of your purchase.

## Shipping Address 1

[Change >](#)

**Protech and Protech Associates** Selected


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






Select one of the following available shipping methods:


- ☒ Standard Freight Flat Rate - \$21.00
- ☐ FedEx 2nd Day - \$21.54
- ☐ FedEx Ground - \$21.54
- ☐ UPS 2nd Day Air - \$21.54
- ☐ UPS Ground - \$21.54
- ☐ UPS Next Day Air - \$21.54
- ☐ UPS Standard To Canada - \$21.54
- ☐ FedEx Express Saver - \$21.54

[< Previous](#)[Next >](#)

## Add to your Cart

  
Product Catalog



You will pay: \$1392.70 





## Payment Information 2

Credit Card: Bill Me - I'll Send Payment Later

Name on Card: \*

Card Type:

Visa2\_US\_Fabrikam



Card Number: \*

Expiration Month:

1-Jan

Expiration Year:

2018

Card Verification #: \*

Card Address - Street: \*

100 Holly Street

City: \*

Salem


State/Province: \*

MA

Postal Code: \*

02678

The amount to be charged to your credit card is: \$1392.70

 Secured By Paypal

[< Previous](#)[Next >](#)

Test Mode

SHOPPING CART
 ADDRESS
 DELIVERY
 PAYMENT
 CONFIRMATION

### Payment Information

Credit Card:
 Bill Me - I'll Send Payment Later
 1

Name on Card: \*

Card Type: Card Number: \*

Visa2\_US\_Fabrikam

Expiration Month: Expiration Year: Card Verification #: \*

1-Jan 2018

Card Address - Street: \*

100 Holly Street

City: \* State/Province: \* Postal Code: \*

Salem MA 02678

The amount to be charged to your credit card is: \$1392.70

Secured By Paypal

< Previous Submit Order >

#### Order Summary

4 Items selected [Change >](#)

Purchase Subtotal	\$1365.00
Shipping and Handling	\$21.00
Sales Tax	\$20.70
Discounts	-\$14.00
<b>Order Total</b>	<b>\$1392.70</b>

**Billing Address** [Change >](#)

Dr. Protech Test SuperUser, Sr.  
100 Holly Street  
Street 3 Address which is breaking into another line and another line and another line and another....  
Salem, MA 02678  
US

**Shipping Address** [Change >](#)

Joe Barton  
21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US  
Freight: Standard Freight Flat Rate

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:

You will pay: \$25.00

### Payment Information

Bill Me - I'll Send Payment Later

Billing Reference

< Previous Submit Order >



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:



## Order Confirmation

Thank you for your purchase!

Order SC-9000418-KIZ9N

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.

21600 North Main Street

Suite 450

Columbia, MD 21045, US


Ship To Address

21600 North Main Street

Suite 450

Columbia, MD 21045, US

INV-26096-H9Y6D0

Chadwick the Crab (Kindle) 

Price per unit

\$8.95

Quantity

1.00

Discount

\$0.00

Taxes

\$0.00

Charges

\$8.95

Total Charges	\$8.95
Sales Tax	\$0.00
Order Total	\$8.95
Gift Card	\$0.00
Previous Payments	\$0.00
Payment	\$8.95
Balance Due	\$0.00

Done

## Auto-Fill for Contact/Account Lookups

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

**Identify My Company**

To select a company, 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.

Company Name

+

Add

- Account for 5.6 Demo1 (Bethesda)
- Account for Famous Baseball Players (Frederick)
- Account for Famous Blues Musicians (Memphis - Account Primary)
- Account for Famous College Basketball Players (Columbia)
- Account for Famous Jazz Musicians (Bethesda)
- Account for Famous People (Pooleville)
- Account for Famous People - MAIN (Spencerville)
- Account for Famous Softball Players (Ellicott City)
- Account for Meeting Multi-currency Testing (Tulsa)
- Account for Some More Testing of Responsive Design (MapleLawn)
- Account for Testing Audit History (4)
- Account for Testing Two Letter ISO Codes (Ellicott City)

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.

**Identify My Company**

To select a company, 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.

Company Name

+

Add

Save

**Add customer**

Account Name

Account for Famous Baseball Players

City

Frederick

Save

Cancel

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.

**Identify My Company**

To select a company, 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.

Company Name

+

Add

- Da Vinci, Leonardo (Account for Famous P
- Davinci, Leonardo (American Way Financi
- DiCaprio, Leonardo (acme)
- Leonard, Ann (Am Ag/ASI)
- Leonard, Buck (Account for Famous Baseb
- Leonard, Jennifer (Chesterfield Insurance S
- Leonard, Lisa (Clark Meadows Agency)
- Leonard, Todd (Smith Company)
- Scioscia, Leonard (Cook Edward F Agency)

**Add customer**

Important Message

There is already a record with the same value(s) in the following field(s): Account Name, City.

Account Name

Account for Famous

City

Frederick

Save

Cancel


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.

MX



First Name

Last Name

Email

Save

Cancel

Register One

Who are you registering

☐ 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.

Configure

### My Company's Child Companies

1 Add Child Company

Account for Famous Baseball Players  
Cobb, Ty S.  
Main Phone: (410) 842-8233  
Website: <http://www.famousbaseballplayers.com>  
Member: No

Account for Famous Blues Musicians  
Davis, Boo Boo  
Main Phone: Account Address1  
Website: <http://www.iloveblues.com>  
Member: Yes

Account for Famous Jazz Musicians  
Miltonator, Roy  
Main Phone: 502-838-1732  
Website: <http://www.jazzmusicians.com>  
Member: No

1 2

- 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.**

### MX Find - Configuration

Result columns:

Attribute Name	Display Type	Order	Text	Line Break	Column/Field Title	Field Prompt
name	Title			<input type="checkbox"/>	Account Name	<input type="checkbox"/>
primarycontactid	Subtitle			<input type="checkbox"/>	Primary Contact	<input checked="" type="checkbox"/>
telephone1	Text Block 1	1		<input checked="" type="checkbox"/>	Main Phone	<input checked="" type="checkbox"/>
websiteurl	Text Block 1	2		<input checked="" type="checkbox"/>	Website	<input checked="" type="checkbox"/>
pa_member	Text Block 1	3		<input checked="" type="checkbox"/>	Member	<input checked="" type="checkbox"/>

Result display type: Template List (Editable)

Item template: Auto

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

- 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.

MX Find - Configuration

Result columns:

Attribute Name	Display Type	Order	Text	Line Break	Column/Field Title	Field Prompt
name	Title			<input type="checkbox"/>	Account Name	<input type="checkbox"/>
primarycontactid	Subtitle			<input type="checkbox"/>	Primary Contact	<input checked="" type="checkbox"/>
telephone1	Text Block 1	1		<input checked="" type="checkbox"/>	Main Phone	<input checked="" type="checkbox"/>
websiteurl	Text Block 1	2		<input checked="" type="checkbox"/>	Website	<input checked="" type="checkbox"/>
pa_member	Text Block 1	3		<input checked="" type="checkbox"/>	Member	<input checked="" type="checkbox"/>

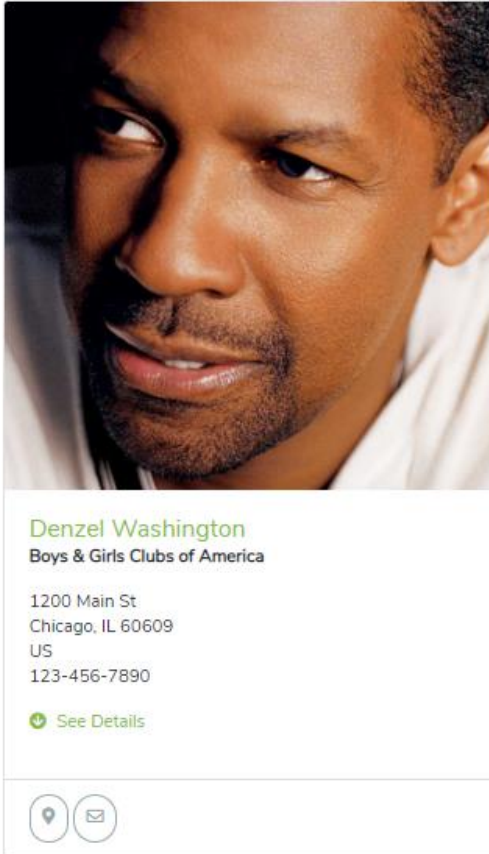
Result display type: Template List (Editable)
Item template: Auto
Item layout option: Card Decks (equal width and height - not attached)

## 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:

`_<div class="card-body">`

Card Title with hyperlink:

`<h5 class="card-title">`

Card Subtitle (2 types):

`<h6 class="card-subtitle text-muted">`

`<p class="card-text"><strong>`

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

Result display type: **Template List** 1

Item template: **CommitteeMember.ascx**

Item layout option: **Card Decks (equal width and height - not attached)** 2

Navigation URL: **rectories/Members/Member-Details?contactid={pa\_contactid\_value}** (mx-navigationurl) 3

Images path: **Contact** (mx-imagespath) 4

Enable export: ☐ **Contact**

Enable export: ☐ **Event**

Export grid button: ☐ **Product**

Export all to Excel: ☐

### New Result Type settings

1 Result display type: **Template List**

- Grid
- Grid (Editable)
- Template List
- Template List (Editable)**
- Control List
- No Results**

- 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.

MX Find - Configuration

aved views: **MX - Calendar Search Form**

earch columns:

Attribute Name	Prompt	Display	To Uri?	Layout Row
pa_wtopic	Topic	Show	To URL topic	1
pa_eventmeetingidname	Name	Show	To URL name	1
pa_city	City	Show	To URL city	2
pa_stateorprovince	State	Show	To URL state	2

result ID name: **pa\_eventmeetingsetupid**

et columns width in: **None - Auto**

Result display type: **No Results**

Item template:

Navigation URL: **/Events/Calendar-of-Events**

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 Uri?” 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.

### 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.

/Events/Calendar-of-Events?topic=&name=Chesapeake&city=&state=

Search our Calendar of Events

Name: Chesapeake Topic:

City: State:

Search Clear Filters

Calendar of Events

Industry Seminar – Chesapeake Bay - November 2018  
11/04/2018 8:00 AM - 11/04/2018 12:00 PM  
Hyatt Regency Chesapeake Bay Golf Resort and Sp

2019 Chesapeake Bay Spring Learning  
June 2019  
06/01/2019 8:00 AM - 09/01/2019 5:00 PM  
Marco Island Marriott Beach Resort and Golf Club



**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"

The screenshot shows the MX Find Global Search interface. At the top, the URL is `te.ptassoc.com/Admin-Resources/Samples/Search?Search=crm`. The search bar contains the text "crm". Below the search bar, there are two sections: "Meetings relevant to your search request" and "Products relevant to your search request". The "Meetings" section shows a list of meetings, including "2019 Chesapeake Bay Spring Learning Series". The "Products" section shows a list of products, including "2011 CRM Manual (With 6 Related Products)". A red arrow points from the search bar to the "2011 CRM Manual" product. A text box explains: "Results of a search for 'CRM' brings up products with CRM in the name, author, or description, and meetings with CRM in the name, location or description."

The screenshot shows the detailed view for the "2019 Chesapeake Bay Spring Learning Series". The title is "2019 Chesapeake Bay Spring Learning Series". The location is "Marco Island Marriott Beach Resort and Golf Club, Marco Island, FL". The dates are "Sat, Jun 1, 2019 thru Sun, Sep 1, 2019". The description states: "The sitemap tiles were re-organized to display tiles in order of the most frequently used modules. The Membership tile is now displayed first, followed by Events, Financial Manager, Product Sales, Education, Fundraising, CRM, and Administration."

ptassoc.com/Admin-Resources/Samples/Search?Search=smith

MXR2G Template SiteMX R5.6 UX 8 R...MX for MX R5.6MX 8.2 Site classesBootstrapJoin mePUG Resource LibraryOps DeptQA DeptC

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

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

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20



**MX Find - Configuration**

Saved views: **MX - Global Search Form**

Search columns:

Attribute Name	Prompt	Display	To Url?	Layout	Row	Column	Control
name	Name or Keyword	Show	To URL Search	1	Left	TextBo	

Result ID name: **businessunitid**

Set columns width in: **None - Auto**

Result columns:

Attribute Name	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)

**You must capitalize the S if the other MX Finds are looking for URL parameter with a capital S**

**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_wpublishweb	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:

Saved views: **MX - Global Search Contacts by Name**

Search columns:

Attribute Name	Prompt	Display	To Uri?
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 Uri?
statecode	Status	Hide	No
pa_wpublishtoweb	Publish To Web	Hide	No
producttypecode	Product Type	Hide	No
pa_wwebmemberrelated	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
- 1** • Registration Header – **NEW Functionality** shows Registrant
  - Location
  - Select Registration
  - Registrant Information
  - Sessions
- 2** • 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.

Quick Register

**1**

THE Alabama State Chapter Meeting

Mon, Jun 1, 2020 thru Thu, Jun 4, 2020

Registrant: SuperUser, Protech T.

Select Registration Level

☒ You are preselected for: Main Alabama Registration \$25.00

Registrant Information

**SUPER**

Dr. Protech Test SuperUser Sr.  
Protech Associates, Inc.

21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

520-448-0932  
Protech@test.com

Inn By The Sea Resort  
40 Bowery Beach Road  
Cape Elizabeth, ME 04107, US

Map & Directions

Event Sessions

Jun 01, 2020

08:00 AM

☐ Main Alabama Session \$10.00 Ends at 9:00 PM

First Previous Page 1 Next

< Cancel Checkout >

Navigation Bar - Configuration

Next button

Display next step button: ☒

Next step button text: Checkout

Next step button text when coming from the summary: Checkout

Next step button URL: ~/Shop/Shopping-Cart

Navigation Provider

**2**

Click HERE to view instructions for configuring navigation providers

Next logic provider:  
Protech.MX.Middleware.NavigationProvider

Next logic provider method name:  
SubmitApplication

Next logic provider method parameters:  
MeetingRegistration,~/Shop/Shopping-Cart

SubmitApplication

- NoParentAccount
- NoGuestRegistration
- NoSessions
- NoSessionsAndNoGuestRegistration
- MembershipType
- SubmitApplication**
- NoGuestRegistrationSubmitApplication
- NoSessionsSubmitApplication
- NoSessionsAndNoGuestRegistrationSubmitApplication
- RedirectToPromotionPackageApplication

## 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)

**Chesapeake Bay Annual Conference** 1

Mon, Oct 28, 2019 thru Thu, Oct 31, 2019

1 IDENTIFY 2 SELECT 3 OPTIONS 4 CHECKOUT 2

[Previous](#) [Next Step](#)

### Select Registrants

In order to make it easy to register your colleagues, the following is a list of contacts who belong to the same company as yours. Click the box next to a name to select a registrant, or enter a name to add them to the list. Feel free to make selections on multiple pages in this list, all selections will be saved.

Register Me as part of the group?

☒ Yes

☐ No

To add a registrant to the list, 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.

[Add](#)

[Add Registrant to List](#) 3

Name	Registrant Status
Organization: Account for Famous Baseball Players (Showing 10 of 84 items. Group continues on the next page.)	
<input type="checkbox"/> Banks, Ernie	Already Registered
<input type="checkbox"/> Barkenstein, Bob	Already Registered
<input type="checkbox"/> Been, John	
<input type="checkbox"/> Bonds, Barry	Already Registered
<input type="checkbox"/> Brett, George	Already Registered
<input type="checkbox"/> Burgandy, Michelle	
<input type="checkbox"/> Campanella, Roy	Already Registered
<input checked="" type="checkbox"/> Carew, Rod	Selected in Group
<input checked="" type="checkbox"/> Charleston, Oscar	Selected in 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.

## Chesapeake Bay Annual Conference

Mon, Oct 28, 2019 thru Thu, Oct 31, 2019

Configure

1 IDENTIFY

2 SELECT

3 OPTIONS

4 CHECKOUT

Configure

< Previous

Options >

Configure

### Select Registration Level for Group Registrants

Thank you for registering a group of your colleagues.

You are registering 4 registrant(s).

Full Name	Registration
Flannigan, Mike	Banquet Table Seat Registration Only \$25.00
Gates, Bill	Main Registration with Banquet Table Seat \$20.00
Robinson, Brooks	Main Registration \$30.00
Santiago, Pablo	Main Registration with Golf Ticket \$30.00

Total Registration Amount: **\$105.00**

But the Navigation bar for this step is different now.

#### Navigation Bar - Configuration

Next button

Display next step button: ☒

Next step button text: Options

Next step button text when coming from the summary: Options

Next step button URL: ~/Events/Group/Group-More

Navigation Provider

Click [HERE](#) to view instructions for configuring navigation providers

Next logic provider: Protech.MX.Middleware.NavigationProvider

Next logic provider method name: SubmitApplication

Next logic provider method parameters: MeetingRegistration,Group-More.aspx?MeetingId={0}

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.

vetemplate.ptassoc.com/Events/Group/Group-More/MeetingId/cba0eb0e-0a31-e811-80e0

## Chesapeake Bay Annual Conference

Mon, Oct 28, 2019 thru Thu, Oct 31, 2019

Configure

1 IDENTIFY 2 SELECT 3 OPTIONS 4 CHECKOUT

Configure

< Previous

1 Checkout >

Configure

### Group Summary - Add Registration Details

Mike Flannigan [Complete Registration - Badge and Sessions](#) 3

Banquet Table Seat Registration Only

Baltimore Orioles

Account - 3300 Stadium

Upper Deck

Section 33

Baltimore, MD 20146, US

Total: \$25.00

Questions ? Details 2

Bill Gates [Complete Registration - Badge and Sessions](#) 3

Main Registration with Banquet Table Seat

Baltimore Orioles

Account - 3300 Stadium

Upper Deck

Section 33

Baltimore, MD 20146, US

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.**

The screenshot shows the registration page for the Chesapeake Bay Annual Conference, held from Mon, Oct 28, 2019 to Thu, Oct 31, 2019. The registrant is Robinson, Brooks. The page features a progress bar with four steps: 1. IDENTIFY, 2. SELECT, 3. OPTIONS (current step), and 4. CHECKOUT. Below the progress bar, there are four main sections: 1. Navigation: A 'Previous' button and a 'Save Details for this Registrant' button. 2. Registrant Information: A card for Brooks Robinson, Master of the Game, Baltimore Orioles, with contact details and account information. 3. Registration Questions: A section for 'First time attendee?' with a checkbox. 4. Guest Registration: A section for adding guests. At the bottom, there is a section for Event Sessions, currently showing 'Jul 01, 2019'. Numbered callouts 1 through 5 are placed over specific elements: 1. 'Save Details for this Registrant' button; 2. 'Add Registration Details for this Registrant' header; 3. 'Registration Questions' header; 4. 'Guest Registration' header; 5. 'Event Sessions' header.



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

Brooks Robinson Complete Registration - Badge and Sessions

Main Registration  
Master of the Game  
Baltimore Orioles  
Account - 3300 Stadium  
Upper Deck  
Section 33  
Baltimore, MD 20146, US

Total: \$70.00

[Questions](#) [Details](#)

Type	Item	Quantity	Fees
Registration	Main Registration	1	\$30.00
Session	1 Removing Invasive Species from the Chesapeake Bay NOW!	1	\$30.00
Session	Keynote Address	1	\$10.00
Subtotal			\$70.00

Paul Hammond Guest

Guest Registration  
Baltimore Orioles  
Account - 3300 Stadium  
Upper Deck  
Section 33  
Baltimore, MD 20146, US

Total: \$10.00

[Questions](#) [Details](#)

SHOPPING CART

ADDRESS

DELIVERY

PAYMENT

CONFIRMATION


You currently have 5 items in your cart [Clear Cart](#)

Product	Unit Price	Quantity	Subtotal
Chesapeake Bay Annual Conference (October 28, 2019 - October 31, 2019) <a href="#">Flannigan, Mike</a> see details			\$25.00
Chesapeake Bay Annual Conference (October 28, 2019 - October 31, 2019) <a href="#">Gates, Bill</a> see details			\$20.00
Chesapeake Bay Annual Conference (October 28, 2019 - October 31, 2019) <a href="#">Robinson, Brooks</a> see details			\$80.00
Main Registration \$30.00 Removing Invasive Species from the Chesapeake Bay NOW! \$30.00 Keynote Address \$10.00			
Hammond, Paul <span>Guest</span> Guest Registration	\$10.00		
Chesapeake Bay Annual Conference (October 28, 2019 - October 31, 2019)			\$30.00

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**  Configure

### Guest Registration

Add Guest

**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**  Configure

### Guest Registration

Product

Guest Registration \$10.00 ▼

Guest Registration \$10.00

Guest Registration with Golf Ticket \$55.00

▼

Paul

Hammond

Display Name      Email Address

Paul      ph@hammond.com

Company Name

Baltimore Orioles

Country

United States ▼

Street 1

Account - 3300 Stadium

Street 2

Upper Deck

Street 3

Section 33

City      State/Province      ZIP/Postal Code

Baltimore      MD ▼      20146

Save      Cancel

**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** Configure

## Guest Registration

Hammond, Paul (Paul)  
Guest Registration

Questions ? Guest Sessions i

Add Guest

**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.

**2**

## Guest Registration

Hammond, Paul (Paul)

First time attendee? ☒

Save Cancel

**4**

Configure

## Guest Registration

Hammond, Paul (Paul)  
Guest Registration

Registration Questions ? Guest Sessions i

Teasdale, Sarah (Sarah)  
Guest Registration

Registration Questions ? Guest Sessions i

Add Guest

**3**

## Guest Registration

### Guest Sessions

Hammond, Paul (Paul)

### Guest Sessions

Jul 01, 2019
05:00 PM
<input type="checkbox"/> Removing Invasive Species from the Chesapeake Ends at 6:00 PM
Jul 02, 2019
07:00 AM
<input type="checkbox"/> Golf Outing for 4 \$40.00 Ends at 3:00 PM
03:00 PM
<input type="checkbox"/> Keynote Address \$10.00 Ends at 4:00 PM
04:00 PM
<input type="checkbox"/> Underwater Grasses in the Chesapeake Bay - The Unsung Hero \$25.00 Ends at 6:00 PM

## 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.

### Event Sessions

Jul 01, 2019

09:00 AM

☐ Keynote Address \$10.00 Ends at 10:00 AM

10:30 AM

☐ Removing Invasive Species from the Chesapeake Bay NOW! \$30.00 Ends at 12:00 PM

06:00 PM

☐ Banquet Table Seat \$20.00 Ends at 10:00 PM

Jul 02, 2019

04:00 PM

☐ Underwater Grasses in the Chesapeake Bay - The Unsung Hero \$25.00 Ends at 6:00 PM

Jul 03, 2019

08:00 AM

☐ Oysters - We'll do Anything to Save them \$10.00 Ends at 10:00 AM

Oct 30, 2019

08:00 AM

☐ Free Session -- Ends at 10:00 AM

Jul 02, 2020

07:00 AM

☐ None

☐ Go Fish! - Charter Fishing out of Tilghman Island \$30.00 Ends at 2:00 PM

☒ Full Day out on the Bay \$50.00 Ends at 4:00 PM

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

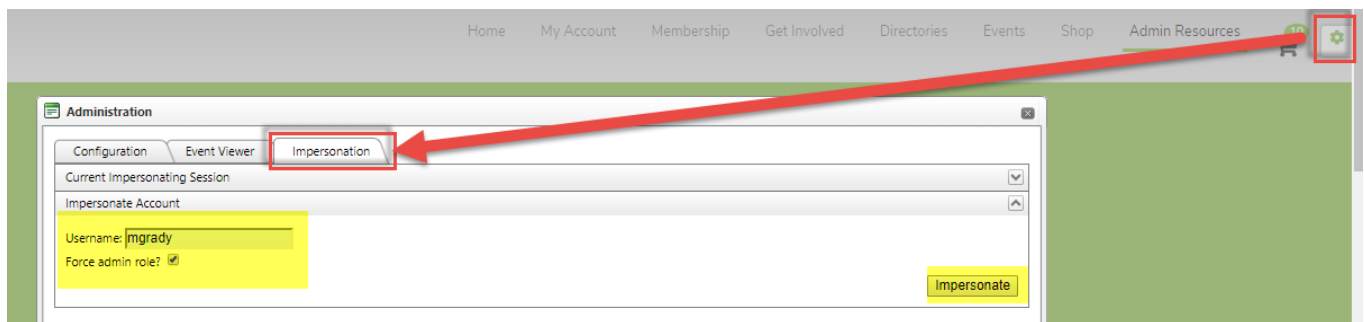
**NEW – Select sessions via radio buttons:** If more than one session is listed in a timeslot where there is a conflict, they are listed with radio buttons, so only one choice is possible. An additional radio button is included for "None", so no default selection is made for the user.

**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.

### Admin Resources

STYLING GUIDE

ADDITIONAL WEB PARTS

SAMPLES

NAVIGATION PANELS

INTERNAL HELP

SANDBOX

Configure

#### Navigation Panels for Dashboard pages

Panel Basics

Title

Chesapeake Bay Annual Conference

Page

Home

Sort Number

1

Link URL

/Events/Calendar-of-Events/Meeting-Home-Page?Meetingid=%7BCBA0EB0E-0A

Image

/Portals/0/assets/images/event/chesapeakeMain.png

Description

Registration is now open!

Panel Options

Publish to Web

☒ Yes ☐ No

Save

Cancel

STYLING GUIDE

ADDITIONAL WEB PARTS

SAMPLES

NAVIGATION PANELS

INTERNAL HELP

SANDBOX

Configure

#### Navigation Panels for Dashboard pages

Ascending

Sort

Add New Record

Chesapeake Bay Annual Conference

Home

Sort Order: : 1

Link URL: : /Events/Calendar-of-Events/Meeting-Home-Page?Meetingid=%7BCBA0EB0E-0A31-E811-80E0-00155DA80B72%7D

Image: : /Portals/0/assets/images/event/chesapeakeMain.png

Description: : Registration is now open!

Search our Membership Directory

Home

Sort Order: : 2

Link URL: : /Directories/Members

Image: : /Portals/0/assets/images/directories.jpg

Description: : Search by name, location, and areas of expertise

Join Now!

Home

Sort Order: : 3

Link URL: : /Membership/Join

Image: : /Portals/0/assets/images/membership.jpg

Description: : Become a part of this terrific community

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# MX 8.2 Template Site – A Guided Tour

## Home Page (/Home)


MX

[Home](#)[My Account](#)[Membership](#)[Get Involved](#)[Directories](#)[Events](#)[Shop](#)[Admin Resources](#)

Mal Grady | Logout

Configure

4




# Welcome

Our member portal has a lot to offer

Configure

It's time to renew your membership,  
click here to Renew Now!

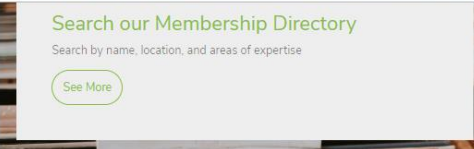
Configure



## Chesapeake Bay Annual Conference

Registration is now open!


[See More](#)



## Search our Membership Directory

Search by name, location, and areas of expertise

[See More](#)




## Join Now!

Become a part of this terrific community


[See More](#)

## Visit Our Store




### Product Catalog

Search our catalog to see all the items for purchase in our online store. View product details and related items, and select one or more. Process your payment through our secure shopping cart



### Calendar Of Events


View a listing of all of our Current and Upcoming Events



### Donate

Give a contribution to our foundation. Browse through a list of our giving opportunities and choose the one that is right for you. Process your payment through our secure shopping cart

### About Us






The full suite of MX web parts already deployed and configured within their own DNN website.

### Site Links

- [Home](#)
- [Membership](#)
- [Get Involved](#)
- [Directories](#)
- [Events](#)
- [Shop](#)

### Contact Info

U.S. Corporate Headquarters  
Protech Associates, Inc.  
5457 Twin Knolls Rd Suite 400  
Columbia, MD 21045

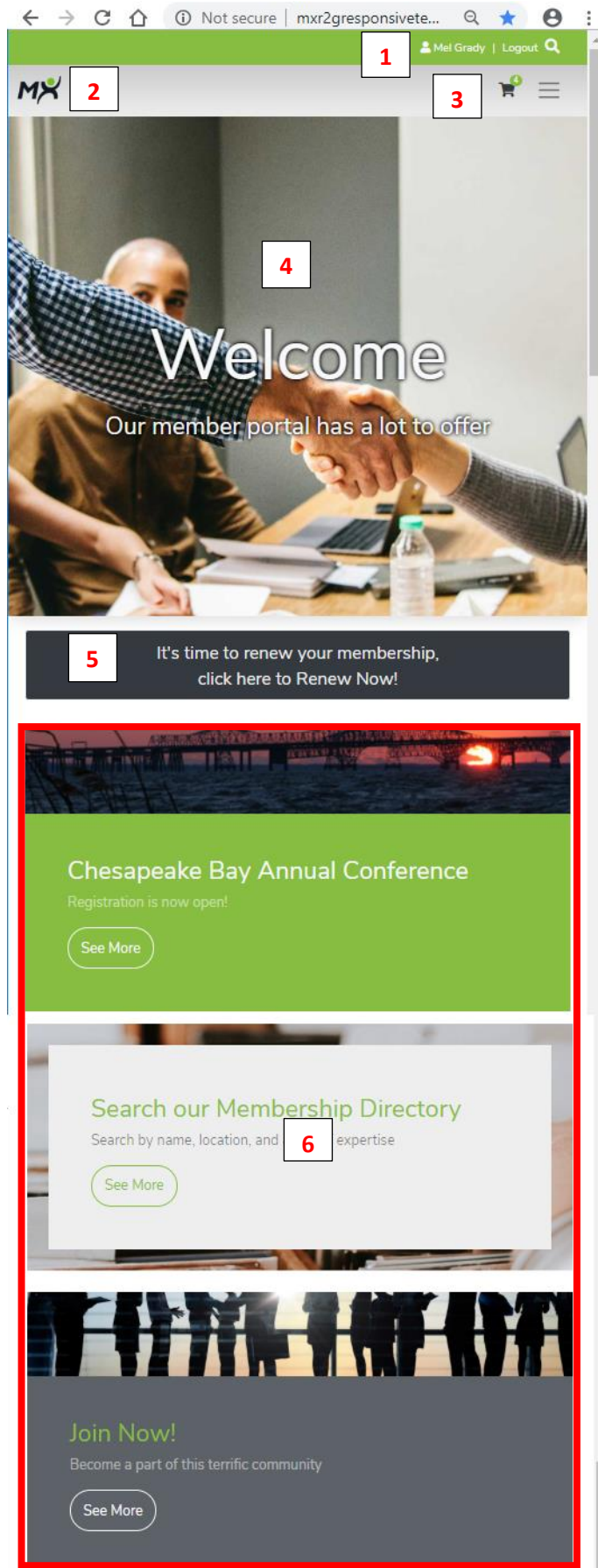


Copyright 2018 [Client] - Powered by Alliance by Protech [Terms Of Use](#) | [Privacy Statement](#)

35



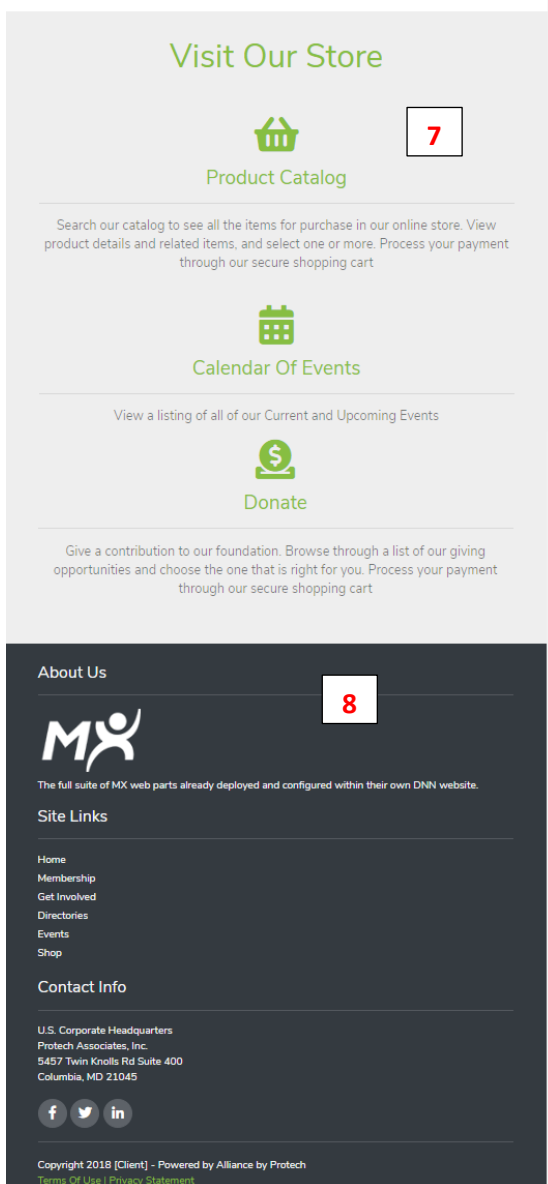
## Home Page – Enhancements to note



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.

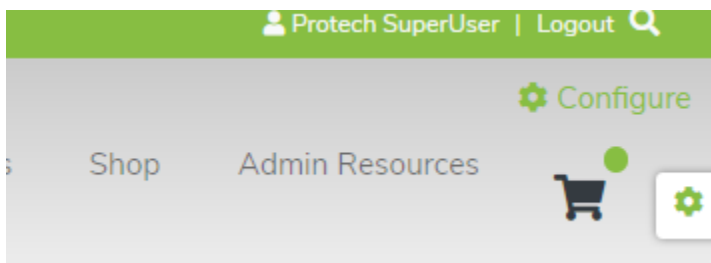
8

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

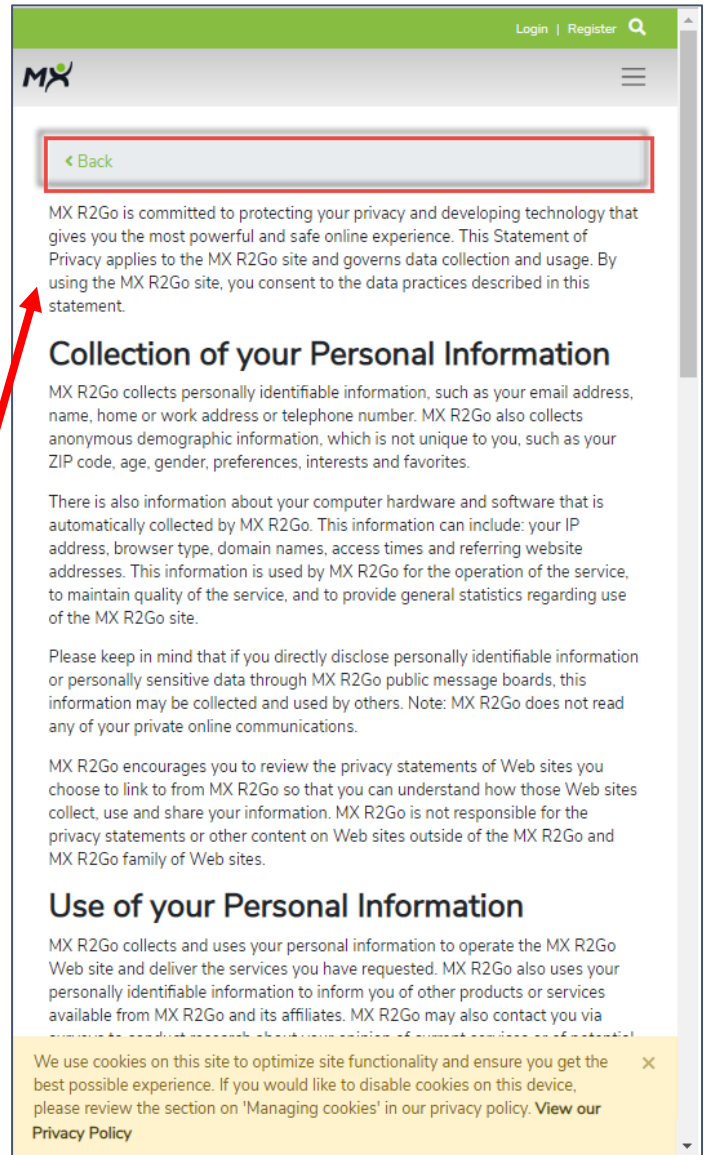
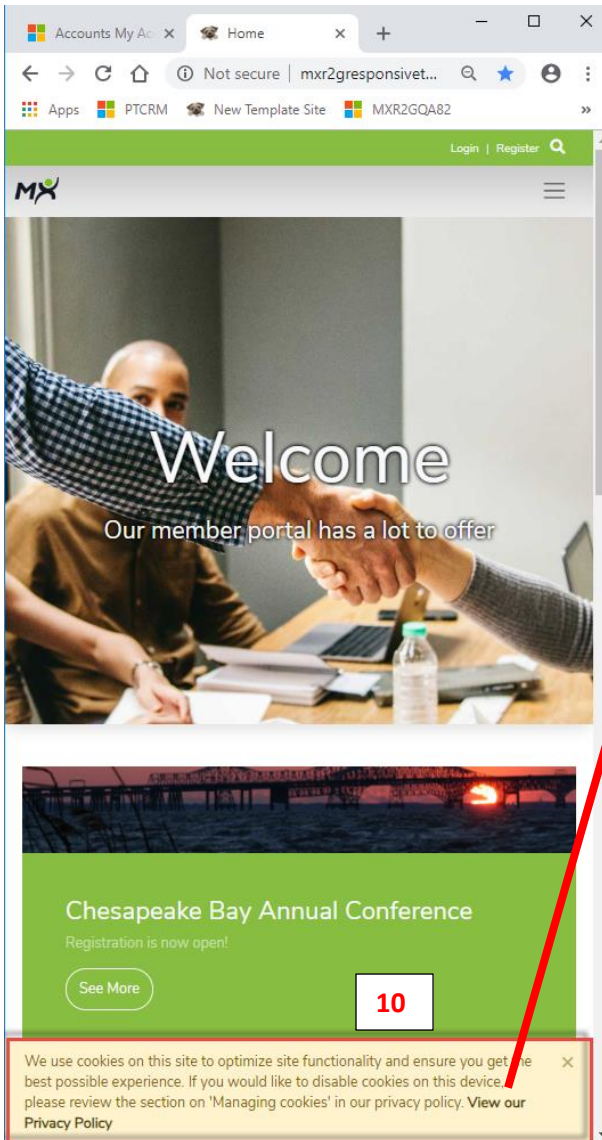
The link for accessing the Administrator form has been changed. Instead of the word “ADMIN”, it is now visible at the top right of the screen as a gear icon on a white tab. It is not part of the menu styling, so it should no longer be subject to styling changes that unintentionally omitted it in the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



9

**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.



The screenshot shows the Security Module interface. At the top, there's a green header with 'Login | Register' and a search icon. Below it, a navigation bar contains links: Home, Membership, Get Involved, Directories, Events, and Shop. The main content area has a large banner image with the text 'Sign In' overlaid. Below the banner, there are two main sections: 'Sign In' and 'Create New User'.

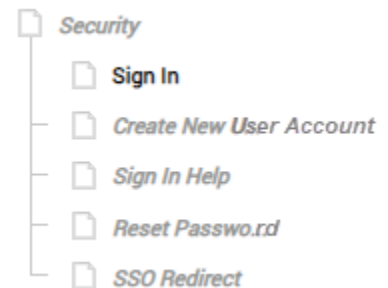
**Sign In Section:**

- Username: A text input field containing 'protech'.
- Password: A password input field with masked characters.
- Keep me signed in if I close the browser: A checkbox.
- Sign In: A green button.
- Do you need help signing into our site?: A section with links: Find my account by e-mail address, I forgot my password, and Contact customer service.

**Create New User Section:**

- Never interacted with this site before? Please use this form to create your own user account and sign into the site.
- A strong password should have: length = 8, numeric characters = 1, upper case characters = 1, lower case characters = 1, symbol characters = 1.
- First Name and Last Name: Two text input fields.
- Enter E-mail and Confirm E-mail: Two text input fields.
- Create Password and Confirm Password: Two text input fields.
- Country: A dropdown menu showing 'United States'.
- To select a company, 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.
- Parent Company: A text input field.
- Add: A green button.

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.



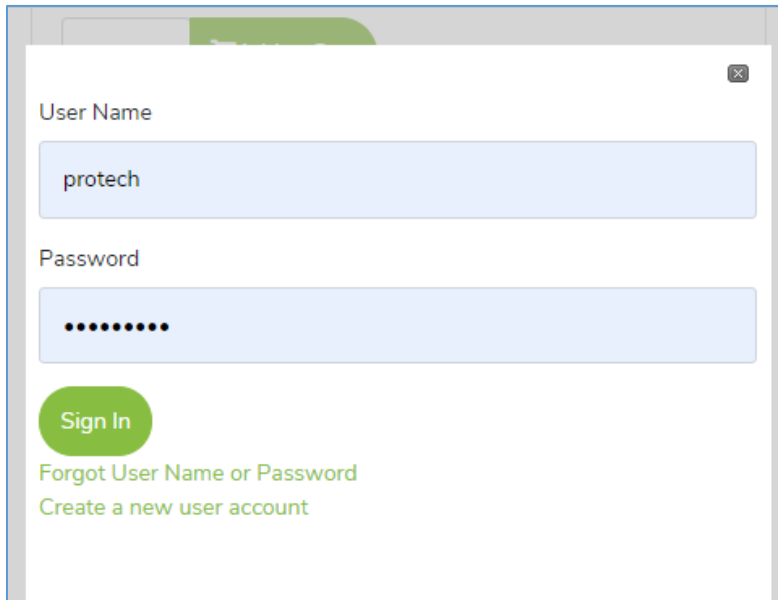
- Create New User and Sign In Help are on the same page as Sign In, so no extra redirection is needed. Dedicated pages exist for both, for direct navigation from elsewhere.
- Functionality has not changed for Sign In Help and Reset Password.
- Automatic sign out for SSO. Sign Out no longer needs separate 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:



The image shows a sign-in popup form with a light gray background and a thin blue border. At the top right is a small close button (an 'X' in a square). Below it, the text 'User Name' is followed by a light blue input field containing the text 'protech'. Below that, the text 'Password' is followed by a light blue input field filled with ten black dots. Under the password field is a green rounded rectangular button with the text 'Sign In' in white. At the bottom, there are two lines of green text: 'Forgot User Name or Password' and 'Create a new user account'.

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

1

### Create New User

Never interacted with this site before? Please use this form to create your own user account and sign into the site.

A strong password should have: length = 8, numeric characters = 1, upper case characters = 1, lower case characters = 1, symbol characters = 1.

First Name	Last Name
<input type="text"/>	<input type="text"/>
Enter E-mail	Confirm E-mail
<input type="text"/>	<input type="text"/>
Create Password	Confirm Password
<input type="password"/>	<input type="password"/>
Secret Question (for Backup Password)	Secret Answer
<div>What is the name of your favorite pet?</div>	<input type="text"/>
Country	
<div>United States</div>	

To select a company, 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.

Parent Company

+ Add

Job Title	Business Phone
<input type="text"/>	<input type="text"/>

Before creating your account we need to verify that you are a real person. To confirm that you are really seeing this screen please type the characters you see in this image into the box below it:

UB TDI


If you can't read the characters click here to generate a new image

Create New Account and Sign In Cancel


- 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.



# Reset Password

 [Configure](#)

Change your password here to something that will be easier to remember at a future time. You may also create or change your personalized question and answer at this time. Please enter an answer that will be easy to remember when prompted by the form.  
A strong password should have: length = 8, numeric characters = 1, upper case characters = 1, lower case characters = 1, symbol characters = 1.

Web Login Name

Web Login Password


Please Confirm New Password

Secret Question

What is your favorite color? ▼

Secret Answer

Before resetting your password we need to verify that you are a real person. To confirm that you are really seeing this screen please type the characters you see in this image into the box below.



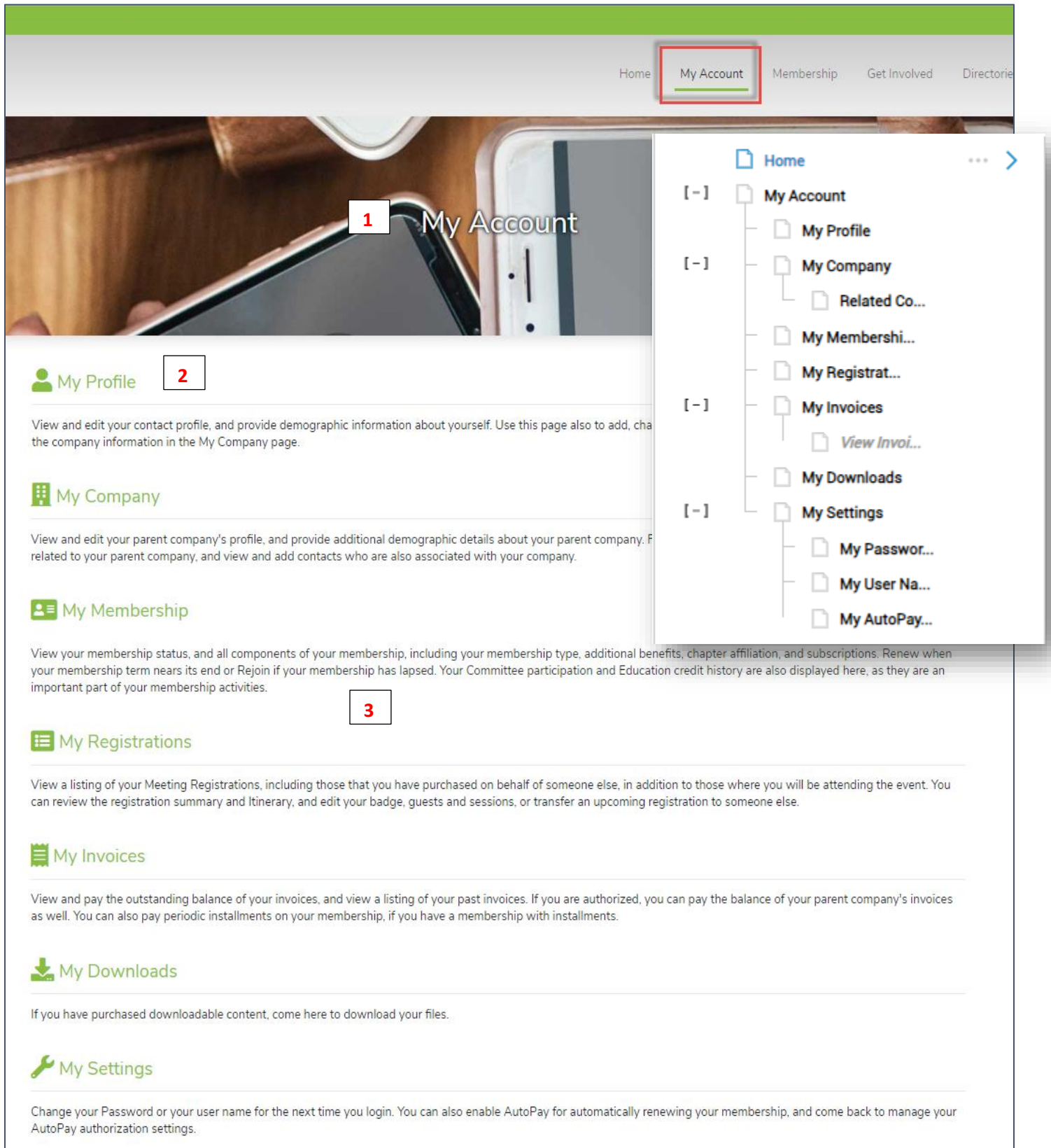
[If you can't read the characters click here to generate a new image](#)

[Save Changes](#) [Cancel](#)



## My Account (/My-Account)

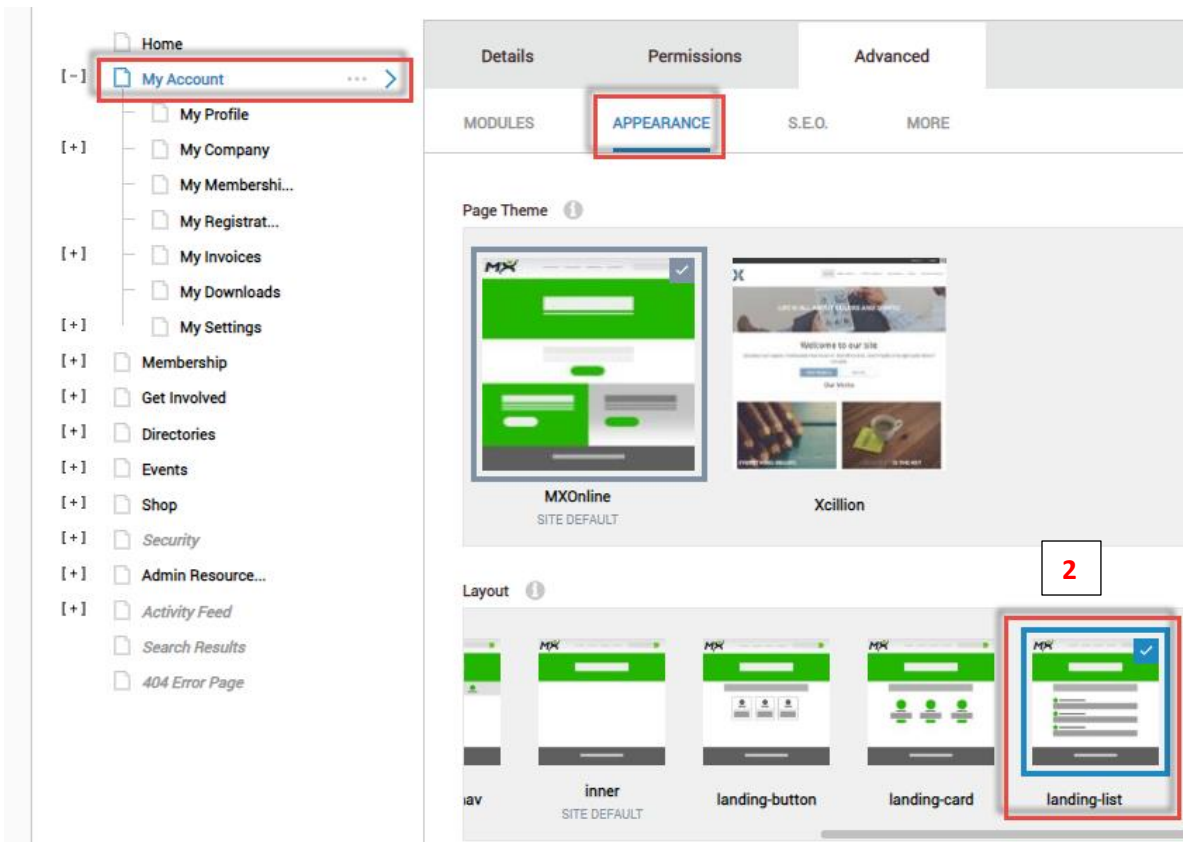
### Landing Page



- 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.

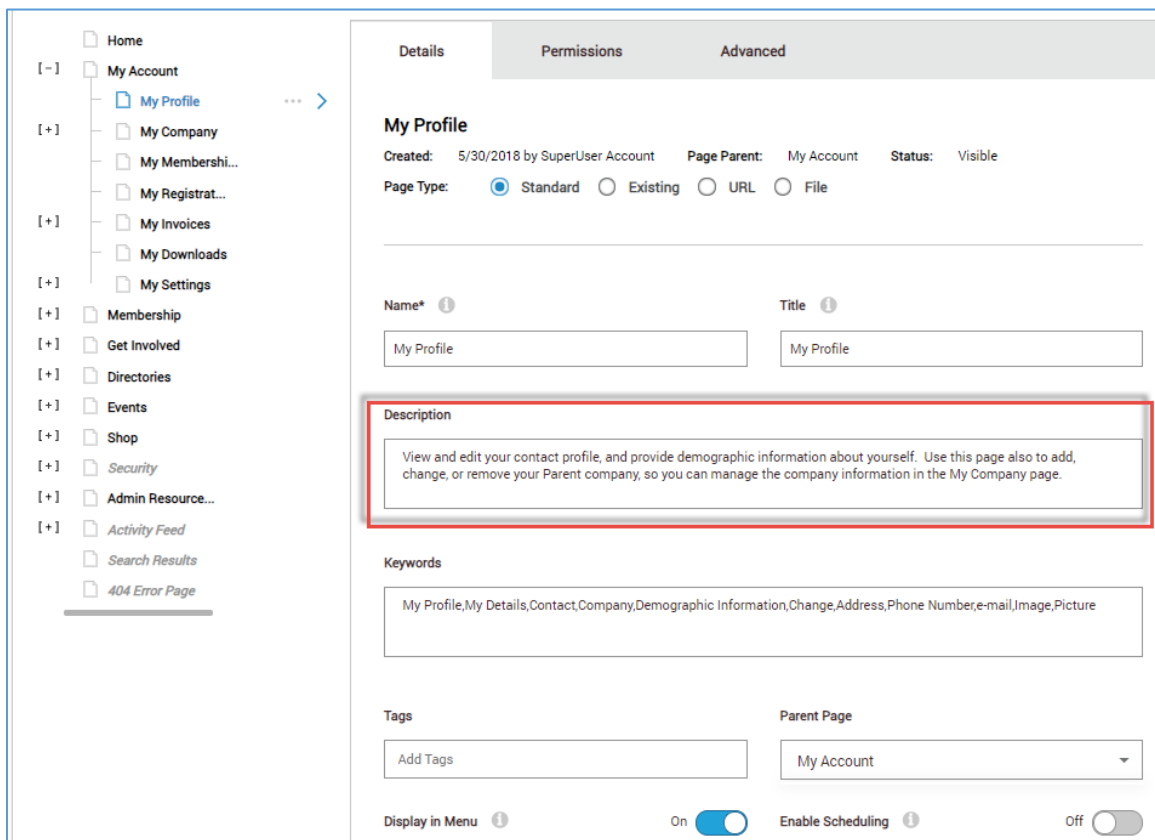
2

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)

com /My-Account/My-Profile

MY PROFILE

MY COMPANY

MY MEMBERSHIP

MY REGISTRATIONS

MY INVOICES

MY DOWNLOADS

MY SETTINGS

1

Configure

Dr. Protech Test SuperUser, Sr.

Protech Associates, Inc.

21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

520-448-0932

Protech@test.com

jannette

jannette

2

3

Update My Profile >

Configure

Prefix

First Name

Middle Name

Last Name

Suffix

Dr.

Protech

Test

SuperUser

Sr.

Email

Website

Protech@test.com

Business Phone

Home Phone

Mobile Phone

Fax

520-448-0932

520-678-2009

1

Job Title

Nickname

Super

Country/Region

United States

Street 1

21600 North Main Street

Street 2

Street 3

Suite 450

City

State/Province

ZIP/Postal Code

Columbia

MD

21045

Social-Facebook

Social-LinkedIn

Social-Twitter

jannette

jannette

Save

Cancel

**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.

City	State/Province	ZIP/Postal Code
Columbia	MD	21045

Prefix	First Name	Middle Name	Last Name	Suffix
Dr.	Protech	Test	SuperUser	Sr.


First Name	Last Name	Suffix
Protech	SuperUser	Sr.

- 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”.

Country
Country key value format: Country Name
Default country: United States



My Account

Prefix
Dr.
First Name
Protech
Middle Name
Test
Last Name
SuperUser
Suffix
Sr.

## 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.

The first screenshot shows the 'Identify My Company' header, an instruction box with a red '1' indicating the start of the search process, a text input field for 'Company Name', an 'Add' button, and a 'Save' button.

The second screenshot shows the same interface with 'prote' entered in the input field. A dropdown list of suggestions is visible, including 'Protech', 'Protech Associates, Inc. (Columbia)', 'Protech Associates, Inc. (North Dakota) (Fargo)', and 'Protech1'. The 'Add' button is highlighted.

The third screenshot shows the selected company, 'Protech Associates, Inc. (Columbia)', displayed in the input field. The 'Add' button is still present, and the 'Save' button is now highlighted.

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

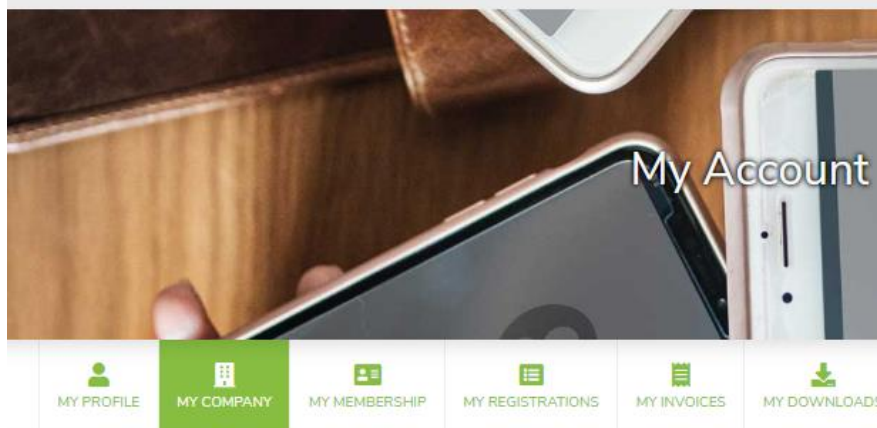
In View mode, only the selected/added parent company name is displayed, because the default view is simple mode. Full mode is still supported, and looks just like the Account Basic Information view mode.

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.

The screenshot shows the 'Identify My Company' header, the company name 'Protech Associates, Inc.' displayed in the input field, a red '2' indicating the selected company, a green link 'Click here to go to Company Profile', and a dark button 'Remove/Change Company' with a red '3' indicating it is the 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.

**MX Find - Configuration**

Page size: 1

Saved views: MX - User has a Parent Company, for ShowHide

Search columns:

Attribute Name	Prompt	Display	To Uri?
contactid	Contact	Context Contact Id	No

Company Name Contains Data

Result display type: Template List

Item template: ShowHide-HideShow.ascx

**Start Process - Configuration**

Global View Mode Administration

General

Basic Form Fields

Advanced Settings

Start process button text: Go to My Profile - Identify my Company

Meeting: [Dropdown]

Benefit: [Dropdown]

Package: [Dropdown]


Membership Application Customer Type: Contact

Contribution: [Dropdown]

Redirect Uri: /My-Account/My-Profile

- **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 Account**

Company Information

[Click here to view related companies and contacts](#)

 **Protech Associates, Inc.**

**Protech**  
 Dr. Protech Test SuperUser, Sr.  
 5457 twin knolls  
 Columbia 21045  
 US

📞 301-206-0070  
 📠 301-206-5145  
 ✉ pt@pt.org  
 🌐 http://www.ProtechAssociates.com

**Testing by RAB**  
 This is a very effective way to test these things.

[Edit My Company >](#)

**Company Information**

[Click here to view related companies and contacts](#)

Company Name  
 Protech Associates, Inc.

Primary Contact  
 SuperUser, Protech T. x

Parent Company

Country  
 United States

Street 1  
 5457 twin knolls

Street 2

Street 3

City  
 Columbia

State/Province

Postal Code  
 21045

Include in Directory

☒ Main Phone  
 301-206-0070

Other Phone  
 test

Fax  
 301-206-5145

E-mail  
 pt@pt.org

Web Site  
 http://www.ProtechAssociates.com

Description

Testing by RAB  
 This is a very effective way to test these things.

Design HTML Preview

[Save](#) [Cancel](#)

## My Addresses

**Configure**

### My Addresses

**Protech and Protech Associates** 1 Edit

Primary Address

21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

**Home** 3 Edit

Secondary Address

100 Holly Street  
Street 3 Address which is breaking  
into another line and another line and  
another line and another....  
Salem, MA 02678  
US

2

5 Load More

4 Add Address

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.

**Configure**

### My Addresses

Address Name

Country

United States 6

Street 1

Street 2

Street 3

City State/Province Postal Code

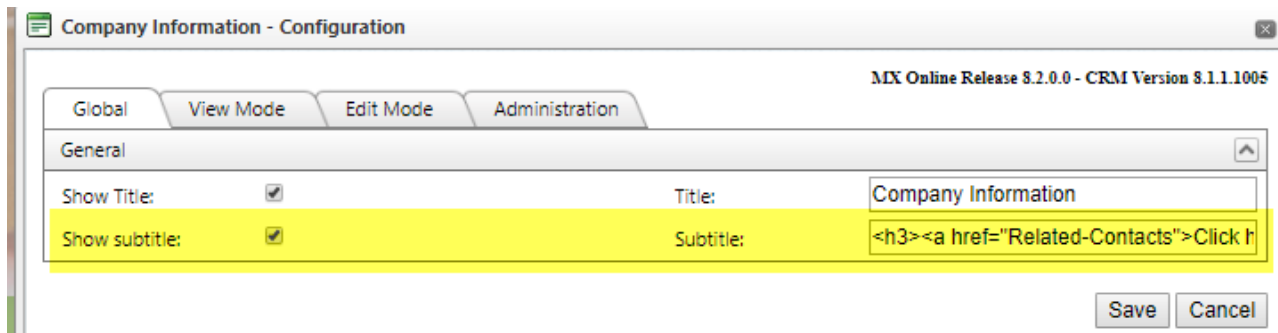
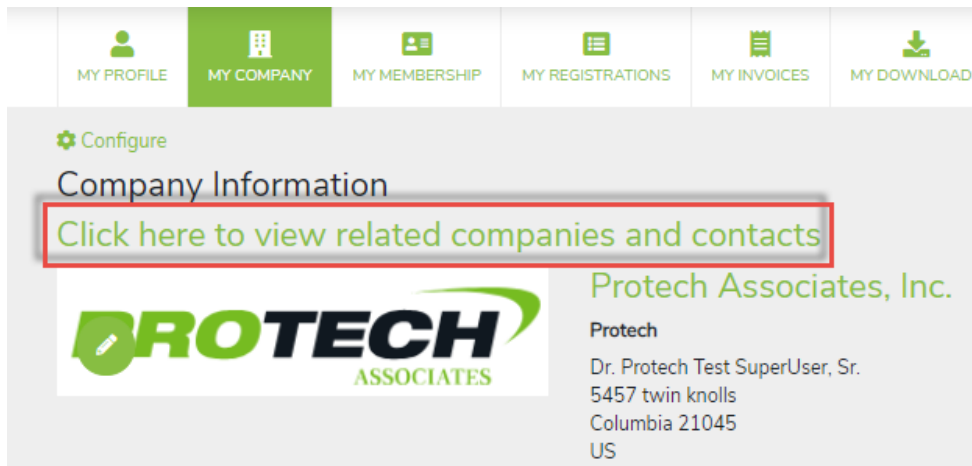
Main Phone

Save Cancel



## 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.

2

1

2

3

Name	Email
Alchin, Kim	kim@alchin.com
Allchin, Jim	jim@mybigchin.com
Allen, Dexter	Dexter@allen.com
Allman, Duane	duane@TravelinMan.com

- 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 PROFILE

MY COMPANY

MY MEMBERSHIP

MY REGISTRATIONS

MY INVOICES

MY DOWNLOADS

MY SETTINGS

Configure

### My Current Membership Status

Dr. Protech Test SuperUser, Sr.

Contact Number: 9000418

Member: No | Membership Type: Non-Member

Chapter/Section: Maryland State Chapter

Configure

### Renew - Membership Details

Sign Up for Automatic Renewals

Membership Category	Cycle Start	Paid Through	Status
Dues Calendar - Jan Next Prorate 1 Year Annual Installment	1/1/2012	12/31/2011	Terminated <a href="#">Rejoin</a>

Configure

### My Chapters

Chapter Benefit	Paid Through	Renewal Cycle
No records to display.		

Configure

### My Secondary Benefits

Benefit	Paid Through	Renewal Cycle
No records to display.		

Configure

### My Subscriptions

Periodical	Paid Through	Renewal Cycle
No records to display.		

Configure

### My Committee Participation

Committee	Title	Term
No records to display.		

1

2

3

4

## 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:

**MX Find - Configuration**

Saved views: **MX - User's Current Membership Status**

Search columns:

Attribute Name	Prompt	Display	To Uri?
statecode	Status	Hide	No
contactid	Contact	Context Contact Id	No

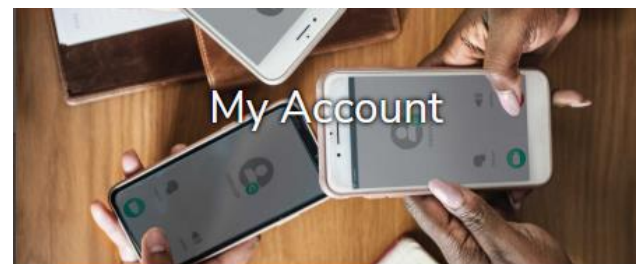
Result ID name: **contactid**

Set columns width in: **None - Auto**

Result columns:

Attribute Name	Display Type	Order	Text	Line Break	Column/Field Title
pa_labelname	Title				Label Name
pa_contactnumber	Text Block 1	1	Bold		Contact Number
pa_member	Text Block 2	1			Member
defaultpricelevelid	Text Block 2	2			Membership Type
pa_chapterterritoryid	Text Block 3	1			Chapter/Section

- 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 Current Membership Status**

Dr. Protech Test SuperUser, Sr.  
Contact Number: 9000418

Member: No | Membership Type: Non-Member

Chapter/Section: Maryland State Chapter

**Renew - Membership Details**

Sign Up for Automatic Renewals

Membership Category	Cycle Start	Paid Through	Status
Dues Calendar - Jan Next Prorate 1 Year Annual Installment	1/1/2012	12/31/2011	Terminated Rejoin

**My Chapters**

Chapter Benefit	Paid Through	Renewal Cycle
No records to display.		

## 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.

MY PROFILE

MY COMPANY

MY MEMBERSHIP

MY REGISTRATIONS

MY INVOICES

MY DOWNLOADS

MY SETTINGS

Configure

My Registrations

Upcoming Meetings Only

Click on Event title for details on that event.

Event	Registrant	1	2
2019 Chesapeake Bay Spring Learning Series 6/1/2019 - 9/1/2019	Davey Jones	<a href="#">View/Edit Details</a>	<a href="#">Transfer to Someone Else</a>
2020 Land of Lincoln Conference 9/1/2020 - 9/6/2020	Ryan A. Bruffey	<a href="#">View/Edit Details</a>	<a href="#">Transfer to Someone Else</a>
2020 Land of Lincoln Conference 9/1/2020 - 9/6/2020	Ryan H Bruffey	<a href="#">View/Edit Details</a>	<a href="#">Transfer to Someone Else</a>
2020 Land of Lincoln Conference 9/1/2020 - 9/6/2020	Brenda Davis	<a href="#">View/Edit Details</a>	<a href="#">Transfer to Someone Else</a>
2020 Land of Lincoln Conference 9/1/2020 - 9/6/2020	Protech Test SuperUser	<a href="#">View/Edit Details</a>	<a href="#">Transfer to Someone Else</a>

Configure

My Registration History

Listing of my registrations for past meetings.

3

2017 Max Cap Meeting - Scenario 3 (US)  
11/15/2017 8:00 AM  
Marco Island Marriott Beach Resort and Golf Club

MX Waitlisted Meeting  
12/01/2016 8:00 AM  
Hilton Hotel Columbia

- 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.

The image displays two screenshots of a web application interface for managing registrations. The top screenshot shows a list of registrations under the heading "My Registrations Upcoming Meetings Only". A red arrow points from a "View/Edit Details" button (labeled 1) to a detailed view of a registration for Davey Jones. The bottom screenshot shows the "View Details" modal for Davey Jones, which includes contact information, a total amount of \$100.00, and a list of sessions. A red arrow points from the "See questions ? Details i" link in the bottom screenshot to the "View Details" modal.

**My Registrations**  
Upcoming Meetings Only  
Click on Event title for details on that event.

Event	Registrant
2019 Chesapeake Bay Spring Learning Series 6/1/2019 - 9/1/2019	Davey Jones

**View Details**

Davey Jones [Edit](#) (3)

All 4 Sessions

Dennis Driskell Insurance Agency, Inc.  
PO Box 211  
Eldorado, IL 62930-0211, US

**Total: \$100.00**

[See questions ?](#) [Details i](#)

First Time Attendee? No

Registration  
All 4 Sessions  
Quantity: 1  
\$100.00

Session  
Week 1 - History of the Chesapeake Bay [Packaged](#)  
Quantity: 1  
\$0.00

Session  
Week 2 – Beautiful Swimmers – Saving the Chesapeake Bay Blue Crab  
[Packaged](#)  
Quantity: 1  
\$0.00

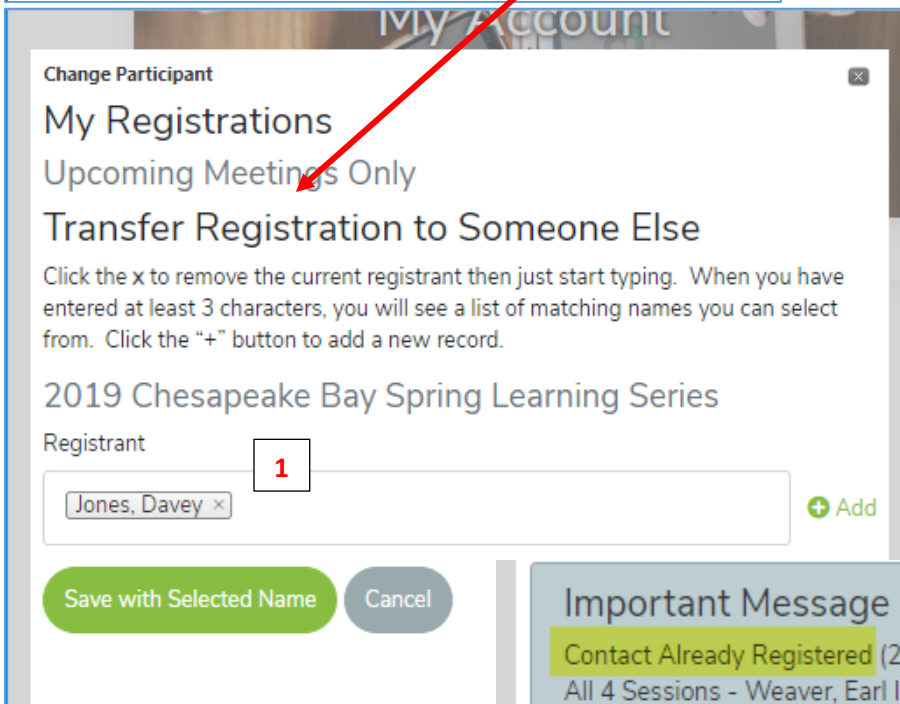
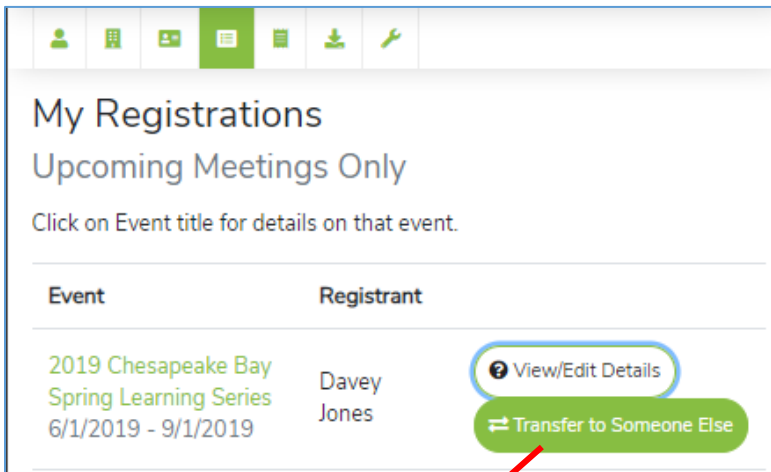
Session  
Week 3 – Oysters – the most powerful filter [Packaged](#)  
Quantity: 1  
\$0.00

Session  
Week 4 – Doing your part to keep the bay clean [Packaged](#)  
Quantity: 1  
\$0.00

**Subtotal**  
**\$100.00**

**Total for all registrants and guests: \$100.00**

- 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.



### Important Message

2

Contact Already Registered (2019 Chesapeake Bay Spring Learning Series - All 4 Sessions - Weaver, Earl I.)

Session with Related Course (Week 1 - History of the Chesapeake Bay - Intro to the Chesapeake Bay)

Session with Related Course (Week 2 – Beautiful Swimmers – Saving the Chesapeake Bay Blue Crab - Intro to the Chesapeake Bay)

Session with Related Course (Week 3 – Oysters – the most powerful filter - Intro to the Chesapeake Bay)

Session with Related Course (Week 4 – Doing your part to keep the bay clean - Intro to the Chesapeake Bay)

## 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

**Pay Invoices**

Test Mode

Please [click on the Invoice number](#) to view and print the details of an invoice.

To select one or more invoices to pay online, click on the checkboxes. The amount charged to your credit card when you click the "Enter Payment" button will be the sum of the Balance Due amounts on all the invoices that you select. The purchase amount column identifies the full invoice amount.

☒ Show only unpaid invoices  
[Create an Auto-pay account for automatic renewal payments](#)

<input type="checkbox"/>	<a href="#">Invoice Date</a>	<a href="#">Invoice Number</a>	<a href="#">Description</a>	<a href="#">Purchase Amount</a>	<a href="#">Balance Due</a>
<input type="checkbox"/>	11/23/2016	INV-23199-L6S9T3	Product Sales	\$25.00	\$25.00
				<b>Total:</b>	<b>Total:</b>
				\$25.00	\$25.00

Total amount selected: \$0.00

[Enter Payment](#)

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.

**Place My Order**

**Payment Information**

Test Mode

**Payment Information**

Name on card: \*

Card type:

Visa2\_US\_Fabrikam

Card Number: \*

1-Jan

2018

Verification #: \*

Street: \*

Address Street 1 - Carrying over to a second address line

City: \*

2

### Pay Installments

3

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

**Enter Payment**

[Configure](#)

**Pay Renewal Installments**

Test Mode

Billing Schedule

The following annual installment payments are up

**Installments - Configuration**

Global View Mode Edit Mode Administration

General

Show Title: ☒

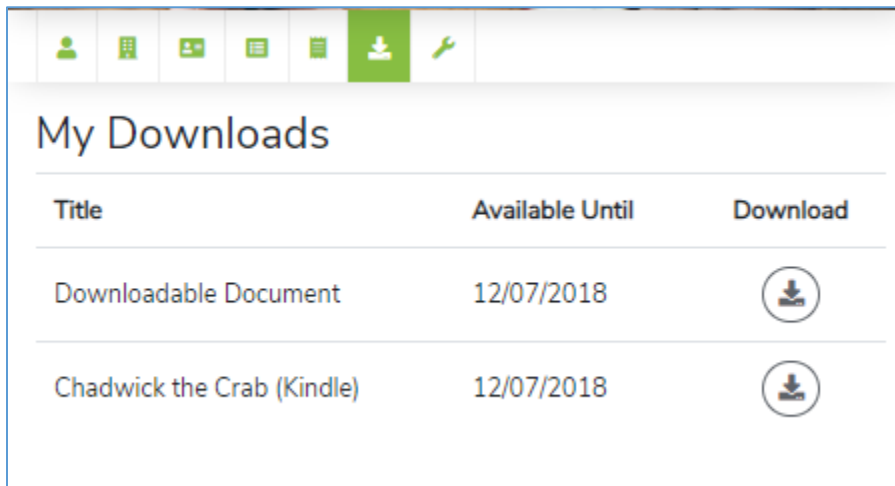
Show subtitle: ☐



Customer type: Account

3

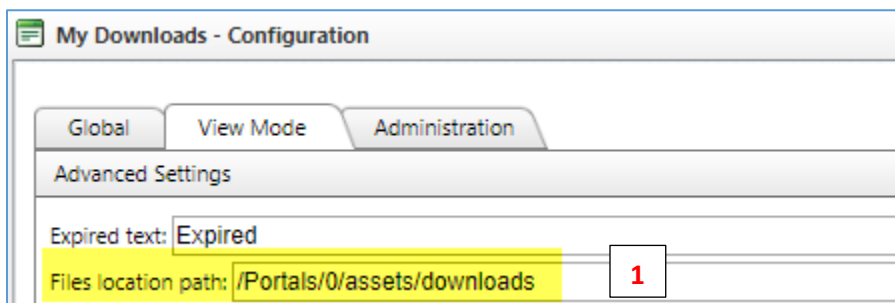
## My Downloads (/My-Account/My-Downloads)

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.



Title	Available Until	Download
Downloadable Document	12/07/2018	
Chadwick the Crab (Kindle)	12/07/2018	

- 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.



My Downloads - Configuration

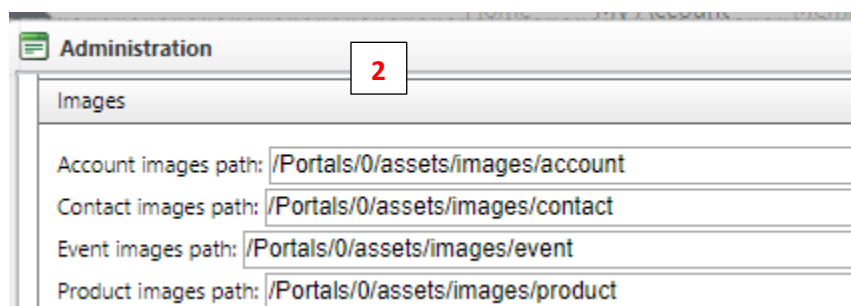
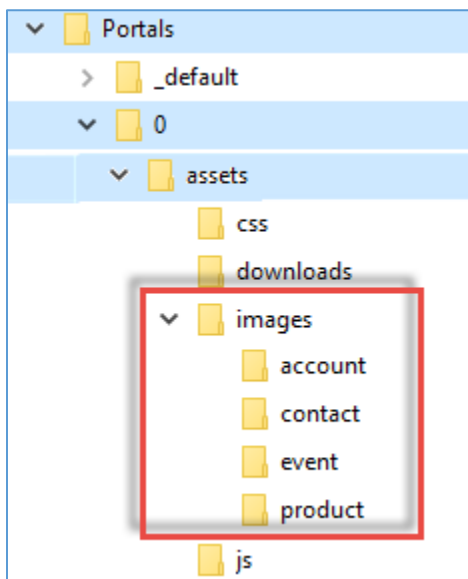
Global View Mode Administration

Advanced Settings

Expired text: Expired

Files location path: `/Portals/0/assets/downloads`

- 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.



Administration

Images

Account images path: `/Portals/0/assets/images/account`

Contact images path: `/Portals/0/assets/images/contact`

Event images path: `/Portals/0/assets/images/event`

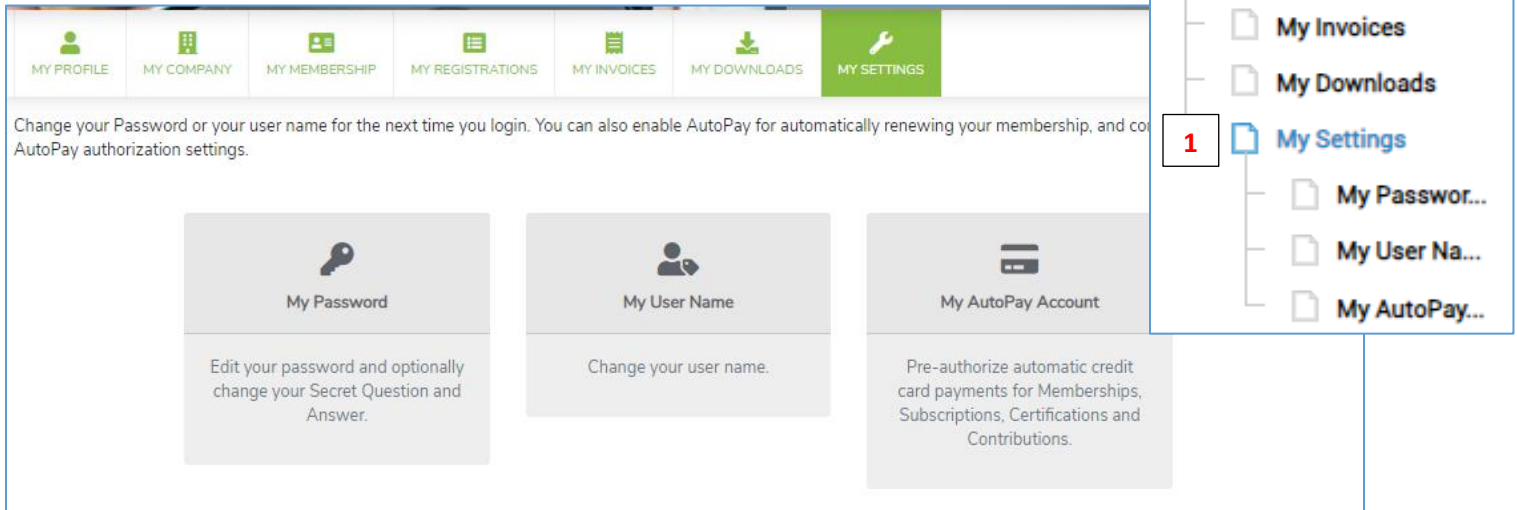
Product images path: `/Portals/0/assets/images/product`

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

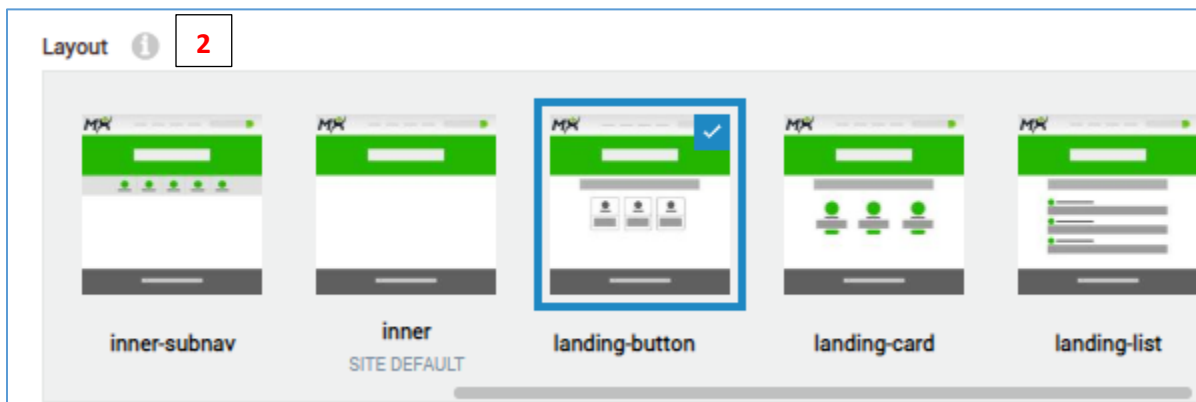
My Settings is a new page created to group account settings pages together.

- 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 PROFILE MY COMPANY MY MEMBERSHIP MY REGISTRATIONS MY INVOICES MY DOWNLOADS MY SETTINGS

< Back **1**

Configure

### Change My Password

You can change your password here. You may also create or change your personalized question and answer at this time. Please enter an answer that will be easy to remember when prompted by the form.  
A strong password should have: length = 8, numeric characters = 1, upper case characters = 1, lower case characters = 1, symbol characters = 1.

User Name

protech

Password **2** Confirm New Password

Secret Question (for Backup Password) Secret Answer

What is your favorite color?

Save Changes Cancel

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

The same observations apply to this page.

MY PROFILE MY COMPANY MY MEMBERSHIP MY REGISTRATIONS MY INVOICES MY DOWNLOADS MY SETTINGS

< Back

Configure

### Change My User Name

Feel free to change your user name here to something that will be easier to remember when you login at a future time.  
Please keep in mind that **your user name must be unique**, so do not use a common word like your first name.

Current User Name

protech

Enter a New User Name **2** Please Confirm New User Name

Before resetting your login name we need to verify that you are a real person. To confirm that you are really seeing this screen please type the characters you see in this image into the box below.


s7u42

If you can't read the characters click here to generate a new image

Save Changes Cancel

## 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.

 Configure

### Manage Credit Card for Automatic Renewals

- To simplify the annual renewal of your membership, we now provide you with this Credit Card Automatic Renewal option. Here's how it works:
  - You provide us with a credit card that you would like to use for future payments on membership renewals.
  - We authorize that credit card via PayPal and save that pre-authorization. We do not save your credit card.
  - When your renewal is due, we will automatically charge against that credit card pre-authorization for the amount due.
  - We will email you a confirmation and detailed receipt for your records.
  - We will not use this credit card pre-authorization for any other purpose than the one(s) that you approve.
  - Mark as "Allow" any recurring transaction types that you approve of for this card.
  - You may revoke this authorization at any time by removing this card from the "Manage Auto Renewals" form.

No more renewal invoices and reminders! This program keeps membership hassle-free for you.

Bill To Name \*

Payment Source Credit Card Number \*

Expiration Month 1 Expiration Year Credit Card Security Code \*

Bill To Country

Bill To Line 1 \*

Bill To City \* 1 Bill To State/Province \* Bill To Postal Code \*

Secured By Paypal

Pre-authorize this credit card for renewals of:

Membership

☐ Do not allow ☒ Allow

Subscription

☒ Do not allow ☐ Allow

Certification

☒ Do not allow ☐ Allow

Contributions

☒ Do not allow ☐ Allow

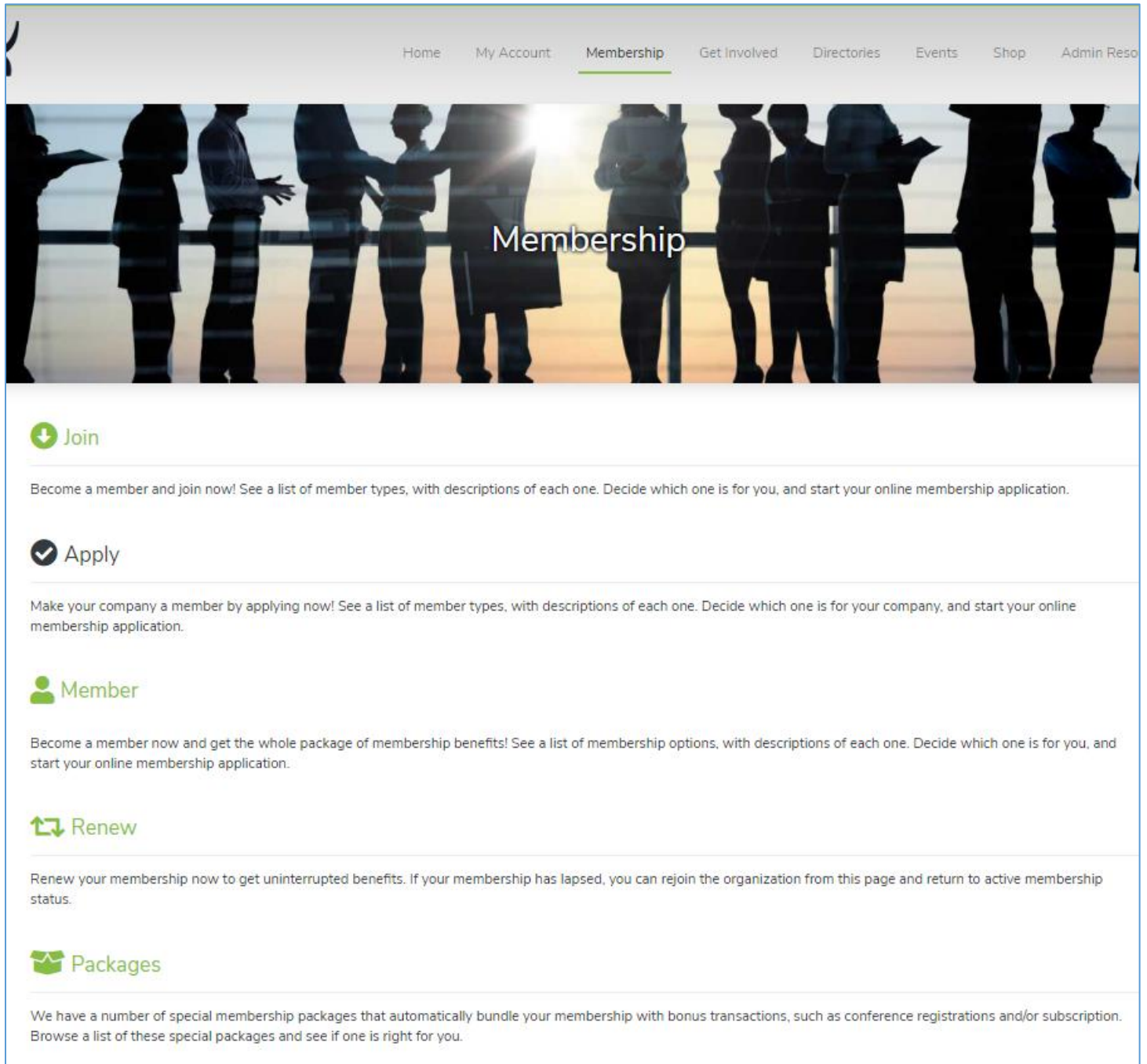
If you would like to sign-up for auto credit card renewal program, click on the "I Agree" button below.

## 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.



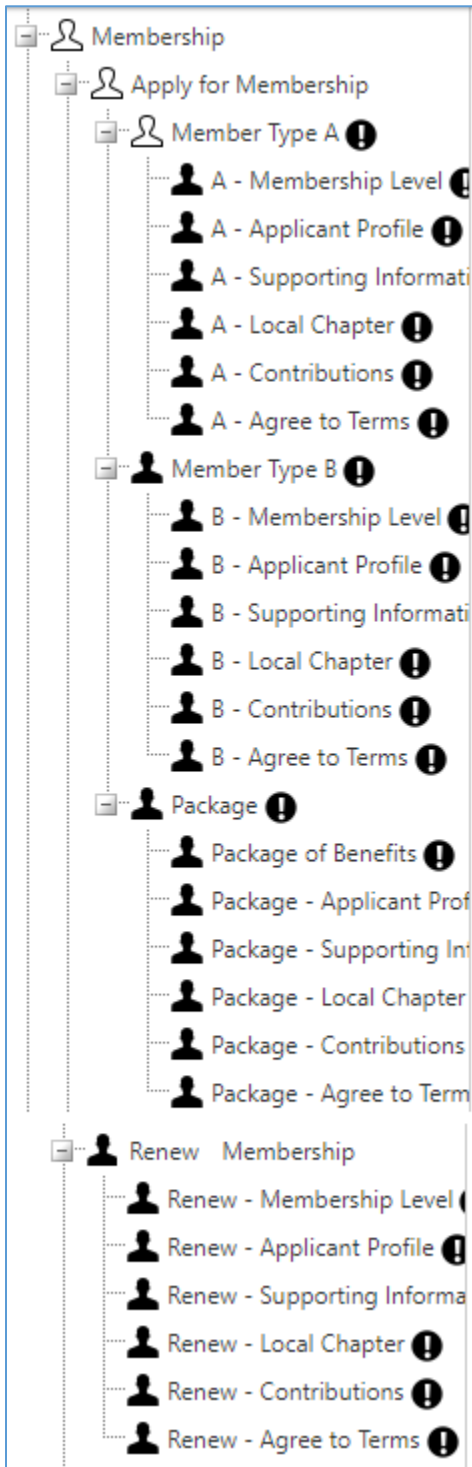
The screenshot displays the Membership landing page. At the top, a navigation bar includes links for Home, My Account, Membership (which is highlighted with a green underline), Get Involved, Directories, Events, Shop, and Admin Resources. Below the navigation bar is a large banner image showing the silhouettes of a group of people standing on a balcony or walkway, looking out at the ocean. The word "Membership" is overlaid in white text on the right side of the banner. Below the banner, there are five main sections, each with a green icon and a title:

- Join** (green downward arrow icon): "Become a member and join now! See a list of member types, with descriptions of each one. Decide which one is for you, and start your online membership application."
- Apply** (green checkmark icon): "Make your company a member by applying now! See a list of member types, with descriptions of each one. Decide which one is for your company, and start your online membership application."
- Member** (green person icon): "Become a member now and get the whole package of membership benefits! See a list of membership options, with descriptions of each one. Decide which one is for you, and start your online membership application."
- Renew** (green circular arrows icon): "Renew your membership now to get uninterrupted benefits. If your membership has lapsed, you can rejoin the organization from this page and return to active membership status."
- Packages** (green gift box icon): "We have a number of special membership packages that automatically bundle your membership with bonus transactions, such as conference registrations and/or subscription. Browse a list of these special packages and see if one is right for you."

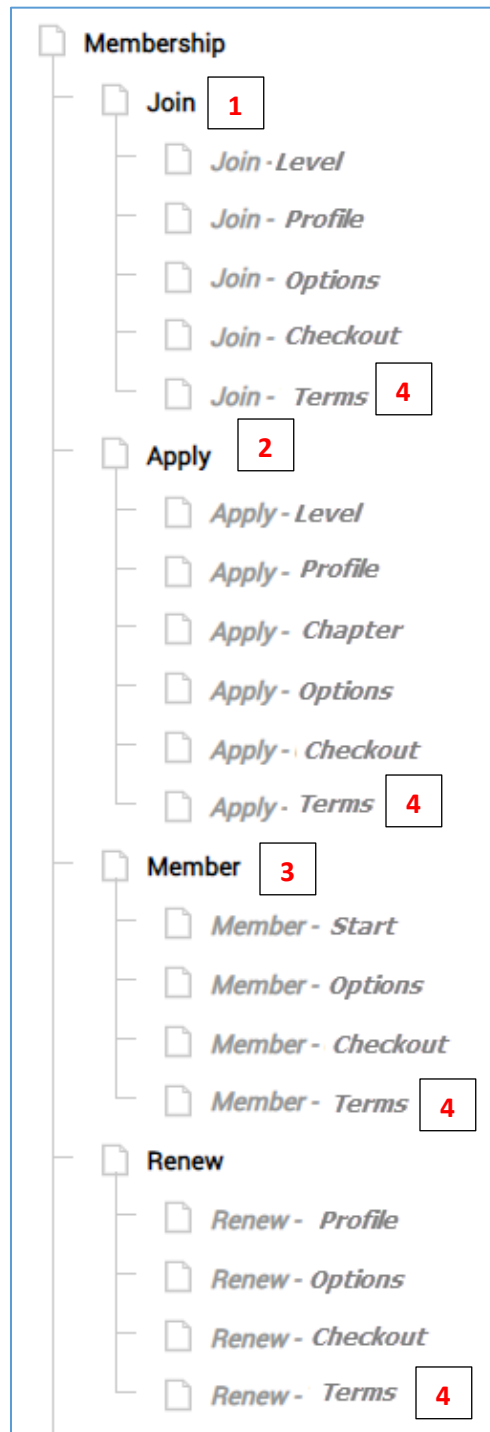
- **Paths and Page names:** In MX 5.6, we created paths for “Member Type A”, “Member type B”, “Package” and “Renew”. But those long and awkward page names were carried over into every process page name, making the naming inappropriate for all situations. The new site streamlines both the directory hierarchy 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.

This is a space for html content to provide a full description of Membership Type 1.

1a

Join Individual Member Type 1

This is a space for html content to provide a full description of Membership Type 2.

1b

Join Individual Member Type 2

Quick Join

Join Now 2

Individual Membership Types 3

4

**MX Basic Primary Benefit**  
Customer Type = CONTACT.  
Calendar, "MX No Prorate at ALL", Current Cycle, Default Start = January, COD = 1  
■ All 7 Rates are Qty based.

**MX Volume Priced Benefit**  
Customer Type = CONTACT.  
Anniversary, Default Start = Beginning of Current QUARTER, COD = 28  
■ There are 3 Rates, all with 1 Year installments

Apply

Apply

- 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.

MX Find - Configuration

Saved views: MX - Primary Benefits with Navigation - Contacts

Search columns:

Attribute Name	Prompt
statecode	Status
pa_wpublishweb	Publish To Web
pa_isprimarybenefit	Is Primary Benefit
pa_accountorcontact	Account or Contact
pa_benefitid	Benefit

- 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.

Navigation URL: /Membership/Join/Join-Level?BenefitId={0}

Images path: Product (mx-imagespath)

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

**Apply - Company Membership**

**Identify My Company**

Protech Associates, Inc. 1

Company Details Remove/Change Company

Apply Company Member Type 1 2

Apply Company Member Type 2

**Company Membership Types** 3

**MX Benefit for Installment Testing**  
Customer Type = ACCOUNT.  
Calendar, No Prorate, Current Cycle, COD = 1

- 1 Rate uses a Single Installment.
- 2 Rates use Multiple Installments (Quarterly and Monthly) 🤔

Apply

**MX Special & Characters Primary Benefit**  
Customer Type = ACCOUNT.  
Anniversary, Default Start = Beginning of NEXT month, COD = 31

- There are 2 Rates. Both are Quantity, with a single 1 year installment.

Apply

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.

Navigation URL: `/Membership/Apply/Apply-Level?BenefitId={0}`  
Images path: `Product` (mx-imagespath)

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.



Identify My Company 1  
Protech Associates, Inc.

Company Details Remove/Change Company

Member Package - Individual 2

Member Package - Company

Membership Options 3

Join Now!

MX Basic "All Prorated" Package - Test Jan Start - January Start  
Customer Type = CONTACT.  
Package Contains 4 items:

Join Now!

MX Basic "Primary Benefit Volume" – Mixed Prorating including NONE  
Customer Type = CONTACT.  
Package Contains 4 items: Primary, Chapter, Subscription with

**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.

Start Process - Configuration

Global View Mode Administration

General

Basic Form Fields

Advanced Settings

Start process button text: Member Package - Company

Meeting:

Benefit:

Package: MX Membership - Full Package

Membership Application Customer Type: Account ▼

Contribution:

Redirect Url: ~/Membership/Member/Member-Start?packageId={0}

Redirect Url Options:

**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.

MX Basic Primary Benefit

Complimentary Rate

Applicant: SuperUser, Protech T.

1

2

3a

3b

Next Step >

Select a Membership Level

- ☐ 1 Year Membership - Same Price Non and Member - Annual \$92.00
- ☒ Complimentary Rate - Annual \$0.00
- ☐ Five Year Membership - Annual \$105.00
- ☐ MX Fourth Year Rate - Annual \$150.00
- ☐ One Year Membership - Quarterly Installments - 1 Year Quarterly Installments \$110.25
- ☐ One Year Primary - Bi Monthly Installments - 1 Year Bi-Monthly Installments \$120.00
- ☐ Three Year Membership - Annual \$175.00

## 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

### Contact Demographics

Edit

1

Name			
Prefix	Dr.	Parent Customer	Protech Associates, Inc.
First Name	Protech	Business Phone	520-448-0932
Middle Name	Test	Home Phone	520-678-2009
Last Name	SuperUser	Mobile Phone	1
Suffix	Sr.	E-mail	Protech@test.com

### Company Demographics

Edit

Account Information

Account Name	Protech Associates, Inc.	Acronym	Protech
Parent Account		Primary Contact	SuperUser, Protech T.
Web Site	<a href="http://www.ProtechAssociates.com">http://www.ProtechAssociates.com</a>	Main Phone	301-206-0070
E-mail	pt@pt.org		

Configure

### Individual Category 1

Group

Fourth Friday Fanatics

Third Thursday Transients

2

Edit My Groups

Configure

### Individual Category 2

Group

Technology SIG

Web Technology Monthly Meeting

Yukon SharePoint Users Group

Edit My Groups

Configure

### Application Document 1

Enter Text

3

Upload a File

Browse...

Ok Cancel

Configure

### Application Document 2

Enter Text

Upload a File

Browse...

Ok Cancel

## 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.

Configure

Select your Primary Chapter

All members must select a primary chapter affiliation. Please select a chapter that is local to where you live, work or study.

None

Chapter Membership (\$25.00)

Chapter\_Calendar (Single Rate) - Sync = NULL (\$15.00)

MX Anniversary Chapter - Single Rate NOT synched (\$40.00)

MX Anniversary Chapter - Single Rate SYNCHED (\$20.00)

MX Basic Chapter Benefit - Single Rate - Quarterly Installments (\$20.00)

MX Basic Chapter Benefit (NEXT Cycle Prorate) (Single Rate) (\$20.00)

MX Calendar Chapter - Sync = YES (\$100.00)

MX Calendar Chapter - Sync = NO (\$100.00)

MX Chapter Membership - Calendar - Jan Start (Single Rate) (\$50.00)

MX Prorate = NO - Chapter - \$25 (\$25.00)

MX Single Rate Benefit 1 - Alabama Chapter (\$100.00)

MX Single Rate Benefit 2 - California Chapter (\$1.67)

MX Single Rate Benefit 3 - Georgia Chapter (\$100.00)

MX Single Rate Benefit 4 - Massachusetts Chapter (\$6.67)

MX Single Rate Benefit 5 - New York Chapter (\$10.00)

MX Single Rate Benefit 6 - Oklahoma Chapter (\$8.33)

Configure

Additional Membership Benefits

Benefit

Add First Class Postage

Individual Professional Membe

Add Platinum Cycle Upgrade

1

Additional Chapters

Feel free to select one or more additional chapters, in addition to the primary chapter you have already selected.

MX Chapter - Quarterly Installments (\$60.00)

MX Chapter Anniversary Rate - Begin CURRENT Month (\$20.00)

Configure

Contribute as part of your Application

Please select one or more areas that you would like to support, and enter the amount you would like to contribute.

Name	Amount
MX Monetary Contribution - The Circle of Trust	\$0
MX Monetary Contribution 7 Long Giving Names with a Contribution Name that just won't Quit!!!!!!	\$0
MX Monetary Contribution 8 - Single Short Giving Level	\$0
MX Monetary Contribution 1 - Boys and Girls Club of America	\$0
MX Monetary Contribution - The only giving amount is Other	\$0

70

- All of these web parts are fully responsive:

Protech SuperUser | Logout

## MX Basic Primary Benefit

### Complimentary Rate

Applicant: SuperUser, Protech T.

### Join Application Step 3

1
2
3
4

Previous
Next Step

### Select your Primary Chapter

All members must select a primary chapter affiliation. Please select a chapter that is local to where you live, work or study.

- ☐ None
- ☐ Chapter Membership (\$25.00)
- ☐ Chapter\_Calendar (Single Rate) - Synch = NULL (\$15.00)
- ☐ MX Anniversary Chapter - Single Rate NOT synched (\$40.00)
- ☐ MX Anniversary Chapter - Single Rate SYNCHED (\$20.00)
- ☐ MX Basic Chapter Benefit - Single Rate - Quarterly Installments (\$20.00)
- ☐ MX Basic Chapter Benefit (NEXT Cycle Prorate) (Single Rate) (\$20.00)
- ☐ MX Calendar Chapter - Sync = NO (\$100.00)
- ☐ MX Calendar Chapter - Sync = YES (\$100.00)
- ☐ MX Chapter Membership - Calendar - Jan Start (Single Rate) (\$50.00)
- ☐ MX Prorate = NO - Chapter - \$25 (\$25.00)
- ☐ MX Single Rate Benefit 1 - Alabama Chapter (\$100.00)
- ☐ MX Single Rate Benefit 2 - California Chapter (\$1.67)
- ☐ MX Single Rate Benefit 3 - Georgia Chapter (\$100.00)

### Subscriptions for Members

#### Benefit

#### 1 A Leader's Guide to Safety

In the past, the Guide to Safe Scouting has been a unit leader's guide for activities. This new version addresses other activities at the council and district levels. While some of the literature provides guidance for district and council activities, the primary focus is for unit leaders conducting unit activities. There are two versions of the Guide to Safe Scouting, an online version and a .pdf version that is easy to print. The online version is updated each quarter and provides the most current information. The printable version is updated every two years.

#### 2 Boy's Life Magazine

(Ages 7-18) The award-winning magazine for all boys. Boys' Life is dedicated to making a high-quality magazine. Includes articles on fiction, history, outdoors, non-fiction, science, sports and much more.

Company Subscription Rate - \$12.00
Individual's Subscription Rate - \$10.00
Life Member - \$0.00
Life Member - First Year - \$350.00

network. Make your PC faster. Choose effective anti-virus software. Every issue of PCWorld is packed with award-winning articles, product rankings,

### Additional Membership Benefits

#### Benefit

Add First Class Postage

Individual Professional Membership - \$150.00

Add Platinum Cycle Upgrade

Add Postage

MX Basic Secondary Benefit with Installments

MX Prorate = NO - Secondary - \$25

#### Subscription to Journal

Electronic - \$15.00

### Additional Chapters

Feel free to select one or more additional chapters, in addition to the primary chapter you have already selected.

- ☐ MX Chapter - Quarterly Installments (\$60.00)
- ☐ MX Chapter Anniversary Rate - Begin CURRENT Month (\$20.00)

### Contribute as part of your Application

Please select one or more areas that you would like to support, and enter the amount you would like to contribute.

Name	Amount
MX Monetary Contribution - The Circle of Trust	\$0
MX Monetary Contribution 7 Long Giving Names with a Contribution Name that just won't Quit!!!!!!	\$0
MX Monetary Contribution 8 - Single Short Giving Level	\$0
MX Monetary Contribution 1 - Boys and Girls Club of America	\$0
MX Monetary Contribution - The only giving amount is Other	\$0

Previous
Next Step

## 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.

**Terms and Conditions**

Click here to view our Membership Terms and Conditions. 1

☐ I agree. By checking this box, I attest that I have read the above Membership Terms and Conditions, and I agree to abide by those terms.

To submit this application please check the "I agree" checkbox above, and then press "CHECKOUT"

Submit Application - Configuration

Global View Mode Administration

General

Advanced Settings

Text

<p><a class="WysLinkDefault" href="/Membership/Join/Join-Terms">Click here to view our Membership Terms and Conditions</a>.</p>

Design HTML Preview

Agreement Checkbox

Display agreement checkbox ☒

Checkbox text:

I agree. By checking this box, I attest that I have read the above Membership Terms and Conditions, and I agree to abide by those terms.

Membership Terms and Conditions


Back


Please paste content here for the terms and conditions that you want an applicant to see and agree to.

Protech SuperUser | Logout

Configure


HomeMy AccountMembershipGet InvolvedDirectoriesEventsShopAdmin Resources





OUR CHAPTERS

View a listing of the organization's chapters. Drill into additional details of any Chapter.



OUR COMMITTEES

View a listing of the organization's Committees. Drill into additional details of any Committee.

- [-]  Get Involved
  - [-]  Our Chapters
    -  Chapter Ho...
  - [-]  Our Committe...
    -  Committee ...

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

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

# Committee Home Page


[Back](#)

[Configure](#)

## Driver Education Steering Committee

[Configure](#)

### Committee Officers and Members



**Ty Cobb**  
Account for Famous College Basketball Players  
**Chairperson**  
<http://www.tycobb.com>

**Brian Habib**  
Protech Associates, Inc.  
**Chairperson**  
[See Details](#)  
Brian Habib RT0003 - iPad Excel Testing Document  
<http://ptshare/sites/dev/WPI/MX%20Online%20Testing%20Documents/RT0003-Brian-iPad.xlsx>

**Reggie Jackson**  
Account for Famous Baseball Players  
**Chairperson**

Look for:

Use Saved View:

▼ AND

▼ Status

▼ End Date

▼ End Date

▼ End Date

▼ Closed

▼ Committee

Equals

Today

Next 7 Days

Next X Weeks

Next X Months

Equals

Equals

Active

52

60

No

The current committee

Select

▼ Committee

Select

▼ Committee Members (Committee)

▼ Member

▼ Member Status

▼ Status

Equals

Equals

Equals

The current user

Current

Active

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

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

MX Find

mxr2gresponsivetemplate.ptassoc.com/Get-Involved/Our-Chapters

te Site MXR2GQA82 MXR2G Template Site MX R5.6 UX 8 R2GO UX for MX R5.6 MX 8.2 Site classes Bootstrap Join me PUG Resource Library Ops Dept QA

Home My Account Membership Get Involved Directories E



The following is a list of our state chapters. If you are an active member, you can click on the name of a chapter below to view its description, officers, members, and meetings.

Name
Alabama State Chapter
Alaska State Chapter
Arizona State Chapter
Arkansas State Chapter
California State Chapter

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

MX Finds

Home

My Account

Membership

Get Involved

- Our Chapters
  - Chapter Ho...
- Our Committe...
- Committee ...

Directories

Events

Shop

Security

Admin Resource...

Activity Feed











Search Results


404 Error Page

DetailsPermissionsAdvanced

MODULESAPPEARANCES.E.O.MORE

Modules on this page

TITLE	MODULE	
Enter Title	HTML	 
MX - Global - Find	MX - Global - Find	 
MX - Global - Find	MX - Global - Find	 
MX - Global - Find	MX - Global - Find	 
MX - Global - Find	MX - Global - Find	 



# Chapter Home Page

[< Back](#)

Alabama State Chapter

Chapter Officers

Ted Williams

Account for Famous Baseball Players

[See Details](#)

## 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

[Configure](#)

## 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 Find - Configuration

Global

View Mode Access

Roles Configuration

Security level cutoff:

Rank	Name
1	<input checked="" type="checkbox"/> Administrators
2	<input type="checkbox"/> Authorized Staff
2	<input checked="" type="checkbox"/> Chapter Officer
2	<input type="checkbox"/> Committee Member
3	<input type="checkbox"/> Primary Contact
4	<input type="checkbox"/> Member
5	<input checked="" type="checkbox"/> Chapter Member
6	<input type="checkbox"/> Conference Registrant
6	<input type="checkbox"/> Roster Member
6	<input type="checkbox"/> Subscribers
7	<input type="checkbox"/> Non-Member
7	<input type="checkbox"/> Registered Users

Save

Cancel

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 Dir...

Members

Member Det...

Member Compa...

Company De...

Company Loca...

Company Lo...

Member Locat...

Member Loc...

Protech SuperUser | Logout

Configure

MX

HomeMy AccountMembershipGet InvolvedDirectoriesEventsShopAdmin Resources

Directories

BOARD OF DIRECTORS

Listing of active Board Members

MEMBERS

Search for Members of our organization

MEMBER COMPANIES

Search our Member Companies

COMPANY LOCATIONS

Search by Zip Code to locate company members with addresses nearest to you.

MEMBER LOCATIONS

Search by Zip Code to locate a member located nearest to you.

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# 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](#)

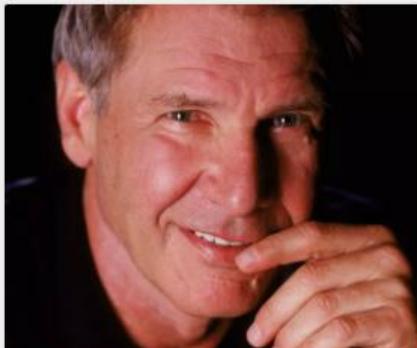


**Willie Stargell**  
Account for Famous Baseball Players  
Chairperson



**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>

 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:

Enable sorting: ☐

Hide pagination controls: ☐

Page size:

Saved views:

Search columns:

Attribute Name	Prompt	Display	To Url?	Layout Row	Col
statecode	<input type="text" value="Status"/>	<input type="text" value="Hide"/>	<input type="text" value="No"/>		
pa_winincludeindirectory	<input type="text" value="Include in Directory"/>	<input type="text" value="Hide"/>	<input type="text" value="No"/>		
pa_member	<input type="text" value="Member"/>	<input type="text" value="Hide"/>	<input type="text" value="No"/>		
lastname	<input type="text" value="Last Name"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="1"/>	<input type="text" value="Le"/>
firstname	<input type="text" value="First Name"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="1"/>	<input type="text" value="Ri"/>
address1_city	<input type="text" value="City"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="3"/>	<input type="text" value="Ri"/>
address1_stateorprovince	<input type="text" value="State/Province"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="2"/>	<input type="text" value="Ri"/>
address1_name	<input type="text" value="Address Label Name"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="3"/>	<input type="text" value="Le"/>
address1_country	<input type="text" value="Country"/>	<input type="text" value="Show"/>	<input type="text" value="No"/>	<input type="text" value="2"/>	<input type="text" value="Le"/>
address1_postalcode	<input type="text" value="ZIP/Postal Code"/>	<input type="text" value="Radius Search"/>	<input type="text" value="No"/>	<input type="text" value="4"/>	<input type="text" value="Le"/>

Result display type:

Item template:

Item layout option:




Navigation URL:  (mx-navigationurl)

Images path:  (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  
Victrola, Victor  
8484 wendell Ct.  
Topeka, ks 20383  
us

 [Locate](#)  
 030-919-9393  
 030-919-9395  
 [www.heythere.com](http://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	Col
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	Right
pa_wincludeindirectory	Include in Directory	Hide	No		
pa_accountnamesort	Organization name	Show	No	1	Bottom
lastname	Last Name	Show	No	4	Left
firstname	First Name	Show	No	4	Right

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)

mxr2gresponsivetemplate.ptassoc.com/Directories/Member-Companies/Company-Details?accountid={4839DE98-D...

PTCRMNew Template SiteMXR2GQA82MXR2G Template SiteMX R5.6 UX 8 R2GO UX for MX R5.6MX 8.2 Site classesBootstrap

Protect SuperUser | Logout

Configure

MX

HomeMy AccountMembershipGet InvolvedDirectoriesEventsShopAdmin 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

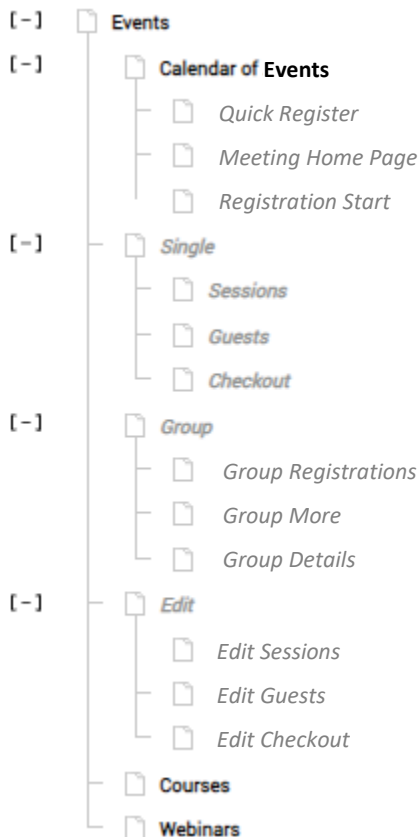
333-444-5555

rbs@ps.com

http://www.ps.abc

## Events (/Events)

### Landing Page

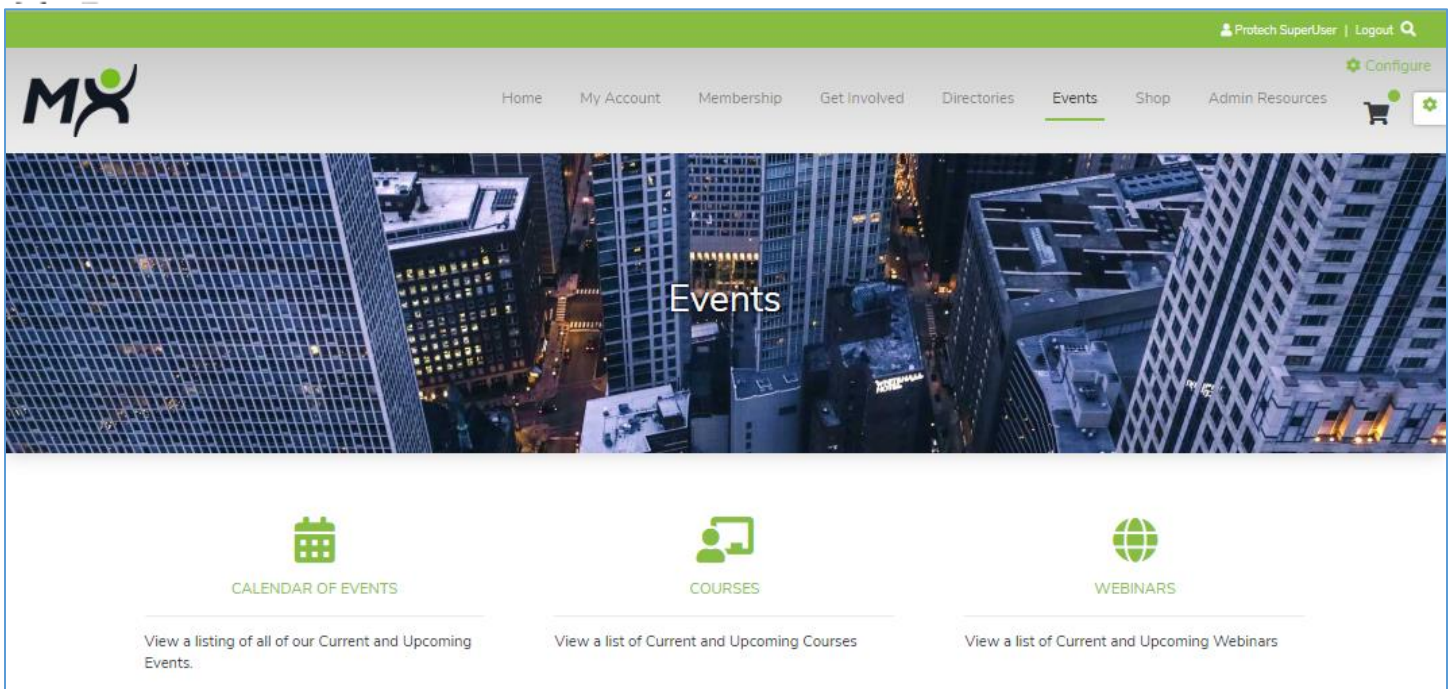


The page structure for the Events module has been significantly simplified and standardized. The page names are shorter, and there are fewer levels.

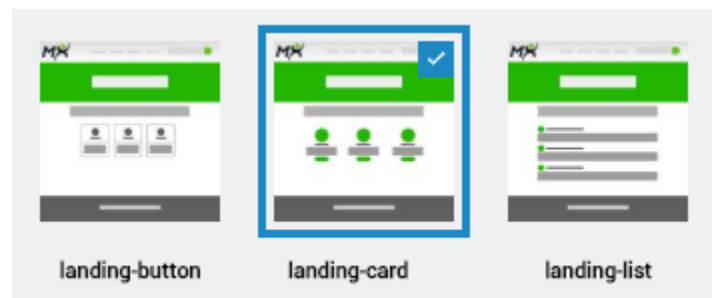
Calendar of Events navigates either to Quick Register or Meeting Home Page, so those are the sub-pages of the calendar. Registration Start is in the same top level because it is arrived at before selecting which branch of registration to go to.

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

COURSES


WEBINARS

Configure


### Individual Courses




**MX Session with course**  
January 2019  
01/01/2019 8:00 AM - 12/31/2019 8:00 AM  
Hilton Hotel Columbia  
Columbia, MD



**2019 Chesapeake Bay Spring Learning Series**  
June 2019  
06/01/2019 8:00 AM - 09/01/2019 5:00 PM  
Marco Island Marriott Beach Resort and Golf Club  
Marco Island, FL



**2019 Fun with Consumer Technology - A spring Seminar Series**  
June 2019  
06/05/2019 8:00 AM - 06/26/2019 8:30 PM  
Courtyard Silver Spring Downtown  
Silver Spring, MD



**2019 Fun Consumer Electronics Show (LONG Description)**  
July 2019  
07/10/2019 8:00 AM - 07/13/2019 8:00 AM  
Convention Center  
Washington, DC


## 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.

CALENDAR OF EVENTS

COURSES

WEBINARS

 Configure

### Search our Calendar of Events

Name


Topic

City

State

Search

Clear Filters

 Configure

### Calendar of Events

2018 True Multi-currency Meeting (US & Euro)

May 2018

05/01/2018 8:00 AM - 05/01/2019 7:00 PM

Courtyard Silver Spring Downtown

2019 LAB Max Capacity Meeting

January 2019

01/01/2019 8:00 AM - 01/02/2019 8:00 AM

Hilton Hotel Columbia

MX Session with course

January 2019

01/01/2019 8:00 AM - 12/31/2019 8:00 AM

Hilton Hotel Columbia

March 2019 Seminar

March 2019

03/01/2019 8:00 AM - 03/01/2019 4:00 PM

Hilton Hotel Columbia



## 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.

Not secure | mxr2gresponsivetemplate.ptassoc.com/Events/Calendar-Of-Events/Quick-Register?Meetingid={6D9B2D3E-9F89-E6...

PTCRMNew Template SiteMXR2GQA82MXR2G Template SiteMX R5.6 UX 8 R2GO UX for MX R5.6MX 8.2 Site classesBootstrap

Quick Register

< Back

Configure

Configure

2020 Meeting - No Sessions 2 Webinar

Mon, Oct 5, 2020 thru Sat, Oct 31, 2020

Registrant: SuperUser, Protech T.

Configure

To go or not to go? That is the question to ask yourself in deciding whether to attend a networking session. Will it be a productive opportunity or waste of time? Answer these four questions to decide if a networking event will be time well spent.

Do you like who you see?

Who is attending the event? Look online at the list of attendees. If this information is not posted on the Internet, inquire with the event organizer. Do you see listed individuals who you have heard of or organizations that inspire you? Networking is the opportunity to meet people. If you do not see people that interest you, you may want to pass on a particular opportunity.

Configure

Select Registration Level

You are preselected for: Main Registration NO Sessions \$25.00

Configure

Registrant Information

SUPER

Dr. Protech Test  
SuperUser Sr.  
Protech Associates, Inc.

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

520-448-0932  
Protech@test.com

Configure

Convention Center

555 21st Street, N.W.  
Washington, DC 20005, US

Map & Directions

Configure

Configure

Configure

Configure

Guest Registration

Add Guest

Configure

Event Sessions

Check to Select	Start Date	End Date	Session Name	Price
No records to display.				

First

Previous

Page 1

Next

Configure

< Cancel


Checkout >

87

## 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.



# Meeting Home Page

[< Back](#)


[Configure](#)

1

## Chesapeake Bay Annual Conference

Hyatt Regency Chesapeake Bay Golf Resort and Spa, Cambridge, MD [Visit Website](#)

Mon, Oct 28, 2019 thru Thu, Oct 31, 2019 [Calendar](#)

[Configure](#)

**Hyatt Regency Chesapeake Bay Golf Resort and Spa** [Visit Website](#)  
100 Heron Blvd.  
at Route 50  
Cambridge, MD 21613, US  
(410) 901-6237

[Map & Directions](#)

[Configure](#)[Register Online](#)

[Configure](#)

**The RUF Chesapeake Bay Summer Conference** is a spectacular 4 day weekend for college students on the shores of the Chesapeake Bay near Annapolis, Maryland. Done with finals? Join us and relax at the bay!


Our Conference speaker back for a second year is the **Rev. Sammy Rhodes**. Sammy is the RUF Campus Minister at the University of South Carolina, and the author of ***This is Awkward: How Life's Uncomfortable Moments open the Door to Intimacy and Connection***. Sammy and his wife Alyssahave 4 kids, Jayne Mac, Asher, Eloise, and Sadie. Sammy is a big fan of food in general, donuts in particular, listening to music, books, and watching movies and Netflix shows.

This year we are pleased to announce that **Daniel Snoke** will be leading our worship sessions and doing a concert one of the evenings. Daniel hails from Pittsburgh and is the worship director at City Reformed Presbyterian Church. You can check out Daniels bio and music here: [Danielsnoke.com](http://Danielsnoke.com)

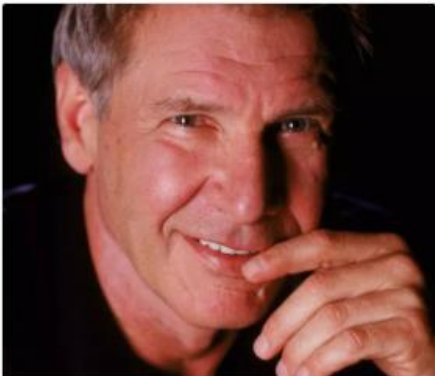


## Redesigned Speakers web part

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.


 Configure


### Speakers



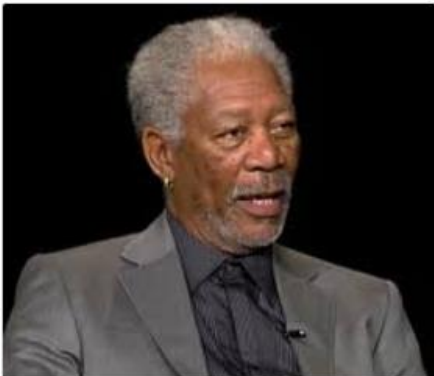
**Harrison Ford**  
Actor/Bay Enthusiast  
**Ocean Conservation Society**

Stanford, OR  
US

 <http://www.harrisonford.com>


 [View Biography](#)


Harrison is not only an actor, he's led highly successful efforts to help keep our oceans clean. Recently a resident in Maryland, he is devoting more and more of his time to helping to save the bay. The Chesapeake Bay association is really lucky to have a supporter like Harrison Ford.




**Mr. Morgan Freeman, Sr.**  
Actor/Environmentalist  
**Ocean Conservation Society**

Marina del Rey, CA  
US

 <http://www.morganfreeman.com>


 [View Biography](#)

Morgan Freeman is a multi-talented individual. Did you know that one of the way that he works his talent is in drumming up support for saving the Chesapeake Bay. Thanks to Morgan's initiative more than 22 million dollars have been raised to help save the bay. In his spare time Morgan enjoys water skiing on the Chesapeake Bay.



**Pamela Brosnan**  
Actress/Activist  
**Ocean Conservation Society**

Harmon, MD  
US

 [View Biography](#)

Pierce Brosnan is best known for his role as James Bond, but did you know that he also enjoys fishing, crabbing and boating right here in our own Chesapeake Bay.

## 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.

Not secure | mxr2gresponsivetemplate.ptassoc.com/Events/Calendar-Of-Events/Registration-Start?MeetingId=cba0eb0e-0a31-e...

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

Protect SuperUser | Logout

MX

Home My Account Membership Get Involved Directories **Events** Shop Admin Resources

Registration Start

< Back

Configure

### Register One Person or a Group

Who are you registering?

☒ Register me  
☐ Register someone else  
☐ Register an open-ended group

Start Registration Cancel

Configure

2019 Chesapeake Bay Annual Conference - 10 Registrations

2019 Chesapeake Bay Annual Conference - 5 Registrations

2019 Chesapeake Bay Individual Membership Including conference -

## 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)

The screenshot displays the 'Single Registration – Step 1' page for the 'Chesapeake Bay Annual Conference'. The page is divided into several sections:

- Header Section:** Includes a 'Configure' icon, the event title 'Chesapeake Bay Annual Conference', the dates 'Mon, Oct 28, 2019 thru Thu, Oct 31, 2019', and the registrant's name 'Registrant: Bruffey, Kevin M.'.
- Navigation Tabs:** A horizontal bar with four tabs: '1 REGISTRANT' (active), '2 SESSIONS', '3 GUESTS', and '4 CHECKOUT'.
- Buttons:** 'Previous' and 'Next Step' buttons are located at the bottom of the header section.
- Select Registration Level Section:** Includes a 'Configure' icon, the title 'Select Registration Level', and a list of registration options with radio buttons:
  - Golf ticket Only \$15.00
  - Main Registration with Banquet Table Seat \$20.00
  - Banquet Table Seat Registration Only \$25.00
  - Main Registration with Golf Ticket \$30.00
  - Main Registration \$35.00 (selected)
- Registrant Information Section:** Includes a 'Configure' icon, the title 'Registrant Information', and a card displaying the registrant's details:
  - KEVIN**
  - Kevin M. Bruffey
  - Sr. Manager
  - Protech Associates, Inc.
  - 5457 twin knolls
  - Columbia, 21045, US
  - Phone: 301-206-0070
  - Email: kmb@ptassoc.com
  - Edit icon (pencil)
- Footer Section:** Includes a 'Configure' icon, 'Previous' and 'Next Step' buttons.

## Single - Sessions (/Events/Single/Sessions)

Not secure | mxr2gresponsivetemplate.ptassoc.com/Events/Single/Sessions?Appld=505ceea8-f9e2-e811-80ed-00155da80b72

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1 REGISTRANT

2 SESSIONS

3 GUESTS

4 CHECKOUT

Configure

Previous

Next Step

Configure

### Event Sessions

Jul 01, 2019

05:00 PM

☐ Removing Invasive Species from the Chesapeake Bay NOW! \$30.00 Ends at 6:00 PM

06:00 PM

☐ Banquet Table Seat \$20.00 Ends at 10:00 PM

Jul 02, 2019

07:00 AM

☐ Golf Outing for 4 \$40.00 Ends at 3:00 PM

03:00 PM

☐ Keynote Address \$10.00 Ends at 4:00 PM

04:00 PM

☐ Underwater Grasses in the Chesapeake Bay - The Unsung Hero \$25.00 Ends at 6:00 PM

Jul 03, 2019

08:00 AM

☐ Oysters - We'll do Anything to Save them \$10.00 Ends at 10:00 AM

Oct 30, 2019

08:00 AM

☐ Free Session -- Ends at 10:00 AM


First

Previous

Page 1

Next

## Single - Guests (/Events/Single/Guests)

 Configure

1

REGISTRANT

2

SESSIONS

3

GUESTS

4

CHECKOUT

 Configure

Guest Registration \$10.00

Prefix

First Name

Last Name

Display Name

Email Address

Company Name

Protech Associates, Inc.

Country

United States

Street 1

5457 twin knolls

Street 2

Street 3

City

State/Province


ZIP/Postal Code

Columbia

21045

Save



Cancel

 Configure

### Guest Registration

Humphrey, Hugh (Hugh)


Guest Registration



Questions ?

Select Sessions ?

Add Guest

 Configure

Previous

Next Step >

Configure

1

2

3

4

REGISTRANTSESSIONSGUESTSCHECKOUT

Configure

Previous

Checkout

Configure

Registration Summary

Kevin M. Bruffey

Edit

Main Registration

Sr. Manager

Protech Associates, Inc.

5457 twin knolls

Columbia, 21045, US

Total: \$30.00

See questionsDetails

Hugh Humphrey

Guest

Edit

Guest Registration

Protech Associates, Inc.

5457 twin knolls

Columbia, 21045, US

Total: \$10.00

See questionsDetails

Total for all registrants and guests: \$40.00

Configure

Previous

Checkout



## Shop (/Shop)

### Landing Page

mxr2responsivetemplate.ptassoc.com/Shop

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MX

Home My Account Membership Get Involved Directories Events **Shop** Admin Resources

Shop

### Product Catalog

Search our catalog to see all the items for purchase in our online store. View product details and related items, and select one or more. Process your payment through our secure shopping cart.

### Donate

Give a contribution to our foundation. Browse through a list of our giving opportunities and choose the one that is right for you. Process your payment through our secure shopping cart.

### Subscriptions

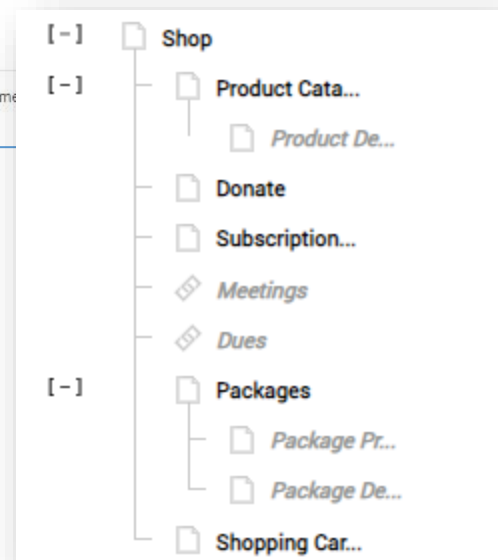
View a list of our renewable periodicals, and select one or more that are interesting to you. Process your payment through our secure shopping cart.

### Packages

Browse a listing of our pre-packaged offerings, where you can add multiple Registrations, and combine them with a Membership, or with Subscriptions and related Products. Choose to name multiple registrants now or later. Process your payment through our secure shopping cart.

### Shopping Cart

Review items that you have added to your online Shopping Cart, and use our secure gateway to process your payment.



## Product Catalog (/Shop/Product-Catalog)

Not secure | mxr2gresponsivetemplate.ptassoc.com/Shop/Product-Catalog?productname=&author=&category=100000002&downloadable=

New Template SiteMXR2GQA82MXR2G Template SiteMX R5.6 UX 8 R2GOUX for MX R5.6MX 8.2 Site classesBootstrapJoin me

PRODUCT CATALOGDONATESUBSCRIPTIONSPACKAGESSHOPPING CART

Configure

Search our Product Catalog

Name

Author Name

Category

Downloadable

☐ Yes ☐ No

Search


Clear Filters

Configure

Category 2

Configure

Product Catalog



A Freightable Taxable Sales Non-Inventory Web Product


Category 2

Member: \$50.00

Non-Member: \$50.00 (Your price)

1

Add to Cart



All Weather Jacket 10


Category 2

Member: \$100.00

Non-Member: \$100.00 (Your price)

1

Add to Cart



An International 2 Pound Non-Inventory Product

Category 2

Member: \$2.00

Non-Member: \$3.00 (Your price)

1


Add to Cart

96

Protech SuperUser | Logout


Configure

HomeMy AccountMembershipGet InvolvedDirectoriesEventsShopAdmin Resources



[← Back](#)

Configure



### A Freightable Taxable Sales Non-Inventory Web Product

Category 2

Euro Member: €50.00

Euro Non-Member: €50.00

Member: \$50.00

Non-Member: \$50.00 (Your price)

Add to Cart

Configure

## 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)

ot secure | mxr2responsivetemplate.ptassoc.com/Shop/Subscriptions

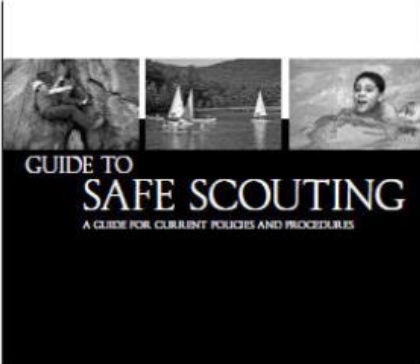
New Template Site MXR2GQA82 MXR2G Template Site MX R5.6 UX 8 R2GO UX for MX R5.6 MX 8.2 Site classes Bootstrap Join me

Shop

PRODUCT CATALOGDONATESUBSCRIPTIONSPACKAGESSHOPPING CART

Configure

Subscriptions Catalog



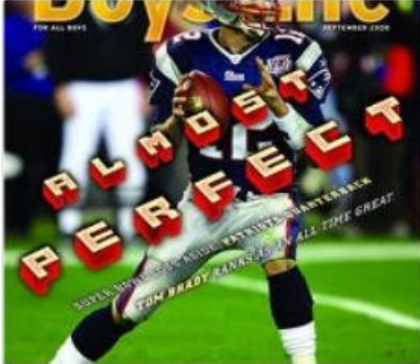
**GUIDE TO SAFE SCOUTING**  
A GUIDE FOR CURRENT POLICIES AND PROCEDURES

1 A Leader's Guide to Safety

In the past, the Guide to Safe Scouting has been a unit leader's guide for activities. This new version addresses other activities at the council and district levels. While some of the literature provides guidance for district and council activities, the primary focus is for unit leaders conducting unit activities. There are two versions of the Guide to Safe Scouting, an online version and a .pdf version that is easy to print. The online version is updated each quarter and provides the most current information. The printable version is updated every two years.

--- Select ---

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FOR ALL BOYS  
PERFECT  
TOM BRADY RANGES AS AN ALL-TIME GREAT

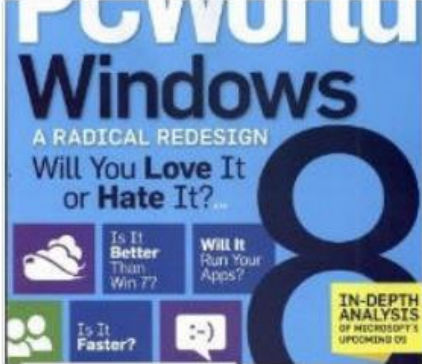
2 Boy's Life Magazine

(Ages 7-18) The award-winning magazine for all boys. Boys' Life is dedicated to making a high-quality magazine. Includes articles on fiction, history, outdoors, non-fiction, science, sports and much more.

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## Available Sponsorships (/Shop/Packages)

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


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New Template SiteMXR2GQA82MXR2G Template SiteMX R5.6 UX 8 R2GOUX for MX R5.6MX 8.2 Site classesBootstrapJoin n

PRODUCT CATALOGDONATESUBSCRIPTIONSPACKAGESSHOPPING CART

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Available Sponsorships



**2019 Chesapeake Bay Annual Conference - Sponsorship**

Select Sponsorship Level:

☒ Bronze (\$200.00 - \$399.99)  
The Bronze sponsorship entitles the company to 4 registrations for the Annual Conference. [Pretty Cool, eh?](#)


☐ Silver (\$400.00 - \$599.99)  
The Silver sponsorship entitles the company to a table for 8 at the banquet and full conference registration for 2 of the attendees.

☐ Gold (\$600.00 - \$799.99)  
The Gold sponsorship entitles the company to a table for 10 at the banquet and full conference registration for each attendee.

☐ Platinum (\$800.00 - \$999.99)  
The Platinum sponsorship entitles the company to 2 tables for 10 at the banquet and full conference registration for each attendee.

Amount:

Select this Sponsorship



**TBOT Annual Conference Banquet Tables for 10**

Select Sponsorship Level:

☒ 1 Table for 10 (\$1200.00 - \$1200.00)

☐ 2 Tables for 10 (\$2400.00 - \$2400.00)

☐ 3 Tables for 10 (\$3600.00 - \$3600.00)

Amount:

Select this Sponsorship

**TBOT Annual Conference Banquet Tables for 8**

Select Sponsorship Level:

☒ 1 Table for 8 (\$1000.00 - \$1000.00)

☐ 2 Tables for 8 (\$2000.00 - \$2000.00)

☐ 3 Tables for 8 (\$3000.00 - \$3000.00)

Amount:

Select this Sponsorship

100



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

Not secure | mxr2gresponsivetemplate.ptassoc.com/Shop/Packages/Package-Processing/PackageId/241d981f-9a8a-e811-80e2-00155da80b72/LevelAmo...

M New Template Site MXR2GQA82 MXR2G Template Site MX R5.6 UX 8 R2GO UX for MX R5.6 MX 8.2 Site classes Bootstrap Join me

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. x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

\*\*\*\* Unassigned \*\*\*\* x

+ Add

Save All - Next Step

101

## 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 the Sponsorship 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

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✖️ Assign Registrant

\*\*\*\* Unassigned \*\*\*\*


✖️ Assign Registrant

\*\*\*\* Unassigned \*\*\*\*

✖️ Assign Registrant

Checkout

## Shopping Cart (/Shop/Shopping-Cart)



# Shopping Cart

[Configure](#)

Please scroll down to the "Next" button to proceed with the checkout process. If you do not need to select a billing address, shipping address or shipping method, you can click "Express Checkout" to go directly to the payment form.

Test Mode

SHOPPING CART



ADDRESS

DELIVERY


PAYMENT


CONFIRMATION

You currently have 1 items in your cart [Clear Cart](#)

Product	Subtotal	
<b>TBOT Annual Conference Banquet</b> Tables for 10 <a href="#">see details</a>	\$1200.00	 
<b>Total</b>	<b>\$1200.00</b>	

Enter your promotion code and/or gift card and click the "gift" icon to the right of your entry. If valid, the discount for a promo code will be calculated for each cart item where it is applicable. A Gift Card is applied to the order total, as a form of payment. You can enter multiple promo codes/gift cards, but only one promo code can be applied to a particular purchase.


Enter Promo Code: 


Enter Gift Card: 


[< Home](#)


[Next >](#)

### Add to your Cart

  
Product Catalog

  
Calendar of Events

  
Donate

  
Subscriptions

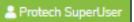
### Order Summary


1 Item selected

<b>Purchase Subtotal</b>	<b>\$1200.00</b>
Sales Tax	\$0.00
<b>Order Total</b>	<b>\$1200.00</b>

**Billing Address** [Change >](#)  
Dr. Protech Test SuperUser, Sr.  
21600 North Main Street  
Suite 450  
Columbia, MD 21045  
US

[Express Checkout](#)


Protech SuperUser



HomeMy AccountMembershipGet InvolvedDirectoriesEventsShopAdmin Resources


# Admin Resources

This section of the site is a repository of MX resources accessible to ADMINISTRATORS ONLY




### Styling Guide

The site documentation in these pages provides an in-depth guide to the Bootstrap classes, layout variants, and templates used in the design of this website. Please feel free to consult this guide for styling reference, and copy the sample code as needed to create custom variations based on the samples provided.




### Additional Web Parts

Visible only to Administrators! On a single page, browse a catalog of MX R2GO web parts that are not deployed in the main site structure. This page is very useful for reviewing MX Online web parts to see what additional functionality is available and for exploring different configuration options. Note that some web parts require a URL parameter to function.




### Samples

Visible to Administrators only. A gallery of common examples of pre-configured web parts (mostly MX Finds) If you like what you see just use the DNN "Move to Page" feature under Page Settings -> Advanced Settings to insert a new instance of the web part wherever you would like.




### Navigation Panels

Visible to Administrators only. Navigation Panels are used to provide image-rich shortcuts to other pages, as used in the dashboard on our Home page. Just add records into the table with a title and an image, identify the page where it should be displayed, and enter the url of the page to navigate to. Add an MX Find to the display page to display all Navigation Panels for that page, and you have an attractive dashboard instantly for any purpose.



### Internal Help

Visible to Administrators only! See a listing of data driven PDF documents identifying different page and web part components in the MX R2GO product.



### Sandbox

Visible to Administrators only! Unpublished testing pages are setup in a staging area where site administrators and testers can test out different scenarios.

← → ↻ 🏠 ⓘ Not secure | mxui82.ptassoc.com/Design/Documentation/ ☆ ⓘ

📱 Apps 🇺🇸 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 🟢 Join me

Documentation

MXR2G Site

Structure

Layouts

Variants

Best Practices

HTML Components

Buttons

Forms

Texts

Alerts

Tables

MX Components

Structure


Navs


Templates

Icons

MXR2G Site / Structure

Primary Nav

 Home Shop Profile

 Login

Home Header

Welcome

Our member portal has a lot to offer

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

STYLING GUIDE

ADDITIONAL WEB PARTS

SAMPLES

NAVIGATION PANELS

INTERNAL HELP

SANDBOX

Configure

CONTACT - My Certification Renewals

Certification	Expires On	Status
No records to display.		

Configure

CONTACT - My Education History

Course	Course Date	Credits Earned	Status
No records to display.			

Configure

CUSTOMER - Image

Please use only these file types for uploading your profile image:

1. bmp

2. jpeg

3. jpg

4. gif

5. png



## Sample Solutions (/Admin-Resources/Samples)

STYLING GUIDE

ADDITIONAL WEB PARTS

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INTERNAL HELP

SANDBOX

Visible to Administrators only. A gallery of common examples of pre-configured web parts (mostly MX Finds) If you like what you see just use the DNN "Move to Page" feature under Page Settings -> Advanced Settings to insert a new instance of the web part wherever you would like.

Buyers Guide

Vendor Details

Our Board

Our Staff

Sign Up for Activities

Search

Configure

### My Interests and Mailing Lists

Category	Interest Area
Mid Atlantic	Maryland Office
Special Interest Group	Technology SIG
Special Interest Group	Web Technology Monthly Meeting
Special Interest Group	Yukon SharePoint Users Group
Volunteering Opportunity	Fourth Friday Fanatics
Volunteering Opportunity	Third Thursday Transients
Web Discussion Group	Web Discussion Group 4

Edit My Interests

Configure

### MX Find


Search again by clicking this bar


First Name


Last Name


Search


Clear Filters


STYLING GUIDE


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Configure

## MX Online R2GO Documentation

**DNN Pages and MX Configuration Settings**

1. R2B1-DNN Pages Similar to Page Management Structure
2. R2B2-DNN Pages with URLs
3. R2L2-Pages Referenced in URLs
4. R2L3-URLs By Configuration Setting Name

**Advanced Find / MX Find Details**

1. R2E5-Advanced Find Summary
2. R2E8-Advanced Find by Result Type
3. R2E6-Advanced Find by Name Grouped

**Main DNN Report...**

1. R2Q1-Everything You Ever Wanted to Know About MX R2GO

## Sandbox (/Admin-Resources/Sandbox)

Not secure | mxr2gresponsivetemplate.ptassoc.com/Admin-Resources/Sandbox

New 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

STYLING GUIDE

ADDITIONAL WEB PARTS

SAMPLES

NAVIGATION PANELS

INTERNAL HELP

SANDBOX

Visible to Administrators only! Unpublished testing pages are setup in a staging area where site administrators and testers can test out different scenarios.

QA1

QA2

QA3

QA4

QA5

Configure

Impersonating Another User for Testing

As an admin user, you have the ability to impersonate another user in order to test the behavior of web parts for different web roles.

Click the **Admin** link at the top right of the screen, and the click on the "Impersonate" tab. Then enter the **USERNAME** of the contact you want to test with, and **check the box below** it in order to retain your access to configuration settings and the Admin link.

When you have finished testing with that user, access the Admin - Impersonate function again to end the impersonation and return to your own admin identity, or impersonate another contact.

Protech SuperUser | Logout

Home My Account Membership Get Involved Directories Events Shop Admin Resources

Configure

Administration

Configuration Event Viewer Impersonation

Current Impersonating Session

Impersonate Account

Username: mgrady

Force admin role? ☐

Impersonate

SuperUser, Protech T.  
Protech Associates, Inc.

Configure

Contact Web Roles for the Current User

Non-Member  
Web Reserved Role ID: 1  
Status: Active  
Created On: 10/08/2012 10:17 AM

Administrators  
Web Reserved Role ID: 10  
Status: Active  
Created On: 09/16/2016 4:33 PM

Primary Contact  
Web Reserved Role ID: 3  
Status: Active  
Created On: 03/29/2018 7:07 PM

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