MX Online Release Notes 8.4.0

December 2, 2019

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ENHANCEMENTS

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<tr><td>1</td><td>NEW Customer – Invoices:

View-only, filterable web part for searching and viewing all user invoices.

CAS-92413-W2S5M4</td><td>Given that the MX - Shopping Cart Invoices web part is filtered for payments only, and there is limited search functionality, an additional web part is needed to serve the function of allowing users to search and view all types of invoices related to them. A new web part, Customer – My Invoices, has been created to provide the user with richer set of search options for viewing, but not Paying invoices. Since the user will never apply payment to an invoice in this web part it is safe to return a much wider range of Invoice results without regard to whether or not an invoice is valid for applying payment.

The new web part consists of two parts:
A search form, similar to MX Find, where the user can enter filter criteria.
An Invoices grid, using the same layout as in the Shopping Cart - Invoices web part, but removing all of the e-commerce related functionality.
The Customer – My Invoices web part can be configured for either Contacts or Accounts. Available search options vary based on the customer assignment in the Global Tab of the web part configuration form. When configured for Contacts, the following search features are always available:
Invoice Name or Number
Radio button group providing 3 options:
Show Paid Invoices
Show Unpaid Invoices
Both Invoice Types (Default)
When configured for Accounts the search form displays all search functionality identified above plus the following options:
Customer Name (uses a ‘Contains’ search)
Radio button group providing 3 options:
Show My Invoices
Show My Company’s Invoices
Both Invoice Types (Default)
There are two search controls that can be displayed or hidden. These controls are available when configured for either Contacts or Accounts. By default, both of these controls are displayed:
Date Range Filter
Filter by Module(s) - (Auto-fill Control allowing multiple selections)
As is the case in the Shopping Cart – Invoices web part, each invoice contains a link for displaying details about the Invoice.

Because this new web part displays invoices from all currencies, when the results grid contains invoices in multiple currencies, the Total Amount values in the Grid footer will be clearly delineated by each Currency.</td></tr>
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Functional Enhancements – Customer Modules		
Item	**Module/Web Part**	**Description**
2	**Customer – Groups:** Options to show in Edit mode only, save with Navigation bar, and enable limit on number of selections allowed. ***CAS-93189-P1Z5T7***	Originally, the Customer - Groups web part always opened in View Mode with an option to open the Edit form. It was not until the user clicked the Edit button that a checkbox list of available Rosters was displayed allowing the user to select one or more Rosters, which would then be displayed in View Mode. However, View mode is not appropriate if the user has not yet selected any groups, because the view will be empty. Changes have been made in the Customer – Groups web part so that an Admin user can now define the default view using alternatives to the previously hardcoded 'View and Edit' display mode. Following is a list of all available display modes: 1. View: Shows only Rosters that the user has selected without the ability to change roster selections. 2. View and Edit: This is the original Display Mode. The user must click 'Edit' to see the full list of available roster options. 3. Edit: The web part can be permanently displayed in the Edit form. The user can check and uncheck roster options without first going from View mode to Edit mode, and can then click SAVE or CANCEL to capture the change. The Edit form does not close, but remains editable, just as with the MX Form and Notes Detail web parts. 4. Edit (Navigation Bar): The web part does not display its own SAVE and Cancel buttons. Instead, changes are captured when the user clicks the Next button in the Navigation Bar web part. This makes it easier to incorporate this web part into a Membership Application process, where a single click of the Navigation Bar can Save multiple instances of this web part, each configured for a different Roster Group. 5. Edit and View (Default Mode): The web part displays an Edit form, but closes to View the user's selections after they click Save or Cancel. Basically, it works the same way the current View and Edit mode works, but in reverse. Note that this Edit-First mode replaces View and Edit as the new default mode upon deploying this web part. Two other enhancements include: 1. A new Edit Mode configuration setting allows the Administrator to identify the maximum number of Rosters that a user can select in that web part instance. This new setting adds validation logic to the Groups web part that prevents the user from saving if they select more Rosters than the setting permits. This is most applicable to associations that allow their members to select only a limited set of membership sections or practice groups. 2. The Roster Group column is now hidden if the web part is configured to show only one roster group.

Functional Enhancements – Fundraising		
Item	**Module/Web Part**	**Description**
3	**Fundraising – Contribution Form, Contributions:** Process Pledges from the Contributions Form, charging $0 in the cart. ***CAS-57182-Y1R3K0***	It is now possible to add one or more monetary pledges to the shopping Cart using the two MX Fundraising web parts; Contributions Form and Contributions Grid. The scope of this case is two-fold: 1) the ability to display a Contribution whose contribution type is defined in UX Online as "Monetary Pledge" in the two Fundraising web parts; 2) the capacity to process a pledge transaction as a $0 product through the Shopping Cart. In doing this MX treats a pledge like other transactions that cannot be charged in full right away, such as waitlisted registrations and back-ordered products. The invoice detail item is created with the full pledged amount as the extended amount, but the pledge amount is not added to the cart totals. So if the pledge is the only item in the cart, the cart is processed without requesting any form of payment - it is a $0 cart. If the pledge is included with other cart items, the amount to be paid is only the amount of the other items. On the other hand, if the fundraising transaction is a monetary contribution, the full amount is added to the cart totals. Because the full amount of the pledge is recorded as the amount charged in the invoice, it can be processed as a receivable using AutoPay in UX Online or paid via the Shopping Cart Invoices web part in MX Online. The Membership Application – Contributions Grid web part still only processes Monetary Contributions, and not Monetary Pledges. Pledges are excluded in this web part because the unpaid pledge amount would leave an outstanding balance on the Membership Invoice, preventing the customer's Price Level from updating to Member pricing.

Functional Enhancements – MX Find/Form		
Item	**Module/Web Part**	**Description**
4	**Global - MX Find/MX Form:** Populate Country and State Picklist Metadata by country and state records, not MX StringMap. ***CAS-69942-K4Y5B8***	MX Online web parts need to display a dropdown list of countries/states when querying or updating the address country and state fields, although they are stored as plain text fields in UX Online. Previously, MX Online used the MX StringMap entity to populate the dropdown list in MX Form and MX Find only, while other web parts, such as Basic Information, Addresses and Shopping Cart, used the Country and State entities. This discrepancy occasionally caused data problems because sometimes State or Country values existed in one table and not the other. When this occurred, the web part where the address had been added used a value that was considered invalid by the web part where the address was now being read, and so the actual value was removed. Now, all MX Online web parts that expose Address fields have consistent logic and data source, so all web parts use a dropdown that is populated by the same records in the country and state entities. MX StringMap records are no longer used for state and country fields in any MX web parts. Because the State and Country StringMap records are obsolete, clients upgrading to MX 8.4.0 should write an Advanced Find on the MX StringMap Entity filtering on records where Attribute Name Begins with 'Address*' or Entity Name = 'pa_location' or 'CustomerAddress'. Export these records to Excel for backup purposes, then delete the results. Note that the total record count after deleting records in the MX StringMap entity, should be reduced from about 1,957 to about 20 records, all of which will reference either Prefix or Suffix. If your organization has made changes in the MX StringMap State and Country records, please be sure to review the records in the OOTB Country and State entities and update them as needed so that they are correct for your purposes. If your organization utilizes multi-currency functionality, the Default Price Level and Currency fields will now be identified in the Country entity records, instead of in the MX StringMap Address_Country records. Protech will update the Country records during the upgrade process using new fields created for that multi-currency purpose. Note: in UX 365 the contact and account entities do not display individual state and country fields in MX form, and only display the composite address. As a result, MX Form cannot be used for updating Addresses in MX 365. Use the Addresses web part instead.

Functional Enhancements – MX Find/Form		
Item	**Module/Web Part**	**Description**
5	**Global - MX Form:** Enhance layout options to display form fields with up to six columns in a single row. ***CAS-81264-R6F0Z8***	Changes have been made to the layout of MX Form, allowing an administrator to configure the sequence of each form field for a single row to display in multiple columns, without being limited to just two columns (left-right-both). The new sequence number settings will allow an Admin user to define the column display order in each row from 1 to 6. There is no need to maintain a strict columnar layout. Each row can be configured in fieldsets that take a different number of columns, depending on the grouping that makes sense, just as the Address form uses up to 5 fields across the same row for name components, and 3 for City, State and Postal code. Another example of where this might be used is to display multiple checkboxes on a single row. Note that you need to consider the size of the web part container as context for configuring multiple columns. In a narrow space it may not be practical to break the row into 5 or 6 columns. • <u>Field width Calculation</u>: The non-columnar layout divides the total form width equally by the number of columns defined for that row, so each field in the row has the same width. If a row contains just 1 field, the width will expand to 100%. If a row contains 2 fields, each field will use a width of 50%. If there are 5 fields in the row, each field in the row will use a width of 20%. This is all done automatically by the MX Form web part. • <u>View mode</u> is now the same UI as Edit mode, but with all fields disabled, and an Edit button. This is no longer a different mode as far as Permissions are concerned – the same web part permissions apply to both View and Edit mode. So, in instances of MX Form where the Display Mode = Edit or Edit (Navigation Bar), be sure to change the web part permissions in the View tab to limit access to only users who have rights to use the fully editable mode. • <u>Validation Changes</u>: Previously, if an Admin user configured more than one field with the same column and row, validation logic in the Configuration form would stop the user from saving any setting and display a validation error message that forced the user to fix conflicting sequence instructions. Now, the Configuration Form automatically handles the conflict. MX Form displays the first field in the list on the furthest left, and continues positioning items directly to the right, in the order that they are listed in the Configuration Form. This automatic adjustment allows the Admin user to save the configuration without triggering the validation message.

Functional Enhancements – Meetings Modules		
Item	**Module/Web Part**	**Description**
6	**Meeting Information, Calendar:** Display and Export to iCalendar with location time zone accompanying start and end times. **CAS-66679-R1L6V0**	A new Timezone field has been added to the Meeting Setup form to identify the Timezone in which the meeting occurs, so MX Online can now display this Timezone below the Start and End Dates. This makes it clear to the user, when viewing meeting information online, whether or not any Timezone adjustment is needed when they wish to participate. In addition, MX Online now exports this Timezone field to Outlook when the user clicks 'Export to iCalendar' from the Event – Information web part. Any conversion needed between the user's Timezone and the Meeting Timezone is handled automatically by Outlook. For instance, in the case of Webinars, which can be attended outside the location where the meeting occurs, Outlook would be able to convert the time to the user's time zone, so that they could dial into the meeting at the Outlook Start Time and in any time-zone, and they would be right on time for the meeting! On the other hand, if a registrant travelled to attend the meeting in person, they would need to see the actual time of the Meeting in the Time Zone in which the meeting occurs, without seeing the time converted to their normal time zone. As part of this enhancement, MX Online corrected some issues where meeting and session times were incorrectly converted between time zones during registration. Meeting related Date/Time fields are now defined as Time zone Independent in UX Online so MX Online does not compare database vs. website time zones when displaying times online. Since some organizations prefer to keep their Date/Time fields in the default "User Local' behavior that they used before, MX Online now evaluates a new UX App Configuration setting name 'PATimeZoneIndependent'. If the setting is set to false, then MX Online applies the previous Date/Time logic as it was before this enhancement. Once this setup field is populated in UX Online, the Time Zone will be displayed in the following MX Online web parts/locations: 1. Global - MX Form - Template – Calendar of Events 2. Event – Meeting Information web part 3. Meeting Registration - Registration Header web part 4. Outlook Calendar item (when 'Exported to iCalendar')

Functional Enhancements – Meetings Modules		
Item	**Module/Web Part**	**Description**
7	**Meeting Registration – Registration Questions:** MX Online validates Registration Questions based on new UX Online UDF 'Required' bit field. ***CAS-92594-J4X4Y8***	New bit fields have been added to the UX Online Meeting Setup UDF form section allowing a UX Online user to flag any UDF question field as required when a user Registers for a meeting in MX Online. The Registration Questions web part now displays a red asterisk next to the question prompt in MX Online and enforces required field validation if Required = True for that UDF question. If the user has provided no answer to a question that has been flagged as required, a validation error message will be displayed forcing the user to provide a value in that field in order to proceed with the registration. MX Online enforces required fields even if the user is not viewing the Registration Questions web part. In a group registration, editing Badge and Questions is normally optional. However, if any UDF question fields are configured as required, the user will not be allowed to checkout any group registration without providing answers to those required questions. Note that if a UDF bit field is flagged in UX Online as required, it will need to have a yes value, because UX does not distinguish between a NULL bit field and an unchecked bit field. So do not use the required flag for bit field questions where NO is a valid response. When currency fields are marked as required, the validation logic not only ensures that the field has a value, but also that it has a numeric value.

Functional Enhancements – Membership		
Item	**Module/Web Part**	**Description**
8	**NEW** **Membership – Benefit Recipients:** New web part to assign Contacts as Benefit Recipients in an Account Membership. ***CAS-51211-N6H9V2***	The MX Account – Benefit Recipients web part is a new web part used to allow the Primary Contact of a Member Company to assign specific Contacts in that company to receive member benefits. This is important functionality for organizations where the Parent Account Price Level does not automatically flow down to all of their Contacts. There are two main components: 1. Identify Benefit Recipients: select Benefit Recipients from a list of Company Contacts and view existing Benefit Recipients; 2. Add Benefit Recipients: Purchase a specified quantity of the Additional Benefit Recipient Product, to increase the number of Benefit Recipients allotted to this membership. When an Account Membership is Created, UX Online automatically creates a certain number of unassigned Benefit Recipient records attached to that Primary Renewal Billing record. The number of Benefit Recipients created = the value in the Number of Benefit Recipients field on the Rate Setup form. The Account - Benefit Recipients web part is designed to assign contacts to these blank Benefit Recipient records. Accessing the Benefit Recipients web part The Benefit Recipients web part should be deployed on a page of its own. However, it will be visible only when a specific Renewal Billing record is referenced in the page URL. This reference is passed to the page automatically from the Shopping Cart or Membership web part as follows: • A hyperlink to this page is displayed automatically in the Shopping Cart Confirmation page upon purchasing an Account Membership, with reference to the newly created Renewal Billing record. This link streamlines the transition from Purchasing an Account Membership to naming the Benefit Recipients for that membership. • A new button called 'Manage our Members' has been added to the Customer - Membership web part. This button is automatically displayed when the web part is configured for Account Memberships. The Membership web part should be included on the same page with the Benefit Recipients web part. In this way, when the user navigates directly to this page and selects a particular Renewal Billing, the Benefit Recipients web part will immediately be made visible.

Functional Enhancements – Membership		
Item	**Module/Web Part**	**Description**
		Using the Benefit Recipients web part The Benefit Recipients web part displays a list of Company Contacts, so that existing Contacts can be selected to receive member benefits via checkbox. Alternatively, a Contact can be selected by using the Auto-fill lookup to search by name or add a new contact. Only Non-Members of the Parent Account are exposed for selection, using either method. The Primary Contact can return at any time to assign additional Benefit Recipients. The Benefit Recipients web part tracks the number of Contacts assigned vs. the number of Benefit Recipient slots that were allocated to this membership rate, and displays both counts. If there are no blank Benefit Recipient records available, the user is given the opportunity to purchase any quantity of new Benefit Recipient slots, which can then be assigned to selected contacts after payment has been applied. Note that the option for adding new Benefit recipient slots is only exposed if there is a value for 'Benefit Recipient Product' in the Rate Setup form. Interaction with UX Online When a Contact is selected as a Benefit Recipient in MX Online, the Contact ID of the selected recipient is inserted into an existing 'placeholder' Benefit Recipient record and MX Online updates the recipient's 'Use Parent Price Level' to YES for that Contact. Contacts in the member company who are not selected retain the default value of No for 'Use Parent Price Level'. If a Contact is later de-selected as a Benefit Recipient in MX Online, their name is removed from the Benefit Recipient record, returning it to blank so that a different Contact can then be selected as a Benefit Recipient. The 'Use Parent Price Level' field of the de-selected contact is returned to NO and the Use Parent Price Level' field of the newly selected contact is set to YES. Processing the Shopping Cart with the purchase of additional Benefit Recipients will automatically create the requisite number of new Benefit Recipient placeholder records for the Primary Membership. A hyperlink on the Purchase Confirmation Page allows the user to return directly to the page with the Benefit Recipient web part where they can assign contacts to the new Benefit Recipient records.

Functional Enhancements – Security		
Item	**Module/Web Part**	**Description**
9	**Security – Change Username:** When Username = emailaddress1, E-mail is Read Only and can only be changed via the Change My Username web part. **CAS-76688-P2S5L4**	If a client configures their system so that Username is automatically updated to equal E-mail address, the two fields function really as one and the same. If a person changes their E-mail, their Username is automatically changed as well. This is fine if the change is made in UX Online, but it creates an issue in MX Online if the user makes the change while already signed in, because their current session is based on the Username that is no longer valid. Now if Username is configured as E-mail, MX Online ensures that both E-mail and Username are always changed together. MX Online displays Emailaddress1 as Read Only in the Contact Basic Information and Shopping Cart web parts, so primary E-mail cannot be changed as if it were just another profile field. Instead, the E-mail address is changed only as part of the Security – Change My Username web part. This special treatment of E-mail and Username is needed to ensure that each user's Username remains unique, and because Username is shared in the integration with other website security systems, including the host CMS site and other sites integrated via SSO. The Change My Username web part is uniquely positioned to maintain the user session and integration with the CMS, because it automatically refreshes Username in both the database and the host site's User table. MX Online evaluates the Application Parameter **"**PAWebLogin.AutomaticallyEquals**"** setting that defines how Username is automatically populated in UX Online. If Username is not automatically synchronized with E-mail, MX Online continues to allow E-mail address to be updated online, as was previously the case. * If MX Online is configured as Username same as E-mail, do not expose E-mail address for editing in the MX Form web part. MX Form does not contain validation to protect a user from changing the value for their own E-mail and breaking the synchronization with the CMS. E-mail can be changed for other contacts, just not the signed in user.

Functional Enhancements – Shopping Cart		
Item	**Module/Web Part**	**Description**
10	**Shopping Cart** Allow an anonymous user to add a purchase to the cart and sign out in Guest mode. ***CAS-58400-W8S8K1***	The MX Shopping Cart web part now supports adding one-click transactions to a cart without requiring the user to sign into the site. Additionally, the user can 'Check out as Guest' without having to enter Username and Password. The following web parts support the new Anonymous Add to Cart feature, and no longer generate a Sign in Popup when an unidentified user clicks 'Add to Cart': 1. Product Catalog 2. Contributions Grid 3. Contributions Form 4. Start Registration - Simple Meetings only 5. Join Now 6. Subscriptions Note that web parts that start a multi-step process, such as Membership Application and Meeting Registration, do not support Anonymous Add to Cart, because identifying the applicant or registrant is an essential first step in the process. The user can continue to add as many one click items to the cart as desired. The Shopping Cart looks the same in Anonymous Mode as it does for a signed in user except that no Address information is displayed and a new Subform in the cart named 'Identification' is added as the second step in the cart. On the Identification step, the user has the following choices: Continue as Guest, Sign in with existing Credentials, or Create a New User Account. If Continue as Guest is selected, the user only needs to provide First Name, Last Name, e-mail and one Address, in a single form. Data entered into this form updates the MX Shopping Cart AND creates a new Contact record in CRM. The Address information entered here will flow into Contact Address 1 for the newly created Contact, and will also be used as the Shopping cart Bill To, Shipping address (if there is a product sales / freightable item in the cart) and Payment Address. From this point on the user is signed in as the new contact so subsequent transactions do not need an anonymous cart anymore. If the user has signed into an existing user account, and is a member, prices are re-calculated for that user's price level at that point before going to the payment form. Guest Checkout is made possible by a new App Config parameter in UX Online named "**MX.GuestUser**". The new App Config parameter identifies the Contact Number of a Non-Member in UX Online that will be assigned as the anonymous owner of the Cart so it can include purchases before the user identifies themselves.

Functional Enhancements – Shopping Cart		
Item	**Module/Web Part**	**Description**
		Regardless of whether the user had chosen to sign in, or had continued as a guest, the original Shopping Cart attached to the Guest Contact will be automatically transferred from the Guest User to the identified Contact. Because unprocessed anonymous carts will always be assigned to the MX Guest User Contact, it is possible to use that Contact number in a query to review all MX Shopping Carts that are still anonymous. Note that Guest Checkout is not the same as Anonymous Checkout. It is essential that the purchaser is recorded in the database as a unique contact in order to support all CRM Functionality, even if they never intend to sign in again. If the Guest checkout form contains the same E-mail as an existing contact, the Shopping Cart’s duplicate detection logic prevents the creation of a duplicate Contact record.

Functional Enhancements – Shopping Cart		
Item	**Module/Web Part**	**Description**
11	**Shopping Cart:** Auto-Pay authorization checkbox on Payment Form while checking out for a purchase. ***CAS-69960-R4N4T7***	MX Online now offers the ability to sign up for AutoPay with a single click from within the Shopping Cart. Signing up for AutoPay creates a credit card Payment Authorization to be kept on file for automatic renewals and recurring transactions. Adding this functionality to the Shopping Cart is an important enhancement for organizations that incorporate AutoPay into their Membership process for renewals and installment payments. Previously AutoPay Sign-Up was only available outside of the e-commerce user experience and had nothing to do with the credit card used in the user's current purchase. The user needed to navigate away and re-enter their Credit Card information in a completely separate process if they wanted to use it for automatic payments in the future. Now, in a single checkout process, the user can save and authorize the same credit card that has just been entered for the current purchase. By default the checkbox for selecting AutoPay Signup is hidden. The feature can be easily exposed in MX Online using a new Shopping Cart configuration setting, 'Display Payment Demographics' = Yes. Because this checkbox is part of the Payment form, the new setting is included in the Edit Mode configuration section. Once exposed, the AutoPay checkbox is always displayed regardless of the types of transactions that are in the cart. This allows the user to save a valid credit card for future renewal payments even if they are not purchasing a membership or making a contribution at that moment. The MX Shopping Cart Payment form now displays configurable text with the AutoPay Authorization checkbox explaining this option to the user. If the user already has a saved card, then additional text will display, alerting the user that they already have a credit card Authorization on file. Even if the user already has a saved credit card, they can select the authorization checkbox again if they want to save this card to replace the previous card. The Shopping Cart option is designed to be as streamlined as possible. New configuration settings in the Shopping Cart allow the organization to pre-define which modules the credit card is authorized for during Rapid Pay, so the user does not have to specify them at this point. These modules can be changed by the user later in the dedicated AutoPay Sign-up web part, where additional card management options are available.

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<tr><th colspan="3">Functional Enhancements – Shopping Cart</th></tr>
<tr><th>Item</th><th>Module/Web Part</th><th>Description</th></tr>
<tr><td>12</td><td>Shopping Cart:

Process transactions for products that are not published to the web.

CAS-68587-X9D5H5</td><td>The MX Shopping Cart will now process transactions regardless of Publish to Web status of the product.

Prior to this release MX Online included validation logic in the Shopping Cart that prevented it from processing transactions for products that were not published to the web. This rule was intended to ensure that MX Online would only process products that were explicitly marked as relevant to the web.

However, there are many valid scenarios where products are not published to the web simply because they are processed in a controlled context, and should not be displayed in an online list for a user to select.

For instance:
• Product Variants are hidden from the catalog so they can be displayed only in their parent product's dropdown list.
• Dues Renewals will contain Rates that are only available as the predefined Next Rate for a regular rate or for special memberships, like Emeritus.
• An Early Bird Registration is still a valid option for editing even after it is no longer available for new registrations.
• Promotional Packages contain registrations with discounts that are only available as part of a promotional group purchase;
• Application Fees are automatically added to a Member Package, without ever being selected by the user.

As these examples illustrate, unpublishing a record to exclude it from online lists should not prevent its associated product from being purchased on the web.

While the Product Catalog, Select Registration, Edit Registration, Membership Rates and Event Calendar will continue to hide records where Publish to Web = No, the MX Shopping Cart has removed all validation based on the Publish to Web attribute. Now the Cart will process all of these transactions regardless of Publish to Web status. Only deactivated products and products without General Ledger codes are invalid for transaction processing.</td></tr>
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Functional Enhancements – Shopping Cart		
Item	**Module/Web Part**	**Description**
13	**Shopping Cart:** Promotion Codes can be valid only for a Specific Rate. **CAS-92917-Y1C1L7**	MX Online now supports a new feature in UX Online that allows an organization to define discount promotions as applying only to a specific benefit & rate. This logic works similar to promotions defined for a specific meeting registration, session, or product. Previously, membership-specific promotions could be defined for a specific Benefit, but not to the granular level of a specific Rate. In UX Online 8.2, the Promotion is defined as applying to specific products, and then a Rate can be selected in that product lookup field. In UX 365, a new entity called 'Promotion Type' links a promotion to a specific Rate, Registration or Session. The MX Online logic for applying Promotions in the Shopping Cart has always compared each Shopping Cart's Detail Product Id with the Specific Product Id's in the associated Promotion Type records. Now, it also compares the specific Rate ID. When applying a discount to a membership that is prorated, the discount will be prorated as well.

Functional Enhancements – Shopping Cart		
Item	**Module/Web Part**	**Description**
14	**Shopping Cart – Invoices:** Filter Instances of Invoices and Installments web parts by Batch Company, and automatically assign/filter by user's currency. **CAS-76884-C0S5F4**	Changes have been made to the Shopping Cart – Invoices and Shopping Cart – Installments web parts to ensure that the Accounting Company applied automatically to the Payment Transaction is consistent with the Accounting Company used already as the Receivables account in the existing invoice. For example, if the user is paying an Invoice where all invoice details are for the Foundation, the Accounts Receivable is assigned to the Foundation General Ledger. In that case, the Payment transaction that eliminates the receivable must also be applied to the Foundation's General Ledger. So now, in the MX Online Shopping Cart – Invoices web part, there is a configuration option allowing that instance to be devoted to payments for one specific Accounting Company. This setting is used to filter the list of outstanding invoices to just one accounting company which in turn filters the list of available credit cards. Using this new configuration, an organization can deploy one web part for paying regular invoices and another for paying foundation invoices. It is no longer possible for a user to apply payment to an invoice using the wrong Accounting Company. In addition, the Payment web parts will automatically display invoices where the invoice currency = the signed in user's Contact currency. Previously, Currency was a configuration option in the Shopping Cart Invoices web part to ensure that one payment could not be applied to invoices of multiple currencies. However, a user whose currency did not match the configured value for currency would not see any of their own invoices. So now, this setting has been removed, and the web part automatically adjusts to ensure that the user's invoices are always visible to them.

Notable Bug Fixes

Global – Customer Modules		
Item	**Module/Web Part**	**Description**
15	**Account – Company Information** Company Information web part now updated in real time when user adds a new company. ***CAS-90315-T6V5C8***	It was reported that the Company Information web was not automatically updated when the user's company was changed via the My Company web part. Similarly, the address displayed in the Company Information web part was not automatically updated when it had been changed in the Addresses web part. Since Account web parts are automatically hidden when the user does not have a parent account, the user could not update their Account information at all after selecting a Parent Account if the Account web parts did not immediately recognize that the user had selected a Parent. This has been fixed, and now the Company Information web part always automatically refreshes based on changes in other web parts. Now, the previously hidden company-related web parts become visible as soon as the user identifies or adds their company in the My Company web part. Similarly, removing a Company in the My Company web part will correctly hide both the Company Information and Addresses web parts.

Meetings Modules		
Item	**Module/Web Part**	**Description**
16	**Meeting Registration – Multiple web parts:** Ignore Time and Time Zone for date fields like Price Start and End, which are Date ONLY. *CAS-78943-G2L8W5*	There are several date fields in UX Online that are used for determining when a record status is active or inactive, such as price start and end dates, and a committee member's term begin and end dates. In these cases, the only relevant portion of that field value is the date, not the time. UX Online uses the field Behavior "Date ONLY" to identify these fields, and the time for these types of fields is automatically set to exactly midnight. Previously, MX Online did evaluate the time portion and timezone offset for all date fields, even for these types of fields. This meant that if it converted the time based on different time zones, the resulting offset could erroneously push the date to the previous or next day. Now MX Online correctly ignores Time Zone for date fields where Behavior has been set in UX Online to Date ONLY, such as committee term dates and active Price date ranges. MX Online does not do any timezone conversion for these fields. Instead, it reads the date portion only and automatically assigns the time for Start Date fields as 00:00:00 and assigns the time for End Date fields as 23:59:59. Date conversion has been removed in MX 8.4.0 for the following date-only fields: pa_committeemember.pa_termbegins pa_committeemember.pa_termends pa_renewalbilling.pa_expirationdate pa_renewalbilling.pa_originaljoindate pa_renewalbilling.pa_cyclestartdate pa_prices.pa_startdate pa_prices.pa_enddate

Security Module		
Item	**Module/Web Part**	**Description**
17	**Security – Create New User:** When validating for duplicate E-mail address, limit check to Primary E-mail only. ***CAS-94122-J7V3P6***	When a user enters an e-mail address for their new user account, MX Online validates that there is no other contact in the system with the same e-mail address for purposes of duplicate detection. Previously, MX Online considered the contact as a duplicate if the entered e-mail address existed in any e-mail field in another Contact record. However, that logic resulted in unintentional exclusions of valid new Contact records. For example, a user can provide a family member's email as a back-up contact method as EmailAddress2, while providing their own E-mail as EmailAddress1. When the Family member creates their own New User Account, their E-mail should be accepted as a unique Primary Identification even though the same E-mail address is a backup on another Contact record. So now, MX Online only considers EmailAddress1 as the identifier field for email when doing duplicate checking. Note that Sign in Help is different. When the user selects the option to find a user account by E-mail address, all E-mail addresses are searched, because the user might be providing a work E-mail or home E-mail, and Sign in Help logic can identify a legitimate account regardless of which contact field they entered that address into. Note that duplicate E-mail checking has been modified in other places where a contact is created, including: - Company Contacts - Group Select Registrants - Register Someone Else - My Registrations - Transfer Registrant - Package Processing

Shopping Cart Module		
Item	**Module/Web Part**	**Description**
18	**Shopping Cart – Packages, Exhibit Reps, Edit Registrations:** Shopping Cart no longer applies over-payment when payment is split between new and existing invoices. ***CAS-97527-Z9T8S6***	When processing a Shopping Cart results in creation of more than one invoice, MX Online automatically distributes that payment across the invoices so that the Amount of the Payment matches the Amount of the Charges on each invoice. For some transactions, such as Edit Registration and Exhibit Reps, the shopping cart processing involves an update to an existing invoice. In these cases, the Payment entered in the Shopping Cart needs to be distributed to cover only the new charges added to that existing invoice, and not the entire balance. It was reported that, when a Shopping Cart included charges in both new and existing invoices, MX Online was incorrectly applying the total payment amount of the Shopping Cart to any pre-existing invoice, instead of correctly splitting the payment between the existing invoice and the new invoices. For example, adding a $50 Session to an existing registration, at the same time as purchasing a Product Sales item for $100, created a new invoice with a $100 payment for the Product Sales, which is correct. But the cart also applied the full payment amount of $150 ($50 session + $100 product) to the existing Registration invoice, when it should have only applied $50. New validation logic has been added to the cart to prevent the scenario that caused this error. The new validation prevents processing a cart that includes Edit Registrations and Exhibit Reps with other items in the cart. This validation prevents the need for calculation of payment distributions into different invoices.