

The logo for Association Technology Solutions (ats) is a blue rounded square with the lowercase letters 'ats' in white. The background of the slide features a horizontal band with a colorful, abstract pattern of vertical lines in shades of green, yellow, and blue.

WEBINAR SERIES

Online Marketplace Latest Features and Innovations

Presented by:
Association Technology Solutions



Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 120 integrations
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020





Presented by



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

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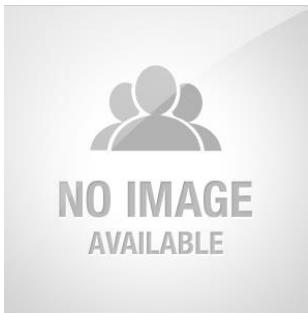
Presenter:

Laura Tidquist

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Moderator:

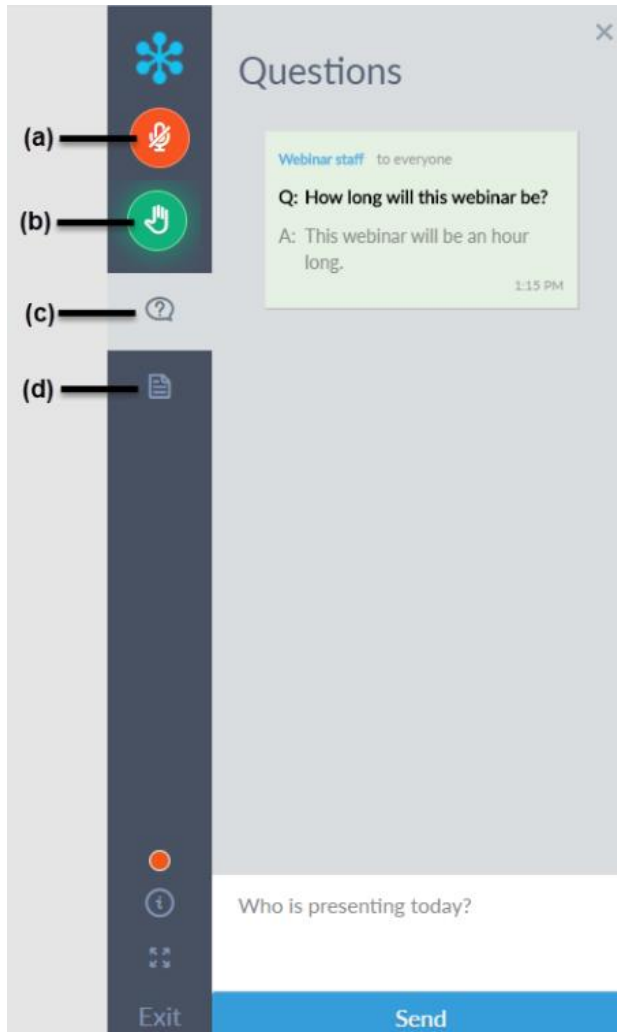
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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

Pay Open Accounts Receivable

Pay Dues Without Logging In

Carding Deterrents

Category Sorting

ATS Catalog

Coupon Support for enSYNC
Online AutoDraft

Conditional Messages on
Receipts

Checkout, Receipt, and
Welcome Messages

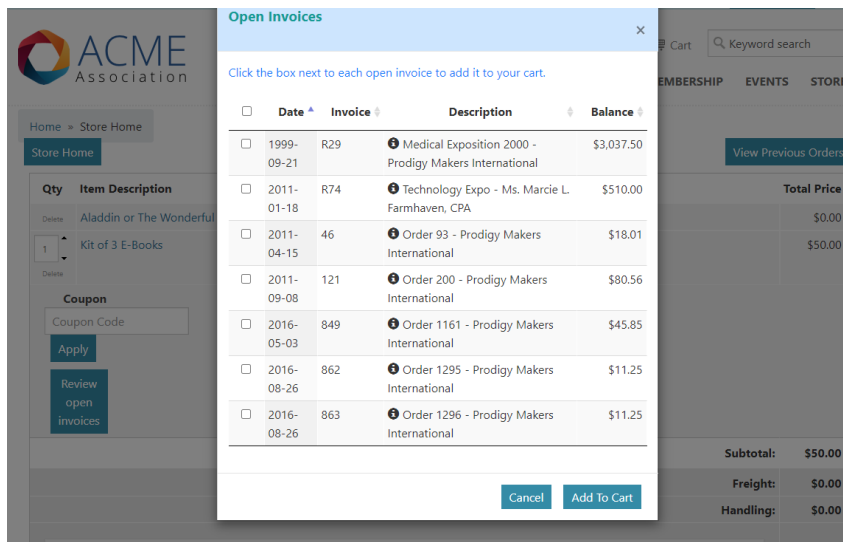
Dues Product Pre-requisites

Download the latest user's
guide and see all release notes
at
<https://www.atsol.org/omdocs>



Pay Open Accounts Receivable

Three new Store_Settings make this very easy to enable!



- **ShowOpenARAtCheckout** – True/False setting to turn feature on.
- **OpenARIQA** – Path to IQA to identify which open invoices a customer can pay. If left blank, they can only pay their own open invoices.
- **OpenARLinkText** – Text that displays in the mini-cart and view cart page.



- Allows dues to be paid without logging in
- A member can forward an email with the link to their accounting department to pay the dues
- URL: [OnlineMarketplaceURL]/duesquickpay.aspx?ID=101 (where 101 is the iMIS ID)
- Creates PaidBy and PaidFor activity records
- Payment plans with enSYNC Online AutoDraft is supported
- Email is required at checkout if person paying is not logged in

With the increased occurrence of hacking attempts, we have put in place a way to stop people from checking out if too many declines have occurred. An activity will now be created for every credit card decline.

- **Why should you implement this?**
 - PayPal (payflowpro) has a policy when a number of declines are received in a short amount of time from the same IP address the entire PayPal account will be shut down. You then need to call PayPal to get your account reactivated.



Carding Deterrents

- 2 new Store_Settings
 - **PaymentCCDeclineActivityType** – a new CCDECLINE activity type will be created to track date, last 4 of credit card, decline reason, charge amount, and IP address.
 - **PaymentCCBlockedIQA** – Path to IQA

Home > Store Home

Store Home View Previous Orders

Qty	Item Description	Total Price
1	Bright Ideas (PDF)	\$1.00
		Subtotal: \$1.00
		Freight: \$0.00
		Handling: \$0.00
		Tax: \$0.00
		Total: \$1.00

You cannot checkout at this time. Please contact us at 555-555-5555.

Continue Browsing View Cart/Checkout



Categories in the right gutter of the Marketplace can now be sorted!

- Updates need to be made to the store category gen tables (Store_Dues_Categories_Addl, Store_Event_Categories_Addl, Store_Product_Categories, Store_Product_Categories_Addl)
- Create new entries with the code contains a number, pipe, then link text.
- Anything left of the pipe is the sort order, after the pipe is link text displayed.
- New Store_Setting to hide Store_Product_Categories - **ConfigProductHideDefaultCategories**

General lookup tables

General tables

STORE_DUES_CATEGORIES_ADDL

Code	Description
001 Pay Dues	~/dues.aspx
010 2-Year Journal Subscription	~/subscription.aspx?id=JOUR2YR
040 List Bill Dues	~/dueslistbill.aspx
050 Upgrade Membership to 2 Years	~/subscription.aspx?id=BASIC2
070 Journal Subscription	~/subscription.aspx?id=JOUR
080 Magazine Subscription	~/subscription.aspx?id=MAG

DUES AND SUBSCRIPTIONS

[Pay Dues](#)
[2-Year Journal Subscription](#)
[List Bill Dues](#)
[Upgrade Membership to 2 Years](#)
[Journal Subscription](#)
[Magazine Subscription](#)



ATS Catalog

- Add-on product to allow for quick filtering and sorting of products
- All IQA controlled

CATALOG

Search


Category

- Apparel 14
- Books 43
- Courses 4
- eBooks 6
- Logo Products 7
- Mobipocket eBooks 2
- See more

Format

- Brochure 1
- CD-ROM 2
- Hardcover 7
- Kindle 1
- Mobiformat 1
- Mobipocket 1
- See more


2009 Books Workbook



2009 Approach to Diagnosis: A Case-Based Imaging Review...
Melissa Rosado de Christenson, Gerald F. At
\$150.00 Members:\$65.00

[Detail](#) [Add To Cart](#)


2011 Books



2011-13 Bar Directory and Handbook
State Bar of Georgia
\$46.00

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2002 Books Paperback



A Multicultural Approach to Physical Education
Rhonda Clements and Suzanne Kinzler
\$19.00 Members:\$17.00

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2002 Publications Softcover



A Planning Guide for Home Businesses
Hennesey, David R.
\$35.00 Members:\$23.00

[Detail](#) [Add To Cart](#)


2010 Books CD-ROM



AAO-HNS Membership Directory
AAO-HNS
\$150.00 Members:\$550.00

[Detail](#) [Add To Cart](#)

Books



Advanced High-Strength Steels: Science, Technology and App.
Mahmoud Y. Demeri
\$167.00 Members:\$125.00

[Detail](#) [Add To Cart](#)



Coupons are now supported and will be applied to the overall dues payment before any payment plans are applied.

Use Case: A coupon code could be sent in an email to prospective members or renewing members encouraging them to sign up for AutoDraft with a coupon.



Conditional Messaging on Receipts

New Store_Setting: **lblReceiptBottomNoteIQA**

IQA must include the iMIS ORDER_NUMBER, TRANS_NUMBER, and NOTE.

Optional filters must exist on ORDER_NUMBER and TRANS_NUMBER.

If the ID is returned in the IQA at checkout the message configured in the query will print on the bottom of the receipt.

lblReceiptBottomNote Store_Setting still exists and will print on ALL receipts if populated.

Use Case: Messages specific to the type of transaction can be displayed on receipts. A special message for nonmember could be added encouraging them to join.

ATS Association

August 12, 2021
Trans # 6470

4704 Harlan St., Denver, CO 80212

Kevin Hodgson
Marsh Ltd
Victoria House
Queens Road
Norwich NR1 3QQ
Customer ID 691

Kevin Hodgson
Marsh Ltd
Victoria House
Queens Road
Norwich NR1 3QQ

ID	ITEM #	Description	PRICE	TAX
1	MAG	Magazine	\$0.50	\$0.50
Subtotal				\$0.50
Tax				0.00
Total				\$0.50
Payments (08/12/2021 - card ending: 1111)				(\$0.50)
Amount Due:				0.00

Note returned from lblReceiptBottomNoteIQA Store_Setting. Order was selected in the query.

This is a note for transaction id 6470

Static text note returned from lblReceiptBottomNote Store_Setting.

This is the lblReceiptBottomNote Store_Setting.



IQA driven process to create custom pop-up messages in 3 different areas

- Welcome: Initial entry to store
- Checkout: When entering the cart
- Receipt: After payment
- Several Store_Settings to control how often and which messages display.

Use Cases:

- A welcome popup could be displayed that alerts a person of a new program or product.
- A checkout message could be displayed for nonmembers entering the cart that they can get better prices by joining.
- A receipt message can display a thank you message or other sort of engagement message.



Dues Product Prerequisites

- General Lookup table to control which product must be selected prior to another one showing
- **Use Case:** Only people who add the Colorado or Wyoming Chapter can see the Denver Section

General lookup tables

General tables

Code	Description
CHAPT/COLO2YR	BASIC2
DENVER	CHAPT/COLORADO,CHAPT/WYOMING
DENVOL	DENVER
INIT	BASIC
JOUR2YR	BASIC2





Questions & Answers



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