# 06.05.17 Website Release Notes

## User Guide - Table of Contents

# Enhancements

## Calendar/Event Manager

**Color Coding Events**

- **As a Club Admin, I would like to be able to color code an event so that it shows with that color in the calendar views.**

    <u>Use Case</u>: Previously, Club Admins were unable to color code Events to appear on a calendar with the color defined.  Now, easily apply a color to a specific event (for instance, Golf Events are Green), to help Members easily identify events that may be of interest to them.

## Calculation of Bookings for an Event

- **As a Club Admin, I want reservations made on an event to be counted towards the total number of reservations allowed regardless of its payment status to prevent overbooking the event.**

    *Use Case:* Previously, when Events were created, registrants who had not yet paid, were excluded from the calculation of remaining Allowable spaces. With this enhancement, now see the total registrants booked for the event (paid or unpaid), and easily view the details of Active (and paid) registrations as well as Incomplete (or unpaid) reservations to ensure the Event is optimized, but not overbooked.

## Export Reservations

- **As a Club Admin, I want to export an Excel report of reservations across multiple statuses.**

*Use Case:* Previously, only one Status (Active, Cancelled, Incomplete, or Wait List) of an Event's details could be exported at a time. Now use, the new filter to select any or all available Statuses, and Export details as desired.



## Party Size Increase to Reservation

- **When a reservation's party size increases, the system needs to process a payment for the remaining amount before confirming the reservation.**

*Use Case:* Previously, when Billing Items were associated with an Event, when a party's size increased, the system did not process the payment before confirming the reservation. Now, ensure fees associated with additional parties, are processed prior to confirming the increased reservation.

**Event Registration**

Event    Billing Test
Date     Wednesday, May 31, 2017 12:00 AM

Increase to 2.

Confirmation    New Registration
Party Size      1        ▼

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Payment        Amount to Charge
Billing Test   $50.00

This payment page will expire in 10 minutes.

| Credit Cards | Bank Accounts |

**Debit or Credit Card Information**

Your Saved Cards    New Credit/Debit Card ▼  Remove Card
Name this Card
Credit Card Type    Visa        ▼
Name on Card
Credit Card Number
Expiration          01    ▼    2017    ▼

**Billing Information**

First Name
Last Name
Address Line 1
Address Line 2
City
State        Alaska               ▼
Country      United States ▼
Zip*

Review Payment

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### Room Bookings - Book Reservation

- **On the Booking window, create a color indication of available vs unavailable dates.**

  *Use Case:* Previously, rooms that were unavailable were not differentiated with a different color in the booking window.  With this change, easily view rooms that are available for booking (green) vs. unavailable (blue) when making the reservation in the Booking Window.

# Form Base

## Admin Functions

- **As a Club Admin, I would like to be able to update the basic information of a form.**

    *Use Case:* Previously, Club Admins were unable to control any data associated with their forms, and had to contact CE Support when changes were needed.  Now, Clubs can easily update the Admin Email, Form Category, Form Activation Date, Form Expiration Date, and also specify whether an email should to go to the Admin on Form Submission, and whether Submission Details should be included.  As an Admin, go to Form Base, select the form to edit, make the necessary adjustments and click save.  When turnover occurs, necessitating a need to change the admin email address attached to a form, use this new toolset to make this happen.

| ADMIN | Client Resource Center |

| CONTENT MGMT | COMMUNICATION | USER / PROFILES | EVENTS | REP( |
|---|---|---|---|---|
| Articles | Compose Email | Directory / Roster | Event Manager | Activ |
| Document Upload | CRM | Dynamic Groups | Today | CE S |
| Form Base | First Impression | Groups | Week \| Month \| Year | Glob |
| Image Explorer | Inbox | Profile | All | Men |
| Template Manager | Mail Reporting | Roster Search | Event Reports | Profi |
| | Polling | Staff | Meeting Manager | Sess |
| | Push Notifications | Yellow Book | Banquets | Site |

# SITE DYNAMIC FORMS

| | Name | Form Type | Admin Email | Active |
|---|---|---|---|---|
| Edit \| View \| Results \| Full Report | Special Events | Generic Form | nwright@clubessential.com | ☑ |
| Edit \| View \| Results \| Full Report | Contact Us | Generic Form | rcoffey@clubessential.com | ☑ |

**Edit Form**

*Form Setup*

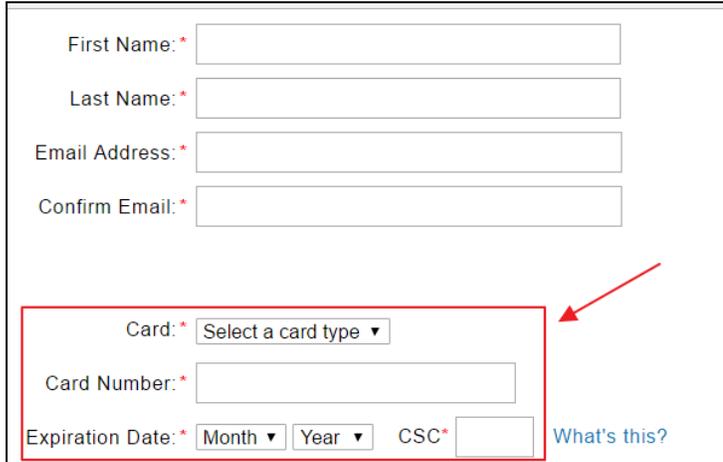| Title | Special Events |
|---|---|
| Admin Email | nwright@clubessential.com |
| Form Category | Uncategorized ▼ |
| Form Activate | 6/5/2017 8:00 AM |
| Form Expiration | 6/30/2017 12:00 A |
| Send Email to Admin on Submission | ☑ |
| Include Submission Details in Admin Email | ☐ |

💾 Save Form Overview

**Credit Card Integration**

- **Allow user to connect credit card processing to form base credit card field.**

   <u>Use Case</u>: Previously, credit card information was unable to be processed on a form.  For Club's with Public Registration needs, now easily collect and process payment prior to allowing a registration.
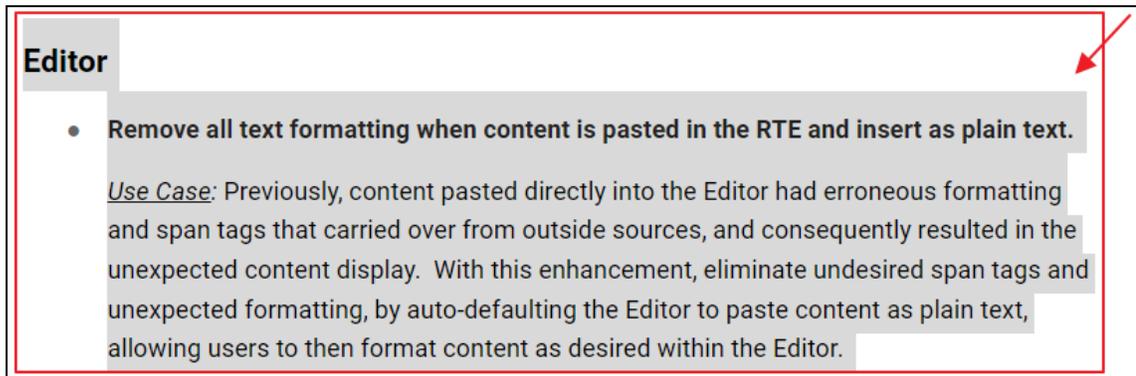


# Editor

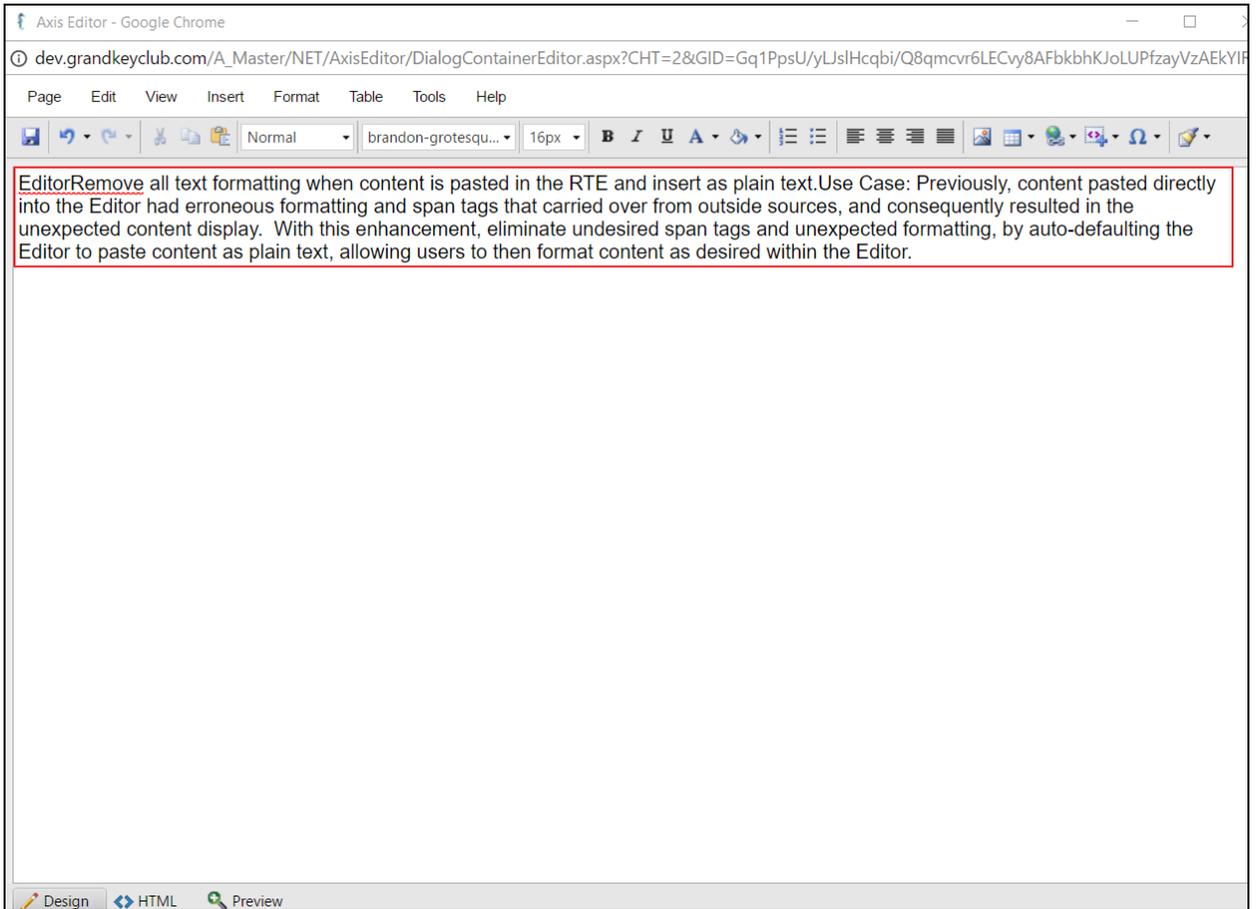- **Remove all text formatting when content is pasted in the RTE and insert as plain text.**

   <u>Use Case</u>: Previously, content pasted directly into the Editor had erroneous formatting and span tags that carried over from outside sources, and consequently resulted in the unexpected content display.  With this enhancement, eliminate undesired span tags and unexpected formatting, by auto-defaulting the Editor to paste content as plain text, allowing users to then format content as desired within the Editor.

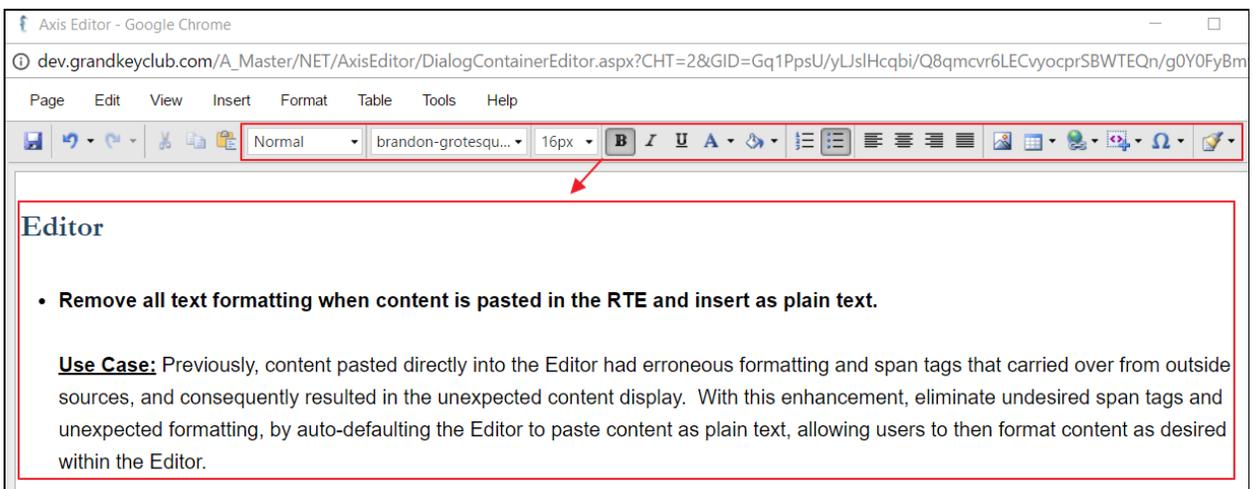   Copy from Outside source (Word/Google Doc)

And, paste directly into the Editor.
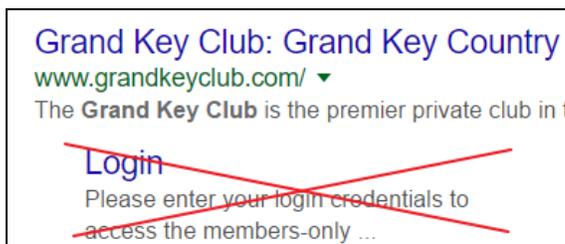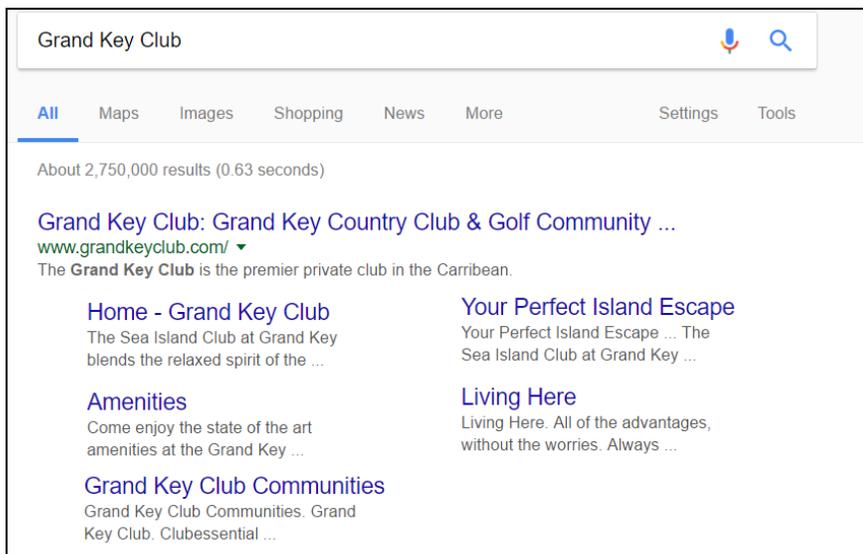


Then, format as desired using the Editor tools.

## SEO

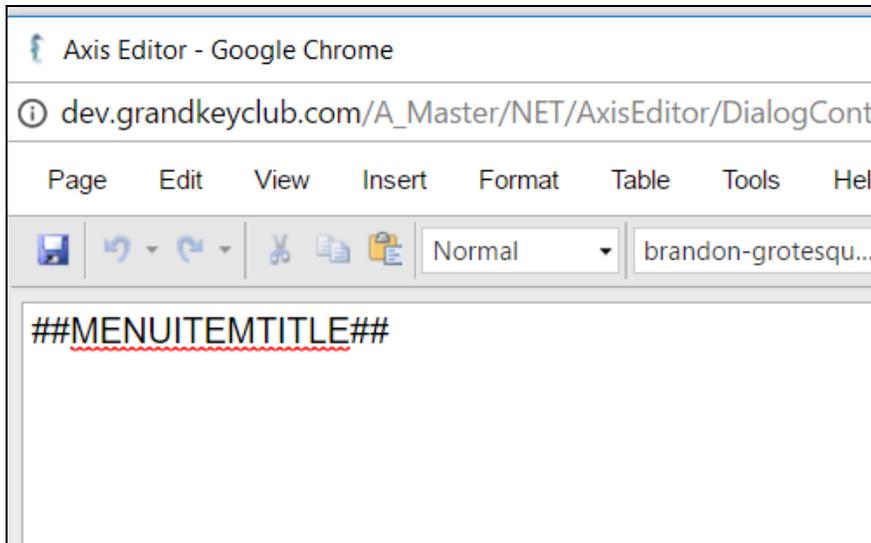- **Add NOINDEX, NOFOLLOW <META> to all admin login pages to prevent google from indexing them.**

  *Use Case*: Ensuring people find the pages you want them to find, and not the ones you don't is key to ensuring you are getting the most of your website.  With this enhancement, no longer have admin login pages returned in Google search results, and instead have the attention focused on the pages that are meaningful to the public.





## Snippets

- **Created new snippet for "menu item title" in page properties.**

  *Use Case*: In a recent release, the Menu Item Title was introduced in your Page Properties tool to help you control what appears on your site's navigation.  Now, enjoy utilizing this new Snippet that is associated with the field ##MENUITEMTITLE## to embed on your Web Pages, include with your flyers, or utilize in other email communication, etc as needed.

## Bug Fixes

- Admin Header Bar -  Fixed broken "Recent communications" link on the admin header, and re-purposed button to more visibly promote "Client Resource Center" (kb.clubessential.com).

- Calendar - Fixed issue with Previous / Next Event buttons not working correctly on filtered calendars.

- Calendar - Fixed issue with inconsistent status icons appearing on calendar.

- Editor - Help Button - Fixed broken help link within the Editor, and redirected link to Editor materials on kb.clubessential.com.

- Event Manager - Fixed misspelling - "removed" in the warning message associated with deleting events.

- Online Store - Fixed error within checkout module when apostrophes were included in the description.