Paycloud - 9.18.17 Releases

User Guide - Table of Contents

Enhancements

Club Admin Features

Reports

● **As a club admin, I would like to see a report section in the navigation so that I can get to the different reports the system has to offer.**

Use Case: Previously, the Club Admin payment navigation options were limited to Users, Payments, and Content options. Now, there is a new **Reports** section with sub navigations for **Payment History** and **Account Changes**.
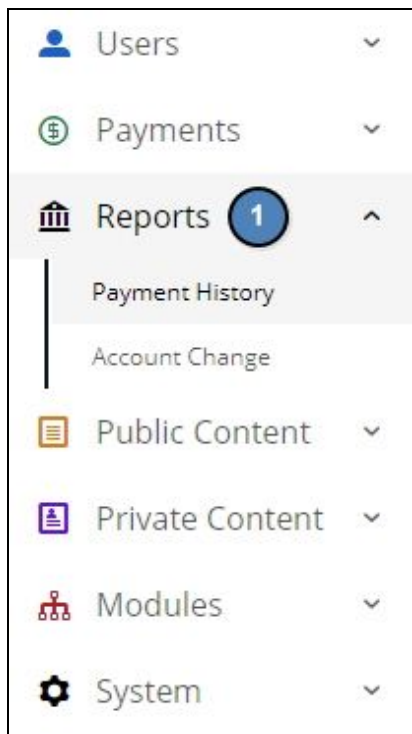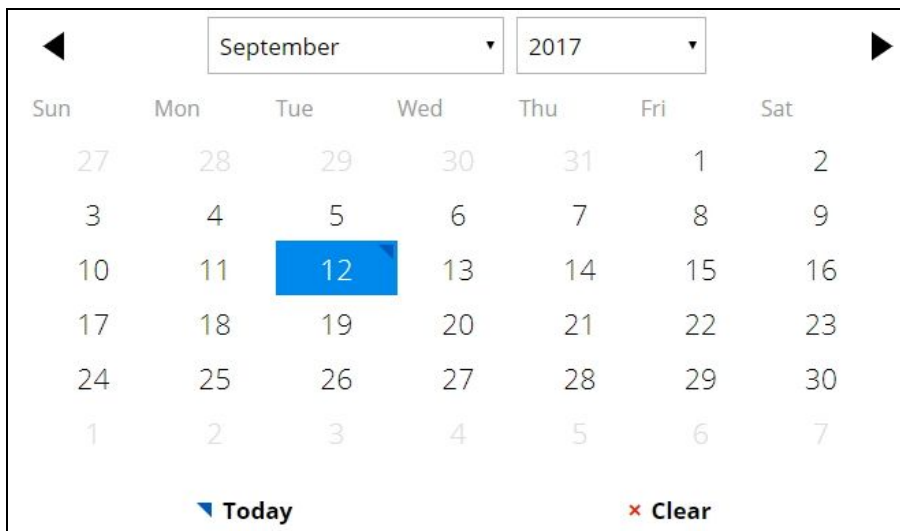

Reports - Payment History

● **As a Club Admin, I would like to view a list of payments made within a date range.**

Use Case: Previously, member payments were listed and searchable via Member information, such as member number. Now, easily view all payments made within a specific date range, with the date picker.

● **As a Club Admin, I would like to view a list of payment errors.**

Use Case: Previously, payment errors were only visible when viewed from the specific member's information. Now, the **Payment History** menu, under **Reports,** has an added filterable column for Payment **Status**, signifying Successful Payments in green and Unsuccessful Payments in red. Filter may be set to show successful, unsuccessful, or both payment statuses.

Reports - Account Change

- **As a Club Admin, I would like to view a list of member account changes.**

  Use Case: Previously, Club Admins were unable to view payment type changes made to a Member's Account. Now, **Account Changes** are listed under the Reports menu, detailing **Member Number**, **Member Name, Changed by** (who made the change)**, Status** (of the change), **Account Type** and **Date Changed**.

System - Payment Notifications

- **As a club admin, I would like to be able to turn on/off payment email notifications.**

  Use Case: Previously, member notifications for successful or failed auto-payments did not exist. Now, under the **System** and **Payment Notification** menu, checking the Payment Processed and/or Payment Error boxes will notify the member via email of their successful payment submissions as well as failures and error codes.

Users - Members

- **As a Club Admin, I would like to view a list of members with scheduled payments from the member list view.**

Use Case: Previously, member scheduled payments were only available when viewing the specific member's information. Now, viewed from **Users** - **Members** menu, columns have been added to view **Next Scheduled Payment** and **Scheduled Payment Type**.

Additionally, a filter was added to allow for easy viewing of Members with scheduled payments. To apply to current view, click on filter, and select **Has Scheduled Payments.**

- **Show validation error messages on custom amounts.**

Use Case: Validation error messages will show when **Payment Amounts** and Scheduled Payment **Other Amounts** are incorrect or invalid. Red border will show around invalid payment amounts with a message below the field until corrected.

- **Disable legacy auto-pay message if the processor supports scheduling a recurring payment and auto-pay.**

  Use Case**:** Previously, a message would be visible for members on the **Manage Payment** screen requesting they contact Club regarding Auto Pay, even when Auto Pay was available based on the Club's processor. Now, message will no longer display when Club's processor supports auto-pay as Member can now handle auto-pay setup within their Paycloud account, rather than having to contact the Club.
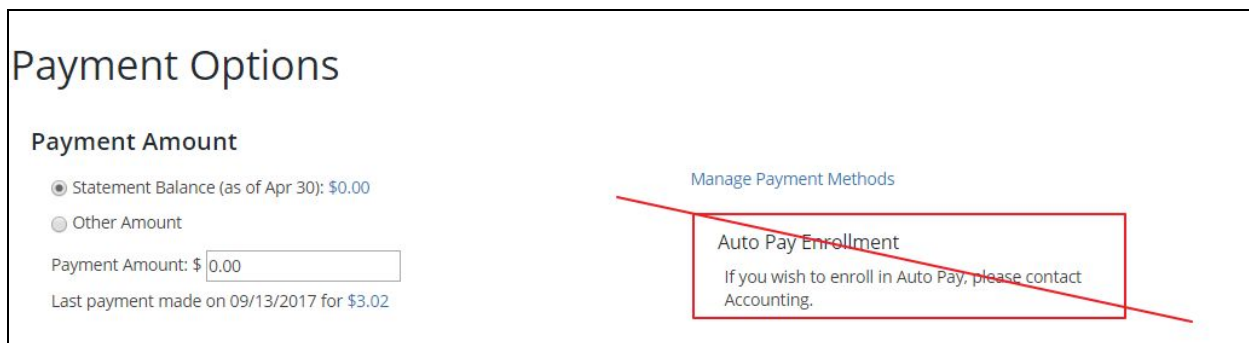
Member Facing Features

Email Payment Notifications

- **As a club member, I would like to get an email when my scheduled auto payment has failed so I can fix the problem to avoid late fees.**

  Use Case: Previously, Members were not notified by the system of failed payments. Now, based on Club Settings, Paycloud allows for email notifications detailing the errors associated with failed automatic or scheduled payments.

  Dear [Member name],

  Your payment to [club name] in the amount of [payment amount]scheduled on [process date] using the account ending in [last four digits] was unsuccessful: [failure reason].

- **As a club member, I would like to get an email when my scheduled payment is successful to verify the transaction's details.**

    <u>Use Case</u>**:** Previously**,** Members were not notified of successful payments. Now, based on Club Settings, Paycloud allows for email notifications detailing transaction details of successful payments.
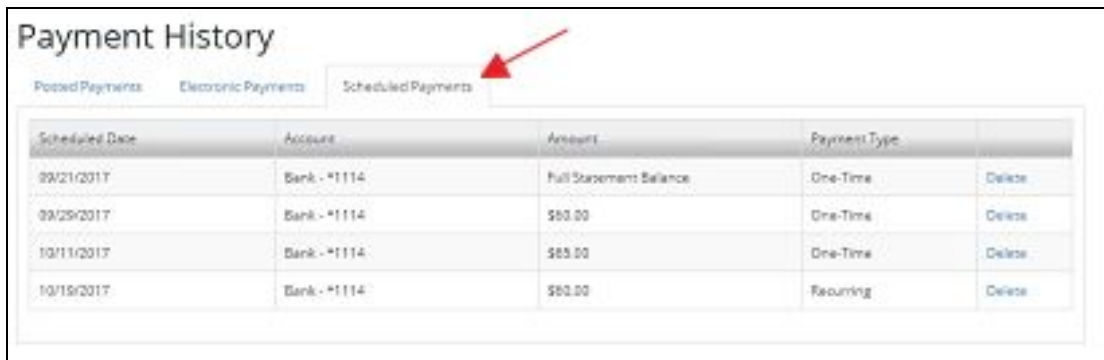
    Dear [Member name],

    Your payment to [club name] in the amount of [payment amount] was processed successfully on [process date] using the account ending in [last four digits].

Payment History View

- **As a club member, I would like to see my scheduled and recurring payments listed in the payment history page.**

    <u>Use Case</u>: Previously, members did not have the capability to view scheduled or recurring payments in a ListView. Now, from the Payment History screen a new tab has been added for Scheduled payments, listing any upcoming payments, and allows for the deletion of upcoming scheduled payments.
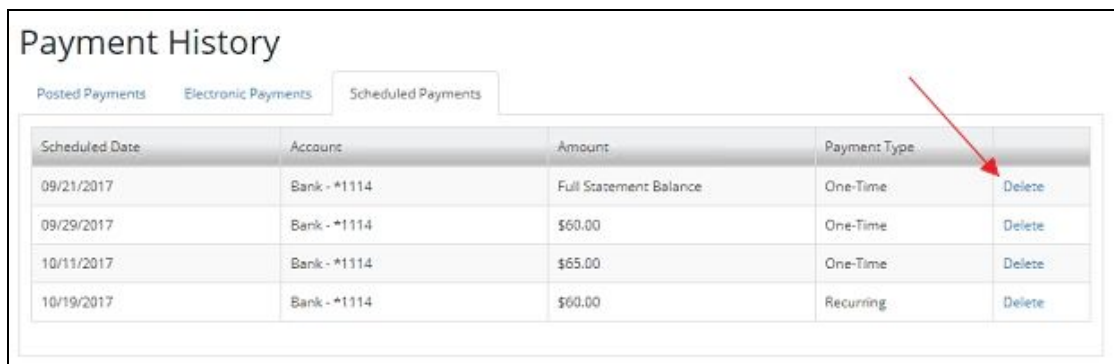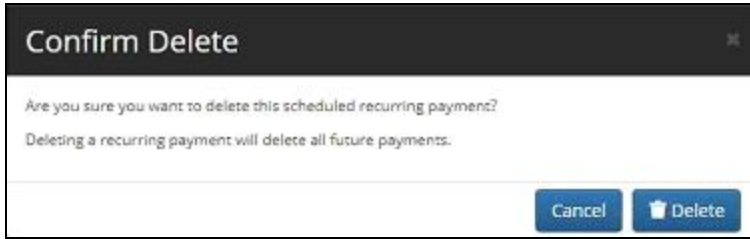

    <u>**Please Note**</u>: *Deleting a scheduled or recurring payment will delete all payments in that series. Members will be notified by the below warning notification.*

Delete Payment Account

- **As a club member, I would like to delete a payment account.**

    Use Case: Previously, members would not be notified of deleted payments associated with deleting a payment account. Now, a warning notification populates, explaining that all payments associated with that account will also be deleted.
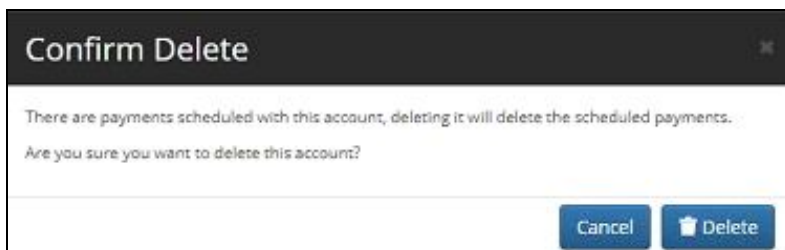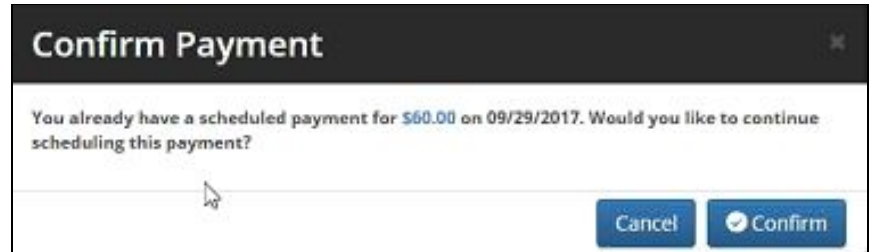

Overlapping Payment Alert

- **As a club member, I would like be alerted when scheduling an overlapping payment.**

    Use Case: Previously, members would not be notified of overlapping payments. Now, from the **Schedule a Future or Recurring Payment** screen, the member will be alerted when trying to schedule multiple payments during the same period with a pop-up warning. For example, creating a new Scheduled Payment for the month of September would populate a warning message because the user already has a scheduled payment for September 29th.

Manage Payment Methods

Upcoming Payments

Date	9/29/2017
Amount	$60.00
Account	Bank - *1114
	Delete
Date	10/11/2017
Amount	$65.00
Account	Bank - *1114
	Delete
Date	10/19/2017
Amount	$60.00
Account	Bank - *1114
	Delete

Confirm Payment ✖

You already have a scheduled payment for $60.00 on 09/29/2017. Would you like to continue scheduling this payment?

Cancel   ✔ Confirm

Bug Fixes

- Fixed issue with incorrect wording on message when a one time scheduled payment is created.

- Fixed issue when using the search control of any ListView entering a boolean ('true'/'false') causes a javascript error.