



Web Release Notes

In an effort to better serve you, our customer, The Online Business Center (OBC) is updated regularly with changes and improvements. In this page of the Help section you will find a brief summary of the latest changes, updates/releases that we hope will help you keep up-to-date.

Membership Agreement Re-Order Form Update

The Membership Agreement Re-Order form was enhanced to enable clubs to reduce the cost of membership agreement forms. Users can choose either the 2 Part forms or the 3 Part forms for any of the existing Re-Order types. Based on whether the 2 Part or 3 Part option is chosen, the Quantity option will change to reflect the appropriate price breaks for the selected option.

Effective Date: 12/10/2009

Daily Web Transaction Report Update

We added two new change types, Update Club Login and Delete Club Login, to the Daily Web Transaction Report. Update Club Login shows updates and adds, and Delete Club Login shows drops.

Effective Date: 11/25/2009

Post Payment (Members only)

A checkbox has been added to the Post Payment page (for Members only) which allows members to update their Auto Payment information while posting a payment. Members are no longer limited to making their changes exclusively through the Auto Payment Update page.

Effective Date: 10/20/2009

Simplified Login

Users will no longer be required to select Club (client) or Member at login. When logging in, the system will recognize the type of account the user has.

Effective Date: 9/27/2009

Improved Web User Registration

When registering for an account, new users can click Register and then select the type of registration they need (client or member). The appropriate form will appear for the new user to complete. Password rules are displayed to help when setting a password.

Effective Date: 9/27/2009

Account Summary

We have added the Latest Transaction on the Account Summary Section under Billing Information. This is the latest transaction on an account.

Effective Date: 6/11/2009

Payment History

We have provided the users the ability to go back in history 50 records at a time as far as account allows (including attempts to collect).

Effective Date: 6/11/2009

UPS Label

New functionality to the UPS Label. You have a create button now that you will click on to create your UPS Label.

Effective Date: 6/11/2009

Web User Self Reset

The users will now have the ability to reset their own password. 1. The user will select Club or Member. 2. Type their User ID and click Forgot Password. 3. On the Client Account Password Reset the user will put in their answer to the secret question and hit submit. 4. Your password has been reset to match your User ID. Upon login, you will be immediately prompted to change your password to a value that you choose. Standard password rules apply.

Effective Date: 6/11/2009

Daily Web Transactions

The Daily Web Transactions page now provides a cleaner, more legible view of the transactions that have been recorded on the website. Users will now be able to control the number of visible results per page as well as filter the

results of their queries using a Quick Filter text box. Users will also now be presented with record headers which can then be expanded to view the record details.

Effective Date: 4/30/2009

Billing Calendar

The Billing Calendar has been updated with more current and helpful dates.

Effective Date: 4/30/2009

Support Live Chat

We have replaced our Live Chat provider with a new Support Live Chat applet that is integrated with our ABC Financial phone system. This will provide better performance and service responses.

Effective Date: 4/30/2009

Club Supplies

Club Supplies have new functionality and a new look. There is a drop down box that has been added to the top that lets you view your pending, cancelled and shipped supply orders. Pending Orders will be displayed. You can click on the details of your pending orders which will show you the invoice number, date submitted, status and the items in which you ordered. If you select canceled all the canceled invoices will display with the invoice number, date and status. If you click on details it will display the items in which you ordered and the processed date. Shipped orders will display with the invoice number, date submitted and status. If you click on details it will display the items that have been shipped and the processed date.

Effective Date: 4/16/2009

Datepicker and Required Fields

We have added a date picker to the account maintenance sections and to the daily web changes. You can enter a date or choose a date from the new calendars. The required fields now have color and if you fill out incorrect information you will receive an error message.

Effective Date: 4/16/2009

The top tool bar has been moved to the right side

The top tool bar has been moved to the right side of the website. The functionality will stay the same.

Effective Date: 4/16/2009

Datepicker

We have added a date picker to the entry sections. You can enter a date or choose a date from the new calendars.

Effective Date: 2/19/2009

Error checking message in entry

We have added an error checking message in entry. For example if you enter an incorrect date you will receive the following message. Begin date must be less than 90 days past. Expire date cannot be more than ten years projected.

Effective Date: 2/19/2009

Browser Check

If you are using a browser that our website does not support you now can download IE7. This message will be displayed on the home page. Attention you are using a web explorer. Our web environment currently supports Internet Explorer 7 only. Internet Explorer can be downloaded free of charge from the Microsoft website.

Effective Date: 2/19/2009

Account Notes

We have made changes to the Account Notes page. We will no longer require a month and year search criteria for Account Notes. However, the list of notes will continue to be limited to 50 notes per page (The More Notes link will allow the user to see the next 50 on the i550.).

Effective Date: 1/19/2009

Account Review

We have made changes to Account Review. We have added the same record number limitation to Account Review as we did for Account Notes. In addition, the Account Review is now its own page (still accessed from the same link within the Billing Information section of Account Summary).

Effective Date: 1/19/2009

Account Notes

Account Notes has a new look and the way the Account Notes Section generates notes. We have added a select box for you to choose the specific month and year of the notes. When you select the month and the year of the

notes it will generate the most recent fifty, if there are more than fifty you will see a more notes button. At the top of the page you will see print view and back. The back button will take you back to the previous page.

Effective Date: 12/11/2008

Left Navigation

We have changed how the left hand navigation works. It is now a floating navigation it will move (up or down) on the page when you move which will makes things easier and faster.

Effective Date: 12/11/2008

User Level Web Page Access

You will now have the ability to allow or deny employee access to various pages of the website. For instance, a User Level 4 will be able to deny access to Agreement Entry to any User Level 3, 2, or 1 within the same club. We have provided you with a 'Select All' box which will check all boxes for your convenience. Please be aware that when you add new Club users, web page access is not automatically given--you will have to set the new user's web page access initially.

Effective Date: 6/19/2008

Club Re-Orders

You now have the ability to send a email to agreements@abcfinancial.com. This is due to the fact that if you place an order from this page, and you put revisions or changes in the comments box, club marketing will still have to send you another order form that you will have to sign and fax back to club marketing. We also moved and changed the wording on the overnight shipping.

Effective Date: 6/19/2008

Daily Web Changes

You now have the ability to keep up with the UPS tracking numbers and dates thru the daily web changes.

Effective Date: 6/19/2008

Select Member Account

The Status dropdown box in the Search for Member Account section now defaults to All instead of Active.

Effective Date: 6/19/2008

Account Summary

In the Account Information section of Account Summary, the wording of the link to view the account's document images now reads 'view/print' because you can also print these images.

Effective Date: 6/19/2008

Account Summary Update

The home phone field will now be required under account summary update. This will help enhance the effectiveness of our customer service.

Effective Date: 6/19/2008

Invoice Schedule

We have repositioned a notice on the change portion of this page to allow for better visibility. This notice informs the user that renewal amounts are not automatically changed by changing an invoice.

Effective Date: 6/19/2008

Webinars

The Webinar page has been updated to arrange webinar items under specified headers. These headers are also links which hide or display the information contained within them.

Effective Date: 6/19/2008

Web User Account Reset

As of May 8th, 2008, if any web user account becomes locked (due to unsuccessful login attempts), or if a web user forgets his or her password, the web login account will have to be 'Reset'. Only ABC Financial personnel can reset a web account. When a web account is reset, the user's password will be updated to equal his or her user ID. This will be temporary as the Online Business Center will require the user to choose a new password as soon as they login with the reset password. This policy change for web account usage is dictated by PCI (Payment Card Industry) Compliance requirements. This process will also replace the 'Remember Me' function previously offered on the website.

Effective Date: 5/8/2008

Client and Member Registration

We have removed the mother's maiden name form field from the registration form. Mother's maiden name is already a part of the secret question/answer field and we found it to be redundant. In addition, we have added a Help section covering the Client and Member Registration process. This help file will be accessible via help icon links next to each page title.

Effective Date: 5/8/2008

Agreement Entry

Added to the Payment Information Form under Agreement Entry you will now have the option of choosing a frequency of Bi-Weekly. NOTE WHEN WORKING IN ACCOUNT MAINTENANCE REMEMBER THE BI-WEEKLY FUNCTION WILL NOT ALLOW CERTAIN CHANGES (FREEZES, CHANGING PAYMENT AMOUNTS ETC).

Effective Date: 5/8/2008

UPS Label

UPS Labels has been added to the Club Supplies section under Club Maintenance. This feature will allow you to print one UPS 2nd Day Air Shipping Label. The label will be pre populated with the Club Supplies Ship To address as the return address and ABC's address as the Ship To address. A new shipping label will need to be generated and printed for each package you are mailing.

Effective Date: 5/8/2008

Account Maintenance Section-Invoice Schedule

We have added a section to the Invoice Schedule under Account Maintenance called frequency. This drop down box will give you the option of adding a profit center for Annual, Semi-Annual, monthly, Bi-Weekly and Weekly.

Effective Date: 4/10/2008

Member Account Registration

In order to help make registration for our members easier we have replaced the social security field with the zip code field. The member will now have to enter a zip code for the Member Account Registration and this will verify against their zip code on the 550.

Effective Date: 4/10/2008
