

Summer '18 Delivered!

Check out the incredible improvements and fixes we are rolling out with Summer '18! Anything with a  was suggested by a customer. We are so grateful the feedback and great ideas!

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Nimble AMS

Recalculate the Price The Pricing Framework was updated to recalculate the price class in addition to recalculating the product prices when triggered AMS-8315

 **Merging Person Accounts** Merging person accounts now creates a completed Task under the Activity History related list of the merged account. This task contains the original Name and Ids of the accounts deleted as a result of the merge. AMS-9038

Taxation in the Order API Orders in the Order API now support taxation, which are automatically calculated whenever something changes in the order. AMS-9073

Select an Order Confirmation Template A drop down menu has been added in the Configure page which allows the user to select an email template to use for order confirmations. AMS-9082

 **Support for manual and imported Deferred Schedules** A new External Transaction Date field has been added. Setting this date will allow manual/imported deferred schedules to be recognized by the Deferred Revenue Recognizer Job. AMS-9086

Subscriptions and Misc Order API Support The Order API now better supports Subscriptions and Miscellaneous products. AMS-9103

Order Confirmation Email Preview The order confirmation email screen was made dynamic in order to provide the user with an accurate preview of what the confirmation email they are sending will look like. AMS-9104

 **Advanced Term Proration Membership Product** "Advance Term" proration membership products now correctly start the 'Next Term' at the nearest logical start date. AMS-9112

 **Bulk Payment Processing Bug** The logic for bulk payment capture for payment gateway requests was adjusted so that error emails are sent properly. AMS-9137

Order API History Records How history records are created from items / lines, and what data is populated on those records from the order side can now be defined via Point-and-Click. AMS-9150



<p>IPaymentGatewayClass IPaymentGateway has been deprecated and replaced with IPaymentGateway2, a globalized class.</p>	AMS-9171
<p>Custom History Records During order adjustments, the order API now dynamically subqueries custom history data types based upon custom metadata configuration.</p>	AMS-9176
<p>Customize the Staff View Order Process The Business Rule Framework can be used to customize the staff view order process.</p>	AMS-9185
<p> Blank address on Recurring Payments Recurring payments processed through Auth.net no longer fail if the address is left blank.</p>	AMS-9188
<p> Insert/Update Carts The CartTriggerHandlers has been improved to better support inserting/updating more than 200 carts at once.</p>	AMS-9196
<p>Custom History HistoryData methods are globalized to allow package users to easily create custom history datas.</p>	AMS-9197
<p> Set the Invoice Number A bug has been addressed so the CartPaymentService Class now sets the 'Invoice Number' for Payment Gateway Requests to the name of a new SelfService Batch</p>	AMS-9199
<p>Subscription Quantity Staff may now set a quantity on Subscription products in Staff View. This simply alters the quantity of a given product on an order and does not impact start / end dates for the subscription. The quantity, unit price is also now visible on the resulting Subscription history record(s).</p>	AMS-9226
<p> Refund Errors with Multiple Entities Refunds will not submit to the order and you will be prompted to enter a refund to the correct Entity.</p>	AMS-9230
<p>Refund Period A new field named "Refund Period" has been added to the payment gateway object. It is intended to be used by payment gateways which have different limitations from Authorize.net. If a gateway record has no value in this field, it will be treated as the current, legacy 120 day Authorize.net refund period. If zero is specified as the limit, there is no limit at all. Any other value greater than zero is treated as the refund period in days.</p>	AMS-9331
<p>More than 10 Stored Payments If you are using BluePay, your members can now save more than 10 Stored Payment Methods.</p>	AMS-9352
<p> Improved Large Batch Export for Microsoft Dynamics™ GP Staff can now export batches containing more than 1000 records for use in Microsoft Dynamics™ GP.</p>	AMS-9432



Express Payment with Products from Different Entities Constituents can now use express payment to pay for an order containing products from multiple entities. AMS-9479

 **Better Experience for Payment Refunds with Errors** To ensure Nimble AMS records stay in sync with records in the Payment gateway, payment refunds are now voided if any errors are encountered. AMS-9491

 **Process Multiple Order Item Lines for the Same Product** We've improved order submission to process orders with multiple order item lines containing the same product. AMS-9510

 **First Credit Card Transaction of the Day is Successful** We've improved how the first credit card payment of the day is submitted so it processes without error. AMS-9518

 **Uniquely Identify Batches when Reconciling** The Batch Reconciliation Identifier field has been added to the Batch object. The new value is unique to each batch and is passed to the payment gateway as the Invoice Number. You can use the Batch Reconciliation Identifier for batch reconciliation between Nimble AMS and the payment gateway. AMS-9533

Data Privacy and Protection

I Do Not Consent When a user clicks the "I Do Not Consent" button the page is refreshed. DPP-48

Forget Me Users can opt to be forgotten in Community Hub. DPP-73

User Consent to Cookies To follow the GDPR guidelines, Community Hub asks users to consent to cookies. DPP-87

DPP Admin Permission Set There is a permission set called DataPrivacyAndProtectionAdmin Permission Set that applies the permissions admins need to manage data privacy and protection. DPP-89

Customize Staff Notifications Customizations can define how they want staff to be notified of a request. DPP-90

Delete Field History The Anonymization process now deletes field history entries for the anonymized fields. DPP-148

Community Hub

Data Source Drop Down In order to improve ease of configurability, the Data Source field is now a drop down list. NC-3445



Autocomplete In order to allow the user to control the number of characters required for the autocomplete function to work, a Minimum Search Length field in the AutoCompleteSearch Configuration page can set to take any number of values with a default of 2. NC-3666

Button Creation URL In order to better integrate Community Hub with third-party systems, a field was added to the point-and-click button creation interface which allows the user to configure the value of the key for the URL parameter. NC-3788

 **Duplicate Search Button** The Duplicate Search button has been updated to use the field set defined on the card instead of that configured in custom settings. NC-4202

Salesforce Duplicate Rules Community Hub can use built in Salesforce Person Account duplicate rules for matching duplicate accounts during the account creation process. This requires the class to be set to NC.DatacloudDupeService. NC-4365

HTML Text in Community Hub In order to give users more control over the contents of their Community Hub cards, Community hub cards can now have their text contents defined in HTML. NC-4379

Add a card friendly name The 'Add A Card' dropdown was updated to display the friendly name / label. NC-4427

 **Left Justified** To ensure consistency in field display, fields on cards such as the Read Only Field Set now correctly appear justified left. NC-4438

Coming Soon: Lightning Components in Community Hub A new framework piece which will be a part of the flexible payments pilot was added which allows for the embedding of Lightning Components into Cards in Community Hub. This is a new card type which at this time is intended for advanced developer use only. This will be expanded to administrators and consultants when its first feature graduates to beta. NC-4439

 **Find My Account Search Updates** The FindMyAccount feature was updated to search only the fields specified on the Card's field set. Additionally, optional fields will no longer be queried for blank values during the search. NC-4478

ID per Row on RecordList Component To improve functionality, an Id is dynamically added each row representing the record. The user can now input a # followed by the Record Id at the end of the URL, it will load the page in the correct position of where the record is. NC-4488

 **So Many Colleagues** A new card is available for use on the Manage Registration page that offers pagination. NC-4489



Launch Flows with Buttons in Community Hub Customers are able to launch autolaunch flows dynamically via buttons in Community Hub. Records returned from a configured data source are passed into the flow as input variables. NC-4500

Securing the Community Hub Cart Additional validations were added in Community Hub to prevent checkout pages from presenting cart information for other users when given their cart ID. This means users can no longer change the cart ID in the URL bar in their browser to view another cart. Please contact NimbleUser Support if this has any affect on your customizations. NC-4504

Lightning Flow Component A new component and card type were added for supporting the lightning:flow Lightning Component from within Community Hub. NC-4511

 **Terms and Conditions Card** The Terms and Conditions card now supports formatted HTML when "Display HTML" is selected for the Card Layout, else it will display raw text in scrollable text area. NC-4515

Maximum Stored Payments For organizations using BluePay, the maximum allowed stored payments per user is now configurable through the payment gateway record. NC-4532

 **Custom Colleague Locator** If a primary affiliation does not exist, then our code now allows a custom colleague locator class to be used. NC-4553

 **Multiple Passcodes per Registration Type** Staff can now assign multiple passcodes to a single registration type. You can distribute multiple passcodes to constituents which they can use to gain access to registration in Community Hub. NC-4560

 **Constituents are Notified When Trying to Check Out with an Expired Coupon** A message now displays to constituents when trying to check out with an expired coupon. They must remove the coupon code to proceed. NC-4563

Programs

 **Transition Program** A bug was resolved so renewal program types with "Transition To Program Type Override" set will now successfully create the transition program when the current renewal is completed. PROG-316

