

As part of our commitment to continuously update and enhance our Fundraising system, we have recently added the following features to the Artez product.



Improved Search Experience



Refund/Void Payments Processed through ArgoFire



Minor Enhancements

Improved Search Experience – Individual and Team Search Page

In a previous release, we added mobile search pages. In this release, the search pages (big browser only) have been updated to improve the user experience. On page load, the search page will now display all individuals or teams that are registered for the event. If there are more than 25 participants or teams, pagination controls will be visible at the bottom of the page.

A major change is the fact that the list is now dynamically filtered as you start to type. For example, as you type each letter, the search results section is automatically updated without the need to click on a Search button. In addition to dynamic filtering, the Individual and Team search now use a “contains” logic so searching for a team or participant is now really simple.

As seen in the example below, we have not made many visual changes to the page. However, clients who have skinned the search page are encouraged to review the page in the Sandbox prior to go live.

[Home](#)

Search for an Individual to Sponsor or Teams to Join

Individual Search

Team Search

Sponsor a Participant

To search for a participant, please enter in a few letters of their first and/or last name.

Participant Name:

You can also narrow your search results further based on the following:

Location:

Select a location ▼

Participant Name	Affiliation	Location
Anderson, Rita		First Location
Artez, Omar		First Location
Barton, Barry		First Location
Bautista, Jose		First Location
Becker, Sharon	GiftWorks	First Location
Ben, Benny	Artez Interactive	First Location
Brady, Tyler		First Location
Casey, Dwayne		First Location
Chapman, Shirley		First Location
Cooper, Maryann		First Location
Echevers, Omar		First Location
Fisher, Marianne		First Location
Gardner, Debbie		First Location
Gilbert, Horace		First Location
Griffith, Alyssa		First Location
Hamilton, Terri		First Location
Harvey, Eloise		First Location
Hawkins, Kelli		First Location
Jay, Ben	Artez Interactive	First Location
jay, Johnny	Artez Interactive	First Location
Jefferson, Maxine		Second Location
Jenkins, Maureen		First Location
Knight, Mona		First Location
Lee, Bruce		First Location
Leonard, Lee		Second Location

Pagination controls

<< 1 2 3 >>




Sprint 5 – Release Notes

Refund/Void Payments Processed through ArgoFire

Organizations that use the ArgoFire gateway, are now able to refund payments directly from the Artez Admin console.

Note: Any refunds for payments made prior to the release of this enhancement will need to be done in ArgoFire.

In the example below we will issue a refund for a donation.

1. From the Artez console, go to the **Relationships** tab.
2. Click on the **Donor/Purchaser** tab.
3. Search for the donor.
4. Click on the  icon next to the donation you would like to refund.
5. From the Donation Summary page, click on **View Payments**.
6. From the Payments page, click on **Details**.
7. In the Payment Summary page, click on the drop down next to Status and select **Voided**.
8. Click on **Yes, Change**. A warning will then be displayed. Click **OK**.
9. You should now see a message indicating that the payment has been voided in the Artez system and ArgoFire.

Payment Summary: \$10.00 on Jul 16, 2014

Please confirm that you wish to change the status of the payment.



The payment has been successfully voided in the Artez system and ArgoFire.

Payment Information

Date: **Jul 16, 2014**

Amount: **\$10.00**

Type: **Credit Card**

Status: **Voided** ▼

Notes:

Are you sure you want to change the status of the payment?

If you log in to the ArgoFire portal, you should expect to see a Credit in the current batch for the payment you just voided.



Credit Transactions for **Omars Test Account 123**

[Filters](#)

Items per page 10 (0 will fill everything on one page)

Report Format: XML

Ref #	Customer ID	Inv #	Date	Result	Payment Type	Account Type	Account #	Name	Type	Status	Approval Code	Auth Amt	Capture Amt	User	Register	PO Num #
482167		40815	7/21/2014 12:00:53 PM	APPROVED	VISA	VISA	*****2220	A	Credit	APPROVAL	098588	\$10.00	\$10.00	ssgg4156	Omars Test	



Sprint 5 – Release Notes

Minor Enhancements

In addition to the new features that we have already mentioned, you can also expect the following minor enhancements:

- Ability to define a vanity URL when creating a corporate team (only applicable to clients that have a custom URL)
- Updated the number format in Donation Details and Registrations Details (pick & choose) reports, to make it easier to export to Excel and sum totals within Excel. Prior to this update, the numbers were being exported as text.