

# **Kinetic Solutions**

## **KxRegistration**

### **2014.0 Release notes**

Date: 16 June 2015  
Version: 2014.0



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# Outline

## ***Document Content***

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### **Content outline**

This document contains the primary changes and installation notes for release 2014.0 of KxRegistration.

This document is intended for reference against existing installations of KxRegistration (2013). Earlier changes can be found in previous release notes documents.

### **Confidentiality**

This document strictly confidential and is intended solely for the use by the client organisation. No distribution or reproduction of this document is permitted without the written permission of Kinetic Solutions Limited.

## ***Migrating from KxRegistration 2012/2013 to KxRegistration 2014***

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*A change has been made to the licensing mechanism which will require all installations to be re-activated when moving from 2012/2013 up to 2014. Once on 2014 this does not need to be repeated.*

*During deployment of application files, delete kx.lic from the root folder. This will require new activation. All licenses have had their activation limit increased to reflect this.*

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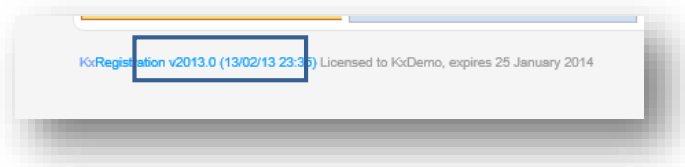
## Outline

### ***New feature/functionality highlights***

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- Admin suite styling updated
- Attendee details viewing and editing within admin suite
- Billing adjustments following changes to packages
- Quantity selection for optional packages
- Accommodation resource type
- Bedroom Type linked to resource
- Answers to questions linked to Kx UDFs
- Passing attendee as contact in Kx
- Transfer of Address to person record in Kx
- Marketing preferences for attendee during booking process.

For full list of new features view the version highlights link in the admin section:



### ***Changes/improvements/fixes***

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- Active Directory/LDAP authentication for Kx Operators
- Improvement to billing/payment views when crediting
- 2 x additional custom fields added to WPM XML interface
- Transfer of attendee data to Kx now "inline"
- Validation of emails through double entry
- 2 x additional Internal Codes added against each event
- Resource and package pages show number remaining
- Supporting of Unicode characters in email templates
- Fixed fault with booking summary display showing Custom Field 4 label for Custom Field 5

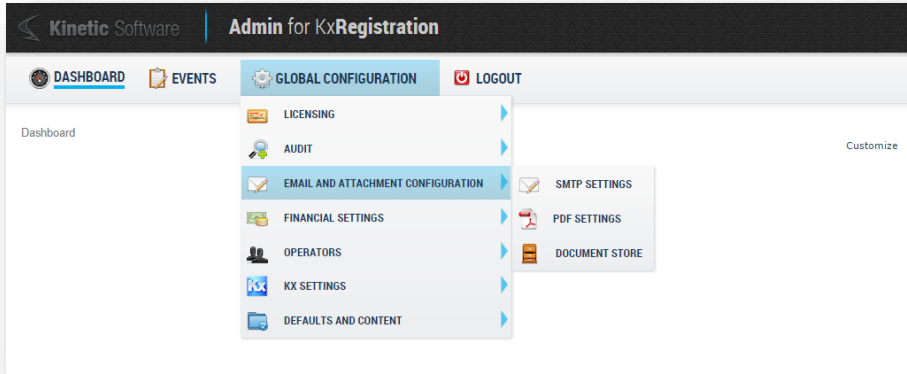
# Changes, improvements and fixes

## Admin suite styling updated

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### Outline

The admin suite has been updated to reflect the new style for Kx web applications. Core locations of items on menus remain unchanged.



## ***Attendee details viewing and editing within admin suite***

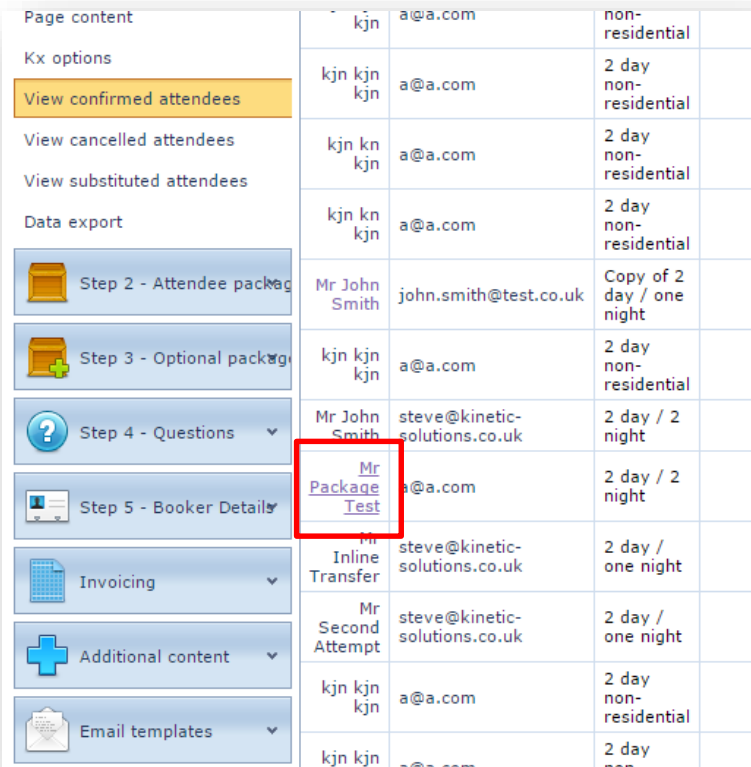
### **Outline**

KxRegistration 2013 did not have the ability to edit the details of any attendee, only view and export them. This has been changed to allow full editing of all attendees on a booking.

### **Details**

#### *Accessing details*

All data for attendees can now be edited by the administrator. Access to the attendee section is by clicking on the name link where an attendee is listed:



Page content	kjn	a@a.com	non-residential	
Kx options	kjn kjn kjn	a@a.com	2 day non-residential	
<b>View confirmed attendees</b>	kjn kn kjn	a@a.com	2 day non-residential	
View cancelled attendees	kjn kn kjn	a@a.com	2 day non-residential	
View substituted attendees	kjn kn kjn	a@a.com	2 day non-residential	
Data export	kjn kn kjn	a@a.com	2 day non-residential	
Step 2 - Attendee package	Mr John Smith	john.smith@test.co.uk	Copy of 2 day / one night	
Step 3 - Optional package	kjn kjn kjn	a@a.com	2 day non-residential	
Step 4 - Questions	Mr John Smith	steve@kinetic-solutions.co.uk	2 day / 2 night	
Step 5 - Booker Details	<a href="#">Mr Package Test</a>	a@a.com	2 day / 2 night	
Invoicing	Mr Inline Transfer	steve@kinetic-solutions.co.uk	2 day / one night	
Additional content	Mr Second Attempt	steve@kinetic-solutions.co.uk	2 day / one night	
Email templates	kjn kjn kjn	a@a.com	2 day non-residential	
	kjn kjn	a@a.com	2 day non-residential	

The links are always on the name of the attendee and appears in numerous places throughout the admin section of KxRegistration.

Attendee summary

DASHBOARD EVENTS GLOBAL CONFIGURATION LOGOUT

Dashboard > Current events > Maths event > Booking 5616 > Attendee Mr John Smith

Booking details for booking # 5616 - kjn kjn kjn (Confirmed)

Back to booking

Summary

Edit details

Personal details

Packages

Questions & answers

Attendee details [Edit these details](#)

Attendee # : 4044

Type : Default

Name : Mr John Smith

Email address : john.smith@test.co.uk

Address 1 : 1 testing rd

Address 2 : Suite 987

Town : Wakefield

County : MA

Postcode/Zip code : 01234

Telephone : 1234567890

Custom data

Name as to appear on the badge

Mobile Phone

Department

Company Name : Kx

Field 5

Packages

Primary: Copy of 2 day / one night

Optional: 2nd night

Optional: B&B Rate 28th May 2013

Answers

Dietary preference : Cheese

Additional dietary comments : Dairy free

Any additional info : Nope

Booking # : 5616

Booking status : Confirmed

Created on : 31/03/2014 14:22:20

Submitted : 31/03/2014 14:23:05

Booking confirmed : 31/03/2014 14:23:10

Booking status link : <http://dev.kxweb.com/KxRegistrationBE/MathsEvent/8ea3c4048f65445b90f3a5af9515f704/5616>

The initial page for an attendee shows a summary of the details for this attendee. Following the same paradigm as the other admin sections, the functionality is listed on the left of the page.

This details page show all of the information held for the attendee, as well as summary information for the booking.



*Personal details*

The screenshot shows the 'Admin for KxRegistration' interface. The top navigation bar includes 'DASHBOARD', 'EVENTS', 'GLOBAL CONFIGURATION', and 'LOGOUT'. The breadcrumb trail is 'Dashboard > Current events > Maths event > Booking 5616 > Attendee Mr John Smith'. The main heading is 'Booking details for booking # 5616 - kjn kjn kjn (Confirmed)'. On the left, a sidebar menu has 'Personal details' selected. The main content area shows a form for 'Personal details' with the following fields:

Personal details	
You are able to edit the personal details of the attendee	
Name	Mr John Smith
Email address	john.smith@test.co.uk
Address 1	1 testing rd
Address 2	Suite 987
Town	Wakefield
County	MA
Postcode/Zip code	01234
Telephone	1234567890
Name as to appear on the badge	
Mobile Phone	
Department	
Company Name	Kx
Field 5	

At the bottom of the form is a 'Save changes' button. A footer note reads: 'KxRegistration v2014.0 (30/11/14 10:38) Licensed to KxDemo, expires 31 July 2016 Copyright © Kinetic Solutions Ltd 2014'.

Within this section, all details for the attendee can be updated. Complete the change necessary and select “Save Changes” to commit them.

Packages

**Optional packages**

Select	Package	Qty	Qty Avail.	Total
Edit qty. <input type="checkbox"/>	1st night	0	∞	£0.00
Edit qty. <input checked="" type="checkbox"/>	2nd night	1	∞	£0.00
Edit qty. <input type="checkbox"/>	Pre-conference BBQ	0	36	£0.00
Edit qty. <input type="checkbox"/>	Gala Dinner @ IOD	0	∞	£0.00
Edit qty. <input checked="" type="checkbox"/>	B&B Rate 28th May 2013	1	∞	£290.00
Edit qty. <input type="checkbox"/>	Quantity Test	0	∞	£0.00

The attendee and optional packages are displayed and can be changed. The attendee package is selected from a drop-down and optional packages are selected/un-selected through the use of the check box in the grid. To confirm the changes, select the “Save Changes” button to commit them.

Editing the quantity of optional packages is achieved through clicking the link in the grid “Edit qty.”. This enables the edit section as shown below:

**Kinetic Software | Admin for KxRegistration**

DASHBOARD EVENTS GLOBAL CONFIGURATION LOGOUT

Dashboard > Current events > Maths event > Booking 5616 > Attendee Mr John Smith

Booking details for booking # 5616 - kjn kjn kjn (Confirmed)

Back to booking

Summary

Edit details

Personal details

**Packages**

Questions & answers

Attendee package: Copy of 2 day / one night

Optional packages

Select	Package	Qty	Qty Avail.	Total
Edit qty. <input type="checkbox"/>	1st night	0	∞	£0.00
	2nd night	1	∞	£0.00
Select quantity		1		
				Update Cancel
Edit qty. <input type="checkbox"/>	Pre-conference BBQ	0	36	£0.00
Edit qty. <input type="checkbox"/>	Gala Dinner @ IOD	0	∞	£0.00
Edit qty. <input checked="" type="checkbox"/>	B&B Rate 28th May 2013	1	∞	£290.00
Edit qty. <input type="checkbox"/>	Quantity Test	0	∞	£0.00

Save changes

KxRegistration v2014.0 (30/11/14 10:38) Licensed to KxDemo, expires 31 July 2016 Copyright © Kinetic Solutions Ltd 2014

The quantity can be adjusted by entering the number and pressing the “Update” link within the grid.  
**N.B. this change is committed immediately.**

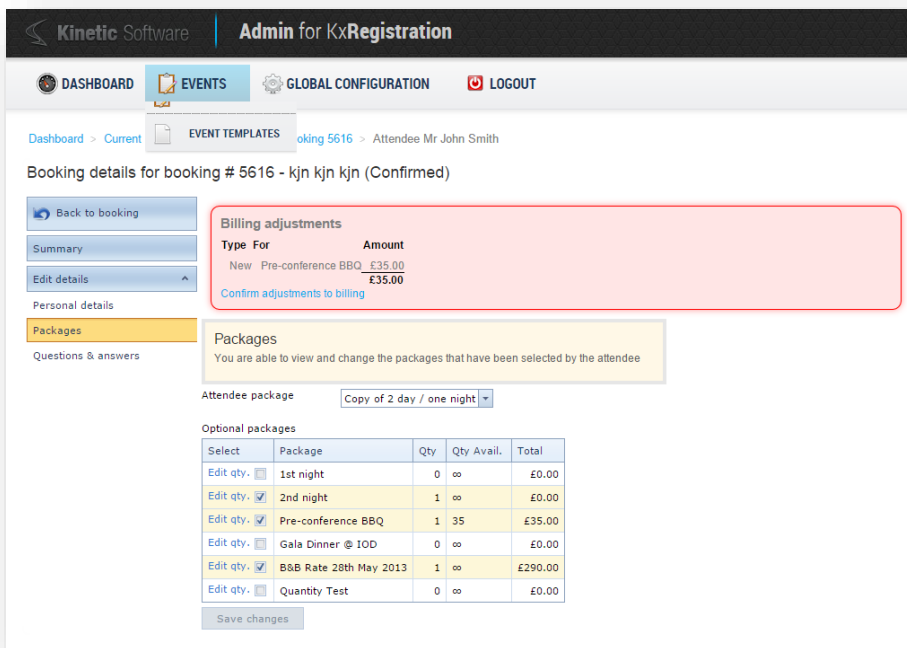
---

*It is important to also note, that the links between packages and attendee types etc. are **NOT** enforced in this section, allowing total freedom with the assignment of packages to an attendee.*

---

### Billing adjustment

When a billing adjustment is detected due to changes in packages, this is displayed at the top of this screen as well as at the top of the attendee and booking summaries.



Full details of the billing adjustments is detailed in the “Billing Adjustments” section later in this document.

Questions and answers

**Kinetic Software | Admin for KxRegistration**

DASHBOARD EVENTS GLOBAL CONFIGURATION LOGOUT

Dashboard > Current events > Maths event > Booking 5616 > Attendee Mr John Smith

Booking details for booking # 5616 - kjn kjn kjn (Confirmed)

Back to booking

Summary

Edit details

Personal details

Packages

Questions & answers

**Questions & answers**  
You are able to view and change the answers that have been given by the attendee to questions posed.

#	Question	Answer
Group		
Edit	Additional dietary comments	Dairy free
Edit	Any additional info	Nope
Edit	Dietary preference	Cheese

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All of the questions for an attendee are listed and can be edited by selecting the “Edit” link. This displays the input box for the answer, which can be entered and committed by selecting the “Update” link.

**Kinetic Software | Admin for KxRegistration**

DASHBOARD EVENTS GLOBAL CONFIGURATION LOGOUT

Dashboard > Current events > Maths event > Booking 5616 > Attendee Mr John Smith

Booking details for booking # 5616 - kjn kjn kjn (Confirmed)

Back to booking

Summary

Edit details

Personal details

Packages

Questions & answers

**Questions & answers**  
You are able to view and change the answers that have been given by the attendee to questions posed.

#	Question	Answer
Group		
Edit	Additional dietary comments	Dairy free
	Any additional info	Nope
		<input type="text" value="Nope"/>
		Update Cancel
Edit	Dietary preference	Cheese

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## Billing adjustments following changes to packages

### Outline

When a change has been made to an attendees packages (attendee or optional) after they have been confirmed and the invoice raised, a billing adjustment needs to be made in order to correctly bill for that booking.

As changes are made to each attendee, a billing adjustment summary is displayed on the attendee and booking details pages to show what adjustments would be required.

The changes are only confirmed when the Confirm Billing Adjustments process is followed. This is to allow for multiple changes to be completed prior to creation of the final invoice for a booking.

When the adjustments are carried out, the following process is completed:

1. Create a credit note for the original invoice
2. Raise a new invoice for the adjusted packages
3. Transfer any payments made against the original invoice to the new invoice.

### Billing adjustment summary

When changes are made to an attendee, an adjustment summary is displayed at the top of the attendee summary and the summary of the booking.

Billing adjustments		
Type	For	Amount
New	2 day non-residential	£169.99
New	Pre-conference BBQ	£35.00
Credit	Copy of 2 day / one night	-£459.99
		<b>-£255.00</b>

[Confirm adjustments to billing](#)

Figure 1: Attendee billing adjustments

Billing adjustments			
Type	Attendee	Package	Amount
New	Mr John Smith	2 day non-residential	£169.99
New	Mr John Smith	Pre-conference BBQ	£35.00
Credit	Mr John Smith	Copy of 2 day / one night	-£459.99
			<b>-£255.00</b>

[Confirm adjustments to billing](#)

Figure 2: Booking billing adjustments

The adjustment summary shows any credits and new lines and amounts that will be made when confirmed.

The “Confirm adjustments to billing” link can be followed to progress to the confirmation process.

### Billing adjustments in event validation

As well as adjustments being shown in the booking and attendee summaries, any adjustments needed are also shown as warnings against the event validation. This is to highlight any changes which have not been confirmed when being viewed within an event or system dashboard:

Linked to KX Event (12254)

Event dashboard		Maths event				
		Event	Package	Booking	Severity	Message
Event details		Maths event		5616	⚠	Billing adjustments exist for booking 5616
Kx						



Clicking on the booking number link will take the operator to the booking summary page in order to view the adjustments that are required.

This validation is also shown in the system dashboard against the active events.

### Confirming the billing adjustments

Following the links from the summary sections, or selecting the Confirm Billing Adjustments section on the left of the booking summary will take the operator to the confirmation process:

Admin for KxRegistration

Dashboard > Current events > Maths event > Booking 5616

Booking details for booking # 5616 - kjn kjn kjn (Confirmed) ⚠

Back to event

Summary

Edit details

Booker details

Attendees

Items

Invoices/Credit notes

Payment audit

Available tasks

Resend booking confirmed email

Cancel this booking

Confirm billing adjustments

**Billing adjustments**

Type	Attendee	Package	Amount
New	Mr John Smith	2 day non-residential	£169.99
New	Mr John Smith	Pre-conference BBQ	£35.00
Credit	Mr John Smith	Copy of 2 day / one night	-£459.99
			<b>-£255.00</b>

Confirm adjustments to billing

Booking #: 5616  
 Status: Confirmed  
 Created on: 31/03/2014 14:22:20  
 Submitted: 31/03/2014 14:23:05  
 Booking confirmed: 31/03/2014 14:23:10  
 Booking status link: <http://dev.kxweb.com/KxRegistrationBE/MathsEvent/8ea3c4048f65445b90f3a5a9515f704/5616>

Booker details

Bookers name: kjn kjn kjn  
 Email address: a@a.com  
 Address 1: kjn  
 Address 2: kjn

The page below is then displayed showing the complete set of changes that will be carried out during the billing adjustment.

Back to event

Summary

Edit details

Booker details

Attendees

Items

Invoices/Credit notes

Payment audit

Available tasks

Resend booking confirmed email

Cancel this booking

Confirm billing adjustments

**Confirm billing adjustments**

This page allows any adjustments to billing required as a result of changing the packages for attendees.  
 The original invoice will be credited and a new invoice raised for the revised packages.

Name	Package	Nett	Tax	Total
<b>Section: New</b>				
Mr John Smith	2 day non-residential	£141.66	£28.33	£169.99
Mr John Smith	Pre-conference BBQ	£29.17	£5.83	£35.00
				<b>£204.99</b>
<b>Section: Credit</b>				
Mr John Smith	Copy of 2 day / one night	-£383.33	-£76.66	-£459.99
				<b>-£459.99</b>
<b>Total adjustments to be made: -£255.00</b>				

Confirm billing adjustments?

This allows a final review of the billing changes, including all nett, tax and total amounts that will be generated.

In order to confirm these changes and generate the necessary credit notes and invoices, press the “Confirm Billing Adjustments” button. Confirmation is then displayed and the invoice page is then displayed upon completion:

[Back to event](#)

Summary

Edit details ^

Booker details

Attendees

Items ^

Invoices/Credit notes

Payment audit

Available tasks ^

Resend booking confirmed email

Cancel this booking

**Invoices & credit notes**

Below are listed the invoices and credit notes which have been logged against the booking.

#	Total Nett	Total Tax	Total	Paid	Due	Payment	View
> 20349	£141.66	£28.33	£169.99	£169.99	£0.00		
> 24108	-£141.66	-£28.33	-£169.99	-£169.99	£0.00		
> 24109	£654.17	£130.82	£784.99	£784.99	£0.00		
> 24162	-£654.17	-£130.82	-£784.99	-£784.99	£0.00		
> 24163	£625.00	£124.99	£749.99	£749.99	£0.00		
> 27868	-£625.00	-£124.99	-£749.99	-£749.99	£0.00		
> 27869	£412.50	£82.49	£494.99	£169.99	£325.00	Add payment	
	£412.50	£82.49	£494.99	£169.99	£325.00		



## Quantity selection for optional packages

### Outline

An attendee is required to select a single attendee package, but the ability to select multiple quantities for optional packages has been added. This has been added to support items like tickets etc. where the booker is currently required to register each person separately even when the only items that the subsequent attendee would select would be the optional package.

This can lead to confusing configuration in order to support multiple elements.

### Details

#### Configuration of quantity selection

When adding an optional package, two new fields are available to enter the minimum and maximum quantities that can be selected:

The screenshot shows the 'Admin for KxRegistration' interface. The main content area is titled 'Maths event' and shows the configuration for adding a package. The 'Add package' section includes the following fields:

- Internal name:** [Text input field]
- Display name:** [Text input field]
- Dates that package is available (optional):** From [Anytime] To [Anytime]
- This package is displayed if the attendee is of type...**

#	Attendee type
<input checked="" type="checkbox"/>	Default
- Minimum quantity:** [1] (highlighted with a red box)
- Maximum quantity:** [1] (highlighted with a red box)

A yellow callout box points to the 'Default' row in the table above, containing the text: "Enables the maximum number of packages that an attendee can select. If both are the same value then quantity is set to 1 and no option is displayed."

Below the configuration fields, there is a table for 'This package is displayed if the attendee has selected...':

#	Package
<input type="checkbox"/>	2 day non-residential

If these items are the same, then the booker will only be able to check the box for the selection of an optional package, which selects 1.

If there is a difference between the values (e.g. min 1 max 3), then the check box will be changed to a drop down showing the quantities available between those numbers:

1 2 3 4 5 6

CHOOSE OPTIONAL PACKAGES FOR MR TEST ATTENDEE

0  
0  
1  
2

Pre-conference BBQ £35.00

0

Gala Dinner @ IOD

B&B Rate 28th May 2013  
£290.00

PACKAGE INCLUDES  
Accommodation (single occupancy)  
Breakfast

0

Quantity Test

Previous Next

The screen above shows the optional package selection with one standard package and three packages where the quantity has been configured.

Existing packages can have their quantity range updated by editing the basic details within the package configuration:

The screenshot shows the 'Admin for KxRegistration' interface. The breadcrumb trail is 'Dashboard > Current events > Maths event > Pre-conference BBQ'. The page title is 'Pre-conference BBQ'. On the left sidebar, 'Basic details' is selected under 'Package details'. The main content area shows the following fields:

- Internal name: Pre-conference BBQ
- Display name: Pre-conference BBQ
- Dates that this package is available: From Anytime, To Anytime
- Minimum quantity: 1
- Maximum quantity: 2

The 'Minimum quantity' and 'Maximum quantity' fields are highlighted with a red box. Below these fields is an 'Inactive?' checkbox and a 'Save changes' button. At the bottom, there is a list of event days: '-1 (07/03/2018) £35.00' and '1 (08/03/2018) £0.00'.

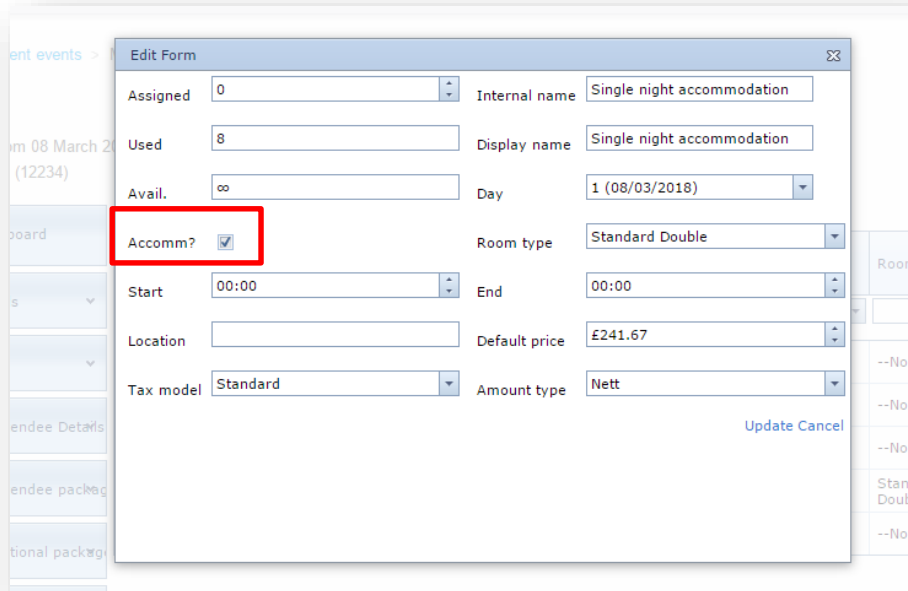
## Resource Types

### Outline

Previously all resources were treated the same, however where accommodation is configured as a resource, when transferred to Kx, the date of departure should be extended by 1 day because the accommodation is for the night of the resource.

### Selecting the resource type

Within the resource configuration, a new checkbox is present allowing a resource to be flagged as an accommodation resource.



### Impact of change

Where this is selected against a resource, when the attendee is transferred to Kx the departure date is extended by an additional day where the last night's resource is an accommodation one.

e.g. KxRegistration resources assigned from 1<sup>st</sup> Nov 2014 to 3<sup>rd</sup> Nov 2014, all accommodation. When the attendee is transferred to Kx the dates of will be posted as 1<sup>st</sup> Nov 2014 to 4<sup>th</sup> Nov 2014.



## ***Bedroom Type linked to resource***

### **Outline**

In order to assist the allocation of attendees in Kx who have selected accommodation types within KxRegistration, the ability to associate a Kx bedroom type to a resource.

#### ***Selecting bedroom types***

Within the resource configuration, a dropdown list of bedroom types which have been reserved for the event will be displayed.

The screenshot shows the 'Edit Form' dialog box with the following fields and values:

Field	Value
Assigned	0
Used	8
Avail.	∞
Accomm?	<input checked="" type="checkbox"/>
Start	00:00
Location	
Tax model	Standard
Internal name	Single night accommodation
Display name	Single night accommodation
Day	1 (08/03/2018)
Room type	Standard Double
End	
Default price	£241.67
Amount type	Nett

#### ***Impact of configuration***

When an attendee is transferred to Kx, the first resource which has a bedroom type associated to it will be assigned as the selected bedroom type within Kx. This allows easier room allocations within Kx.

## Answers to questions linked to Kx UDFs

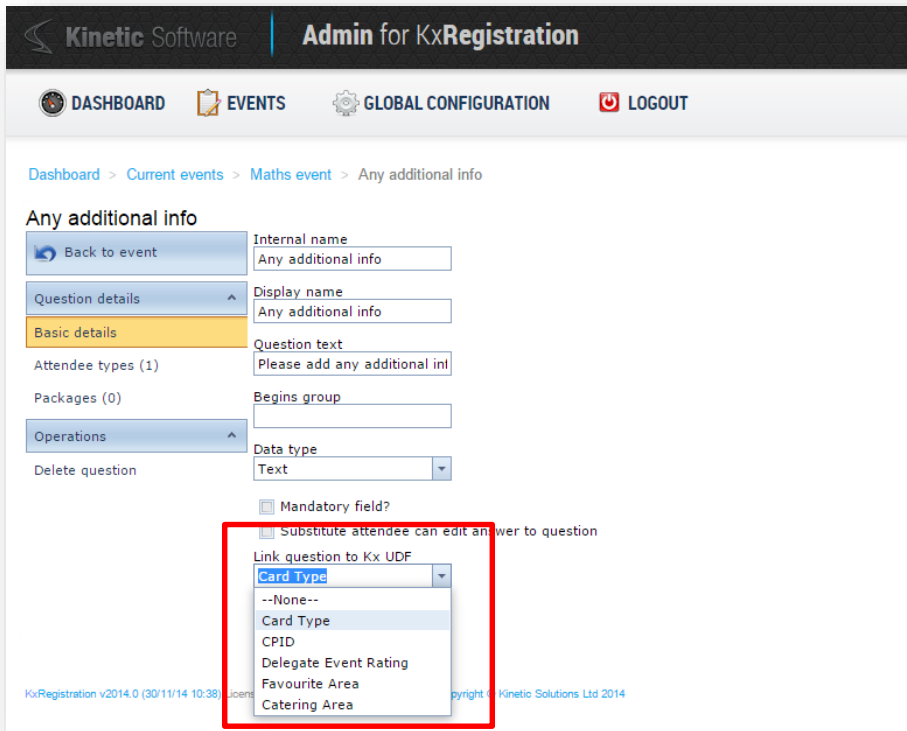
### Outline

To aid data presentation within Kx for data provided during KxRegistration, the ability to pass answers to questions through to UDF's within Kx has been added.

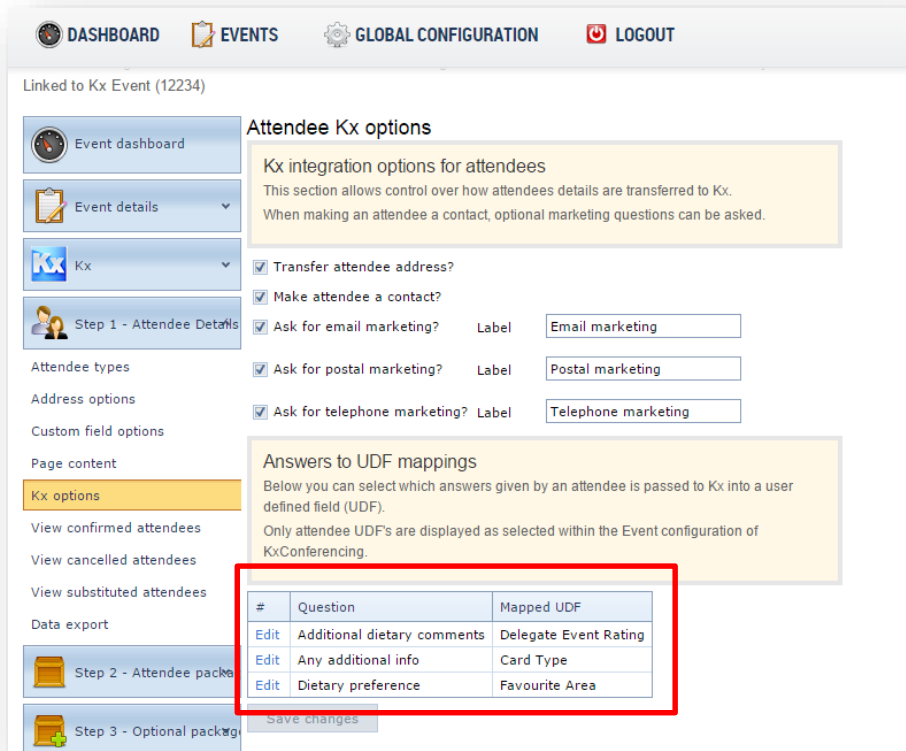
This is a one-time/one-way transfer and subsequent changes will not be passed either way between Kx and KxRegistration.

### Configuration of UDF to answers

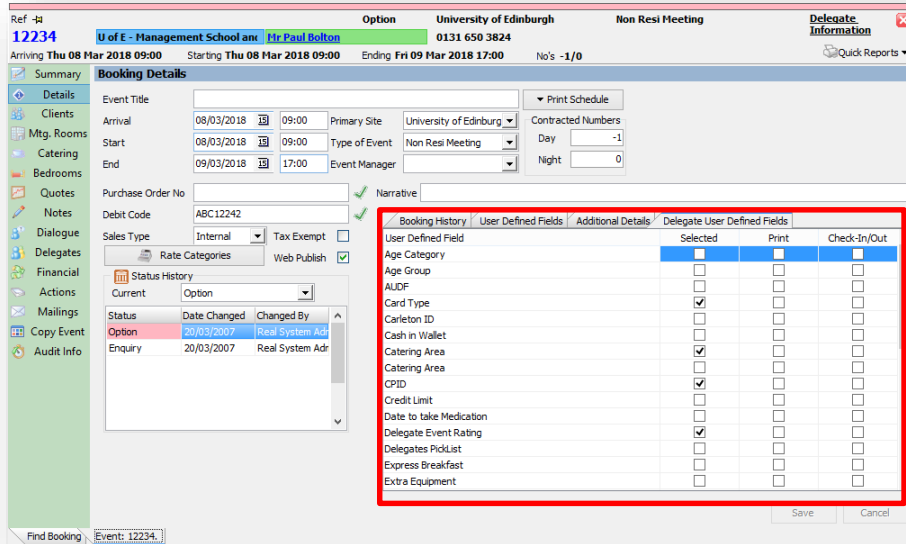
Within the question configuration basic details, if the event is linked to a Kx event, a list of attendee UDF's associated with the event are listed:



The UDF's linked to questions can also be configured within the Kx Options section of the Attendee Details configuration area:



Only UDF's linked to the event are displayed, which are configured in the Details section of the Kx Event:



# Passing attendee as contact in Kx

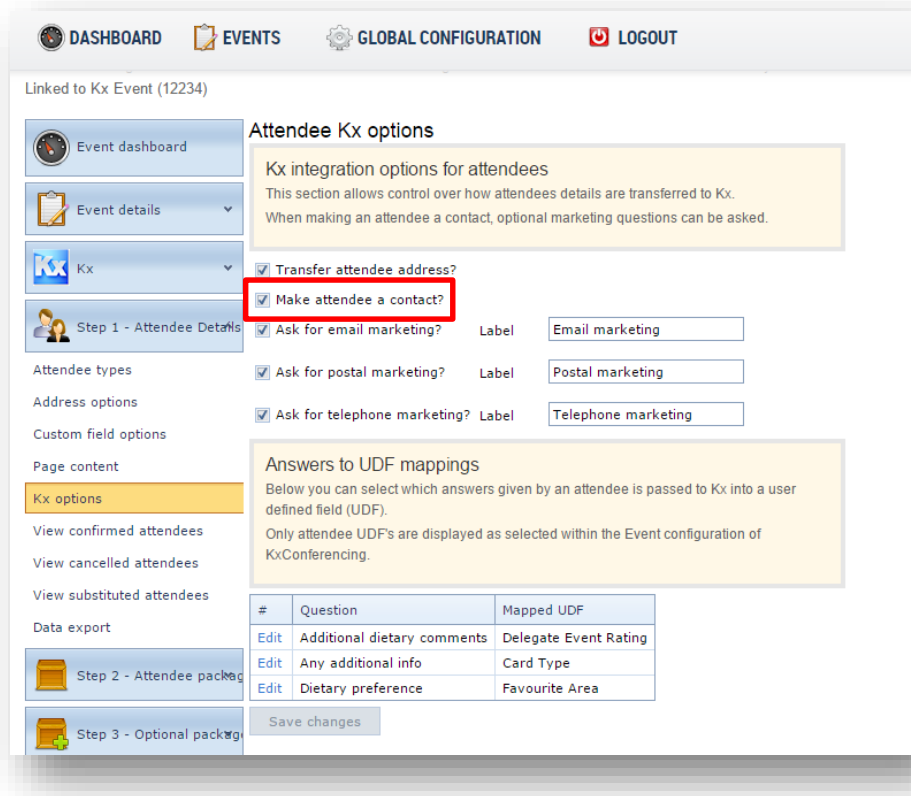
## Outline

When the attendee is transferred to the event in Kx, there is now the option to identify each attendee as a Contact in Kx, which will then permit contact through the CRM modules.

## Details

### Configuration of option

A new option has been placed under the Attendee Details section of the event configuration called "Kx Options". This allows configuration of all elements of the improved integration to Kx Conferencing:



In order to make attendees a contact in Kx, tick the "Make attendee a contact" check box and press the "Save Changes" button to commit the change.

Any attendees *after this point* will be made a contact.



## ***Transfer of Address to person record in Kx***

### Outline

As a support to the making an attendee a contact, the ability to transfer the full address of the attendee through to Kx has been added.

### Details

#### *Configuration of option*

A new option has been placed under the Attendee Details section of the event configuration called "Kx Options". This allows configuration of all elements of the improved integration to KxConferencing:

Linked to Kx Event (12234)

**Attendee Kx options**

Kx integration options for attendees  
This section allows control over how attendees details are transferred to Kx. When making an attendee a contact, optional marketing questions can be asked.

**Transfer attendee address?**

Make attendee a contact?

Ask for email marketing? Label:

Ask for postal marketing? Label:

Ask for telephone marketing? Label:

Answers to UDF mappings  
Below you can select which answers given by an attendee is passed to Kx into a user defined field (UDF). Only attendee UDF's are displayed as selected within the Event configuration of KxConferencing.

#	Question	Mapped UDF
<a href="#">Edit</a>	Additional dietary comments	Delegate Event Rating
<a href="#">Edit</a>	Any additional info	Card Type
<a href="#">Edit</a>	Dietary preference	Favourite Area

In order to transfer the attendees address to Kx, tick the "Transfer attendee address" check box and press the "Save Changes" button to commit the change.

Any attendees *after this point* will have their address transferred to Kx.

# Marketing preferences for attendee during booking process

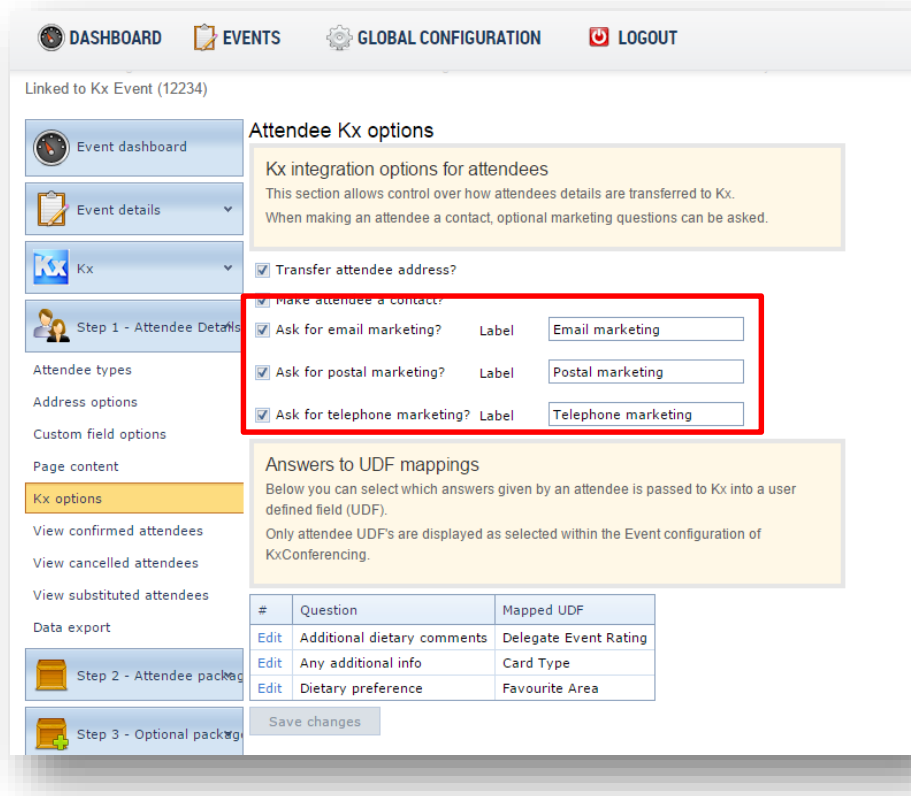
## Outline

In order to comply with legislation regarding preferences and opt-out for marketing information, the ability to configure and ask for marketing preferences has been added to each event.

## Details

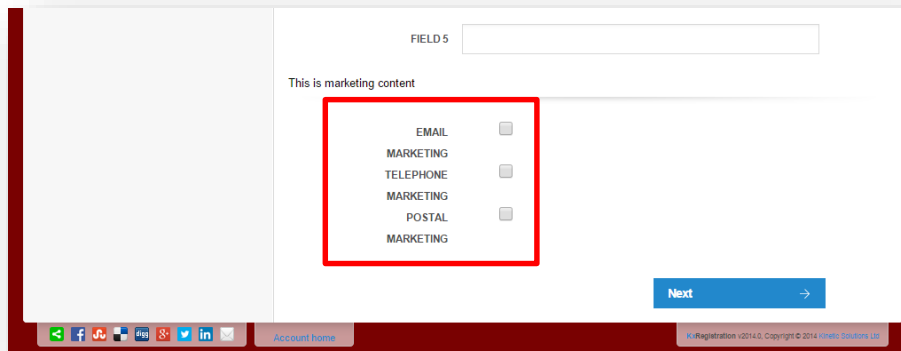
### Configuration of option

A new option has been placed under the Attendee Details section of the event configuration called "Kx Options". This allows configuration of all elements of the improved integration to Kx Conferencing:



Each type of marketing preference can be turned on and off and the label for each one changed on a per-event basis.

Selecting the option displays a check box on the attendee details page of the registration process:



To support more information about the marketing questions, a new content section has been added above the questions. This is identified as Marketing Content on the Page Content in the Attendee Details section. The information captured here is passed to Kx as the marketing preferences. Any attendees *after this point* will have their preferences transferred to Kx.

## Changes improvements and fixes

### ***Active Directory/LDAP authentication for Kx Operators***

#### Outline

The back-office authentication has always been linked to the Kx Operator configuration, however it only supported internal Kx credentials for authentication. This has been changed now to be able to utilise Active Directory/LDAP authentication in the same way as the Kx modules.

#### Details

KxRegistration will automatically pick up the AD/LDAP settings from the Kx configuration and will utilise the same per-operator configuration for the authentication source.

One additional setting may be required to be configured within the web.config file of the KxRegistration site. This is due to limitations of cross-platform encryption and the password for the initial LDAP Bind not being able to be de-crypted.

The setting in the Kx Configuration for the LDAP Bind Password should be placed in the "Kx.LDAP.BindPassword" app.setting. This will default to %CURRENTPASSWORD% and will use the password of the user who is authenticating at that time, however the individual configuration should be replicated from Kx.

### ***Improvement to billing/payment views when crediting***

#### Outline

As part of the billing adjustments functionality, the method of linking credits and invoices has been improved. Where previously there was no direct link between a credit note and an invoice, now a "virtual" payment is displayed against the invoice and credit note so that the relevant document does not show as outstanding.

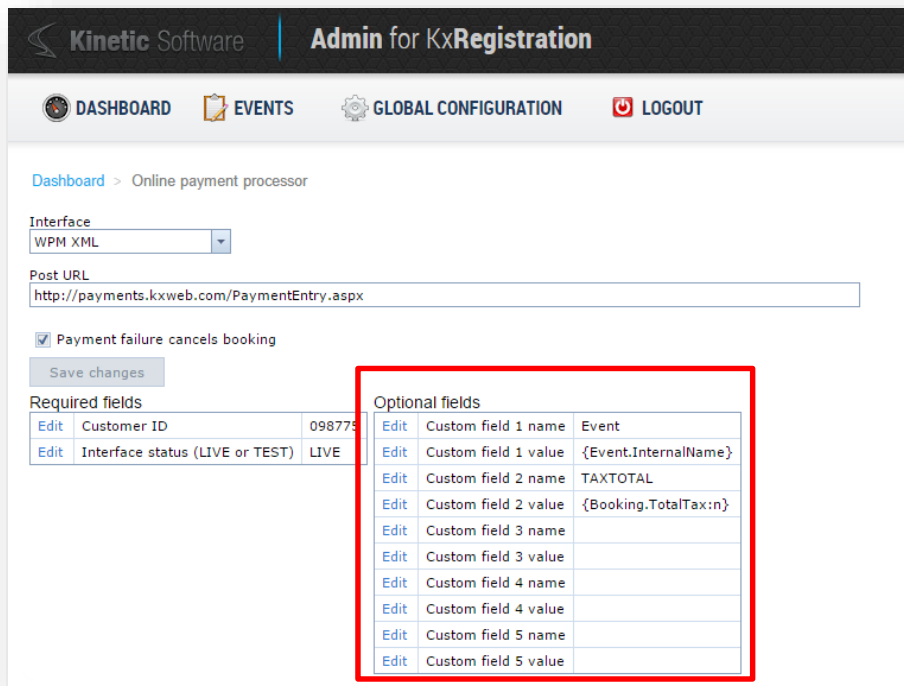
Invoice lines				Payments																														
Delegate	Package	Tax	Total	Date	Ref	Via	Amount																											
kjn kjn kjn	Pre-conference BBQ	£23.32	£140.00	29/11/2014 20:30:06	Credit invoice 27859	Credit	£140.00																											
<table border="1"> <thead> <tr> <th colspan="4">Invoice lines</th> <th colspan="4">Payments</th> </tr> <tr> <th>Delegate</th> <th>Package</th> <th>Tax</th> <th>Total</th> <th>Date</th> <th>Ref</th> <th>Via</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>kjn kjn kjn</td> <td>Pre-conference BBQ</td> <td>-£23.32</td> <td>-£140.00</td> <td>29/11/2014 20:30:06</td> <td>Credit for invoice 27698</td> <td>Credit</td> <td>-£140.00</td> </tr> </tbody> </table>				Invoice lines				Payments				Delegate	Package	Tax	Total	Date	Ref	Via	Amount	kjn kjn kjn	Pre-conference BBQ	-£23.32	-£140.00	29/11/2014 20:30:06	Credit for invoice 27698	Credit	-£140.00							
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kjn kjn kjn	Pre-conference BBQ	-£23.32	-£140.00	29/11/2014 20:30:06	Credit for invoice 27698	Credit	-£140.00																											

No physical records are created for this, and they are for display purposes only. Any financial interfaces will remain un-affected.

## ***2 x additional custom fields added to WPM XML interface***

### **Details**

The WPM XML based payment interface original supported three custom fields for transfer of data through to WPM. This has been expanded to now support up to five custom fields:



Dashboard > Online payment processor

Interface  
WPM XML

Post URL  
http://payments.kxweb.com/PaymentEntry.aspx

Payment failure cancels booking

Save changes

Required fields

Edit	Customer ID	098773
Edit	Interface status (LIVE or TEST)	LIVE

Optional fields

Edit	Custom field 1 name	Event
Edit	Custom field 1 value	{Event.InternalName}
Edit	Custom field 2 name	TAXTOTAL
Edit	Custom field 2 value	{Booking.TotalTax:n}
Edit	Custom field 3 name	
Edit	Custom field 3 value	
Edit	Custom field 4 name	
Edit	Custom field 4 value	
Edit	Custom field 5 name	
Edit	Custom field 5 value	

## ***Transfer of attendee data to Kx now “inline”***

### **Outline**

The transfer of attendees from KxRegistration through to Kx was originally an off-line SQL Server Agent Job which ran a procedure to transfer the necessary data. This sometimes caused an issue where the agent was not running, and so attendees were not being transferred to Kx.

The process has now been moved “inline” and is performed during the booking confirmation process. Whilst this results in a slight delay in the processing of the confirmation to the booker, the data is transferred immediately into Kx.

Where the SQL Server Agent Job has been configured, this can remain in place, the stored procedure executed has been adjusted to only process bookings that were confirmed over an hour ago and has not been transferred. Therefore only acting as a sweep-up job in the event of a failure of the inline process.

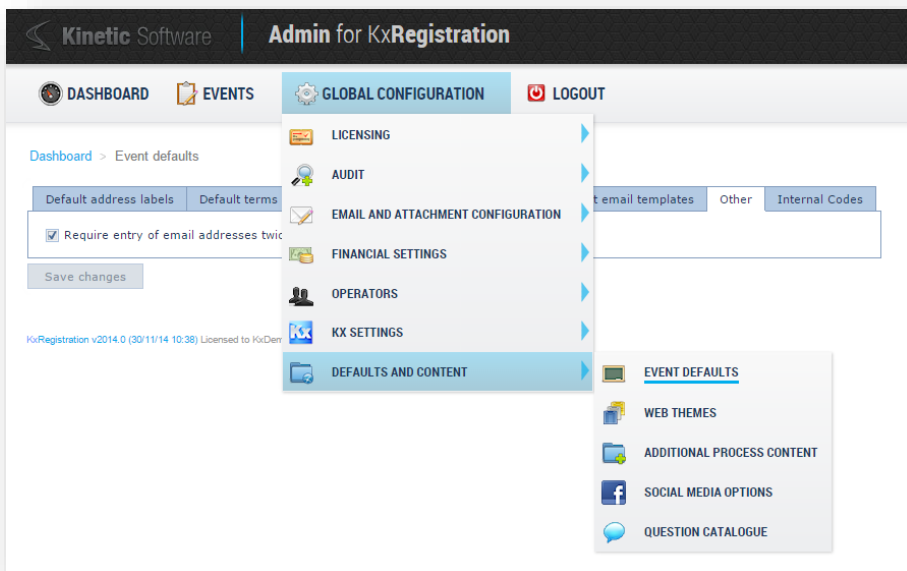
# Validation of emails through double entry

## Outline

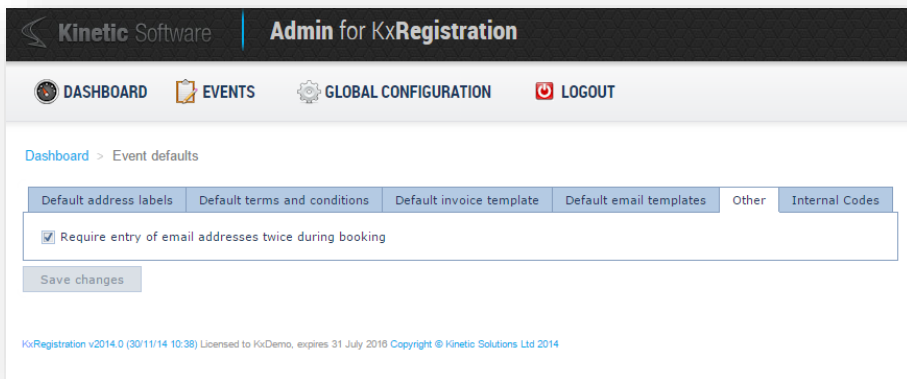
The option has been added to require the booker to enter any email fields twice during the booking process to ensure that the email being entered is as they intended. This is important because both the booker and the attendee may be required to receive an email from KxRegistration.

## Details

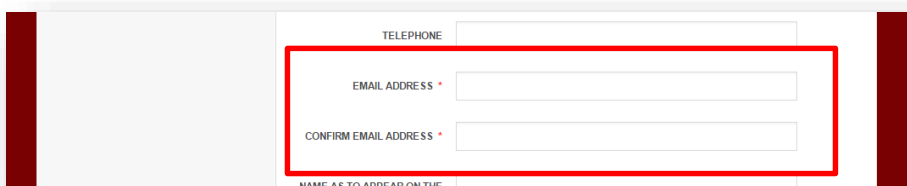
Configuration of the option is system-wide and is access from the Global Configuration\Defaults and Content\Event Defaults menu option:



Under the “Other” tab is an option to “Require entry of email addresses twice”.



If this is checked and the changes saved, all email input fields will have a validation entry field below it



This second field has no data-storage changes, other than validation of the initial input field. There is nothing stopping a booker from copy-and-pasting an incorrect value between these two fields.

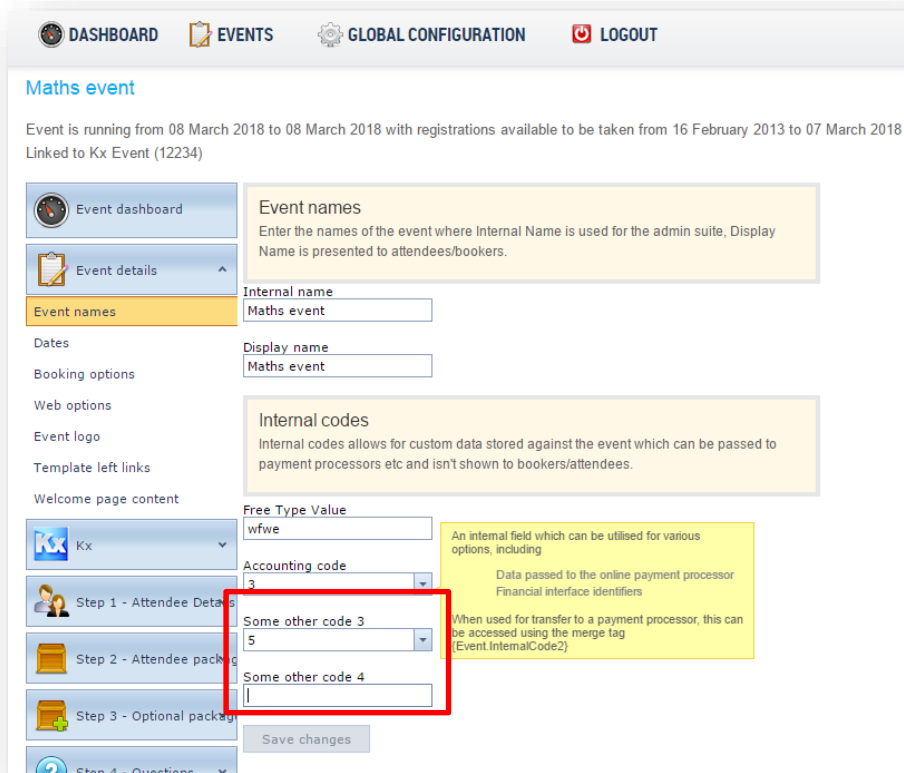
## 2 x additional Internal Codes added against each event

### Outline

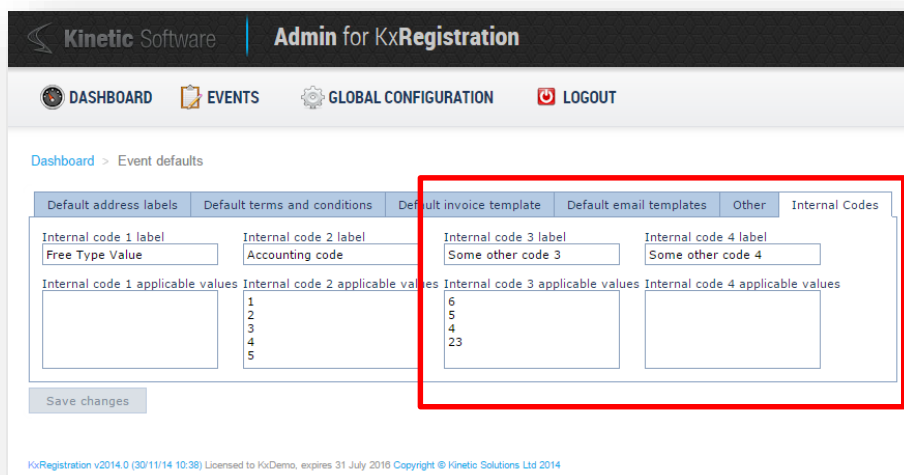
Each event has now the ability to have up to four "internal" fields configured against it. This is an expansion from the previous two fields.

### Details

The configuration for the extra fields appears in the same places as the current ones:



The configuration for these new fields labels and available values is also in the same place as the current fields:



# Resource and package pages show number remaining

## Outline

Where resources (and therefore packages) have a limited quantity, there was no easy way to see how many were left of a package/resource and so no easy way to determine actions to take.

In all package and resource listing pages, the quantity remaining have now been added.

Where a resource/package has no limit, the quantity available show the infinity sign ( $\infty$ ).

Event dashboard

Resources

#	Internal name	Day	Quantity			Accomm?	Room type	Default price
			Assigned	Used	Avail.			
	Attending	-1 (07/03/2018)	0	0	$\infty$		--None--	£0.00
	Attending	1 (08/03/2018)	0	23	$\infty$		--None--	£0.00
	Conference	1 (08/03/2018)	0	23	$\infty$		--None--	£141.66
	Single night accommodation	1 (08/03/2018)	0	8	$\infty$	<input checked="" type="checkbox"/>	Standard Double	£241.67
	BBQ	-1 (07/03/2018)	50	15	35		--None--	£29.17

View packages

Internal name	Display name	Available		Inactive?	Price	Qty Avail.	Order
		From	To				
2 day non-residential	2 day non-residential			<input type="checkbox"/>	£169.99	$\infty$	
2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	
2 day / 2 night	2 day / 2 night			<input type="checkbox"/>	£850.00	$\infty$	
Copy of 2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	
Copy of Copy of 2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	
Copy of Copy of Copy of 2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	
Copy of Copy of Copy of Copy of 2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	
Copy of 2 day / one night	2 day / one night			<input type="checkbox"/>	£459.99	$\infty$	



The screenshot shows the 'Admin for KxRegistration' interface. The main content area displays a table of event items for a 'Maths event'. The table has columns for 'Internal name', 'Display name', 'Available From', 'Available To', 'Inactive?', 'Price', 'Min Qty', 'Max Qty', 'Qty Avail.', and 'Order'. A red box highlights the 'Qty Avail.' and 'Order' columns.

	Internal name	Display name	Available		Inactive?	Price	Min Qty	Max Qty	Qty Avail.	Order
			From	To						
Event dashboard	1st night	Night of the 28th May			<input type="checkbox"/>	£0.00	1	1	∞	<input type="button" value=""/>
Event details	2nd night	Night of the 29th May			<input type="checkbox"/>	£0.00	1	1	∞	<input type="button" value=""/>
Kx	Pre-conference BBQ	Pre-conference BBQ			<input type="checkbox"/>	£35.00	1	2	35	<input type="button" value=""/>
Step 1 - Attendee Details	Gala Dinner @ IOD	Gala Dinner @ IOD			<input type="checkbox"/>	£0.00	1	3	∞	<input type="button" value=""/>
Step 2 - Attendee packages	B&B Rate 28th May 2013	B&B Rate 28th May 2013			<input type="checkbox"/>	£290.00	1	1	∞	<input type="button" value=""/>
View packages	Quantity Test	Quantity Test			<input type="checkbox"/>	£0.00	2	3	∞	<input type="button" value=""/>

## Supporting of Unicode characters in email templates

### Outline

Some clients reported errors within emails that were being sent containing non-ascii characters. The email process has now been adjusted to support Unicode characters.

If this causes issues with a configuration, this can be disabled through a web.config app.setting of "AllowUnicodeEmail" and setting it to False:

```
<add key="AllowUnicodeEmail" value="True" />
```

## Fixed fault with booking summary display showing Custom Field 4 label for Custom Field 5

### Outline

A fault was reported where the label for Custom Field 4 was being displayed for Custom Field 5 in the booking summary page. This has been corrected.

# Deployment of the upgrade

## Database

The following steps should be carried out when upgrading the database:

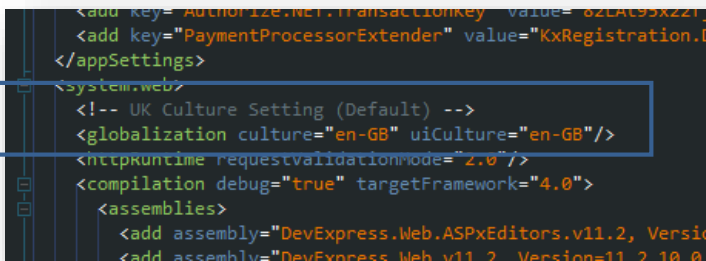
1. Backup the existing database
2. Open and the KxRegistration DB Installation 2014.0s script
3. Perform a Find and Replace on this file replacing DBNAME with the name of the linked Kx database, e.g. Kx\_Live, GERM etc.

## Website

The following steps should be carried out when upgrading the website:

1. Backup the existing website
2. Delete the \bin\ folder
3. Deploy the Website folder from the deployment package.
4. Retrieve the existing Connection String/globalization settings from the backup of the web.config file into the clipboard
5. Open the new Web.config and paste the connection string, replacing the current one in the file.
6. Ensure that any existing settings are copied back in place:
  - a. PaymentProcessorExtender
  - b. Authorize.NET.TransactionKey
  - c. ICalGenerator
  - d. IConvertHtmlToPDFFile
  - e. IAuditExtraInfoProvider
  - f. Auditor
  - g. StopCachingUser
  - h. CacheSeconds

For US sites, the web.config should also be edited to use the en-US culture settings to ensure that the US date and currency formats are used:



```
<add key="Authorize.NET.TransactionKey" value="62LAt95x22Tj" />
<add key="PaymentProcessorExtender" value="KxRegistration.D" />
</appSettings>
<system.web>
  <!-- UK Culture Setting (Default) -->
  <globalization culture="en-GB" uiCulture="en-GB" />
  <httpRuntime requestValidationMode="2.0" />
  <compilation debug="true" targetFramework="4.0">
    <assemblies>
      <add assembly="DevExpress.Web.ASPxEEditors.v11.2, Versio" />
      <add assembly="DevExpress.Web.v11.2, Version=11.2.10.0" />
    </assemblies>
  </compilation>
</system.web>
```