

IMM eReceipts 8

Release Notes

End of Support Notices

- Citrix XenApp and XenDesktop 7.6, 7.9, and 7.14
- Microsoft Windows Server 2012 R2
- Microsoft Windows Server 2016
- SQL Server 2014 SP1/SP2
- VMware Horizon 6
- VMware View 5

Deprecated Features

- Auto Archive
- Auto Print
- Hide Disbursement Grid
- Print Additional Lines
- Print Count
- Receipt Designer
- Self-Mailer and Envelope

New Supported Environments

Note: Only IP scanners are supported in thin client environments.

- Citrix Virtual Apps 7 2009 and 7 2012
- VMware Horizon 7.12 and 8.1.0
- Remote Desktop Services 2019

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eReceipts 8.0.2.2

Supported Upgrades

eReceipts Server 8.0.2.2 and eReceipts Client 8.0.2.2 support upgrades from these versions:

- eReceipts Server 8.0.2
- eReceipts Client 8.0.1 and higher

eReceipts Server Compatibility

Note: eReceipts Client 8.0.2.2 is required for some features and fixes in this release.

eReceipts Server 8.0.2.2 is compatible with these eReceipts Client versions:

- eReceipts Client 8.0.1
- eReceipts Client 8.0.2
- eReceipts Client 8.0.2.2

New Features and Functionality

Teller Portal

- If the core/host system becomes unavailable, the Offline Transaction feature lets you record transaction data and continue processing transactions using the Teller Portal. eReceipts Client 8.0.2.2 is required to use this feature.
- Load performance is improved when multiple users are processing and archiving transactions simultaneously in on-premise environments.
- Financial institution representatives are notified when a transaction is placed in the archiving queue and to proceed with the next transaction.
- The ability to search for partial member numbers is supported on the Dashboard, Teller Reports, and Archives pages.
- Character validation is improved:
 - Member # fields can only contain alphanumeric characters and hyphens (-).
 - Maximum Lines (printing orientation) and Scanner IP fields will display a message when incorrect values are entered.

Subscriptions

- The eReceipts+ “Real-time Remote Sign” add-on is here. With IMM’s patent-pending technology, send digital receipts directly to your customers’ mobile devices via text message to get eSignatures in real time from anywhere. Once the customer signs the receipt on the mobile device, the eSignature is displayed on the digital receipt immediately. After the transaction is complete, provide your customer with the digital receipt via text message or email. eReceipts+ is available in cloud environments.

Administration

- eReceipts purge is automatically configured as part of the on-premise installation. Refer to the eReceipts Server Installation Guide for the latest eReceipts installation procedures.
- Using the Retain Archived Transactions (Days) setting, set a maximum of 180 days between purges for on-premise installations.

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Bug Fixes

Teller Portal

- In this release, the Scanner IP field is fixed to allow users to enter values.
- This release fixes the issue that caused the Notify checkbox to revert to its original checked or unchecked status after the Save button was clicked in the Update Member Information window.
- eReceipts Client 8.0.2.2 fixes the issue where duplicate receipts were printed when a teller was logged onto multiple workstations.
- This release fixes performance issues that occurred when a large volume of transactions were archived.

eReceipts 8.0.2

New Features and Functionality

Teller Portal

- The eReceipts Client is available as a Microsoft Installer (MSI) file. Refer to the eReceipts Client Installation Guide for details.
- Verifast devices are supported as an optional signature method. A subscription is required.
- Take action on transactions that have not been archived by clicking the alert that displays the Not Archived and Error count at the top of the Dashboard page.
- On the Teller Reports page, search for transactions that contain the exact text entered in the Search Text field.
- Fast user switching is supported to allow multiple users to work at the same workstation without the need to log out of eReceipts.
- Report transactions are supported. Depending on your imaging system, this feature may not be applicable to you.
- Easily access and navigate the user documentation using the new eReceipts Teller Portal Help website built into eReceipts. In the Teller Portal, click Help > Documentation to open the eReceipts Teller Portal Help website.

Administration

- Use the Verifast Agent (server agent) to use a Verifast tablet for signing. Verifast tablets are available with a subscription. This agent may not be applicable to you.
- Using the Retain Archived Transactions (Days) system setting, periodically delete (purge) successfully archived transactions and logs from the system to prevent eReceipts from encountering limited storage space.
- Set the default printer port for the entire financial institution.
- Take action on transactions that have not been archived by clicking the alert that displays the Not Processed and Error count at the top of the Archives page.
- Easily access and navigate the administrator documentation using the new eReceipts Admin Portal Help website built into eReceipts. In the Admin Portal, click Help > Documentation to open the eReceipts Admin Portal Help website.

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eReceipts 8.0.1

Overview

eReceipts has been redesigned and re-architected entirely as a server-side, web-based application. eReceipts Client has a very small footprint to manage third-party receipt data and support hardware such as signature pads and scanners. eReceipts is not an upgrade from a previous release and data will not be migrated over.

New Features and Functionality

Teller Portal

- eReceipts Client is redesigned as a light-weight component. While running on the client workstation, eReceipts Client reads the receipt file, creates the transaction, and launches the transaction in the Teller Portal for a seamless UI experience.
- The Teller Portal is a built-in receipt browser window. The application is a single page that provides a simple user experience and utilizes the Chromium open-source web browser for a secure, reliable user experience.
- The new design makes it simple to access the various eReceipts capabilities.
- On the Transaction page, perform all transaction tasks with an easy click.
- From the Dashboard page, all transactions performed by the teller are displayed. Search for transactions based on dates, teller ID, teller name, member number, transaction number, and transaction status.
- Once a transaction is archived, send receipt notifications to members and view transaction logs directly from the Dashboard page.
- eReceipts has scanning capability using Ranger software and support for certain hardware. Refer to the workstation system requirements for prerequisites.
- Hold notices are incorporated into the UI for some core system integrations. Hold notice reasons can be changed at any time before the receipt is archived. Hold notices are displayed on printed receipts, in email notifications, and in text message notifications. In addition, hold notices are archived with the receipt PDF file.
- Add notes to a transaction using the memo feature.
- Keep a record of how a member is authenticated, such as by ID card, SSN, driver's license number, or a user-defined method, and enter the corresponding document ID.
- Member information can be updated during a transaction. The contact and shared contacts are automatically updated within the eReceipts database. Users with elevated permissions can update the member information for future use. Users without elevated permissions can update the member information for that transaction only.
- eReceipts has various signature capture methods. Some methods are built in and some are optional features. Signature pads and touch devices can be used to capture signatures. Tablets are optional signature methods that are available with a subscription.
- Receipts can be printed or emailed during or after archiving while maintaining the same format. As an optional module, receipts can be texted to a member.
- Teller reports are generated to summarize workstation activity and teller transaction details within a workstation. Teller reports can be used as an additional tool when a teller reviews the day's transaction details for end-of-day balancing.
- Tellers can customize their printing, signing, and scanning workstation settings.

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Administration

- The eReceipts Admin Portal application is a built-in browser window. The application is a single page that provides a simple user experience and utilizes the Chromium open-source web browser for a secure, reliable user experience. Launch the application from the eReceipts Client system tray icon or using the Admin Portal URL.
- eReceipts authenticates users via an external authentication authority. Because eReceipts does not receive and store user credentials, it is more secure than traditional applications that require users to directly authenticate.
 - In cloud environments, eReceipts authenticates users via Azure Active Directory.
 - In on-premise environments, eReceipts authenticates users via Active Directory Federation Services (ADFS). To minimize administrative overhead, ADFS is automatically installed and configured during eReceipts installation. Refer to the eReceipts Server Installation Guide for details about ADFS.
- From the eReceipts Admin Portal, administrators have access to all administrative functions. From here, manage and configure settings at the financial institution level, branch level, or workstation level.
- Design a more customized and controlled eReceipts environment for your financial institution employees. Employee groups are created and managed using Microsoft Active Directory. In the eReceipts Admin Portal, assign roles to these groups so that users and administrators have access to the specific eReceipts features that they need.
- Import member names, emails, and phone numbers from the core system so that information does not have to be entered manually for each member. Import can be performed as needed or scheduled at a regular interval. eReceipts receives the import file from the core system in a specific format.
- Create and manage branches and workstations. When a branch or workstation is created, the corresponding branch-level or workstation-level settings are applied. When a financial institution (FI) is created, FI-level settings are applied to the branches and workstations automatically. Clone branch or workstation settings and apply those settings to other branches or workstations.
- Establish settings at an institution level. Those settings can be pushed to branches or each workstation automatically. Logos, tablet marketing images, receipt marketing messages, and addresses can be customized for the institution.
- Configure specific system settings such as time zone, email, and more.
- Use server agents (Windows services) to coordinate tasks.
 - **Archive Agent:** The Archive Agent downloads the archived documents to the financial institution's imaging system. Depending on your imaging system configuration, an index file will be generated.
 - **Member Import Agent:** The Member Import Agent imports the member contact information from a CSV file into the eReceipts system so that the member information is accessible to tellers while processing transactions. This prevents tellers from having to manually enter member information repeatedly.
 - **Verifast Agent:** The Verifast Agent allows you to use a Verifast tablet for signing. This agent may not be applicable to you. Verifast devices are available in eReceipts 8.0.2 with a subscription.
- Manage the settings for imaging system integration. eReceipts will archive the receipt and the audit information in the imaging system as a PDF file. Receipt archival is supported with many industry standard imaging systems. Refer to the eReceipts administrative documentation or call IMM Support for specific imaging system information.
- All error logs and audit logs are stored on the eReceipts Server. Administrators and users with the appropriate administrative roles have access to the detailed information.