

# IMM eReceiptsCloud

## Release Notes

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### End of Support Notices

- Citrix XenApp and XenDesktop 7.6, 7.9, and 7.14
- VMware Horizon 6
- VMware View 5

### Deprecated Features

- 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 8.0.3.1

#### Supported Client Upgrades

- eReceipts Client 8.0.3.1 can be upgraded from eReceipts 8.0.2.5.

#### eReceipts Client Compatibility

- eReceipts Client 8.0.3.1
- eReceipts Client 8.0.2.5

#### New Features and Functionality

##### Teller Portal

- During the signing process, signatures must meet a minimum size requirement to ensure acceptable signatures are entered. (ERW-1111)
- User friendly error messages are displayed when a printer is not accessible, a printer is not configured, or an error occurs during printing. (ERW-2305, ERW-2299, ERW-2306, ERW-2301)
- If the Teller ID or Sequence values are missing or not extracted from the data file, the default value for indexing is 999. (ERW-2069, ERW-2235)

##### Administration

- Schedule automatic archiving to prevent pending transactions that have not been archived from being deleted (purged).
  - Using the Auto Archive Transactions setting in the FI Settings > Archive window, view the number of days between archiving and configure the time that archival occurs. The default configuration is zero days at 11:00 PM, which means all pending transactions will be archived by the system every day at 11:00 PM. Currently, the number of days (0) is not editable. (ERW-1696, ERW-2292)
  - The Logs page will now allow users to perform a case-sensitive search for "system" in the Teller/User field. When "system" is displayed in the Teller/User column, that means the transaction was automatically archived. Previously, the Teller/User search field and column on the Logs page were named "Teller." (ERW-2366)
  - Archive Agent is updated to support automatic archiving. For existing Archive Agent installations, new settings must be manually added. For details about adding these new settings, refer to the Agent Installation Guide. (ERW-2555)
- When information is entered in specific fields on the Edit Agent Log Settings and Workstation Settings user interfaces, eReceipts will check that the information is valid and provide more details if the information does not meet the requirements. (ERW-1748)

##### Bug Fixes

##### Teller Portal

- When an email or text message notification fails to send, error messages are not displayed when the notification is not sent and when archiving is not successful. (ERW-2587)
- If a workstation is in a different time zone than the time zone configured in the System Settings, the time displayed in the Teller Portal is incorrect. (ERW-2542)

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- In some scenarios, when a signature pad is not connected, the IMM SigPad App window cannot be closed unless the eReceipts Client is closed. (ERW-2271)
- The signature pad screen is not cleared when eReceipts Client is exited. (ERW-2212)

### eReceipts 8.0.2.6

#### eReceipts Client Compatibility

- eReceipts Client 8.0.2.5

#### New Features and Functionality

##### Teller Portal

- eReceipts**Plus** (optional, paid feature) can now be configured to display the financial institution's brand (logo) while a consumer signs remotely on their phone.
- When the total cash amount for a specific denomination is entered on the transaction page, the number of bills for that denomination is automatically calculated.
- Labels in the teller reports are improved for clarity.
- The delivery speed for email and text notifications is improved.

#### Bug Fixes

##### Administration

- Some member import tasks that are scheduled to run once a week are running a day earlier than configured.

#### Known Issues

- The time displayed in the eReceipts Teller Portal is based on the time zone configured in the System Settings. If your time zone is different than the time zone configured in the System Settings, the time displayed in the eReceipts Teller Portal will not reflect your local time.

### eReceipts 8.0.2.5

#### eReceipts Client Compatibility

- eReceipts Client 8.0.2.5

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### New Features and Functionality

#### Teller Portal

- When a new transaction is started, the Teller Portal window will pop up in front of other open windows on the workstation to alert the teller and provide seamless accessibility to the new transaction.
- To eliminate wait time between transactions, the Teller Portal is automatically minimized as soon as the archiving process is started. If this feature is disabled, the user is automatically rerouted to a landing page in the Teller Portal instead. This feature is configured by the administrator.
- By default, the Dashboard page will display active transactions. Previously, the Dashboard page displayed active, archived, and error transactions by default.
- Enter a memo directly in the Memo card to streamline and speed up transactions.
- Security is improved.

#### Administration

- Verifast 6.4 API is supported.
- Using the Minimize Client FI setting, configure the Teller Portal to automatically minimize as soon as the archiving process is started to eliminate wait time between transactions. This feature is enabled by default.
- Using IP filtering, control the IP addresses allowed to access eReceipts.
- Security is improved.

### eReceipts 8.0.2.3

#### Supported Upgrades

eReceipts Server 8.0.2.3 supports upgrades from these versions:

- eReceipts Server 8.0.2
- eReceipts Server 8.0.2.2

eReceipts Client 8.0.2.3 supports upgrades from these versions:

- eReceipts Client 8.0.1

**Note:** To upgrade from eReceipts Client 8.0.1 to eReceipts Client 8.0.2.3, the install path of eReceipts Client 8.0.2.3 must be the same as the install path of eReceipts Client 8.0.1.

- eReceipts Client 8.0.2
- eReceipts Client 8.0.2.2

#### eReceipts Server Compatibility

**Note:** eReceipts Client 8.0.2.3 is required for some features and fixes in this release.

eReceipts Server 8.0.2.3 is compatible with these eReceipts Client versions:

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- eReceipts Client 8.0.1
- eReceipts Client 8.0.2
- eReceipts Client 8.0.2.2
- eReceipts Client 8.0.2.3

### **New Features and Functionality**

#### **Teller Portal**

- When the archive process is started, the user is immediately taken to a landing page so that there is no wait time before the user can start the next transaction.
- Email addresses up to 254 characters are supported.
- The eReceipts Client displays warning messages to alert users when server errors occur that prevent transactions from being completed.
- When the eReceipts license expires, users receive a notification from eReceipts Client.

#### **Administration**

- eReceipts purge speed is improved.

### **Bug Fixes**

#### **Teller Portal**

- Users with the Super Tellers role were unable to search for transactions using the Teller ID field.
- There are intermittent hardware errors in thin client environments.

#### **Administration**

- This release resolves 500 Internal Server Errors observed during peak times due to lingering SQL Server connections.

## **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

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### 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.
- 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**Plus** “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**Plus** is available in eReceipts**Cloud** environments.

### Administration

#### 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.

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### 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.

### 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.

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- 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 (eReceiptsCloud), eReceipts authenticates users via Azure Active Directory.
- 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.