Magic Feature:
Is Important Functionality

Functionality to Improve Reporting for Accordion

NCR

Contents

Processing Payment Style – Accordion

Payment Identifiers

Issues in Reporting

When a client is utilizing the Accordion style setup in Magic, there can be issues with getting Payment identifiers conveyed in a manner that allows for easy manipulation in reporting. I'll use a child care program as the example.

The Payment Type "Latchkey" is where the Payment Identifiers are captured. For this example, I've processed a transaction containing Child 1 and Child 2 and both are associated with Parent 1.

Latchkey	
Name of Child*	Child 1
Name of Parent/Guardian*	Parent 1
School*	Armstrong
Grade*	Kindergarten
Start Date*	04/01/2020
Stop Date*	04/01/2020

Registration Fee
Late Fee
Monday
Tuesday
Wednesday

Wednesday	$	Payment for All Day - $25.00	+

Thursday
Friday

Total Selected	$	0.00

Add to Cart **Add and Checkout**

To view the transaction in a report with the Payment Identifiers, you would select the Export Transactions report type. As the Payment Identifiers are currently configured, they are only conveyed in the Payment Type "Latchkey".

Export Transactions

Randy - Test

TRANSACTION DATE	CONFIRMATION NUMBER	PAYMENT TYPE NAME	API IDENTIFIER	FIXED SELECTED VALUE	AMOUNT	PRIMARY PAYMENTID	SECONDARY PAYMENTID	PAYMENTID THREE	PAYMENTID FOUR	PAYMENTID FIVE	PAYMENTID SIX
2/26/2020	20000005	Latchkey	0001		$0.00	Child 1	Parent 1	Armstrong	1	2020-04-01	2020-04-01
2/26/2020	20000005	Latchkey	0001		$0.00	Child 2	Parent 1	Armstrong	2	2020-04-01	2020-04-01
2/26/2020	20000005	Late Fee	0003	0.00	$0.00						
2/26/2020	20000005	Late Fee	0003	0.00	$0.00						
2/26/2020	20000005	Wednesday	0006	Wed AllDay	$25.00						
2/26/2020	20000005	Wednesday	0006	Wed AllDay	$25.00						

Is Important Functionality

To have the Payment Identifiers conveyed for all applicable Payment Types, the **Is Important** functionality must be enabled.

To do this, select **Payment Types** under Manage.
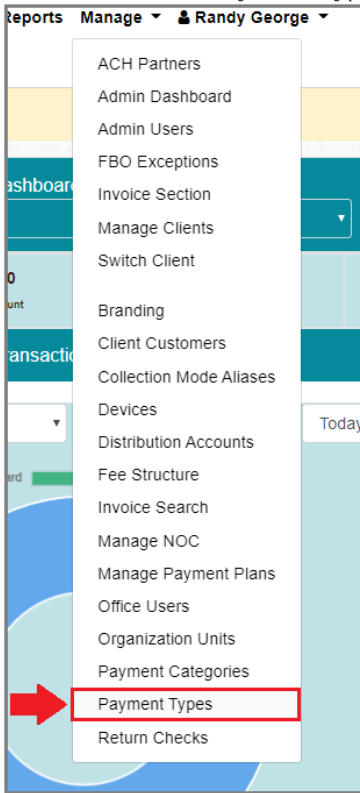
Find the Payment Type with the Payment Identifiers ("Latchkey" for this example) that should be conveyed for other Payment Types and click the ✎ icon to edit the Payment Type.

Name	Payment Category	Parent Name	API Identifier	ACH Payment Identifier	Enabled	Last Updated	
Friday	Friday		0008	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Latchkey	Latchkey		0001	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Late Fee	Late Fee		0003	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Monday	Monday		0004	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Registration	Registration Fee		0002	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Thursday	Thursday		0007	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Tuesday	Tuesday		0005	FONDULACPARK	Enabled	2/21/2020	✎ 🗑
Wednesday	Wednesday		0006	FONDULACPARK	Enabled	2/21/2020	✎ 🗑

Total Results: 8

Click **Edit Payment Identifiers**.

Edit Payment Type - Randy - Test

Back to Payment Type List

- Edit Payment Identifiers
- Edit Customer Descriptors
- Edit Partial Payment Allowance
- Edit Bill Template
- Edit Icon
- Edit Client Integration
- Search Metadata
- View Invoices
- Edit Payment Type Capabilities
- Edit Payment Type Consent

Payment Category	Latchkey
Distribution Account	Fon du Lac Park District
Name	Latchkey

Locate the Payment Identifier(s) you wish to have conveyed for the other Payment Types. Click the ⌄ icon to view the Metadata Options menu. Click to check the box **Is Important** to enable and save.

🖫 Save

Name	Value	Tooltip	Prompt	Required	Verified	Show On Receipt
⌃ Payment ID 1	Name of Child		☑	☑	☐	☑

Metadata Options

☐ Verified Remotely   ☐ Encrypted   ☑ Allow Partial Search   ☐ Unique Identifier   ☐ Mask Value   ☑ Is Important

Control Type Settings

☐ Enable Preselected Value   [Text ▼]   ☑ Edit Values

Max Length of Input	Min Length of Input	Regex	Validation Message
	0	❓	

Disclaimer Settings

☐ Enable Disclaimer   ☑ Edit Disclaimer

Flyover Settings

☑ Add Flyover

Now, any Payment Identifiers with **Is Important** will be conveyed for the associated Payment Types in reporting and the client is now able to more easily manipulate the data for their use.

Export Transactions

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TRANSACTION DATE	CONFIRMATION NUMBER	PAYMENT TYPE NAME	API IDENTIFIER	FIXED SELECTED VALUE	AMOUNT	PRIMARY PAYMENTID	SECONDARY PAYMENTID	PAYMENTID THREE	PAYMENTID FOUR	PAYMENTID FIVE	PAYMENTID SIX
2/26/2020	20000006	Latchkey	0001		$0.00	Child 1	Parent 1	Armstrong	K	2020-04-01	2020-04-01
2/26/2020	20000006	Latchkey	0001		$0.00	Child 2	Parent 1	Armstrong	1	2020-04-01	2020-04-01
2/26/2020	20000006	Late Fee	0003	0.00	$0.00	Child 1	Parent 1	Armstrong	K	2020-04-01	2020-04-01
2/26/2020	20000006	Late Fee	0003	0.00	$0.00	Child 2	Parent 1	Armstrong	1	2020-04-01	2020-04-01
2/26/2020	20000006	Wednesday	0006	Wed AllDay	$25.00	Child 1	Parent 1	Armstrong	K	2020-04-01	2020-04-01
2/26/2020	20000006	Wednesday	0006	Wed AllDay	$25.00	Child 2	Parent 1	Armstrong	1	2020-04-01	2020-04-01