Noomerik Release Notes
V9.22.23

- **SaaS configurator**
    - The Noomerik SaaS configurator will allow the the user to automatically create sub-accounts, unlimited SaaS products (so you could just create a SaaS product that allows for only reviews), add a snapshot and create revoke permissions based on non-payment.
    - This release also allows you to sell “seats” or per user access to a sub account by creating a SaaS product just for a “seat” in a particular location. It sends the credentials to the new seat on auto pilot.
    - You must have the GHL $497 plan for this to work
    - To setup a SaaS product follow the steps below:

1. Go to products in the Noomerik dashboard and click Add New in the top right corner.
    1. Add all the details to the product, sku, name, price, setup fee (if any), description, etc
    2. Under the Description section click the box that says “Create User?”
    3. Choose a User with Location or Only User
    4. Choose User Access Revoke Setting (this means you can revoke the access of the user OR account if their payment fails)
        1. Default Setting is for the default settings in Company Settings
        2. Custom Setting is per product
    5. Select the Snapshot you want to load into the sub account
    6. Choose the Role
        1. Admin
        2. User
    7. Select User Permissions
    8. Click Save Changes
    9. Add the new SaaS product to a Payment Form and embed it in your website and/or funnel or use as a hosted payment form.

- **Appointments**
    - Our own calendar payment forms system connected to the GHL calendar system. You can now use Noomerik to charge for booking appointments.
    - Our calendar payments pull in ANY GHL calendar you create and allows you to take payment for that calendar date/time before confirming the appointment in the GHL system.
    - To setup a calendar payment form to book for appointments follow the steps below:
1. Create a product that requires an appointment, like a salon visit or in person service.
2. Create a payment form and add that product to the payment form
3. Enable calendar at the bottom of the payment form
4. Pick the calendar you want to use for this particular product
5. Click Save Changes
6. Embed the payment form on your website/funnel page or use it as a hosted payment form.

- **Auto dunning**
    - The Noomerik auto dunning feature will automatically retry a failed payment for clients with a recurring subscription. It will retry the default payment method on file, either credit card or bank account. If the system never gets a successful payment (after a pre-determined number of attempts) it will email the customer asking them to update their payment details and provide a link for them to login and do so.
    - There are two ways to configure how many times the system retries a payment, system default for all products and per product settings.
    - To see setup the auto dunning feature follow the steps below:
1. Go to Settings
2. Then go to Company Settings
3. Under the General Settings tab look for:
    1. Retry Failed Payments (no of times)
        1. This field is the number of times you want to retry a failed payment, i.e. 2, 3, 5 times.
        2. Just enter a single digit here, the number represents the number of days in a row it will retry.
    2. Action on throttle limit reached
        1. This field is the action you want the system to take if the payment ultimately fails and the customer doesn’t update their payment details.
            1. You can revoke admin access, all users access or just the access of a particular user
    3. Revoke Access By
        1. You can choose to revoke access after a failed payment by changing the email on file for the user or their permissions.
    4. Send email after no of failed payments in subscriptions
        1. This says to the system send a failed payment email (this is currently hard coded in our system) after the last failed attempt. So if in bullet point one above you put 4, meaning you want the system to try 4 days in a row to retry a failed payment, you’d put 3 in this box to send the email after the final failed payment.

- **Custom fields**
    - Our users can create custom fields in the Noomerik stand alone form for use in GHL. This creates the opportunity to completely customize your checkout forms for any part of your business.
    - To create custom fields in Noomerik follow the below steps:
1. In the Noomerik Dashboard look for Custom Fields
2. Click on Custom Fields
3. Click Add New in the top right corner
4. You can create new custom fields or auto fill custom fields in our payment form that already exist in your CRM

- **API Connection**
    - We've now included the updated Oauth2.0 API connection to the CRM.
    - To use this connection follow the steps below:
1. Go to Settings
2. Then go to API Setting
3. Scroll to the bottom of the page and look for:
    1. CRM Oauth Company Connection
        1. This is the agency account connection
    2. CRM Oauth Connection
        1. This is the sub account connection
- **Stand alone payment form**
    - Users will now have the option to use the Noomerik payment form instead of the default CRM form, which is coded for payments. This new payment form will have the ability for CSS to be added so you can customize the form to your brand.
    - When creating a payment form in Noomerik the system will automatically create both versions of the form, you simply choose which version you want to use on your funnel/website pages and/or as a hosted payment form.
    - Other enhancements to the payment form include the following:
        - Naming the one and/or two steps
        - Custom CSS for the stand alone form
        - Adding custom fields
        - Enabling calendar payments
        - Updated the overall design and UI/UX

- **Contacts (Customer Vault)**
    - The Contacts menu item now will show all of your customers in the Noomerik system, allow you to add new customers in Noomerik, which will also show in your CRM, see which payment details they have on file (meaning just the last 4 digits of an account number on file) and which products, subscriptions or invoices they have attached to their payments on file. All payment data is secure, PCI Level 1 secure, which is the highest standard in the payments industry.
    - This sets the stage for future updates that will allow for refunding through Noomerik as well as recharging a payment method on file, all features coming later this year. It allows us to complete an all in one payment system for your business and the businesses of your clients.
    - Here's the training video:

- **Member portal**
    - The Noomerik member portal allows your customers/users to update their own payment details, per subscription product, as well as see all purchase ever made with you, any invoices that may exist and change payment methods per product and finally re-authorize existing card details on file (e.g. if their card expired and they just need to update the date and cvv/cvc code).
    - The member portal is created per customer/client/user upon initial purchase. This is configured in our system upon request and when turned on your customer will receive login credentials via email to view their specific products and/or services. As previously stated it will provide them a list of all payment types on file and allow them to update as needed.