14.3 Release Notes

Accounts Payable		
Improvement	AP-151	Implement COM-99 on AP screens
	AP-180	add date column on Batch posting > Detail field
	AP-261	Add Withheld and Discount columns
	AP-272	Add Discount and Withheld amount on tblAPBill table.
	AP-279	Attach a document to a vendor
	AP-318	AP should use intEntityId to determine the user who creates the transaction (not intUserId)
	AP-360	Void and Unpost Checks
New Feature	AP-9	AP Transaction - Post Payables
	AP-327	Create Bill Entry screen
Accounts Receivable		
Improvement	AR-236	Customer Contact screen changes to allow Customer contacts to login to i21
	AR-237	AR should use intEntityId to determine the user who creates the transaction (not intUserId)
	AR-238	AR changes to conform to new Entity schema
	AR-259	Additional menu for Customer Portal menu permission.
	AR-270	Show the password screen on Customer Contacts screen
	AR-303	Rename "Tickets Assigned to Me" menu under Customer Portal folder.
	AR-337	Loosen the Salesperson field requirement
	AR-395	Move "Create Ticket" menu on top of "Tickets" menu.
	AR-400	Make Customer Contact screen modal
	AR-424	Customer Contact Integration
New Feature	AR-37	Customer Maintenance - Setup Tab - Splits Tab
	AR-55	Transports - Customer Freight X-Ref
	AR-59	Additional Setup -> Contracts tab
	AR-75	Integration with Origin: Customer Integration
	AR-79	Integration with Origin: One time import and update of service charge
	AR-262	Add Help Desk tab to Customer screen with default Product and Version number
	AR-271	AR Company Preference
	AR-333	Integration with Origin: One time import and update of Market Zone
Cash Management		
Improvement	CM-249	We should add location to the CM Bank transactions
	CM-257	The Bank Reconciliation Report takes a while to export
	CM-288	CM should use intEntityId to determine the user who creates the transaction (not intUserId)
	CM-307	Void and Unpost Checks
	CM-311	Check Voucher Middle report for A/P and CM
	CM-314	Implement RPT-400 (Close print preview when closing the Print Verification screen)
	CM-316	Implement RPT-401. Do not show report archive message on check reports.
	CM-341	Do not allow unpost if Misc Check is already in the print spool table.

New Feature	CM-30	Undeposited Fund feature
	CM-245	Add a location to the cash management entry screen
E-commerce		
Improvement	EC-54	CP - i21 Help launched from Help button
	EC-64	Create Petro pages
	EC-66	User Setup for Customer Portal made easier
	EC-103	Validation on incorrect email address format
New Feature	EC-55	Implement Customer Portal preference
Dashboard		
Improvement	IG-131	Do not require ASP.Net MVC 4 installation on client API server.
	IG-303	Automatically refresh and clear the grid layouts on the panel dashboard
	IG-543	Notify Users that he has no access to create new Panel.
	IG-622	Panel User List update message
	IG-626	Connection Type not working for all tables in database
	IG-651	Chart Panels are not working on SQL Server Connection
New Feature	IG-608	Tool to import customer panels from iGuide Desktop and iGuide Web to i21 Dashboard
	IG-670	Additional Canned Panel - i21 Data Dictionary
Financial Report Designer		
Improvement	FRD-157	Total Calculation row is not computing correctly on Column Calculation column when Override Column Mask is used
	FRD-162	FRD - i21 Help launched from Help button
	FRD-163	Deleted Row(s) to sync automatically if is used by other columns
	FRD-171	Debit Units and Credit Units
	FRD-190	FRD - Export to excel does not format correctly for negative values.
	FRD-191	Column validation in FRD
New Feature	FRD-133	FRD to save budget name on the column not at time of running the report
General Ledger		
Improvement	FIN-89	Tab Sequence for grid in journal and recurring journal template forms
	FIN-646	Provide sample accounts for primary account (to build a sample chart of accounts)
	FIN-695	Allow opening of Transaction Detail for the selected transaction only
	FIN-757	Add message when imported Primary Account is already existing
	FIN-758	Close Import Primary Accounts screen automatically
	FIN-759	Validate CSV schema on import
	FIN-767	Change conversion of historical data to autopost - eliminate step of batch posting
	FIN-768	Do not allow modification of journal entries imported from subledger.
	FIN-793	Implement new requirements for record navigation when creating new record

	FIN-801	FY - validation that one of the FY records is set to Current
	FIN-815	GL Account Detail - Change Unposted column to "Posted" so it's consistent with other screens
	FIN-816	Add a "Created By" column to the Search General Journal screen.
	FIN-854	Starting Number auto-correct
	FIN-874	General ledger account creation - display of account name
	FIN-892	Insert a link to "Create Fiscal Year" before "Import Historical Journal"
	FIN-1000	Change transaction types 'Legacy Journal' and 'Adjusted Legacy Journal' to 'Origin Journal' and 'Adjusted Origin Journal'
	FIN-1006	GL should use intEntityId to determine the user who creates the transaction (not intUserId)
	FIN-1024	Change Open button to View
	FIN-1051	Use LumenWorks 3rd party control for Import/Export CSV
	FIN-1057	Copy details of previous row on Recurring Journal
	FIN-1067	Allow manual adding of codes on Account Template screen
	FIN-1068	Allow manual adding of primary account codes in Account Template screen
	FIN-1194	Cannot drill down Adjusted Origin journals
Legacy Requirement	FIN-792	PT Drill down is not working in GL Transaction Detail
New Feature	FIN-745	Do not allow Manual Journal entries for Cash, AR, Payables, Sub Account Group and Undeposited Funds
	FIN-746	Provide sample segments
	FIN-955	Add GL Maintenance tab at GL Utility
	FIN-1213	Interface G/L Entries to PeachTree/Sage 50
HelpDesk		
Improvement	HD-21	HD - i21 Help launched from Help button
	HD-37	Add editable box to Help Desk Details tab showing original description of ticket
	HD-48	Add Agent to attachments
	HD-63	create link between Help Desk and JIRA
	HD-72	change Details option of Cancel and add Delete option
	HD-73	Add Created Date/Time to Help Desk ticket screen
	HD-74	Add Alternative Phone # to Help Desk ticket
	HD-75	Add drop down option to be able to change Contact in Help Desk ticket
	HD-76	auto-fill Agent and Date on Hours Worked tab in Help Desk ticket, extend description
	HD-77	Changes to Notes tab in Help Desk - autofill fields and expand notes
	HD-78	Add print option to Help Desk ticket
	HD-79	Changes name on Notes tab to "Internal Notes"
	HD-81	Default Version and Product on creation of tickets from Customer Maintenance
	HD-82	create default screen for Help Desk
	HD-83	Add a JIRA URL field to the Help Desk Settings screen

	HD-84	Add a "JIRA Project" field to the Modules tab of the Products screen. This will be used to link the Modules to JIRA Projects
	HD-86	Add Customer Contact button to the Ticket screen
	HD-154	Received email for the customer does not tell significant information about the Ticket
	HD-189	Assign to should not change when changing the module
	HD-205	To have default: Open Status
	HD-217	change order of names appearing in Reporter
	HD-226	tickets reported by me on customer side is not showing all
	HD-227	when opening an attachment a blank screen appears. Eliminate blank screen
	HD-249	Need to separate time stamp description with line breaks with import of tickets
	HD-250	change script for Incident Type for Help Desk import
	HD-283	Make Status read only on customer side when creating a ticket
	HD-284	alignment is off when creating new ticket
	HD-285	Eliminate Details box (send, save as draft, cancel) when creating new ticket
	HD-286	Default Ticket Type to Support on new tickets
	HD-298	Detach linked JIRA
	HD-299	Ticket Number:
	HD-305	move Create Ticket up to top of list
	HD-307	Use User Name, instead of User ID for Assigned To: and Created By:
	HD-323	Customer login - move Create Ticket up to top of list
	HD-345	Add Itemid for Supported column of Products | Version field needed for automation
	HD-353	Display User Name, instead of User ID when Assigning ticket to new user
	HD-363	Default Value in the Send Test Email
New Feature	HD-118	Export Hours Worked

Report Framework

Improvement	RPT-401	Do not show the report archive message on certain reports like Check Reports.
	RPT-415	Changes on datasource should not clear the field list
	RPT-435	Allow unique report name per module.
	RPT-445	Allow multiple use of report company name
	RPT-448	Allow duplicate report names but under a different report Group
	RPT-454	Handle SQL SP as datasource of sunbreport when doing direct print
	RPT-508	Can apply 2 datasource to a report
	RPT-510	Missing dummy row on Options Manager screen after screen reload
	RPT-524	Improve Cancel feature of TaskList
New Feature	RPT-16	Design Filter
	RPT-18	Shift to different report
	RPT-22	Create reusable filter view.
	RPT-400	Close the report preview from module code.
	RPT-419	User notification if the Report being called from Menu doesn't exist
	RPT-455	Capability to override subreport and assign more than one report to a sub report control
	RPT-456	Feature that allows user to assign multiple subreport to a subreport control and use it by condition

	RPT-474	Allow selection of printer in the Direct Printing option.
Task	RPT-426	Add Unit Test
	RPT-431	Change app.ID to app.UserId
	RPT-440	Implement changes from Search module (Breaking all RPT filtering)
	RPT-442	Update Report data for Help Desk.
	RPT-449	Use all "And" operators in report setting is not working
	RPT-459	Reports ERD
	RPT-460	Report Data Dictionary
	RPT-472	Point Reference to the resources\references path
	RPT-473	Rename Server Side Projects
	RPT-478	Hide Export and Import button on Report manager since its not yet implemented
	RPT-488	Change the approach for using Report Designer and Direct Printing
	RPT-493	Create Report Designer Installer (for manual installation)
	RPT-535	Research if there is a way to enclose the data source columns with square brackets []?

Tank Management

Improvement	TM-183	Additional Details on Sync Failed Form
	TM-437	Implement the new Required field validation standard
	TM-462	Email notification during Dispatch and Cancel Dispatch process
	TM-561	TM - i21 Help launched from Help button
	TM-573	Obsolete Tank Size from Device Screen and Database
	TM-641	Budget Customer Amount Due does not show up for Petrolac Customers
	TM-697	Add the Print button on Close Reason, Work To Do Items, and Work Status screen
	TM-899	Import TM For Delivery History
	TM-900	General Import TM Event History
	TM-901	Create Cobol Customer Key on tblTMCustomer
	TM-916	General Conversion Improvements
	TM-917	Conversion Error Logging Format
	TM-930	Add TM Lease Starting Numbers to use in General Lease Import
	TM-931	Add ability to Maintain TM Lease Starting Numbers
	TM-953	Move Product to be a separate line on the Consumption Site Screen to allow for longer descriptions
	TM-965	Location in Open Call Entries
	TM-978	Call Entry Implement i21 Tax Calcs
New Feature	TM-832	General Import Utility of Consumption Sites for New Customers
	TM-833	General Import Utility of Devices for New Customers
	TM-834	General Import Utility of Devices - Validation Error Logging
	TM-835	General Import Utility of Sites - Validation Error Logging
	TM-911	Import Leases