# 14.2 Release Notes

## Accounts Payable

## Improvement

[AP-164] - Starting Number auto-correct [AP-262] - Print button is disabled

[AP-264] - Check Register: No data to display

### Legacy Requirement

[AP-181] - Conversion for AP History

#### **New Feature**

[AP-4] - AP Reports/Inquiry - Check History Payment Detail [AP-7] - AP Reports/Inquiry - Cash Requirements report [AP-13] - AP Reports/Inquiry - Invoice by General Ledger [AP-16] - AP Reports/Inquiry - Reconcile AP to GL [AP-22] - AP Reports/Inquiry - Check register [AP-24] - AP Reports/Inquiry - Tax Remittance List [AP-26] - AP Reports/Inquiry - Vendor History report [AP-292] - AP Terms Import

## Accounts Receivable

[AR-36] - Customer Maintenance - Setup Tab

## Improvement

[AR-63] - Implement COM-99 on AR screens [AR-108] - AR - i21 Help launched from Help button [AR-117] - Add a Search button on Customer Groups screen [AR-161] - Add a Total footer field on Customer Split screen

**New Feature** [AR-25] - Customer Maintenance - Detail Tab [AR-26] - Customer Maintenance - Location Tab [AR-27] - Customer Maintenance - Contacts Tab [AR-28] - Customer Maintenance - Notes Tab [AR-29] - Customer Maintenance - History Tab [AR-31] - Customer Maintenance - Attachment Tab [AR-32] - Customer Maintenance - Message Tab [AR-37] - Customer Maintenance - Setup Tab - Splits Tab [AR-38] - Customer Maintenance - Setup Tab - Pricing tab [AR-39] - Customer Maintenance - Setup Tab - Grain tab [AR-40] - Customer Maintenance - Setup Tab - Agrimine Cross Reference Tab [AR-41] - Customer Maintenance - Setup Tab - Patronage Tab [AR-43] - Customer Maintenance - Setup Tab - Farm maintenance Tab [AR-44] - Customer Maintenance - Setup Tab - EFT Information [AR-52] - Add screen to maintain Market Zones [AR-54] - Add category pricing maintenance [AR-55] - Transports - Customer Freight X-Ref [AR-56] - Transports - Customer Quote X-Ref Grid [AR-57] - Additional Setup -> Commission Rates tab [AR-58] - Additional Setup -> Buyback tab [AR-59] - Additional Setup -> Contracts tab [AR-60] - Additional Setup -> Field X-Ref -> Buyback - Customer Group X-Ref [AR-61] - Additional Setup -> Field X-Ref -> Key Lock X-Ref (Metered Billing) [AR-62] - Customer Groups [AR-65] - Service Charge Maintenance [AR-66] - Account status maintenance [AR-69] - Statement Footer Message [AR-71] - Salesperson [AR-72] - Territory

## Cash Management

## Improvement

- [CM-67] Bank Transactions Restrictions
- [CM-79] Adding entity record (payor) on the fly
- [CM-127] Add two additional fields immediate orign and immediate destination
- [CM-208] Implement COM-99 on CM screens
- [CM-235] Starting Number auto-correct
- [CM-251] CM i21 Help launched from Help button
- [CM-253] After reconciliation report prints, the Bank Reconciliation does not disappear
- [CM-258] Add an Attachment on Bank Reconciliation

#### **New Feature**

- [CM-15] CM Transactions Bank Deposits
- [CM-24] Drill-down on transactions on Bank Recon grids.
- [CM-26] Bank Account Register: Grid filter feature
- [CM-32] Bank Deposit Detail grid filter feature
- [CM-38] Bank Transaction: Detail grid filter feature
- [CM-44] Misc Checks: Detail grid filter feature
- [CM-54] Drill-down to the transaction screens from Bank Register screen.
- [CM-243] Allow just typing the Payor in.

## **Customer Portal**

#### **New Feature**

[CP-53] - Customer Portal Preference

## Dashboard

## Improvement

- [IG-195] Color schemes for Chart Style Panels
- [IG-293] Tooltip when mouse hovering on checkboxes of Options
- [IG-295] Panel Layout: Display only the unselected panels on the dropdown column
- [IG-300] Options: Pivot Grid Column Settings
- [IG-307] Filtering feature on Pivot Grid panels
- [IG-309] Hide or remove the drag and drop fields on the printed pivot grid panels
- [IG-368] Warning icon is displaying even the Client API installed is latest already.
- [IG-464] Default Options
- [IG-470] A way to save the new Dashboard layout after drag-drop of panel
- [IG-477] Remove the Add button on Filter Editor screen
- [IG-478] Apply 'Enable Column Sorting' feature to pivot panel
- [IG-479] Apply the 'Enable Column Moving' feature to pivot grid
- [IG-487] A way to select the Tab Name in Panel Layout screen
- $\mbox{[IG-493]}$  Records in the panel did not remain searched/filtered after Refresh
- [IG-502] Display proper format with comma on negative numbers

## **New Feature**

- [IG-494] Dashboard security permission
- [IG-514] Canned Canned Panel Management

## **FRD**

## Bug

[FRD-54] - Date is changed after saving if client-pc time zone is different from the server

## Improvement

- [FRD-155] Column Type = GL Trend needs Budget
- [FRD-162] FRD i21 Help launched from Help button

## Legacy Requirement

[FRD-176] - Add "Primary" and "Segment" as option in "Account" column of Filter Accounts

# General Ledger

## Improvement

- [FIN-631] Improve Journal Entry screen to keyboard friendly.
- [FIN-842] Implement COM-99 on Financial screens
- [FIN-882] GL i21 Help launched from Help button
- [FIN-945] Improve importing of CSV and loading its of General Journal if line items records

## New Feature

- [FIN-691] Import the complete chart of accounts one time from origin
- [FIN-692] Validation of primary account length

# Global

[COM-88] - Database object standards implementation

[COM-100] - Grid on posted transaction or read-only records should not have a blank new row

[COM-106] - Starting Number auto correct

### Improvement

[COM-14] - Eliminate batches from the system

[COM-35] - Export is not working

[COM-114] - Able to filter full text in local query mode

[COM-123] - Disregard readonly controls

[COM-144] - Use google maps query string not google API for maps

[COM-145] - When Invalid field is in a tab, mark the tab as invalid as well

[COM-151] - Performance Fixes (First Part)

[COM-160] - Add moment is as one of i21's javascript external libraries.

### **New Feature**

[COM-75] - Required Fields

[COM-99] - Ability to turn-off grid's new bank line.

[COM-108] - Custom Fields

# Help Desk

## Improvement

[HD-45] - Enlarge the Subject field to include more data

### **New Feature**

[HD-1] - Ticket screen

[HD-2] - Customer Portal Menu [HD-3] - Ticket - Details

[HD-4] - Ticket - Attachments

[HD-5] - Ticket - Hours Worked

[HD-6] - Ticket - Notes

[HD-7] - Ticket - History

[HD-8] - Ticket - WYSIWYG Editor

[HD-9] - Watch Ticket

[HD-10] - Help Desk - Products

[HD-11] - Ticket Groups [HD-12] - Ticket Types

[HD-13] - Ticket Statuses

[HD-14] - Ticket Priorities

[HD-15] - Help Desk Settings

[HD-16] - Email Setup

[HD-17] - Create the i21 Help Desk menu items

[HD-18] - Assign Ticket

[HD-20] - Ticket Job Codes

# Report Manager

## Improvement

[RPT-390] - Handle ACU4GL SQL

[RPT-392] - Report Viewer After Printing

[RPT-10] - Field Selection screen (not the actual implementation on printing)

[RPT-365] - Other options are not unchecked when List Totals Only option is checked

# System Manager

[SM-945] - Double clicking Origin Folder in User's menu panel throws an error

[SM-950] - Cannot Migrate menus in Repowell 99

[SM-952] - User Role in Repowell did not apply the setup saved

## **Epic**

[SM-793] - Fault trap for 0 starting number

[SM-851] - i21 Help launched from Help button

### Improvement

- [SM-301] User Security Maximum Origin Screens Allowed
- [SM-735] Return the intCurrencyID value on defaultCurrency function.
- [SM-802] Add a Collapse All button to the i21 tree menu
- [SM-820] Added Ticket Number field to the Starting Number screen
- [SM-821] AP needs to set a default country in vendor screen which is a setup in company preference..
- [SM-826] Additional Menu for Customer Portal
- [SM-837] Help Desk Menu
- [SM-852] SM i21 Help launched from Help button
- [SM-854] Log into the software via i21 takes a while to load
- [SM-862] Allow ZipCode, Payment Method, Ship Via, Terms screens be available for everyone
- [SM-914] Admin and User Role for demo purposes

#### Instal

[SM-974] - Remove All References to ACU 9.1.2

### **New Feature**

- [SM-317] C-Store and Petrolac Menus for Powell
- [SM-741] Add Screen Permissions to the User Security and User Roles screens based on how VisionCore's Form Permissions work.
- [SM-742] Add Control Permissions to the User Security and User Roles screens based on how VisionCore's Control Permissions work.
- [SM-744] Add Report Permissions to the User Security and User Roles screens based on how VisionCore's Report Permissions work.
- [SM-745] Add Financial Report Permissions to the User Security and User Roles screens based on how VisionCore's Financial Report Permissions work.
- [SM-808] EULA Validation for users entering i21
- [SM-828] Service to pull License Key information of Customers
- [SM-835] Forgot Login
- [SM-838] Company Locations
- [SM-843] User Default Location
- [SM-857] Implement/Activate Help button on toolbar
- [SM-916] Make a function that will return store of State

## Tank Management

#### Bug

- [TM-262] Missed Julian Calendar Should not Renew
- [TM-575] Call Entry Does Not Get Contract Price
- [TM-576] Save Message in Clock Reading

## Improvement

- [TM-216] On Hold Reason to Log in Event History
- [TM-391] From Julian Calendar to Other Fill Method
- [TM-460] Direct printing of Call Entry report
- [TM-659] Move up the data when On Hold Reason is not displayed

## **New Feature**

- [TM-141] Performance Improvement of the Export Tool
- [TM-185] Single Rule to Override All Other Rules
- [TM-477] Next Julian Dates Should Auto Renew After Synchronization Process
- [TM-579] Future and Balance Field in TM Site