What's New in 2023.1

By Module

Account Portal/Online Account Management

What's New in 2023.1 - Major Enhancements

Account Portal

530372   A new homepage gadget type, External, has been added for the Account Portal. This allows you to configure a button that can send your customer over to another site, application, etc...

Accounts Payable

What's New in 2023.1 - More Enhancements

1099s

    527410   The 1099 reports have been updated to the latest versions to support recent formatting changes, etc...

Accounts Receivable

What's New in 2023.1 - Announcements

Accounts Receivable Journal Entries

527385   Behavior Change: Currently, if Credit Card Processing fees are being passed onto customers, there are typically 2 journal entries being created. One journal entry for the Cash Receipt reconciliation batch (when pulling journals based upon batches created in Cash Receipt Inquiry and Reconciliation) and then a separate journal entry for Adjustments is ran to capture the Credit Card processing fee that was passed on.

With this release, when batching cash receipts via 'Cash Receipt Inquiry and Reconciliation' where a Credit Card Processing fee is being assigned to the payment, the Cash Receipt batch journal will pull both the Cash Receipt and the Adjustment entry to avoid the need for pulling 2 journal entries.

What's New in 2023.1 - More Enhancements

Cash Receipts: Display Fee Amount

527385   Upon customer request, a new column, Payment Amount - Payment Fee, has been added to the Payments record to show the amount of the fee passed onto the customer when credit card processing fees are configured.

Historical Aging Report

527385   The Historical Aging Report now allows for displaying and filtering on Book Control and Core Dimension Fields.

Payment Plan Invoicing: Exhibitor Status

527385   Upon customer request, the Exhibitor Status field has been added as a column and filter to the Payment Plan Invoicing Window.

Receivable Transaction Inquiry

527385   Upon customer request, the Receivable Transaction Inquiry now allows edit multiple for the following fields: Integration Status and External ID.

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API and Webhooks

What's New in 2023.1 - More Enhancements

Financial Documents

530371   It is now possible to add documents to the Financial Documents folder through the API. The document subject of GL must be supplied to add the document.

Standard API Endpoints

530371   The following API endpoints have been added to the Standard Edition:

- Account External IDs: Add
- Account External IDs: Delete
- Account External IDs: Edit
- Account External IDs: Read
- Campaign Details: Add
- Campaign Details: Delete
- Campaign Details: Edit
- Contact External IDs: Add
- Contact External IDs: Delete
- Contact External IDs: Edit
- Contact External IDs: Read
- External Systems: Add
- External Systems: Delete
- External Systems: Edit
- External Systems: Read
- External System Subjects: Add
- External System Subjects: Delete
- External System Subjects: Edit
- External System Subjects: Read
- Market Segments: Add
- Market Segments: Edit

Audit Log

What's New in 2023.1 - Announcements

Dates in Audit Log Text

530369   When dates and/or times are written to the text for an audit log entry, the format of the date/time will be determined using the following logic:

1 - Use the organization's locale
2 - Use the locale defined on the Site Configuration
3 - If neither are present, ISO date/time format is used (yyyy-MM-dd HH:mm)

What's New in 2023.1 - More Enhancements

Audit Log

530369   A new filter, Changed Between, has been added to the Audit Log page. This allows you to filter the audit log entries based on a specific time range. It is recommended to use this along with the Changed On filter.

Campaigns & Imports

What's New in 2023.1 - More Enhancements

Campaign Macros

530373   It is now possible to add and edit the parameters for a campaign macro.

Credit Card Processing

What's New in 2023.1 - Announcements

Momentus Payments

530364   Please Note - At this time, Momentus Payments only supports customers with a registered business entity or non-profit in the United States.

Momentus Payments - Multiple Merchant Account Support

530364   Momentus Payments now offers the ability to support multiple merchant accounts.

What's New in 2023.1 - Major Enhancements

Momentus Payments: Saved Cards and Charge Now

530364   Momentus Payments now supports saving Credit Cards and utilizing the Charge Now feature for running automated credit card payments.

Momentus Payments: Self Onboarding

530364   Momentus Payments now offers a self-onboarding experience for creating merchant accounts and setting up Backoffice configuration needed to process payments using Momentus Payments.

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CRM

What's New in 2023.1 - Announcements

External IDs

527337   A new feature, Account and Contact External IDs, has been introduced in the 2023.1 release. This feature allows you to store identifiers for other systems against an account or contact. Prior to this enhancement, many of these values were stored in user defined fields.

A new configuration table, External Systems, is available to define the external systems available and the configuration of the ID (numeric, alphanumeric, max length, etc...).

At the account and contact levels, a new section for External IDs is available to define the IDs for an account/contact.

The ability to limit access to certain external systems at the account/contact level is possible using two new access privileges - Ability to Add/Edit External IDs and Ability to Delete External IDs. Security is also available for external systems through another two new access privileges - Ability to Add/Edit External Systems and Ability to Delete External Systems.

Full API support has been added for this feature as well.

In future releases, we plan to roll out this feature to other areas.

What's New in 2023.1 - More Enhancements

Customer Opportunity Web Form

527337   The ability to upload documents through the Customer Opportunity Web Form has been temporarily disabled due to a security concern. The functionality will be added back in during an upcoming update.

UPDATE - The ability to upload documents through the Customer Opportunity Web Form has been restored. You must be on an update after September 10, 2023 to use this functionality.

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Document Management

What's New in 2023.1 - More Enhancements

Direct Mail

530374 The Email Document to Myself checkbox will not default to unchecked on the Direct Mail page (aka - Mass Add Documents). You would typically email documents to yourself if you were looking to print them.

![momentus technologies logo]

DocuSign

What's New in 2023.1 - Announcements

DocuSign

530375   Multiple updates have been made to how authentication works with DocuSign. These changes are introduced in 2023.1, 30.99C, and 30.98F. These changes do require some configuration changes. Please see the following Support Center article for more information:

https://supportcenter.ungerboeck.com/hc/en-us/articles/12216494887063-Mandatory-DocuSign-Configuration-Changes-in-98 F-and-9 9C

Email

What's New in 2023.1 - More Enhancements

Copy Template

   530376   When an email template is copied, the language specific templates will be copied as well.

Email Send Process

   510043   As sending emails through Outlook is no longer supported, the Outlook option has been removed from the Email Send Process on Users. A conversion is included in the upgrade to 2023.1 that sets the value to SMTP for any users with it set to Outlook.

Links to Documents in Emails

   530376   The ability to insert a link into an email template that provides a link to a document has been removed from the application. At this time, it has not been determined if this feature will be added back.

Event Management & Coordination

What's New in 2023.1 - More Enhancements

Events

527399   Internal Ticketing Contact and External Ticketing Contact are now available as filter fields on the Events page.

Lost To

527399   The Lost To field is now editable when changing cancellation reason on a cancelled or archived event. This allows the Lost To information to be entered/changed on an event if that information wasn't initially available when cancelling the event.

![momentus technologies logo]

Event Portal

What's New in 2023.1 - Major Enhancements

Deep Link to Tasks

527401 Event Portal (EP) now supports deep linking into specific Tasks. This will allow a link to be provided to a user which will allow them to directly access a specific Task inside of EP. Please note that an engagement with Solutions is required to utilize this feature.

Documents

527401 A new checkbox has been added to document properties on Events and Event Tasks - Show on Event Portal. It is also available in Edit Multiple documents. This indicates if the document should be shared with external users via Event Portal.

Single Sign On Support

527401 Event Portal (EP) now supports Single Sign On (SSO). Please note that an engagement with Solutions is required to utilize this feature.

What's New in 2023.1 - More Enhancements

Select Contact for Message

527401 If Messaging is activated in Event Portal (EP), a user sending a message in EP can now select from a list of event contacts to send the message to. Available contacts are those assigned on the EP configuration as well as selected event contacts. When a message is sent with the contact selected, the message will display the contact in the Backoffice message view in the To User Recipient field. Messages can also be filtered by this value.

Service Orders

527401 In Event Portal (EP), on Service Orders, any item that has been flagged as Internal will no longer show.

527401 The Service Orders/Items tab in Event Portal (EP) has been redesigned to a cleaner format, grouping is no longer based on item status.

Task Documents

527401 In Event Portal (EP), if a task has multiple documents attached, all documents will now show. Previously, only the most recent document showed.

Exhibition Management

What's New in 2023.1 - Announcements

Booth Number - Managing and Reporting

530370 Please use the "Booth Assignment" field for managing the booth number assignment on the Edit Exhibitor page or the Edit Service Order page...exhibitor is recommended over order. Do not use any other field to manage the booth number assignment in v30. The "Booth" field should not be used, that was retired with v20 and will cause bad data if used.

Please use the "Exhibitor Booth Number" field for ALL booth number reporting.

All other fields are being retired and will not be reliable.

What's New in 2023.1 - Major Enhancements

Payments

530370 Momentus Payments is now supported in Exhibitor Portal task checkouts, including 3rd party credit card gateway redirect payments.

What's New in 2023.1 - More Enhancements

API & Reporting

530370 Exhibitor – improved reporting on Exhibitors

- Added "Exhibitor Booth Number" to Exhibitors, also patched to .98 and up.
- Social media options on exhibitor have been added to Exhibitors

API – updated exhibitions API for newer fields over past few versions

Exhibitor Portal

530370 Improved overall navigation and consistency across all Exhibitor Portal modes: regular single show Exhibitor Portal, Multi-Show Exhibitor Portal, Sales Exhibitor Portal, Contractor Portal, Pavilion Portal.

Added the double header and home button and improved logic so that Home always takes user back to the parent mode they started in.

Modernized the Manage Account page and ensured intuitiveness for public users.

Redesigned the Company Selection page to include more information requested by customers and add intelligence to hide fields when not populated.

Exhibitor Portal – single show – redesigned and modernized the checklist home page, providing updated data cards and buttons ensuring intuitiveness for non-trained users.

Multi-Show Exhibitor Portal – exhibitors can now apply for all selected events in one process, with a new dashboard.

Sales Exhibitor Portal – Created Admin Mode, salespeople can manage all aspects of the exhibitor portal without the same restrictions as exhibitors, like manage internal sales tasks or manage exhibitor contacts before moving through required tasks.

Manage sales opportunity data in internal sales tasks.

Manage internal sales tasks or manage exhibitor contacts before moving through required tasks, like Exhibit Space Application/Contract.

Floor Plans

530370 Floor Plans – created campus feature where users can navigate from hall to hall in Exhibition Floor Plan, Show Map, or Exhibitor Portal maps. Also improved the Open Sides feature making it easier to manage a large floor plan and intelligence to always save settings.

Linked Floor Plans: added ability to link maps together so that users can navigate from hall to hall when an event has more than 1 hall/floor plan.

Improved the Show Open Sides feature by allowing users to toggle booth side settings in mass, and improved the open side logic to remain even if the booth is moved or modified.

Exhibitor Service Center

What's New in 2023.1 - Announcements

Custom HTML > Navigation Redirect Changes

530366   With the 30.99 and 2023.1 releases, the Exhibitor Service Center and Suite Management applications were converted to a new binding library. The library we had previously used for this was going out of support and therefore a security risk.

As part of this migration, a number of controls and functionalities had to be updated. One of these was the code within the Custom HTML control when looking to redirect to another page within the application. Within the public-facing app, these would appear as gadgets on a landing page.

For customers that utilize Custom HTML within their Exhibitor Service Center or Suite Management applications, they 'll need to upgrade their code, or the links will no longer work.

OLD vs. NEW

The old syntax for the page linking was:
data-bind="click: function() {runCode('openPage', 1957)}"

The new syntax is:
onclick="window.runCode('openPage', 1957)"

Customers can update this themselves by swapping out the aforementioned code or they can contact our Solutions team for assistance.

URL Encryption

530366   With the 30.99 and 2023.1 releases, the Exhibitor Service Center application was converted to a new binding library. The library we had previously used for this was going out of support and therefore a security risk.

As part of this migration, a number of controls and functionalities had to be updated. One of these functionalities was the existing URL encryption. Any application links which were generated on 30.98 and earlier versions will no longer allow exhibitors to access the site once they try to login. They'll see a message that says there's a problem accessing their account.

The solution for customers is to re-generate their URLs for the Exhibitor Service Center application once they 've upgraded to 30.99 or 2023.1 and make those links available to their suite owners.

What's New in 2023.1 - Major Enhancements

Credit Card Payments

530366   ESC will now save orders prior to leaving for the payment gateway. When this flow is used the order should be saved as if "pay later" was selected. It should then redirect to the gateway. When the gateway returns the appropriate payment should be added against the order. The end result should be a user experience and backend data that is exactly the same as the normal gateway flow, but which saves the order before leaving for the gateway.

What's New in 2023.1 - More Enhancements

Google Analytics

530366   Exhibitor Service Center has moved from Google's Universal Analytics to Google Analytics 4 as Universal Analytics will go offline July 1, 2023.

Mark Documents as Publish

530366   With this new enhancement, all documents uploaded through ESC are included in the reports. Before, the system does not pick up any attachments because those submitted documents are not flagged as 'Publish' when they're uploaded through the app. All documents will now automatically be marked as 'Publish' when submitted through ESC.

Expense Reports

What's New in 2023.1 - Major Enhancements

Expense Reports

527409   Upon customer request, an access privilege has been added to control whether or not users are allowed to approve the expense reports that they entered. The access privilege is called 'Allow Approval of Self-Entered Expense Reports.' When no users are assigned, all users can approve expense reports they have entered. When a user or role is applied, then only those users or roles are allowed to approve their own expense reports.

Facility Booking

What's New in 2023.1 - Announcements

Booking Restrictions and Conflict Checking

527400   Booking Restrictions will no longer need conflict checking to be configured in order to be enforced. These will operate independently of one another. Previously, conflict checking had to be turned on for a given space in order for Booking Restrictions to be enforced.

What's New in 2023.1 - More Enhancements

Bookings

527400   Usage Type and Usage Category are now available as filters in the following areas: Event Bookings and Daily Bookings.

Status Filter on Daily Bookings

527400   A new filter field, Statuses, has been added to Daily Bookings. This allows filtering for bookings by status in a multi-select mode vs. a range so non-consecutive statuses can be selected and searched on.

Functions

What's New in 2023.1 - More Enhancements

Edit Multiple

530368   Sync with Event Attendance has been added as an option on Edit Multiple Functions. This allows multiple functions to be activated to keep in sync function attendance with event attendance.

Functions

530368   Usage Type and Usage Category are now available as filters on Functions.

530368   Pre-Sale Date and On-Sale Date (with time) fields are now available on Functions.

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General Accounting & Analysis

What's New in 2023.1 - Major Enhancements

Budget Imports for Dimensions
530360 Budgets can now be imported for customers using GL dimension processes.

What's New in 2023.1 - More Enhancements

Bank Reconciliation by Main Account
530360 Upon customer request, when using dimension GL processes, bank reconciliations can now be performed by Main GL Account.

Excel Reporting Add-In
530360 Upon customer request, the Excel Reporting Add-in now supports the configuration of Book Control at the Workbook & Worksheet level. When used on these levels, it is unable to be edited at lower levels (row and cell).

GL Transaction Inquiry
530360 Enterprise Express Users will now be able to view the GL Transaction Inquiry if at least one of their roles is assigned to the General Accounting - Express feature under the General Ledger module.

Global Behavior

What's New in 2023.1 - Announcements

Momentus

> **527551** When you first access 2023.1, the first thing you will most likely notice is that the application has been rebranded as Momentus Enterprise. While you may see some new names and logos, the functionality and workflows you have grown to know will still feel familiar.

What's New in 2023.1 - Major Enhancements

Color Schemes

> **527551** A new color scheme, Momentus, has been added. This new color scheme will be the default color scheme. Please note that if your organization has already set a default color scheme, you will not see any changes.

> **527551** The Dark color scheme has been removed and replaced with the new Momentus color scheme. It is still possible to set the Color Scheme Mode to Dark at the user level.

What's New in 2023.1 - More Enhancements

Back Button

> **527551** The Back and Forward browser buttons now allow you to cycle through the pages you have navigated to during your session.

Edit Layout

> **527551** As the application does not support having a grid in a subsection under a grid section, you will now receive a message on the Edit Layout page when attempting to save this configuration.

PDF Export

> **527551** Behind the scenes changes have been made to the Export to PDF functionality used on grids throughout the system. These changes will improve performance, security and stability but should have no visible impact to user workflows.

iEBMS

What's New in 2023.1 - Announcements

iEBMS Bulletin Management

527766 Please note that iEBMS Bulletin Management (BUM) is not supported in 2023.1. If you are still using this application, we do not recommend upgrading to 2023.1. Please reach out to your Customer Success Manager and/or Account Manager to discuss an upgrade path.

For the latest information on iEBMS support, please see the iEBMS Retirement Announcement article in the Support Center.

iEBMS Meeting Requests

527766 Please note that iEBMS Meeting Requests (MTR) is not supported in 2023.1. If you are still using this application, we do not recommend upgrading to 2023.1. Please reach out to your Customer Success Manager and/or Account Manager to discuss an upgrade path.

For the latest information on iEBMS support, please see the iEBMS Retirement Announcement article in the Support Center.

iEBMS Service Order Processing

527766 Please note that iEBMS Service Order Processing (SOP) is not supported in 2023.21. If you are still using this application, we do not recommend upgrading to 2023.1. Please reach out to your Customer Success Manager and/or Account Manager to discuss an upgrade path.

For the latest information on iEBMS support, please see the iEBMS Retirement Announcement article in the Support Center.

Inventory Management

What's New in 2023.1 - More Enhancements

Physical Count Batch: Filtering on Multiple Values

530361   Upon customer request, the following fields can now be used as multi-select filters when selecting criteria for generating a physical count batch:

1) Major
2) Minor
3) Physical Count Frequency
4) Product Group

Mobile Work Orders

What's New in 2023.1 - Major Enhancements

Ability to Add/Edit/Delete Actuals

530363   Within this new enhancement, users will be able to view/edit/delete actuals similar to Backoffice. Users will now be able to enter multiple actual records and view them. There will also be the option to edit or delete the actual record. This gives the front-end user more flexibility when entering actuals. Please note that Mobile Work Orders currently does not support the editing or deletion of the actuals when the item has already been completed, which is consistent with backoffice. An additional enhancement to 're-open' items in Mobile Work Orders is planned for a future release.

Online Event Ordering (OEO)

What's New in 2023.1 - Major Enhancements

Ability to Place Orders Against Events that Didn't Originate in OEO

527680 Within this enhancement, the user will be able to place an order against an event that was created in Backoffice. Within the Event, Attaching the correct OEO configuration to the 'OEO Configuration' field and it will allow the event to populate within the front facing application. Orders will not be allowed if the event falls out of the configuration date/time parameters. Additionally, orders created within public facing application will be available too.

What's New in 2023.1 - More Enhancements

New Icons for Create New Order & Active Orders

527680 Within the OEO application, new icons have been added for the 'Create New Order' and 'Active Orders' actions. The new icons are a '+' symbol and 'script pad', replacing the old 'burger & soda' and 'shopping bag'.

Unavailable Days

527680 Within the OEO application, the calendar has been updated so that 'Unavailable Days' are now a shade darker, making it more pronounced that the user cannot place an order for those days.

Web Themes

527680 Web Themes will now allow the user to see a preview of the Online Event Ordering (OEO) application.

What's New in 2023.1

By Module

Online Space Booking (OSB)

What's New in 2023.1 - Announcements

Prompt for Item Ordering

527398   A new checkbox has been added to the Online Space Booking (OSB) configuration - Prompt for Item Ordering. If checked, and there is an Order Processing Component configuration selected on that OSB configuration, the user will be prompted to order items prior to checkout.

What's New in 2023.1 - Major Enhancements

Book from Space Details

527398   In Online Space Booking (OSB), spaces can now be booked from the Space Details page. A new button has been added to the Space Details page - Book Now. If clicked, the space is added to the cart if using single day mode. If using multi-day or recurring, a slide out appears allowing selection of dates before adding to cart. Additionally, for multi-day and recurring, an indicator on the Space Details page displays whether the space is fully available or partially available.

Conflict Check Refinement

527398   In Online Space Booking (OSB), a change was made to the conflict checking logic. When checking for conflicts, the system will only detect a conflict, thus not showing the space as available in OSB, when the status of BOTH bookings (the existing booking and the booking being potentially created in OSB using the Resulting Booking Status setting) is above the setting for Conflict Check Status on the OSB configuration. Previously, when checking conflicts, the system detected a conflict when only ONE booking had a status above the setting for Conflict Check Status. Be advised this change may result in more conflicts being created from events added in OSB.

Featured Spaces

527398   In Online Space Booking (OSB), spaces can now be marked as Featured on the Spaces tab. Any spaces marked featured will show first in the results list, in a new section denoting featured spaces. Non-featured spaces will show below.

Multi-Select Fields

527398   In Online Space Booking (OSB), User Defined Fields with the format of multi-select (dropdown list) can now be added to the Event Details page(s).

What's New in 2023.1 - More Enhancements

Default Sensitivity

527398   A new field has been added to the Online Space Booking (OSB) configuration - Default Sensitivity. If configured, events created from that OSB configuration will have the selected Sensitivity value defaulted.

Item Editing Prior to Checkout

527398   In Online Space Booking (OSB), when a user has added order items to their cart, they are able to edit the details of the items in their cart on the Summary page using the Edit Item link. Additionally, they may increase or decrease quantities of the items currently in the cart.

Page Titles

527398   In Online Space Bookings (OSB), all page titles have been dictionary enabled. This will allow users to rename pages and improves the application's accessibility for screen readers.

Prompt for Removing Last Item

527398   In Online Space Bookings (OSB), if removing the last space in the cart prior to checkout, the user will be prompted to confirm the removal. Previously, the space was removed and the user taken back to the search page.

Space Note Field Size Increase

527398   The Space Note field on Spaces has been increased from 255 characters to 2000 characters. This is the field that shows on the Space Details page inside of Online Space Booking (OSB).

Unassign Configuration

527398   In Online Space Booking (OSB), an event can now be unassigned from an OSB configuration. (A previous enhancement allowed an event to be assigned to an OSB configuration.) The unassign option will make the event no longer viewable/editable in OSB.

Online Space Booking (OSB)

Validations for Released Bookings

527398   New validations have been added around OSB and Released Bookings. If an event was created through Online Space Bookings (OSB)/is assigned to an OSB configuration, its bookings will not be able to be released. (Recommended process is to cancel bookings.) If an event has released bookings, a user will not be able to assign an OSB configuration to the event.

View Event Order on Confirmation

527398   In Online Space Bookings (OSB), a new button has been added to the confirmation page - View Event Order. This allows a user to proceed directly to the Event Order/Summary page for the event they just submitted. This button only appears if My Events is set to be shown on the OSB configuration.

Operations Portal and Tasks

What's New in 2023.1 - More Enhancements

Performance Indicator

527682   Within the Operations Tasks application, there is now the ability to indicate performance on how a particular task has been completed. This performance value is selectable within the application & stored in real-time within Backoffice against the corresponding task.

Payment Applications

What's New in 2023.1 - Major Enhancements

Payment Configuration: Allows for Payment Gateway Determination

527408   To help support customers utilizing multiple merchant accounts, the Payment Configuration assigned to the Ordering Application or Payment Portal can be designated to run through the gateway specified at the Payment Configuration instead of using Event or Receivable Transaction Types. This will be especially important for customers utilizing multiple Merchant Accounts in conjunction with Momentus Payments.

What's New in 2023.1 - More Enhancements

Payment Portal Confirmations

527408   Upon customer request, the following wildcards can now be used on payment portal confirmation email templates:
- Start Date-Event
- End Date-Event
- Out Date-Event

Payment Portal: Add Web Payment Parameter

527408   The parameter that controls the Add Web Payment action now allows users to set the Value of the Parameter as 'Prompt.' When set to Prompt, Backoffice users accessing Add Web Payment will get to select which Payment Portal they run a payment through instead of always being set to a specific payment portal configuration. This will be especially useful for customers operating multiple merchant accounts in the portal and wanting to ensure that the payment processed via Add Web Payment runs through the correct merchant account.

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Phone

What's New in 2023.1 - Announcements

Filters

527536   Phone will now remember your filters automatically when you refresh a listing of records. These settings will be remembered across sessions. If needed, settings can be reset by manually changing your filters back and refreshing or deleting the necessary view from the Phone Views page found on the Main Menu in Back-Office.

With this change, an upper limit of 100 records is now enforced in Phone to aid in performance and data usage.

What's New in 2023.1 - More Enhancements

Activities

527536   Filters are now available for Activities on Accounts, Contacts, and Events on Phone.

Documents

527536   Filters are now available for Documents on Accounts, Contacts, and Events on Phone.

Notes

527536   Filters are now available for Notes on Accounts, Contacts, and Events on Phone.

Query & Reporting

What's New in 2023.1 - Major Enhancements

Report Parameters

530379   An improvement has been made to Numeric and Currency parameters on reports. You now have the ability to specify the number of decimals to display. This is done by adding qualifiers to the parameter name. Examples:

- ParameterName#2 indicates two decimal places
- ParameterName#3 indicates three decimal places
- ParameterName# will use the default of six decimal places
- ParameterName or ParameterName#0 indicates no decimal places

Please note that the maximum decimal places is six so anything over six will still only display six decimal places.

Resources and Price Lists

What's New in 2023.1 - More Enhancements

Allergies & Dietary Preferences

527684   Within this enhancement, allergies & dietary preferences configured on the resource are now included in the 'Copy Resource' process.

Package Modeling

530365   When pricing a package by the package details, it will now display the roll-up price so that the back-end user immediately knows how much the package will cost. Before this enhancement, there's no way for a user to be able to edit/view a package and tell what the roll-up price will be without adding it to a service order.

Tiered Pricing/Costing Rates

527684   Within this new enhancement, tiered pricing and costing rates will now be a new section within the Price List window. This will provide quick visibility to this information without going 2-3 levels deep into the configuration.

Sales Goals

What's New in 2023.1 - Announcements

Legacy Sales Goals

510480   As mentioned in the 30.99 release documentation, the Legacy Sales Goals feature will not be supported after 30.99. If you are currently using this feature, please contact your Customer Success Manager and/or Account Manager to discuss an upgrade path to the new and improved version of Sales Goals.

Service Orders

What's New in 2023.1 - More Enhancements

Copy Event

530378 Flex Standard and Professional users can now access the Order Item Phase option on Copy Event. Please note that while you can now copy orders to forecasted orders with this change, you will need the Advanced Sales Opportunities and Forecasting upgrade to see forecast orders.

Discounts and Surcharges

530378 Flex Standard users now have access to the Add/Edit Discount and Surcharge functionality without purchasing the Advanced Pricing upgrade.

Suite Management

What's New in 2023.1 - Announcements

Custom HTML > Navigation Redirect

527672   With the 30.99 and 2023.1 releases, the Exhibitor Service Center and Suite Management applications were converted to a new binding library. The library we had previously used for this was going out of support and therefore a security risk.

As part of this migration, a number of controls and functionalities had to be updated. One of these was the code within the Custom HTML control when looking to redirect to another page within the application. Within the public-facing app, these would appear as gadgets on a landing page.

For customers that utilize Custom HTML within their Exhibitor Service Center or Suite Management applications, they 'll need to upgrade their code, or the links will no longer work.

OLD vs. NEW

The old syntax for the page linking was:
data-bind="click: function() {runCode('openPage', 1957)}"

The new syntax is:
onclick="window.runCode('openPage', 1957)"

Customers can update this themselves by swapping out the aforementioned code or they can contact our Solutions team for assistance.

URL Encryption

527672   With the 30.99 and 2023.1 releases, the Suites application was converted to a new binding library. The library we had previously used for this was going out of support and therefore a security risk.

As part of this migration, a number of controls and functionalities had to be updated. One of these functionalities was the existing URL encryption. Any application links which were generated on 30.98 and earlier versions will no longer allow exhibitors to access the site once they try to login. They'll see a message that says there's a problem accessing their account.

The solution for customers is to re-generate their URLs for the Suites application once they 've upgraded to 30.99 or 2023.1 and make those links available to their suite owners.

What's New in 2023.1 - More Enhancements

Cutoffs

527672   Within this enhancement, the 'Days Before Event that SOP/ESC/Suites Becomes Inactive' field is now fully supported within Suite Management. Previously, there was a functionality gap where items that were already within the shopping cart would still be able to be ordered despite the 'Days Before Event....' field. This enhancement closes that gap.

Google Analytics

527672   Suite Management has moved from Google's Universal Analytics to Google Analytics 4 as Universal Analytics will go offline July 1, 2023.

Summary Fields

527672   Within this enhancement, the summary field on the Event Suites window will now support Service Order and Service Order Items within the summary field.

System Administration

What's New in 2023.1 - Major Enhancements

Content Builder Components

527335   It is now possible to configure the following content builder components and settings from a single add/edit page: Custom Text, File Upload, Note Entry, and Terms and Conditions. Prior to this change, the component and settings needed to be configured from two separate pages. This change will be rolled out to other component types in future releases.

System Health Check

527335   A new feature, System Health Check, has been added to the main menu. This option allows you to check if there are areas of the application that may require some reconfiguration or assistance. As things change in the application, there may be options that are no longer valid. The System Health Check helps administrators, support staff, etc... to identify these areas. It is recommended to run this process after an update and review the Excel document it produces. The Excel document will list out the record along with the potential problem. A link to the record is included in the Excel document as well.

While we have plans to expand this to other areas in future releases, the following areas are now available:

- Document Classes: Identifies if there are document classes that are not configured as expected.

- EZWriter Data Sources: Identifies if there are data sources that are configured in a manner that will not allow the proper wildcard replacement, etc....

What's New in 2023.1 - More Enhancements

Site Configuration

527335   Field restrictions are now available on the Site Configuration page. Field restrictions allow you to determine if a user has full access, read only, or no access to a field. The ability to require the field is also included in this feature.

527335   The standard Updated field has been added to the Site Configuration page.

527335   Two new fields, Report Server User Name and Report Server Password, have been added to the Site Configuration. These values are used to allow the application to communicate with the report server.

SQL Log

527335   An upgrade step has been added to purge all SQL Log records to aid in performance. This step will run each time an upgrade is applied.

Venue Sales

What's New in 2023.1 - Announcements

Inbound Venue Sales Workflow

530359   Multiple enhancements have been made to improve the venue sales workflow. The first enhancement involved adding new fields to Account Leads to capture information about the event opportunity. Examples of fields that have been added include event description, preferred dates, alternate dates, event type, total attendance, and more. The new fields can be filled out by internal staff or can be collected online through the Web Lead Form application.

    When a lead is converted to an account and/or contact, an event opportunity will be created if the necessary event opportunity fields are filled out on the lead. At this time, there is not a process to convert the event opportunity to an existing CRM record but we do have plans to add this in a future release. The recommended workaround is to merge the accounts/contacts after converting the lead.

What's New in 2023.1 - Major Enhancements

Group Profile to Event Opportunity

530359   When an Event Opportunity is created from a Group Profile, the following information is now copied/inherited from Group Profile to Event Opportunity: Description, Account, Next Bid Opportunity Date, Category, Class, Contact, Description, Frequency, ID, Local Account, Local Contact, Market Class, Market Sub Class, Meeting Planner Account, Meeting Planner Contact, Duration, Organization, Next Open Date (Preferred Start), Next Open Date + Duration (Preferred End), Rank, Salesperson, Secondary Market Class, and Type.

What's New in 2023.1 - More Enhancements

Event Opportunities

530359   Inline Notes are now supported on Event Opportunities.

530359   The following fields are now available as standard fields on Event Opportunities: Local Account, Bid Open Date, Genre, Intent Due Date, Number of Exhibitors, Number of Posters, Rank, Gross Exhibit Area (SQM), and Gross Exhibit Area (SQFT).

Group Profiles

530359   The following fields are now available as standard fields on Group Profiles: Salesperson, Local Account, Local Contact, Rank, Next Open Date, Typical Exhibitors, Typical Posters, Typical Gross Exhibit Area (SQM), and Gross Exhibit Area (SQFT).

Market Sub Class

530359   The existing Market Class table has been enhanced to allow use of Market Sub Classes as a hierarchical classification. The values and relationships are established on the Market Class master table, and a new field, Market Sub Class has been added to Group Profiles and Event Opportunities.

View Access to Event Opportunities

530359   Enterprise Express Users will now be able to view Event Opportunities if at least one of their roles is assigned to the Customer Relationship Management feature.

Web Lead Form

530359   The ability to collect notes for the lead has been added to the Web Lead Form application. To collect notes on the form, add the note entry component to the content builder configured for your form.

Work Orders

What's New in 2023.1 - More Enhancements

Work Order Items

530380   Columns for the Event In Date, Event In Time, Event Out Date, and Event Out Time have been added to the Work Order Items page. Filters for Event In Date, Event In Time, and Event Out Date are also available.