What's New Entries

By Module

Account Portal/Online Account Management

What's New in 30.99 - Announcements

Account Portal

515726 Ungerboeck is excited to introduce an Account Portal for public users. The Account Portal will allow public users to sign into a single site and use that as a launching point into other Ungerboeck public facing applications. As of .99, the Account Portal can be configured to allow a user to modify their contact information, preferences, password as well as allergies. In addition to information tied to their record, you also have the ability to configure home page gadgets that allow them to jump into a specific Online Space Booking configuration or Online Event Ordering configuration. They also have the access to view a listing of events attached to their record and jump into editing the event information through Online Space Booking or Online Event Ordering.

Please note that in .99, the Account Portal is only available for customers that are using Online Event Ordering (OEO) and/or Online Space Booking (OSB). In upcoming releases, we will expand the Account Portal to other online applications.

Password Schemes

515726 A new feature, Password Schemes, has been introduced in 30.99 Service Release B and is available in the Account Portal. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

An online application that supports Password Schemes will check which rules to enforce when a public user signs up or attempt to change their password in the following order:

1 - Defined in the Sign-In Configuration for the application
2 - Defined in the Organization (found off the Main Menu)
3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

What's New in 30.99 - More Enhancements

New Preference Type - Unsubscribe

508448 A new preference type of Unsubscribe is now available. When this is used online, it will uncheck all preferences when it is selected by the online user.

What's New Entries

By Module

Accounts Payable

What's New in 30.99 - Major Enhancements

AP Automation: PO Matching

502738 The AP automation product has been enhanced to allow for PO matching within the External Invoice. When a PO is matched on the External Invoice, this information will flow through the Voucher when created.

Vouchers: Ability to Amortize Cost

484392 The ability to amortize the cost of a voucher has been added upon customer request. When applicable, the voucher distribution line can be edited to assign a Deferral Schedule to the expense record. A monthly journal entry for Deferred Recognition will be used to reverse the deferral expense and record the true expense.

What's New in 30.99 - More Enhancements

AP Automation

527410 Upon customer request, the PO Status field has been added to the External Invoices window for easier reference when processing invoices.

AP Demographics: Edit Multiple

503731 When using the "Edit Multiple A/P Demographics" from the Accounts - Supplier page, the system will automatically create A/P Demographic records for any edited Accounts which did not already have them.

AP Demographics: Email Addresses

513897 Upon customer requests, AP Demographics now allows multiple email addresses to be configured as a semi-colon delimited list.

Documents for Vouchers and POs

503239 Upon customer request, when a document is assigned to a voucher that is related to a purchase order, the document assigned to the voucher will be accessible on the purchase order as well.

External Invoices - Received Date

519065 A new field has been added to Edit External Invoices to allow for recording the Received Date of the supplier invoice. This field was added to comply with government reporting standards in Australia that require record of the date an invoice was received by an organization. This field will need to be added to the layout of Edit External Invoice.

External Invoices Audit Log

476516 The Audit log now contains configuration options for tracking External Invoice Supplier Account changes. To enable these, go to Audit Log Configuration and these options are listed under the External Invoices class. Once active, Supplier Changes on External Invoices will be tracked in the Audit Log.

Payment Processing - Remove Voucher

464372 Upon customer request, the ability to remove a specific voucher from a payment batch that has not been assigned or posted has been added. Within the payment batch, once vouchers have been added and payments have been assigned, when editing a specific payment and viewing the vouchers applied, an action called Remove Voucher has been added to allow removing a voucher as needed.

Vouchers - Received Date

518616 A new field has been added to Add/Edit Vouchers to allow for recording the Received Date of the voucher. This field was added to comply with government reporting standards in Australia that require record of the date an invoice was received by an organization. This field will need to be added to the layout of Add/Edit Voucher.

Vouchers Audit Log

498674 The Audit log now has configuration options for tracking Voucher Department Changes and Voucher Voids. To enable these, go to Audit Log Configuration and these options are listed under the Vouchers class. Once active, Voucher Department Changed and Voucher voids will be tracked in the Audit Log.

Accounts Receivable

What's New in 30.99 - More Enhancements

Cash Receipt Entry Batches

510489 Behavior Change: Upon customer request, when journal entries are automatically created via the posting of a cash receipt entry batch, the journal entry description will now be the same as the Cash Receipt Entry batch description.

Void Payment: Behavior Change

513303 Behavior Change: Upon customer request, when a payment is voided, the original transaction will now be marked as Internal as well as the void payment transaction.

Activities

What's New in 30.99 - More Enhancements

Activities

508708 Prior to .99, a View Full Email link was included at the bottom of the text column in the Activities grid. In order to aid in performance and assist in future enhancements, this link has been removed and replaced with a column/field titled View Email that can be shown in the grid or on the Edit Activity page to access the View Email page.

511676 Event status is now available as a filter on Activities.

API and Webhooks

What's New in 30.99 - Major Enhancements

Send Emails Through the API

517281 It is now possible to send emails through the API. An endpoint is now available for Emails that can be used along with another new endpoint on Templates to produce emails that will merge wildcards, etc... These endpoints are available at the Standard level of the API.

What's New in 30.99 - More Enhancements

API Users

520023 The following fields are now available on API Users - Email, Locale, Reply To and Send Email Process. The email and send email process fields are needed in order to send emails through the API.

Event Portal Tasks - Webhooks

495960 It is now possible to customize notifications around Event Portal Tasks through webhooks. The following Trigger Actions to the Webhooks Trigger Action data map have been added:

- Task Updated: ID 199
- Task Validation: ID 200
- Event Task Detail Updated: ID 201
- Event Task Detail Validation: ID 202
- Event Task User Updated: ID 203
- Event Task User Validation: ID 204

Standard API Endpoints

496172 The following API endpoints were added to the Standard Edition:

- Book Control Codes: Add
- Book Control Codes: Edit
- Book Control Codes: Read
- Core Dimensions: Read
- Event Task Details: Read
- Event Task Users: Read
- Event Portal Messages: Read
- GL Space Major: Add
- GL Space Major: Edit
- GL Space Major: Read
- GL Space Minor: Add
- GL Space Minor: Edit
- GL Space Minor: Read
- Management Report Codes: Read
- Market Segments: Add (30.99 Service Release B)
- Market Segments: Edit (30.99 Service Release B)
- Purchase Orders: Receive
- Tasks: Add
- Tasks: Delete
- Tasks: Edit
- Tasks: Read

Campaigns & Imports

30.99 Service Release A

Patch Note

519133 Now you can copy a campaign with results successfully without error.

30.99 Service Release B

Patch Note

520839 Now Campaigns will work correctly after merging accounts tied to the same campaign.

What's New in 30.99 - Announcements

Security

502595 In 30.99 Service Release B, changes have been made to Campaign Retrievals and Campaign Macros to increase security around the database and data. Customer should notice no changes to their processes but please reach out to Ungerboeck Support if something seems different after upgrading.

What's New in 30.99 - More Enhancements

Account/Contact Imports

513388 Notes are now available on Account/Contact Imports.

Campaign Macro Parameters

502595 In 30.99 Service Release B, it is now possible to configure prompt parameters for a campaign macro. When the macro is used on a campaign, the prompt parameters will be used when necessary.

Campaign Retrieval Status

502595 A new main menu option, Campaign Retrieval Status, has been added. The retrieval process on campaigns runs in the background and the Campaign Retrieval Status page allows a user to see if the process is still running, has completed, has errored out and why, etc...

Please note that each time your site is upgraded, patched, or hotfixed, any retrieval status records older than 90 days will be purged.

Cash Book

What's New in 30.99 - Announcements

Cash Forecast Licensing

489821 We are excited to announce that the 'Cash Forecasts' feature is now available for those licensed to Cash Book without purchasing an additional module. This feature allows your organization to pull from invoices, vouchers, purchase orders, and more to create a better view of incoming and outgoing cash flow for the organization. To find more information about this feature, please refer to the following Knowledge Base article for how to configure and run Cash Forecasts.
Cash Forecasts Knowledge Base Article

What's New in 30.99 - Major Enhancements

Cash Forecasts

489821 Cash Forecasts have been updated to now allow pulling in Purchase Order information into the forecasted results.

What's New in 30.99 - More Enhancements

Bank Statement/Cash Book Transaction Imports: Dimension Fields Added

499421 Upon customer request, when editing a bank statement import detail, the following fields can now be added to the transactions:
1)Core Dimension 1
2)Core Dimension 2
3)Department
4)Book Control
5)Management Report Code

Cash Forecasts

496583 In the Cash Forecast Results page, additional filters have been added for 'Source' and 'Date' of the transactions found.

Contract Administration

What's New in 30.99 - More Enhancements

Contract Access for Express Users

508224 A new feature has been added for Ungerboeck for Venue - Enterprise customers that will allow express users to view contract information.

Credit Card Processing

What's New in 30.99 - More Enhancements

Cybersource Merchant Reference Parameter

507920 When using the standard Cybersource gateway, the parameter for merchant reference number now allows for more flexibility by allowing both static text and wildcards to be configured as the reference number.

CRM

30.99 Service Release B

PATCH NOTE

522668 Tested the scenario and records on mentioned version and its working fine now hence marking it as Complete.

What's New in 30.99 - Major Enhancements

Merge Accounts

513304 A new filter, Only Show Records with Potential Duplicates, has been added to the Merge Accounts page. This filter will only show accounts and contacts that have potential duplicates. It is recommended to use additional filters, such as Changed On or Entered On, along with this filter to aid in performance.

Potential Duplicates

511679 A section, Potential Duplicates, has been added to the layout for individual accounts. This section will display other individual account records that may be duplicates of the selected record.

517809 It is now possible to merge potential duplicates from the Potential Duplicates section that is available on the add/edit page or reading pane for Accounts and Contacts.

What's New in 30.99 - More Enhancements

Alternate Addresses

517441 All address line and address label fields are now available as view only fields on the Add/Edit Alternate Address page.

Audit Log - Opportunities

511219 Opportunity number is now available for audit log entries for opportunities.

511220 The From and To values are now filled out for audit log transactions for revenue changes on opportunities.

Events Across Organizations

517441 In 30.99 Service Release B, if an account is linked across Ungerboeck organizations and the current user has access to those organizations, the events tab on the account/contact will show events for the organizations that the user has access to. Please note that only events within the current organization can be added or edited from the grid. Also, the only action that will work for events not from the current organization will be the Edit action. Events outside the current organization will open in a separate tab when editing. These restrictions are in place to aid in performance and making sure that access privileges are enforced correctly. If your Ungerboeck instance doesn't use multiple organizations, you should not experience any changes.

Leads

491441 First name is no longer a required field on Leads.

500475 A Search For filter has been added to Leads. This filter will go over Company Name, First Name, and Last Name.

502157 Notes can now be attached to Leads. When a lead is converted, the notes will carry over to the account/contact record.

Merge Account Status

509888 Columns/fields have been added to Merge Account Status to show the account name for the account being merged and the account being merged into.

510025 Filters for Entered By, From Account Code, and To Account Code have been added to the Merge Account Status page.

Merge Accounts - A/P Demographics

512196 Upon customer request, the Merge Accounts process will now move the full A/P Demographics information contained on the Merge From Account in the situation where the Merge From Account has had Vouchers (i.e. Supplier Transactions) entered but the Merge To Account does not have any Vouchers entered.

Opportunities

509038 A column and filter for the entered user's group has been added to Opportunities.

515166 Multi-currency opportunities will now use the exchange rate based on the close date if it is filled out. If it is not filled out, the opportunity date will continue to be used.

CRM

Opportunities Across Organization

517441 In 30.99 Service Release B, if an account is linked across Ungerboeck organizations and the current user has access to those organizations, the opportunities tab on the account/contact will show opportunities for the organizations that the user has access to. Please note that only opportunities within the current organization can be added or edited from the grid. Also, the only action that will work for opportunities not from the current organization will be the Edit action. Opportunities outside the current organization will open in a separate tab when editing. These restrictions are in place to aid in performance and making sure that access privileges are enforced correctly. If your Ungerboeck instance doesn't use multiple organizations, you should not experience any changes.

Web Lead Forms

513757 The following filters have been added to the Web Lead Forms page that lists all configurations: Changed By, Changed On, Entered By, Entered On, and ID.

Dashboards

What's New in 30.99 - Major Enhancements

Dashboard Reports

509117 It is now possible to export a grid related to a dashboard report.

What's New in 30.99 - More Enhancements

Dashboard Reports

502300 The grid that is accessed by drilling down into a section of a chart, gauge, etc... dashboard report will now show the proper column name instead of the database name.

Dashboards

502300 It is now possible to collapse the header section of the dashboard to allow more room for viewing gadgets. The collapse/expand state of the header will be remembered across sessions and devices.

505170 A section, Users, has been added to the Dashboards page so you can view which users have the dashboard assigned. This allows you to see which dashboards are in use and which ones are not.

Destination Management (DMO)

What's New in 30.99 - More Enhancements

Meeting Room Flow

460689 The Meeting Room Flow report has been converted to v30 in 30.99 Service Release B. The report will now produce an Excel report instead of a Crystal report.

Document Management

30.99 Service Release B

Patch Note

519795 The checkbox under Users and Roles field is now be pre-checked when selecting the User and Roles option under Document/Template is accessible to field.

521865 Now you can Add Document From Template on Invoices reading pane and Edit Invoice windows without issue.

What's New in 30.99 - Announcements

Security

510289 In 30.99 Service Release B, changes have been made to EZWriter Data Sources to increase security around the database and data. Customer should notice no changes to their processes but please reach out to Ungerboeck Support if something seems different after upgrading.

What's New in 30.99 - More Enhancements

Import Document

510289 It is now possible to import .skf files.

DocuSign

30.99 Service Release B

Patch Note

522509 Docusign now validates the BYOE configuration correctly.

Email

What's New in 30.99 - More Enhancements

Schedule Email

510043 Ungerboeck for Venues - Flex professional users can now schedule emails.

Send Email

510043 The ability to send an email through Outlook is no longer supported. If your user record has the Email Send Process set to Outlook, you will receive a message that your send process is no longer supported. You will need to have the field updated to SMTP.

Event Management & Coordination

30.99 Service Release B

30.99 Service Release B

522941 The Event filter for "Occurs On" when it is set to "Today" will correctly display Events spanning the current date, of course also with respect to other filter settings which may impact the results.

What's New in 30.99 - Announcements

Tessitura Integration

527399 In 30.99B, a standard integration with Tessitura is available (requires licensing the integration). This integration enables events and functions to be sync'd to Tessitura to create the corresponding performances. As ticket sales are entered into Tessitura, the integration can then retrieve ticketing data back into function level fields in Ungerboeck for viewing and reporting.

What's New in 30.99 - More Enhancements

Booking Restrictions - Min/Max Booked Hours

497771 Booking Restrictions now include the ability to set a minimum or maximum number of hours for which a space can be booked. The minimum can be for as little as 30 minutes, with a maximum of up to 24 hours, in half-hour increments. This restriction operates independently of any day/time restrictions configured on Conditions.
This was added on to the enhanced Booking Restrictions that was released in 30.98.

Option to Copy Performing Arts Fields

484888 A new checkbox has been added to the Copy Event, Copy Profile and Add Event from Profile pages - Include Performing Arts Fields. If checked, the values in the performing arts dedicated fields will be copied over to the new event or profile.

Requester Contact Filter on Events

478828 The Requester Contact field has been added as a filter on the Events page.

Services, Work Orders on Cancelled/Archived Events

493128 The Services and Work Orders tabs/sections can now be shown on Cancelled and Archived Events.

Venue Field on Bookings and Functions

506276 The Venue field (attached to the Space) is now available as a column and filter on the Bookings grid within an Event and the Event Bookings page. Additionally, it is available in the Functions grid within an Event and the Event Functions page. The Venue that 's attached to the space that's assigned to the function is displayed.

Event Portal

What's New in 30.99 - Announcements

Payment Portal

499033 The Payment Portal integration within Event Portal has been updated. Users will need to update their Event Portal Base Configuration with a newly configured Payment Portal that is configured to use Version 2 via the Payment Portal Version dropdown to avoid user disruption.

Removal of Payment Configuration & reCAPTCHA

500366 There will no longer be an option to select a Payment Configuration on the Event Portal Base Configuration. All orders submitted will default to the pay later option, if Event Portal users need to pay for items ordered they must utilize the Payment Portal within Event Portal.

reCAPTCHA on the Event Portal Base Configuration which was tied to the Payment Configuration was also removed from the Event Portal Base Configuration.

What's New in 30.99 - More Enhancements

Bill-To Account

497876 Event Portal with Order Processing now has the option to configure the service order bill-to. Located on the Event Portal Base Configuration, the checkbox is named "Use Event Bill-To for Order Bill-To." If this is selected when an order is saved in EP the Bill-to account and contact on the order will be set to the bill-to account/contact on the selected event instead of the bill-to from the logged in user.

Home Page

516660 The Task Status Section on the Home Page has been updated to a new appearance with the removal of the pie chart. This change offers a cleaner look to the homepage and places the focus on the tasks that are coming due.

Messaging

498109 Internal users can now add a new message within Ungerboeck and assign it to their Event Portal Users.

499964 Back-office users are now able to search for messages across the subject line and through the text of each message with the addition of the 'Text Search' field on the Event Portal Message page.

507860 The back-office experience for Event Portal Messaging has been enhanced for greater usability and user experience.

Payment Portal

484891 Event Portal users will no longer have to re-enter their user credentials when accessing the Payment Portal through Event Portal. The Event Portal Payment button will now redirect users to the Payment Portal configured on the Event Portal Base Configuration and automatically sign them in with their user credentials.

Registration

506668 In 30.99 design enhancements were done for the Registrants page within Event Portal. Changes were made to allow for a better mobile experience by moving the Registrant Status chart to its own slide out.

511924 The Registration Page within Event Portal has been updated. We removed the Pie Chart that displayed Registration Statuses due to it not adequately displaying the information. This change now offers a refined appearance for the information you are sharing with the Event Portal user. The page will now display the information in a slide-out once the user selects the "View Registration Breakdown" button.

Service Accounts

456705 Event Portal now supports displaying Service Account on Event Portals Contacts Tab. This will help expand the amount of important contacts you want to share with your Event Portal User.

Task Sets

510011 The ability to attach documents at the Task Set level is now available. When the Task Set is added at the event level, the documents will be added. If template documents with merging are attached to the Task Set, the necessary merging will take place at that time as well.

Event Registration & Housing

What's New in 30.99 - More Enhancements

Page Settings

502038 Filters for Changed By, Changed On, Entered By and Entered On have been added to the Page Settings page.

502038 An Apply button has been added to the Add/Edit Page Settings page.

Registration

490161 There is a new section available on Registration Setup called, "Web Links". This new section allows users to create customized registration form links. The registration links can be customized to include parameters, Promo Code, Account Code, Language, and Registrant Type.

497867 Gender Identity fields are now available as filters and columns on Registration Order Items page.

Registration Profiles

500735 Additional registrant profile fields have been added to the Registrant Profile component of the Form Template in Registration Setup. These new fields are, Other Allergy Information, Other Behavioral Condition, Other Medical Condition, and Dietary Preference Information

Exhibition Floor Plan

What's New in 30.99 - Announcements

Floor Plans List on Events

510254 The Edit Event page has been enhanced to display a new section for "Floor Plans" which will list out all floor plans on the Event.

PLEASE NOTE: Floor plans have been purposely removed from the Documents tab on the Event. They are all still on the event and will be listed in this new section. You can also still open Exhibition Floor Plans by clicking on the "View Floor Plan" action on the Event, inside the "Floor Plans" menu. This is to provide a more intuitive experience to users and to remove confusion between Ungerboeck Documents and Ungerboeck Exhibition Floor Plans. They are technically different, but were in the same list, and sometimes bug cases were created by users who wanted to perform a document only action on a floor plan record inside the documents tab. This has been eliminated.

Upgrade Conversion for Retired Booth Record Types

520527 Upgrade Conversion on Retired Booth Records.
To continue to increase quality and performance of the system, various record types stored in the booths table (CC385) have been retired. This is older v19 data and it causes the system to do several seemingly "random" issues in Exhibition Floor Plan.
In the past couple of releases, we added a way for users to delete this data from the Booths list/grid (from Events, Functions, or Main Menu), using the "Assignment Type" filter. As this issue surfaced several times, we added a cleanup routine to automatically delete these records across the entire system within the upgrade conversion for .98E and above.
Retired REC_TYPES:
- C: for co-exhibitor
- N: for non-exhibitor
- A: for account

Please review before upgrading since the conversion will be deleting these retired CC385 records.
As those record types are being retired, the functionality they provided is still in place and enhanced.
The ability to manage and report on co-exhibitors can all be found on the Exhibitors feature.
The ability to "assign to account" is now the Booth Proposal functionality on the Exhibitor.
The ability to provide regular service orders for billing companies is handled via the Bill-To feature on the order.

What's New in 30.99 - More Enhancements

Copying Booth Data

503107 The Split, Duplicate, and Copy Booth processes have been enhanced to copy booth values on newly created booths. This is useful when splitting a booth that might be part of a specific Floor Plan Section, and you want the newly created split booth to also have that value. Now those values will copy to the new booth(s).

Highlight Schemes

514371 Ability to highlight booths in by their pre-configured booth resources: area, dimensions, open sides, pillar discount. This is useful when verifying that all booths have the correct pricing pre-configured.

Workflow Improvements

514773 The process for opening a floor plan for a specific exhibitor has been enhanced to select the exhibitor within the existing Exhibitors list control that is docked on the left side of Exhibition Floor Plan. Users can easily see who they are trying to place immediately after the floor plan opens, then select the desired booth, and propose or place them as necessary.

This workflow exists in previous versions, but it would open the Edit Exhibitor page on top of Exhibition Floor Plan, where users were forced to minimize the page, creating extra unnecessary clicks. This worked ok as long as users did not close the Edit Exhibitor page, because then they would lose the ability to place them without selecting them again from the built-in exhibitors list.

This process is very useful when working a list of exhibitors outside the floor plan, and you want to open the floor plan for a specific company, make some changes, then close the floor plan and get back to your list.

Exhibition Management

30.99 Service Release A

Patch Note

520567 Users can now successfully delete Exhibitor Cancellation Reasons.

What's New in 30.99 - 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 30.99 - Major Enhancements

Highlight Schemes

500560 Enhanced Highlight Schemes in floor plans with the following new functionality:
1. Ability to highlight booths with expired booth proposals
2. Ability to highlight based on sales opportunity data, like win probability, stage, expected close, expected revenue, etc. This is useful when sales proposes or places exhibitors in booths before they are 100% signed and contracted.
3. Ability to highlight booths by the resource setup on the booth (area, dimensions, open sides, discount). This is useful when you want to visually see which booths are pricing at different prices so that you can easily tell if something is not priced correctly, like your premium booths are the color you would expect.
4. Ability to manage existing highlight schemes from within the Exhibition Floor Plan, in the footer of the highlight scheme dropdown.

On Screen Reporting Enhancements

499597 Based on customer feedback for on screen reporting around Exhibitions, here are enhancements added this version:
- The "Search For" field on Exhibitors will also search across Banner Name, and updated Tooltip.
- Filtering for "Stage" on Exhibitors now allows users to select multiple Stages.
- Added the account "Gender" field on Exhibitors for the 8 contacts set on the Exhibitor: Main Contact, Booth Contact, Press, Additional Contact 1-5).
- Added 2 new last event order total fields on Exhibitors, "Orders Total" and "Booth Order Total". These are useful for formula fields and quick look ups.
- Added 2 order subtotal fields on Exhibitors, "Booth Order Subtotal" and “Orders Subtotal”. These are existing fields on Service Orders that can be displayed on Exhibitors for revenue reporting.
- Retired the "Maybe" value from 12 Exhibitor system fields. These now only have Yes and No, which makes them easier for customers and consultants to repurpose when needed. They already exist on Exhibitors and the Exhibitor Portal. Any existing "Maybe" data will remain, this only impacts setting new data.
- Added the "Booth Note" field on Service Orders and Exhibitors. This can be used to communicate information to users in Show Map or Exhibitor Portal.
- Added the "Exhibitor Portal Task" field on Service Orders, so users can sort by.
- Added the "Exhibitor Categories" field on Service Orders, from Exhibitors.
- Added ability to "Also Show" Exhibitor Documents in Event Documents. This is useful when users want to see all 'Certificate of Insurance' documents for all exhibitors on the event, as an example. This can be achieved in previous versions using Find Documents from Main Menu, this provides a nice workflow improvement.

Workflow Improvements

500461 Added ability for the system to automatically select the Main Contact for Exhibitors when using the "Add Multiple Exhibitors" feature, like from Accounts or Campaigns. This feature is useful when importing accounts or working account lists or campaign lists, and you now want to bring all into an event (or events) as Exhibitors. We call these Exhibitor Opportunities, until they are contracted for a booth.
System will respect org parm EM273 to determine which contact relation type to automatically select when multiple contacts exist on the account.

What's New in 30.99 - More Enhancements

Alternate Descriptions on Floor Plans

397922 Added ability to have alternate descriptions on floor plan descriptions, so that they can be shared in Exhibitor Portal and Show Map and have the language selected respected for the floor plan description. This is only necessary when event has more than 1 floor plan.

Exhibition Management

Booth UDFs

500504 Added ability to copy Booth UDFs with Copy Event.

Exhibitor Defaults

506113 Added ability for admins to configure defaults for various exhibitor data created on the event, like Exhibitor Status, or Exhibitor Salesperson. Admins can create a single set of defaults for all events, or specific defaults for specific events.

Exhibitor Email Templates

500468 Added support for event fields in the exhibitor subject for email templates, for things like alternate event desc for multiple languages.

Floor Plan Card List

504348 The system has been enhanced to provide an easy way to open other floor plans on the event when inside one of the floor plans on the event. Users can click the "View Floor Plans" action inside the File menu of Exhibition Floor Plan. System will also display a nice floor plan card, with an overview snapshot and floor plan stats. This can be found inside any Exhibition Floor Plan using the action listed above, and also when opening a floor plan on an event with multiple floor plans. In previous versions, the system displayed a basic dropdown control that has been replaced with this new floor plan card list.

Sales Workflow Improvements

513329 Added ability to display the Exhibitor Status on Activities. This is useful when working your list of activities and you want to quickly know which activity has the highest priority status, so you address the right activities first.

Ungerboeck Standard Reports

516755 Various standard Ungerboeck reports have been updated to pull from the booth number from the booth record instead of the service order or exhibitor records.

Exhibitor Portal

What's New in 30.99 - Announcements

Exhibitor Portal

521467 Significant behind the scenes changes were made to Exhibitor Portal to increase stability and security. While there should be no noticeable changes, it is highly recommended to spend some time reviewing the application prior to upgrading your production environment.

Exhibitor Portal Setup

505174 To improve workflow and prevent accidental deletion of forms, we changed the "Add Task" page to default the form to "Blank" and disable the field, since Exhibitor Portal forms do not share the Form Templates from Registration. The only way to copy forms in Exhibitor Portal tasks is by using the "Copy Exhibitor Portal To" feature inside the Exhibitor Portal Setup you want to copy elsewhere.

Password Schemes

521467 A new feature, Password Schemes, has been introduced in 30.99 Service Release B. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

An online application that supports Password Schemes will check which rules to enforce when a public user signs up or attempt to change their password in the following order:

1 - Defined in the Sign-In Configuration for the application
2 - Defined in the Organization (found off the Main Menu)
3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

Redesigned Booth Proposal Card

507046 The booth proposal feature in the Exhibitor Portal has been enhanced to help salespeople provide the right information to exhibitors when proposing booths.

We heard feedback saying the functionality for accepting booth proposals in an exhibit space contract task is great, but that it can be challenging to provide the right information when exhibitor sees the price for the first time, especially with larger deals. They need to provide more information on screen at the same time when the exhibitor sees the price, to prevent "Sticker Shock". Our UX team listened and designed a modern card for reviewing a proposed booth.

The card was redesigned to include 3 sections of information: booth information, snapshot of booth location, price information. This provides lots of detail to the exhibitor designed to take their eyes from the upper left corner of the card, down diagonally to the lower right, where they land on the price, after taking in all the great details about the booth and a nice visual snapshot.

Booth information includes booth number, proposal deadline, net area, dimensions, type (row, corner, peninsula, island, custom), booth note, utilities (all utilities on booth record), pavilion, section.

Pricing will display line item details that make up the booth proposal subtotal.

For expired booth proposals, the "Contact Salesperson" feature places a quick link next to the new expired deadline notification. This helps exhibitors quickly reach out to their salesperson to address any confusion.

The "Contact Salesperson" feature was redesigned to be a modal and more modern, so that users would not feel like they left a process to send a quick message. They will now feel natural to send a message to their salesperson even when in the middle of a task. This helps with the booth proposal and general exhibit space contracting processes.

What's New in 30.99 - Major Enhancements

Booth Ordering Flexibilities

521467 With the new feature to allow multiple booth ordering tasks on a single Exhibitor Portal Setup, users have more flexibility in how they use Exhibitor Portal tasks to update the booth order on the exhibitor. This is very useful when you want to provide different tasks to different exhibiting groups, but they all need to update the booth order.
Here are 3 examples for tasks updating the same booth order:
1. an exhibit space application task that requires exhibitor to select booth space, which creates the booth order.
2. an exhibit space contract task that requires exhibitor to review a booth proposal that might update the booth order.
3. a task to select and order a booth from the floor plan, but this is only available to salespeople, and this also needs to update the booth order.

Exhibitor Portal

Contracts with Signatures Reports

501743 Enhanced the feature to "attach contract report with signature and terms" to allow admins to fully configure the report that is automatically creates when submitting a task. Now admins can brand the report and place the terms and signature elements where needed inside the report.

Added new wildcards in reports for data that is collected on the summary page when signing digital signature:
- Exhibitor Portal Terms
- Exhibitor Portal Initials
- Exhibitor Portal Printed Name
- Exhibitor Portal Signed Date

Added new placeholder for the Exhibitor Portal Digital Signature.

Instructions for how to insert the digital signature captured by exhibitors during the checkout process of an Exhibitor Portal task.
Click the "Insert Ungerboeck Link" button on an Email Template, with Subject = "Exhibitors (25)"
Select "Image from Source" on the Select Link Type page:
Adjust any Link Parameters, if needed:
Image Placeholder will appear, as an Ungerboeck stock image. However, the actual digital signature image will be added in its place.

This allows admins to create a fully branded Email Templates and use them as the "Confirmation Report Template". A copy is placed in the Documents section on the Exhibitor, and a copy is sent to the exhibitor in the email confirmation.

Custom Journeys

512616 Enhanced the flexibility of the exhibitor portal setup custom journey experiences to allow multiple portal tasks to be linked to a single service order. This is useful when admins need multiple steps/tasks to complete a specific process, and all steps in the larger process work to "build up" a service order over time.

514583 Enhanced the flexibility of the custom journey features in the Exhibitor Portal to be able to auto assign Exhibitor Category(ies) based on how many units the user orders in the portal. This is helpful when you want to branch the process based on the area of the booth they are requesting. If the exhibitor requests a booth of a specific size, like more than 400sqft / 36sqm assign them an Exhibitor Category that asks for custom booth construction information, or if exhibitor orders exactly 100sqft / 9sqm, skip some questions and take them directly to a pre-build booth kit offering.
This functionality can be added to any order item within any of the tasks in the Exhibitor Portal. Since Exhibitor Categories can drive custom journeys inside or outside tasks, this takes the existing ordering flexibility of the portal to another level.

Multi-Currency Support & Price List Setups

507877 Enhanced the ordering flexibility of the Exhibitor Portal to support multiple currencies for exhibitors creating new orders in the Exhibitor Portal tasks. This could be achieved in previous versions by using Price Class pricing in the portal or by creating orders in advance. However, this process was suboptimal when new exhibitors were signing up for the first time, or the existing companies/exhibitors were not pre-configured with the correct price classes or orders in advance. With this new feature, admins can setup the portal so that existing exhibitors and new sign ups can choose their preferred currency (or price list) when entering the task to create a new order. This feature is obviously skipped when editing orders since the currency (or price list) is already set on the order.

Exhibitors will see a modern currency prompt as soon as they enter the task (as long as the exhibitor is not editing an existing order). Admins can setup as many currencies as they wish. The prompt is best designed for 2-5 currencies.

With this new feature, the Exhibitor Portal Setup was enhanced to allow admins the ability to select multiple price lists on the task within a new Price Lists section, instead of only 1 in the single select dropdown field. There is a new "Default" setting on the price lists section so admins can select the price list/currency that is selected by default.

The default price list will be the price list used for selecting order items within the form. If price lists have different items, you will need to select the appropriate default, configure the order items sections, then go back and ensure the correct price list is flagged as the Default. Work with your Customer Success Manager if you have any questions on these changes.

Exhibitor Portal

Sales Only Tasks & Sections

512353 Enhanced the Sales Exhibitor Portal to have sales specific tasks and/or sales specific sections within tasks. This is useful when admins need to provide advanced Exhibitor Portal features to salespeople, but they do not want them to be available to exhibitors.

Example: An admin creates a sales only task that lets salespeople manage the Exhibitor Status or Exhibitor Categories, since these fields help drive a majority of the custom journey experiences. Or create an Exhibitor Category section on the exhibit space renewal contract task that lets salespeople dynamically enable functionality inside the task, like access to special pricing or order from floor plan feature.

What's New in 30.99 - More Enhancements

Accessibility Improvements

470170 Added accessibility improvements around the Exhibitor Portal and Show Map.

Automatic Booth Charging

512356 The automatic booth charging functionality in the Exhibitor Portal has been enhanced to support charging booth open sides as a percentage, instead of a flat fee. Using this feature will set the item quantity for the open sides resource = area of booth. This feature is useful when exhibitors accept a booth proposal or order a booth from the floor plan.

Checkout Improvements

501746 The checkout process in Exhibitor Portal Tasks has been enhanced to allow users to create a new Bill-To Account without forcing them to create a Bill-To Contact.

Cleanup of Shared Controls

507668 Removed the "Status" column from exhibitor list columns in Exhibitor Portal modes that share an exhibitor list:
- Co-Exhibitor Portal
- Sales Exhibitor Portal
- Contractor Portal

Since the Exhibitor Status is designed to be an internal field, we needed to remove it from the shared list.
However, as this was very useful for internal staff/salespeople when using the Sales Exhibitor Portal, we also enhanced the Exhibitor Portal to support viewing, or even managing, the Exhibitor Status. This was part of a larger enhancement to support Sales specific tasks and sections, so now salespeople can have their own task in the portal where they can have special instructions with ability to manage Exhibitor Categories and Exhibitor Status, which controls most of the custom journey workflow automation in the portal.
Read more about these features further within the What's New document.

Exhibitor Portal Setup

501745 Enhanced the Exhibitor Portal Setup to display the Price List Item Description instead of the Resource Description as the price list description makes the most sense when inside an event.

521465 Added ability to limit Document Download sections by Exhibitor Status and Exhibitor Category.

Multi-Show Exhibitor Portal - Manage Events Page Improvements

516292 The Manage Events page within the Multi-Show Exhibitor Portal has been enhanced to include the following improvements:
- Added Event Searching.
- Added Event Filtering.
- Updated some of the UI elements around the page.
- Enhanced mobile responsiveness.

Pavilion Portal

507667 The Pavilion Portal (part of the Exhibitor Portal product) has been enhanced to include the following:
1. Ability for pavilion owner / agent to sign up new pavilion exhibitors to be in the existing Exhibitors List tab in the Pavilion Portal, where the agent can further manage exhibitor portal tasks or booth assignments.
2. Pavilion Owners can have a dedicated link to a specific Show Map configuration that shows their specific pavilion on the map. This gives them a nice visual representation of the existing Booths List tab, inside the Pavilion Portal.
3. Pavilion owners / agents can Make Payments from within Pavilion Portal, like the existing Make Payment feature inside Exhibitor Portal, which links to the Payment Portal setup in the Exhibitor Portal Setup.

Exhibitor Portal

Redesigned Messaging Salesperson

507670 The "Contact Salesperson" feature, which is how exhibitors send messages or communicate with their salesperson, was redesigned to be a modal and more modern, so that users would feel comfortable sending a quick message without feeling like they left a process. They will now feel natural to send a message to their salesperson even when in the middle of a task. This helps with the booth proposal and general exhibit space contracting processes.

Sharing Documents

512360 Added ability to share Order Documents in Exhibitor Portal tasks. This enhances the existing features in the portal that allow admins to setup tasks to review and download historical documents. The portal already supports general event documents and dynamic exhibitor documents. Adding order documents completes the various documents exhibitors might need to review and download.
Reminder: Invoice PDF documents are already available to download and print from within the Payment Portal, which is the "Make Payment" button in Exhibitor Portal.
This allows instant communication of all event level documents organizers need to share with exhibitors.
We recommend setting up a task for something like "Documents & Links". This would have all general event documents (like exhibiting terms), any specific exhibitor documents (like contract documents, signed or unsigned), order documents (like order confirmations). A section can be setup to communicate back and forth utilizing Exhibitor Notes, or responses to new messages from the "Contact Salesperson" feature.

Workflow

494830 Enhanced email confirmation documents that are generated and sent from Exhibitor Portal tasks to respect the Document Heading setting on the Email Template when creating the document records. This is helpful with reporting and workflow. This was also patched to .98 and .97 versions.

501744 Added a configuration option to determine if a task will display the "Save as Draft" button at the end of the task.
This is only available in tasks without ordering functionality.

504174 Added ability to have a task that opens Manage Account. This is useful when exhibitors need to be guided to do something specific in Manage Account, like a task to "Manage Contacts", where they might need to add new contacts.

505671 Added ability to display Instructional Text components on task summary pages. This is very useful when exhibitors need specific instructions for checking out, to further detail an admin's setup, like options for managing Bill-To information, payment plan options, payment options, credit card surcharges, terms and signature requirements, etc.

Workflow Improvements

500483 Added ability to define the Activity Type for activities that are automatically created when users accept or reject booth proposals in the Exhibitor Portal. This is useful when teams need to further refine the new activities automatically coming in from exhibitors in the portal, using the booth proposal feature.

513332 The Exhibitor Portal has been enhanced to filter out exhibitors with a cancelled status, meaning they have a weight of 90 or greater.

Exhibitor Service Center

30.99 Service Release B

30.99 Service Release B

516552 Changes made to remove the script bundles and load the script files directly on start up to resolve script file not found errors.

523168 For Aurelia, once you sign in and go through the booth page the manage account works correctly.

What's New in 30.99 - Announcements

Exhibitor Service Center

496383 Significant behind the scenes changes were made to Exhibitor Service Center to increase stability and security. While there should be no noticeable changes, it is highly recommended to spend some time reviewing the application prior to upgrading your production environment.

Password Schemes

496383 A new feature, Password Schemes, has been introduced in 30.99 Service Release B. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

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What's New in 30.99 - Major Enhancements

ESC > URL Encryption

530366 With the 30.99 and 23.1 releases, the ESC 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 ESC application once they 've upgraded to 30.99 or 23.1 and make those links available to their suite owners.

What's New in 30.99 - More Enhancements

Form Template Safety Save Action

496383 Users can now add Items to a Form Template and be able to do a Safety Select. This will allow the user to select items and send them back to the Order Form without leaving the Select Order Items page.

Expense Reports

What's New in 30.99 - Major Enhancements

Ungerboeck Phone for Expense Reports

527409 The ability to enter expense reports and expense report details via Ungerboeck Phone is now available.

What's New in 30.99 - More Enhancements

Expense Reports

511376 A new feature has been added for Ungerboeck for Venue - Enterprise customers that will allow express users to add, edit and view expense reports.

Major and Minor Inventory Groups for Expense Reports

506847 Upon customer requests, Major and Minor Inventory Groups have been updated to allow for tagging Majors/Minors as being allowed for use on Expense Report entries. This ensures more accuracy in expense report entry by limiting selection to only majors/minors with the Expense report flag to be used on Expense report entries. Majors and Minors with the Expense report flag can still be used on inventory items as needed.

Transaction Analysis Code Support

506696 Upon customer request, the ability to select Transaction Analysis Codes on Expense Report Details has been added.

Visa Transaction Feeds

502454 Support for Visa card transactions is now available for Expense Reports.

Facility Booking

What's New in 30.99 - Announcements

Add Events from Calendar of Bookings, Add Holds

483105 A new event with bookings can now be added from the monthly calendar/Calendar of Bookings. A user can click/drag to select multiple days, or CTRL + click to select multiple, non-consecutive days. A user will then click Add and have the option of selecting one or multiple spaces for which pending bookings will be created. This workflow is designed for quickly and easily placing holds (adding bookings) on the calendar for particular days and spaces.

Availability Search

518710 The Edit Layout action on the Availability Search page has been removed. Please reset your layout using the following steps if you find fields are missing:

- Go to Themes off the Main Menu.
- Select the appropriate theme in the grid.
- Find the Layouts section on the Reading Pane.
- Find the Availability Search page.
- Open Edit Layout & Reset.

What's New in 30.99 - More Enhancements

Tentative/Firm Dates on Bookings

504679 To facilitate more complete space utilization and occupancy reporting, two new fields have been added to bookings: Tentative and Firm dates. These fields are populated automatically when a booking is move to the Tentative (status of 20 - 29) or Firm (status of 30 - 79), respectively. These field are also able to be populated manually. The fields will be cleared out if the booking 's status is moved below either Tentative or Firm, respectively. These fields are not copied when an event or booking is copied. Tentative and Firm dates are also available to be shown as columns on Event Bookings and Daily Bookings.

Year Drop-Down

483105 Improvements to the year drop-down used on the Calendars have been made. When the drop-down opens, it will scroll to show the selected year and only show ten years.

Fixed Assets

What's New in 30.99 - More Enhancements

Asset Register

495366 Upon customer request, the asset register can now display Purchase Order Items related to the asset. Purchase Order Items can be added as a section to the layout of the Edit Asset page.

Fulfillment Orders

What's New in 30.99 - More Enhancements

Fulfillment Order > Add 'Opportunity' as a column & filter

527681 Within the Fulfillment Order window, the 'Opportunity' field has been added as an available column & filter.

Fulfillment Order Items > 'Opportunity' Improvements

527681 Within the Fulfillment Order Items window, the 'Opportunity' field has been added as an available column & filter. In addition, the value of the 'Opportunity' field will be inherited from the connected Fulfillment Order.

Fulfillment Orders

508331 Order Category will now be available as a filter and column.

Fulfillment Orders - Add 'Account Warn' Functionality

527681 Within this enhancement, 'Account Warn' functionality has been copied from Service Orders to Fulfillment Orders. Accounts that have a "warn" status will now include a yellow triangle to indicate there is a 'Warn Status' on the account. Accounts that have a "hold" status will now include a red stop sign to indicate it is a 'Hold Status' on the account.

Global Navigation

505088 Add Fulfillment Order is now available as a Global Navigation action.

New Access Privileges for Fulfillment Orders

527681 Within this enhancement, 2 new access privileges have been added for Fulfillment Orders which ensures consistency with Service Orders. The first access privilege is for "Allow Editing of Multiple Fulfillment Orders and Items", which provides control over which users can edit multiple fulfillment orders and items. The second access privilege is for "Edit/Delete Fulfillment Order By Status", which provides control over who can edit and delete fulfillment orders by checking the assigned fulfillment orders status level for each role/user and comparing to the status of the order.

Functions

What's New in 30.99 - More Enhancements

Functions

519953 In .99 Service Release B, it is now possible to total on Total Tickets Comped, Total Tickets Sold and Gross Ticket Sales.

General Accounting & Analysis

What's New in 30.99 - More Enhancements

Event Job Profiles: Dimension & Book Assignment

499529 Upon customer request, event and job profiles have been enhanced to allow assignment of Book Control and Core Dimension fields. The fields will flow through to new events and jobs when created from profiles.

Export Retrievals from previous versions of Ungerboeck Excel Reporting documents

499675 A right-click option Export has been added to the Versions grid for Ungerboeck Excel Reporting documents which allows the user to export the Definitions from the Version selected.

General Ledger Configuration

505976 The General Ledger Configuration page now has options for selecting the Cost Clearing Account and Cost Clearing Sub Account. This is used in conjunction with the Cost GL Account field on the Resources page to establish the Credit side of the entry.

GL Accounts

507876 Upon customer request, new filters have been added on the GL Accounts page for the following fields:
- Effective Status
- Effective FYP
- Effective Year
- Effective Period

GL Dimension Mapping

503426 A new Main Menu option has been added "GL Dimension Value Mapping" which allows users to create mapping between a source transaction dimension value and the dimension value to be used when creating GL Account balances. For example, if two Departments "Beverages" and "Kitchen" are required for operations but the financial reporting should use "Food & Beverage" then the two source Departments could be mapped to a single Dimension Department for use in GL reporting.

GL Period Details

517102 Upon customer request, the Reclass Journal Entry action can now be accessed via the GL Period Details page.

GL Transaction Inquiry

492270 Upon customer request the following fields are now available on the GL Transaction Inquiry page:
- Purchase Order Description
- Purchase Order Item Description
- Requisition Number

519737 Upon customer request, Book Control has been added as a filter to the GL Transaction Inquiry page.

Journal Entries Standard Reports

507628 Upon customer request, the standard journal entry reports have been updated to include the Posted User ID and date/timestamp in order to better show the audit trail of the journal entry. These reports are:

CGL110: Journal Entry Detail – By Account
CGL111: Journal Entry Detail – By Event
CGL112: Journal Entry Detail – By Line
CGL115: Journal Entry Summary

Undo Deferral Journal Entries

511506 Users are now able to use the Undo Journal Entry action on Deferred Recognition (DR) Journal Entries.

Global Behavior

30.99 Service Release B

Patch Note

521015 Now when viewing an activity the correct spacing is respected on Activities window.

What's New in 30.99 - Announcements

Views

507816 In 30.99 Service Release B, Ungerboeck for Venues Enterprise Express users will now have the ability to modify and create views.

What's New in 30.99 - More Enhancements

Date Range Filters

507816 It is now possible to filter by calendar quarters in the various date range filters throughout the system. Please note that this only applies to calendar quarters (example: Q1 = January 1 - March 31) and not fiscal quarters at this time.

Snap Pages to Right/Left of Browser

508723 It is now possible to snap a page in Ungerboeck to the right side of the browser using Ctrl +Alt+Right Arrow or the left side using Ctrl+Alt+Left Arrow.

iEBMS

30.99 Service Release B

Patch Note

518127 Now you will no longer receive an error when accessing an iEBMS EZWriter WRI link.

What's New in 30.99 - Announcements

iEBMS Venue Availability

527766 Please note that iEBMS Venue Availability (VA) is not supported in 30.99. If you are still using this application, we do not recommend upgrading to 30.99. Please reach out to your Customer Success Manager and/or Account Manager to discuss an upgrade path to Online Spacing Booking.

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

Inventory Management

What's New in 30.99 - More Enhancements

Mobile Inventory Application

492014 The Mobile Inventory Application now allows the ability to create restock transactions.

Purchase GL Account on Inventory Items

507608 On Inventory Items, new fields have been added to indicate which GL account is configured as the Purchasing GL account. The fields are 'Purchase GL Account' and 'Purchase GL Account Description.' These fields will look across the Major/Minor Configuration and item level GL distribution to determine which account is configured as the debit Purchasing account and display it accordingly against the inventory item. If a multi-line GL Distribution is configured it will show the GL Account on the Dr Purchase line with the lowest Sequence.

Job Management

What's New in 30.99 - More Enhancements

Job Bookings on the Calendar of Bookings

499029 Job Bookings can now be shown in the Calendar of Bookings. New filters have been added to show job bookings as well as to apply filters based on the job.

Purchase Order Items on Jobs

501913 Upon customer request, Purchase Order Items is now an available on section that can be added to the Edit Job page.

Membership Services

What's New in 30.99 - Major Enhancements

Membership Portal

508454 You can now include a link to external sites or pages in the Membership Portal. This is a perfect way to link out to a Membership Information or Member FAQ page that is hosted on your main website.

Mobile Work Orders

What's New in 30.99 - More Enhancements

Booth/Press/Additional Contacts 1-6

511753 Mobile Work Orders can now support exhibitor Booth Contact, Press Contact, and Additional Contacts 1-6 within .99A. These contacts will need to be selected for display within the Mobile Work Order Configuration.

Item Level Space

511751 Within this new .98A enhancement, item level space will now be supported within Mobile Work Orders. Item level space will display on the Work Order Item card and detail page. This fits into the Day Delegate Rate (DDR) functionality.

Venue

518367 Venue will now have a display and filter within Mobile Work Orders. Display and filter will work on both Work Orders and Items in .99A.

Online Event Ordering (OEO)

What's New in 30.99 - Major Enhancements

Add-Ons

527680 Within this enhancement, a new type of upsell is being added to our ordering processing arsenal. The new 'Add-On' upsell will be able to promote additional items that (1) can be ordered in any quantity removed from a configured ratio, (2) can be ordered in any combination with another similar upsell type, and (3) cannot be ordered individually within public applications. An example would be a Caesar Salad where there's a protein add-on upsell selection of steak, chicken, tofu, or shrimp.

What's New in 30.99 - More Enhancements

Bcc Email Confirmation

527680 Within this enhancement, users now have the ability to include a Bcc on the email confirmation so that an additional user can receive a copy of an order through the OEO application.

Email Confirmations

502258 The Confirmation From Email Address and Confirmation Email Template fields are now required in the Online Event Ordering Configuration.

Events

502382 A new field, OEO Configuration, is now available on an event. After an order is submitted, Online Event Ordering creates an Event and will auto populate the OEO Configuration field. OEO Configuration is also available as a filter on the Events page.

Lead Time

500485 You can now configure the lead time hours needed before users can place an order. This will allow for the catering operation to collect orders the same day, but still give their team some lead time to accommodate those orders. For example, imagine that you configure 4 hours for this configuration field. If a user accesses the application at 8:00 AM, the earliest they would be able to place an order is 12:00 PM.

Limiting Orders

502259 You are now able to configure the time span a user can place an order by 'Day of the Week' or 'Date'. For example, orders can be placed between 8:00AM – 5:00 PM Monday through Friday and 10:00 AM – 4:00 PM Saturday/Sunday. If configuring a 'Date', select the specific date and select the Start and End time. The 'Date' will override the 'Day of the Week' configuration within the Online Event Ordering Configuration.

513306 Online Event Ordering will now have the ability to mark a particular date or day of the week as 'Closed'. This will be done within the Order Time Availability section. Marking a day 'Closed' will not allow a user to select the date or day of the week that is closed which will not allow orders to be submitted.

513308 The Start New Order page will now have a hyperlink called Hours of Operation that will display the available hours for the application. This will help user to have visibility to when they can place an order. This will display:

- Normal Weekly Days/Hours
- Closed Days/Hours
- Special Days/Hours

Multiple Menus

506154 Online Event Ordering will now have support for multiple menus. There is a new section called "OP Component Configurations" where the user can configure what menus user would like to use. NOTE: This enhancement does not include time. This only includes selecting dates, therefore, when a new menu is selected for a day, it will be applied for that entire day.

Order History

500257 Online Event Ordering now has the ability to view order history / details, so users can ensure they're planning correctly. All Active, Past, and Cancelled Orders will display under their corresponding section. Users have filtering options available to them to find the proper order.

Payment Gateway Support

508312 Payment Gateways for credit card payments are now supported in Online Event Ordering.

Online Event Ordering (OEO)

Secondary Navigation

503736 The secondary navigation links for Start Your Order, Catering, and Orders will now be visible. Previously, users would only see the individual catering links within the mobile menu.

SSO Support within Online Event Ordering App

500215 Within this enhancement, clients who utilize SSO/Auto-login for their v30 login will now have the same support within the Online Event Ordering application. Those customers who wish to use this feature need to work with our Solutions team to ensure that the implementation works within the technical architecture.

Start New Order

503517 Online Event Ordering now has Start New Order within the secondary navigation. This will allow the user to go back to the initial Online Event Ordering page where the user can select a date/time or view active orders.

Online Order Processing (OP)

What's New in 30.99 - More Enhancements

Performance Improvements - Item Details

504602 Within this enhancement, loading the item detail page will now load quicker. Quick add and add-to-cart from the item detail page will load quicker as well.

Saved Cart Support

507143 Within this enhancement, Online Event Ordering will now have saved cart support. However, if a user switches to a new date/time, they will be notified their cart will empty. Saved cart support will only work when the same date and time is selected.

Online Space Booking (OSB)

What's New in 30.99 - Announcements

Availability Calendar

509231 A new checkbox has been added to the Online Space Booking (OSB) configuration - Show Availability Calendar. This takes the place of the control on the content builder layout. This checkbox controls whether the Availability Calendar shows on the search page in OSB.

Content Builder Changes

501760 Online Space Booking (OSB) now uses content builder layout on Event Details pages only. Previously, the Search page was also controlled by content builder layout. Dynamic content on the Search page should now be handled by customizations to web themes/CSS. Additionally, there is a new control on the OSB configuration to show or hide the Availability Calendar on the Search page.

What's New in 30.99 - Major Enhancements

Adding Orders to Existing Events

482694 Online Space Bookings (OSB) now supports the ability to add orders to existing events. An option on the OSB configuration - Allow Changes to Existing Events - controls whether the user is able to add orders to previously submitted events via My Events.

Availability Calendar

505977 The Availability Calendar in Online Space Bookings (OSB) has been revamped. There is now a Day mode in addition to Week and Month. The Day and Week modes are now displayed by space, with spaces on the left and dates/times across the top, with availability indicated within the grid. Additional filters are now available for Venue and Capacity. When viewing the calendar in mobile/tablet mode, available times are listed for each space per day.

Editing Events

506163 Online Space Booking (OSB) now supports the ability to update Event Details for existing events. If configured, an end user can access a previously submitted event from My Events, where they will have an option to Change Event Details. They will be able to see previously submitted values for any standard fields, UDFs, or notes contained on the Event Details page(s) and be able to make changes to those fields.

Editing Orders and Items

517821 Online Space Booking (OSB) now allows previously entered orders and items to be edited. If configured on the respective OP configuration, a user can access the event via My Events, where they are able to manage individual orders. The Manage link will take the user to the Event Order/view order page, from where they can select Modify Your Order. From there, item quantities can be adjusted, new items can be added, and individual items can be edited or removed/cancelled. Additionally, the entire order may be cancelled.

What's New in 30.99 - More Enhancements

Adding Events

514781 In Online Space Booking (OSB), if the Set Event Account To is set to Allow Selection on the configuration, the following behavior occurs:

- If the user is a single contact not associated with an organization, they will be logged in as a single contact and any resulting events will be saved with the contact as the main event account.
- If the user is a contact associated with multiple organizations, they will be presented with options to login as themself or select which associated organization they want to login as a contact for.
- If the user is a contact for a single organization, they will be presented with options to login as themself or login as a contact for their associated organization. (Prior to this enhancement, this option was not presented to the user.)

Assigning an OSB Configuration to an Event

507411 A new action has been added to events - Assign to OSB. This action allows a user to tag an event to a specific Online Space Booking (OSB) configuration, thus enabling viewing and managing of the event in OSB. Please note there are validations in place with this action, that the event's price list must match the price list on the selected OSB configuration, and the bookings on the event must be daily/not crossing midnight.

Online Space Booking (OSB)

Editing Events

507372 Online Space Booking (OSB) now has validation on which configuration an event was originally created in to allow or disallow editing. The ability to add spaces or orders/items to an event, to cancel a booking, request to cancel the event, or to edit event details can only be done within the configuration in which it was originally created. Accessing an event from any other configuration will show the user a message that the event cannot be edited.

Event Cancellation Request Access for Standard Users

519084 A new feature has been added for Ungerboeck for Venue - Flex customers that have purchased Online Space Bookings that will allow standard users to view event cancellation requests.

Lead/Strike Hours

515647 Online Space Booking (OSB) now allows spaces to be booked if their lead hours or strike hours cross over midnight. Previously, OSB had a validation that a space that had lead or strike hours that crossed over midnight would not show as available and was not able to be booked. This validation has been removed from OSB as well as from the v30 Availability Search. (The booked hours themselves - start/end - cannot cross over midnight, that validation is still in place.)

My Events

511461 In Online Space Bookings (OSB), the My Events page previously used the logged in user who originally created the event as the criteria for showing events. A change was made to use the Main Event Account and Main Event Contact as criteria. This change allows an event to be reassigned to a different account/contact from the original submitter, so that the event is then viewable/accessible to the newly assigned account or contact.

Navigation

504591 In Online Space Booking (OSB), when ordering items on an event with multiple spaces/bookings, the modal presented to user to select space/booking will show as a dropdown vs. a radio button selection.

515851 In Online Space Bookings (OSB), when a user is adding spaces to their cart on the Search Results page, the toast/success message now includes two buttons, one to keep the user on the results page, one to navigate them to the Event Details page. This saves the user from additional scrolling and improves the overall navigation and workflows in OSB.

Order Processing

504593 In Online Space Bookings (OSB), two new buttons have been added on the Order Processing (OP) pages: Order for another Space or Date - allows a user to move to another space/booking without having to return to Event Order/Summary page. Go to Cart - allows a user to go directly back to shopping cart/Event Order/Summary page from anywhere within OP.

Searching for Spaces

482434 Online Space Booking (OSB) now supports searching for spaces by Venue. If configured on OSB, an additional search field, Venues, is available on the Search page and Search results page. Users are able to filter spaces by their assigned venue, which is configured in the Spaces configuration table. If shown, interaction has been added between the Venues and Spaces field, such that selecting a venue will auto-filter the spaces available in the Spaces field. Additionally, the Venue for a selected space will be displayed on the Space Details page.

498088 The Venue field is now available as a filter on the Availability Search page. If configured on the Spaces configuration table, a user is able to search for available spaces by their assigned venue.

Spaces

511221 In Online Space Booking (OSB), the Spaces filters/dropdowns on the search page, the availability calendar and the results page are now sorted in alphabetical order by space description. Previously, they were sorted by space code.

Payment Applications

What's New in 30.99 - Announcements

Password Schemes

517121 A new feature, Password Schemes, has been introduced in 30.99 Service Release B and is available in the Payment Portal (Version 1). Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

An online application that supports Password Schemes will check which rules to enforce when a public user signs up or attempt to change their password in the following order:

1 - Defined in the Sign-In Configuration for the application
2 - Defined in the Organization (found off the Main Menu)
3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

Ungerboeck Payments

517121 Ungerboeck is excited to launch Ungerboeck Payments!

Ungerboeck Payments is a Payment Gateway that allows your organization to accept electronic payments in a single payment account and removes the need for integration with an external provider. Ungerboeck payments offers PCI Compliance, End-to End-Support and makes it easier to collect and receive funds. Please contact your Account Manager or CSM for more details on how your organization could benefit from Ungerboeck Payments.

Ungerboeck Payments will be rolled out in phases across the globe. Below is the anticipated schedule. Please note that this is subject to change.

- Available Now in North America
- 2023 Q2/Q3 for Europe
- 2023 Q3 for Australia and New Zealand

What's New in 30.99 - Major Enhancements

Electronic Checks

474233 Upon customer request, the E-payment application and Payment Portal (version 2) application have been updated to allow accepting an Electronic Check as a payment type.

Payment Portal (Version 2)

502029 The ability to configure Payment Portals using Version Type = 2 for accepting Partial Payments is now available. Within the Payment Portal Configuration, the selection for Allow Partial Payments should be checked when wanting to allow users to partially pay an invoice, order, or memo payment plan step.

Payment Portal Confirmations - Behavior Change

527408 Payment portal confirmations will now honor the configuration set in organization parameter = EM140. Emails will continue to be sent to the email address entered via the Payment portal itself. These emails are sent in addition to the provided email to ensure that all relevant parties receive confirmation of payment.

What's New in 30.99 - More Enhancements

E-Payment Application

507558 The ability to assign Terms and Conditions configurations to the E-Payment Application is now available. Terms and Conditions can be setup via the Main Menu > Terms and Conditions page and then assigned as needed to the E-Payment Configuration.

Payment Portal (Version 2)

473023 The ability to assign Terms and Conditions configurations to Payment Portals using Version Type = 2 is now available. Terms and Conditions can be setup via the Main Menu > Terms and Conditions page and then assigned as needed to the Payment Portal Configuration.

Personnel Management

What's New in 30.99 - More Enhancements

Workforce Scheduling

503733 When selecting the Account field on the Add Workforce Scheduling Detail page, it will now only display individuals that are available to be scheduled at the selected date/time.

Phone

What's New in 30.99 - Announcements

Defining the Phone Main Menu

503055 It is now possible to define the options that appear on the Phone Main Menu at the theme level. Prior to .99, the Phone Main Menu was loaded based off the user's theme's Global Navigation. In .99, a tab has been added on the Themes reading pane to allow you to define which action will appear on the Phone Main Menu and the order in which they appear.

Ungerboeck Phone

504468 Please note that Ungerboeck Phone is the default application when accessed from a phone device. Prior to .99, Ungerboeck Mobile was the default.

In 30.99 Service Release B, a user will be directed to Phone if they have access. If they don't have access to Phone, they will be sent to Mobile if they have access. If they don't have access to either, they will receive a message informing them that they don't have access.

What's New in 30.99 - Major Enhancements

Expense Report Approvals

517180 The ability to view and approve expense reports has been added to Ungerboeck Phone.

Purchase Order Approvals

499636 The ability to view and approve Purchase Orders has been added to Ungerboeck Phone.

Requisition Approvals

503632 The ability to view and approve Purchase Orders has been added to Ungerboeck Phone.

Voucher Approvals

501908 The ability to view and approve vouchers has been added to Ungerboeck Phone.

Purchasing

What's New in 30.99 - Major Enhancements

Copy Purchase Order Item

482920 Upon customer request, the ability to Copy a Purchase Order Item has been added.

Purchase Orders: Add Other Actuals

499953 Upon customer request, the ability to add additional actuals to a Purchase Order is now available. In the Edit Purchase Order page on the Actuals tab, there is a new action called 'Add Other Actual.' This allow for the input of an additional item onto the PO in the scenario where something being received in is an additional or different item than what was originally specified as being ordered on the PO.

What's New in 30.99 - More Enhancements

GL Transaction Inquiry

499208 Upon customer request the Purchase Order Contract Reference field is now available on the GL Transaction Inquiry page.

Purchase Order Approvals - Activities

508493 Upon customer request, the ability to view & add Activities from the Review Purchase Order page is now available.

Purchasing Contracts

499204 Upon customer request, a new checkbox "Contracted Item" has been added to Purchase Order Items. If a Purchase Order is related to a PO Contract but some of the PO Items are not part of the contract, this checkbox can be un-selected so that those PO Items do not appear in the Purchase Order Items tab on the Edit PO Contract page.

What's New Entries

By Module

Query & Reporting

30.99 Service Release B

Patch Note

520065 Now when running a report with a naming scheme tied to it the file name on email attachment shows naming scheme correctly when selecting Email to Myself in report prompt.

523021 Now the Event Order Confirmation report will show function date and time on report viewer correctly when selecting report format on report prompt.

What's New in 30.99 - Announcements

Report Views

504958 In 30.99 Service Release B, Ungerboeck for Venues Enterprise Express users will now have the ability to modify and create report views.

What's New in 30.99 - More Enhancements

Documents

504958 It is now possible to store documents against report entries. This is a great place to store design specifications, mockups, etc... for the report.

Schedule Reports

510045 Ungerboeck for Venues - Flex professional users can now schedule reports.

Registration Check-In

What's New in 30.99 - Major Enhancements

Function Attendance Tracking

359094 You can now track the actual time an attendee checked into a function. This will allow you to better understand how early attendees are showing up to functions.

What's New in 30.99 - More Enhancements

Registration Check-In

413105 It's easier than ever to find dictionary phrases for the public-facing Registration Check-In web application. We 've added a filter to "Browser Phrase Types" in the dictionary to group all RCI portal phrases.

Resources and Price Lists

What's New in 30.99 - Major Enhancements

Allergies / Dietary Preferences

511463 Both Allergies and Dietary Preferences can be connected to resources. This information will flow down to the Price List Item, Service Order Item, and Work Order Item. Future enhancement will connect both Allergies and Dietary Preferences to the public facing applications.

What's New in 30.99 - More Enhancements

Allergies & Dietary Preferences: Display

527684 Within this enhancement, the 'allergies' and 'dietary preference' values established on the resource are now displayed within the following object grids: Resources, Price List Items, Service Order Items, Work Order Items, Service Orders > Add Items, and Fulfillment Orders > Add Items.

Allergies & Dietary Preferences: Edit Multiple

527684 Within this enhancement, on the Resource master, users will now be able to add and remove allergies & dietary preferences via 'Edit Multiple'.

Resource Abbreviation Description

508330 A column for resource abbreviation description has been added to Price List Items, Service Order Items, and Work Order Items.

Tiered Pricing / Costing

504863 The pricing fields for custom & standard Pricing / Costing Schemes has been increased from 2 to 4 decimals. This allows for greater granularity when it comes to segmenting certain tiers, especially for some complex items such as rental rates and space cleaning.

Room Diagrams

What's New in 30.99 - More Enhancements

Room Diagram Overview

504351 What’s New in .99 for Room Diagram Overview:

- Undo/ Redo – allows users a safety net when making changes in the diagram
- Draw multiple – right click on item panel allows users to fill an area with evenly spaced items in a few clicks
- Right click – available options change based on object clicked. Diagram items, item panel and shapes all give different options.
- View Orders – a service orders list that only shows the orders linked to this diagram
- View inventory – opens the resource requirements window with filters passed through for this diagram
- The table object – allows for intelligent linking of chairs to their table and easier measurement between table edges rather than group edges
- Edit measurements/ tables/ shapes – allows users to stretch measurements, edit points on shapes and alter the chairs associated to tables. Can be accessed by double clicking the object.
- Space filter on diagram items – allows views to be created to limit what is visible in the item panel
- Tabbed ribbon – allows for grouping of actions together
- Audit Log support – tracks changes to the diagram
- Room Diagram main menu subject – allows users to see all diagrams in the system in a single view. This crosses all events
- Room Diagram Status – allows users to create a process around diagrams by making them certain statuses
- Substitute items/ chairs features – allows users to quickly switch out one item for another or to switch out one style of chair around a table for another or a different number of chairs
- Diagram item panel performance improvement – altered how the item panel is created so that it loads in ¼ of the time
- Duplicate without grouping – duplicating multiple objects no longer requires grouping them which should save some time and hassle.

Sales Goals

What's New in 30.99 - Announcements

Legacy Sales Goals

510480 With the introduction of our new approach to Sales Goals in 30.98, the old approach has been renamed Legacy Sales Goals. Legacy Sales Goals 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.

What's New in 30.99 - More Enhancements

Sales Goal Periods

510480 A description field has been added to sales goal periods. This field will default to the sales goal description.

510481 New columns for Cumulative Contributed Amount, Cumulative Goal Amount, and Cumulative Variance have been added to Sales Goal Periods. These columns allow you to track progress towards the overall goal as well as the goal for the period.

510483 You can now view and filter by the sales goal event on the Sales Goal Periods page.

Sales Goal Types

512078 The following filters are now available on Sales Goal Types - Active, Changed By, Changed On, Entered By, Entered On, and ID.

Sales Goals

512093 The following date range filters have been added to Sales Goals - Changed On, Entered On, and Last End Date.

515364 A description column has been added to Sales Goals. In the upgrade to .99, any existing sales goal will have their description set to the sales goal type description.

Service Orders

30.99 Service Release B

30.99 Service Release B

520266 There is now be a Real Time Inventory Warning Window when trying to set a substitution that already exists instead of just closing out of the window without any explanation to the Client.

521595 Resource notes are no longer doubling during the copy process.

522836 The column was being removed from the grid for service order items tab within events, however, it was still an option within available fields in the show column selection view. With this code change the Resource field is not displayed in available fields to select when selecting show columns within service order items tab grid.

Patch Note

523337 As per the dev note, the issue has been resolved. now the "Save and Add item" button is not visible in Copy Order window. hence completing the case as of now.

What's New in 30.99 - Major Enhancements

Cancel Service Order(s) when Cancelling Function/Booking

506084 When cancelling a function, all associated service order(s) will now be cancelled. This includes the scenario where a function is linked to a booking and the booking is cancelled in Ungerboeck or though the Online Space Booking application.

What's New in 30.99 - More Enhancements

Copy Orders

508999 When copying an order, there is now a new option to Copy Times to Target Function and Copy Dates to Target Function. This option will set the start and end times/dates from the function directly to the order item(s).

Event Orders / Day-Delegate Rates

506798 The Event Order/Day Delegate Rate functionality will now support item level space. This will give parallel flexibility to also indicate which space those items will be located/delivered.

506803 Within this enhancement, users will be able to more efficiently move an entire package from one function to another when using Event Orders/Day Delegate Rate functionality. If the package header and the package details share the same function (or no function), then when the package header is moved to a different function the associated details will follow suit. If a package detail is already on a different function, then it will remain on that function and not follow the package header.

508709 The Event Order/Day Delegate Rate functionality will now give users the ability to edit multiple service order items to assign a function.

Package Substitutions

508900 The following columns are now available when selecting Package Substitutions: Resource Type, Resource Type Description, Resource Code, Major, Minor, and Department.

Service Charge Schemes

515642 Upon customer request, service charge schemes can now be configured and calculated independently of tax schemes. Service Charge Schemes will allow for calculations that could not be completed with tax schemes alone. Ex. an item is tax inclusive but service charge exclusive > configuring tax schemes and service charge schemes separately allows for these types of configurations to be possible.

There is no impact to existing tax schemes and no requirement for current customers to change their configuration. Please see your CSM if you need more details on how service charge schemes could be used within your organization.

Service Order Items

500925 A column and filter for the personnel position of the order account representative has been added to Service Order Items.

Venues

509815 Service Order and Service Order Items can now be filtered by Venues.

Session Proposals

What's New in 30.99 - Announcements

Password Schemes

527623 A new feature, Password Schemes, has been introduced in 30.99 Service Release B. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

An online application that supports Password Schemes will check which rules to enforce when a public user signs up or attempt to change their password in the following order:

1 - Defined in the Sign-In Configuration for the application
2 - Defined in the Organization (found off the Main Menu)
3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

Show Map

What's New in 30.99 - Announcements

Show Map

512334 Significant behind the scenes changes were made to Show Map to increase stability and security. While there should be no noticeable changes, it is highly recommended to spend some time reviewing the application prior to upgrading your production environment.

What's New in 30.99 - More Enhancements

Styles & Colors

512334 Show Map has been enhanced to have neutral system colors, like greyscale colors. This will remove the blue elements around Show Map, so that they do not conflict with branding colors. Also updated some of the styles around Show Map.

Speaker & Abstract Management

What's New in 30.99 - Announcements

Submissions

361164 You can now add a section called, Submissions, to a speaker contact. This will show you all the submissions the contact record has submitted.

Suite Management

What's New in 30.99 - Announcements

Password Schemes

514962 A new feature, Password Schemes, has been introduced in 30.99 Service Release B. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

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3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

Suite Management

514962 Significant behind the scenes changes were made to Suite Management online application to increase stability and security. While there should be no noticeable changes, it is highly recommended to spend some time reviewing the application prior to upgrading your production environment.

What's New in 30.99 - Major Enhancements

Individual Accounts

514962 The Suite Management application will now allow individuals to sign into the application. Prior to this change, an individual was required to be a contact for a company.

Suites > URL encryption

527672 With the 30.99 and 23.1 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 23.1 and make those links available to their suite owners.

What's New in 30.99 - More Enhancements

Attendee Invitations

477593 Within the invitation app, when the invitation is for 1 ticket, it will suppress the entire "Guest Information" page including, 'Guest Information ("You can invite up to X people")', 'Known Guest Food Allergies', 'Guest Food Type', and 'Additional Allergies 'Notes'. The guest invitation field quantity will be recorded as '0' when the invitation is for only for 1 ticket.

499887 It is now possible to collect the first and last name of an attendee when there are manually invited within the Suite Management application.

Custom Fields

527672 Within this enhancement, users will now have the ability to configure custom fields on the Event Suite object. This includes the ability to add a formula field, summary field, note field, plain text field, and action or link field.

Filtering on Suite Code

502484 Service Orders, Service Order Items, Work Orders, and Work Order Items will now have a filter and column for suite code.

Ticket Distribution

467510 An email will now be sent to the suite owner to know if the ticket distribution was a success or failure. There are four new fields within the Suite Management configuration. These fields are:

- Scheduled Ticket Confirmation Email Template - Allows the user to configure a temple for a ticket distributed successfully.
- Scheduled Ticket Failure Email Template - Allows the user to configure a temple for a ticket distributed that failed.
- Scheduled Ticket From Email - Allows the user to configure whom the email address is sent from.
- Scheduled Ticket BCC Email - Allows the user to configure whom will be BCC on the email sent.

Suite Management

System Administration

What's New in 30.99 - Announcements

Password Schemes

510144 A new feature, Password Schemes, has been introduced in 30.99 Service Release B. Public Password Schemes allow you to determine what password rules are enforced in your public facing applications. Examples include whether an upper and lower case character is required, whether a symbol is required, how many invalid attempts are allowed before locking the user and how long that lockup takes place, plus much more.

An online application that supports Password Schemes will check which rules to enforce when a public user signs up or attempt to change their password in the following order:

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3 - Defined in the Site Configuration (found off the Main Menu)
4 - If nothing is found in 1-3, the same password rules as before this change was made will be enforced

The following applications support Public Password Schemes: Account Portal, Exhibitor Portal, Exhibitor Service Center, Payment Portal (Version 1), Session Proposals, and Suite Management. More applications will be added in future releases.

A new system access privilege, Allow Access to Password Schemes, has also been added to allow sites to control access to password schemes.

What's New in 30.99 - More Enhancements

Access Privileges

510144 In .99 Service Release B, columns for changed by, changed on, entered by and entered on have been added to the Access Privilege Details grid.

Auth Configurations

504503 The USI-Shipped values for Facebook, Google, LinkedIn and Microsoft have been removed as they are not supported at this time.

Copy User

510230 The copy user process will no longer copy over the activation status.

Custom Links

513098 It is now possible to add an app access token to a custom link that has an execution mode of External Program or URL.

An access privilege, Add App Access Token to Custom Link, has been added to control which users have access to use this functionality when adding/editing custom links. The access privilege is an explicit access privilege and must be configured to enable this feature.

516145 In the upgrade to .99, any custom links with an execution mode of Backoffice Window will be removed. It will also no longer be possible to add new custom links with this execution mode. The Backoffice Window execution mode was used to open v19 windows.

Users

510144 The same email address validation rules that apply accounts and contacts are now checked on the email address field for a user.

Validation Tables

516103 The description field for a validation table entry has been increased from 60 characters to 100.

Window Usage

517903 A time range filter has been added to the Window Usage page to allow you to filter by the time a page was opened.

User Setup/Password Reset

What's New in 30.99 - More Enhancements

Password Pages

464609 The various password pages and processes in the application (Change Password, Reset Password, etc...) have been updated to be more secure and stable. There should be no noticeable changes in functionality with these updates.

Venue Sales

What's New in 30.99 - More Enhancements

Event Opportunities

517708 Selected standard fields from Group Profiles are now available as filter/search fields on the Event Opportunities page. For these filters to work as expected, a Group Profile must be associated with the Event Opportunity.

517710 The UDFs on Group Profiles are now available as filter/search fields on the Event Opportunities page. For these filters to work as expected, a Group Profile must be associated with the Event Opportunity.

Group Profiles

517705 The following fields have been added as filters on the Group Profiles page - for the Group Profile Account: Account Rep, Region, City, Country, Keyword, Market Segment, Type, Status, Affiliation

517706 The following fields have been added as filters on the Group Profiles page - for the Group Profile Contact: Position, Title, City, Country, Type, Status, Affiliations

Work Orders

What's New in 30.99 - More Enhancements

Inventory Fulfillment Location

499515 Upon customer request, a new field has been added to Work Order Items for 'Inventory Fulfillment Location.' This field can be used to designate an Inventory Location for the Work Order Item to be fulfilled from.

Venues

499515 Work Order and Work Order Items can now be filtered by Venues.

Work Order Completion

508899 In prior releases, Work Orders would not be completed when the last item was cancelled. In .99, whenever the last Item on a Work Order is cancelled, it will now complete the Work Order. It will not complete the Work Order if all other items are cancelled as well as it will cancel the Order.