What's New Entries

By Module

30.98 Announcements

What's New in 30.98

Cloud and v30 Only

501635 30.98 is a Cloud and v30 only version. If you have not made the move to the Ungerboeck Cloud yet, please reach out to your Account Manager and/or Customer Success Manager to discuss your cloud migration plans.

Purging Data

501635 In the upgrade process to .97, we started purging certain data (see below). This process will run when upgrading to a new version, applying a service release or applying a hotfix. Ungerboeck will continue to roll this out to other areas to improve performance. The areas being purged in .98 are:

- Audit Log and Archived Audit Log: Any records older than ten years (previously twelve years)
- Session Files: Any records older than ninety days
- Window Usage: Any records older than three years

Account Portal/Online Account Management

30.98 Service Release E

Patch Note

494632 Preference Type Instructions will no longer show in Account Management Configuration (ACM) online.

502639 In the ACM form template both Email and First, Last Name fields will now be required in at least one section for Contact type. For the Account type section the Name field will now be required in at least one section. If at least one Contact and Account type section has been configured then these fields will not be required for selection.

503398 In the ACM form template both Email and First, Last Name fields will now be required in at least one section for Contact type. For the Account type section the Name field will now be required in at least one section. If at least one Contact and Account type section has been configured then these fields will not be required for selection.

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Patch Note

492073 The VAT number field will no longer be displayed when selecting an EU member country in the Country field dropdown for Account Management Configuration Sign Up.

Accounts Payable

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504714 Code changes to fix the issue :
-Added error message for line + column. (Note that we are shipping the message from v19 screenshot if the # columns match the file, this is when it does not match and throws generic exception. After patch it will be more specific)
-Added validation for org code mismatch(don't really support for cross-org, need to change org first after logged in or leave it empty)

Patch Note

503559 Added a Scheduled Task type of Ap Automation to schedule Ap Automation using the regular Task Scheduling process. A Scheduled Task can be created from the new action "Schedule Ap Automation" present on External Invoices list window.

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506957 User should no longer receive error when voiding a voucher.

507346 The matching supplier logic will no longer look to supppliers with inactive AP demographics records OR any record that is not designated as a Payables / Supplier account

510544 Now Net Date filter will be defaulted as = Current date + value set in org parm AP002

Patch Note

508678 Users can no longer access vouchers if they don't have access to vouchers. Also denied access by department to the reading pane of a voucher.

509053 Correction to importing vouchers with many distribution lines. Possible workaround exists by importing the taxable amount explicitly as a separate column from the distribution amount and tax amount.

509182 Error with site refreshing when clicking on "Payment Instruction" link has been fixed.

What's New in 30.98

AP Automation: Task Scheduling

503559 AP Automation can now be configured to bring in External Invoices automatically via the Task Engine.

Payments - Paid by Credit Card

483825 On Payment Processing, a new payment type has been added for 'Pay by Credit Card.' When selected, vouchers marked as Paid by Credit Card can be added to the Payment Processing batch.

Voucher Approval Emails

486153 When parameter = Email Voucher Approver Notification is turned on, the user designated on the Voucher as being the Next Approver will be the user who the Voucher Approval will be sent to.

Voucher Distribution Inquiry

498391 Upon customer request, the field = Invoice Date has been added as column and filter to the Voucher Distribution Inquiry window.

Voucher Imports

494592 For customers utilizing GL Dimensions, the ability to import vouchers using the dimension-based general ledger values has been enabled. Fields needed for importing dimension-based values have been added into the Accounts Payable Import format window options to allow for creating import formats that meet the expected entry criteria.

Voucher Next Approver

483048 For those who use Voucher Approvals, a new field has been added called 'Next Approver' to the edit Voucher window and Review Voucher windows. This allows for selecting a specific user to be the Next Approver from the list of possible voucher approvers.

Voucher Processing - Selecting Multiple PO Items

499657 Upon customer request, it is now easier to select multiple PO items to apply to a voucher. When adding items to a voucher from a PO, all items can be highlighted > right click > Mark for Select.

Accounts Payable

Vouchers - Paid by Credit Card

483825 A field has been added to Vouchers called "Paid by Credit Card' to indicate that the voucher was paid by a credit card.

Accounts Receivable

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492750 Added Event ID column to cash batch details.

498965 Fixed error when reopening a service order, where the order items would reopen at the same time.

30.98 Service Release E

516168 When bank statement is imported , it open window where we can straight edit, match bank transaction and post.

517843 The success message for invoice now shows correctly and invoice reports with Invoice Additional copies Prompt (861) as the object window now run correctly.

Patch Note

518667 When generating an event prepaid entry, the entry will now continue to stay at a status of New - as it does for a majority of all other entries generated manually (with the exception being invoice specific entries)

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30.98 Service Release C

507611 Feature assignment will be correct after the next cut hotfix for 97/98 until then, the user can access this button if they change their role - Features access to allow access to Administration - Cash Book feature.

508669 Specific Accounts that have Orders without Events were being caught when changing Tax Registration Status. This has now been fixed and all Accounts and affiliated items should be updated accordingly.

Patch Note

508610 Fixed issue of the reading pane on the Invoice Events and Invoice Jobs window not displaying correctly.

509009 Retire Flag on detail tax rates window is now available.

512477 User can now select bank account on cash receipt entry batch on both cash receipt entry window and on the post cash receipt batches when create deposit checkbox is checked.

What's New in 30.98

Invoices

481535 Upon customer request, we have added field restrictions to the Issue Invoices window.

493383 Fields for the event coordinators' first and last name have been added to Invoices to be used in email templates, merge documents, etc....

Voided Invoices as Internal

492649 Upon customer request, when invoices are voided, they will now be marked as internal. This will help ensure that voided invoices do not show up on customer-facing reports like Customer Statements.

Activities

30.98 Service Release E

Patch Note

499796 You can now select multiple activities and mark them for delete.

500370 All active Activity Checklists now appear in Add Checklist dropdown on Events and you are able to add checklist successfully to Activities grid.

502297 Clicking the source field hyperlink for a fulfillment order on an activity will now open the Edit Fulfillment Order window correctly.

503247 When copying an activity checklist BEFORE and AFTER due dates selected for an activity will now show correctly.

505105 Event details will now display correctly on the email reminder sent to the user when using the Activity Email Notification Template.

518670 The shipped Activity Email Notification Template has now been updated to have the correct wildcard in the link.

30.98 Service Release F

Patch Note

499447 You can now view documents added to activities created on Exhibitor and Service Order contexts.

505720 Activity links no longer throw an error when they do not have a style tag in the html source for Activity Email Notification Template.

507095 Now due dates of activities imported from checklists will be calculated correctly.

509819 The activity email notification template links now build correctly when they have the actual application url in the html instead of *Application URL* wildcard.

509850 Now the correct information will display in received email when a change is made to template body on send email window.

512219 Going forward, adding an activity checklist under the contracts tab will not throw exception.

513262 Now when adding an activity with formatting the text in the activity will show correctly.

What's New in 30.98

Activity Notification Email Templates

499235 Changes have been made to the USI-shipped activity notification email template so that any links direct to v30. Customers that have customized their template may want to ensure any links pointing to Ungerboeck reference "app85.cshtml". Feel free to reach out to Ungerboeck if assistance or guidance is needed.

Please note that if you have modified your template, you can reset to the shipped default by selecting delete on the edit page.

API and Webhooks

30.98 Service Release E

30.98 Service Release B

500883 Take units into account when adding a new item to an existing package on a service order through the API

Patch Note

500912 You are now able to cancel an opportunity through the API as the PUT endpoint will work with a closed status.

502347 You will no longer receive an error when running a report from the API.

503672 UDF data is now returned for Opportunities endpoint when requesting through API.

520487 Now Communications POST request will not create a record for an account which is inactive or does not exist and returns 400 status code. When setting an inactive account on AccountCode field on Communications POST user will now receive Request Body validation response of 'Unable to add a Communication whose account code is either inactive or does not exist. Please enter a valid account code and try your request again.'

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30.98 Service Release C

500880 Allow the api to ignore the real-time inventory warning and to override the RTI stop error.

508508 There was some shared state between the threads used to process (multiple) async WebHooks. This caused them to overwrite each other's data giving unpredictable results depending upon the timing of the events.
Updated to send a copy of the request to the webhook so they are each working with separated data.

What's New in 30.98

Authentication

499240 Major updates have been made to authentication in the API. See the Support Center for more information. Highlights include:

- Ability to authenticate with the most advanced API standard: JWT. No more Initialize calls, better security for all. Note that Ungerboeck Authentication is still usable but customers are encouraged to switch to JWT for increased security and other benefits.

- Dedicated API users. Using Ungerboeck authentication is obsolete, yielding better security and features dedicated for bot access. Also allows multiple API users per customer.

- Admins can now restrict API use per endpoint

- All Ungerboeck users can now be configured to be proxied in API calls. This has benefits like access privileges controlling call access, entered stamps reflecting users, and more

- Client controllable authentication expiration.

- 100% backwards compatible. Customers encouraged but not forced to upgrade.

- API use now trackable (and can be filtered out) of the Audit Log

- New API Help page upgrades

- API is faster with the new authentication system, due to less DB calls and sign in code to run through.

Fulfillment Order and Item API Endpoints

500229 API endpoints for Fulfillment Orders and Items have been added to Ungerboeck starting in .98 Service Release B.

The Read endpoints are available in the Standard Edition. The Add, Edit and Delete endpoints do require additional licensing. Please contact to your Customer Success Manager or Account Manager to discuss if needed.

Fulfillment Order and Item Webhook Support

500228 In .98 Service Release B, webhooks are now supported in fulfillment orders and items.

Package Modeling

488665 The package modeling functionality is now supported within the API.

API and Webhooks

Purchase Order Approvals API

496172 Upon customer requests, an API endpoint for Purchase Orders Approvals is now available. This allows the implementation of custom developments for Approval Workflows & Controls using our standard webhook & API Functionality that will work in conjunction with the Approval Levels & Amounts configured in back office, and requires the Standard API License. Please speak with your Account Manager if you would like more information or pricing on the API License.

SDK

499240 To go alongside the new API authentication, there is now a new SDK. Highlights include:

- It has JWT capabilities, as well as being an In Memory wrapper. It fully manages your authentication with an expiration you choose, so no more having to worry about catching expiration dates.

- Asynchronous ability, taking half or even less the time for many calls via the SDK.

- Tightened API endpoint architecture in wrapper, allowing for easy discoverability and splitting Ungerboeck Subjects and less parameters per endpoint call. Users also don't have to explicitly pass model types into searches. Names and parameters are far more standardized for endpoints.

- New ability: Options. Set options before initializing your client, before specific calls, or even global options

- Better wrapper summary descriptions for documentation purposes

- Simplification of nuget package names and versioning.

Standard API Endpoints

499240 The following API endpoints were added to the Standard Edition:

- Custom Field Validation Tables: Add
- Custom Field Validation Tables: Edit
- Group Profiles: Add
- Group Profiles: Delete
- Group Profiles: Edit
- Group Profiles: Read
- Membership Cards: Add
- Membership Cards: Delete
- Membership Cards: Edit
- Membership Cards: Read
- Membership Engagements: Add
- Membership Engagements: Delete
- Membership Engagements: Edit
- Membership Engagements: Read
- Membership Engagement Types: Add
- Membership Engagement Types: Delete
- Membership Engagement Types: Edit
- Membership Engagement Types: Read
- Validation Entries: Add
- Validation Entries: Edit

Webhooks

494593 The Secret Key field on Webhooks has been increased to 255 characters.

Audit Log

What's New in 30.98

Audit Log

485718 In the upgrade process to .98, any audit log record older than ten years will be purged. Please note that starting with .98, this process will run when upgrading to a new version, applying a service release or applying a hotfix. Prior to this change, records older than 12 years were purged.

494315 A filter has been added to go over the order number attached to the audit log entry.

Campaigns & Imports

30.98 Service Release E

Patch Note

500373 File import columns will now be mapped correctly on step 2 when importing accounts and contacts.

500796 Importing accounts and contacts will only map fields set during step 2 and no longer delete data when updating existing imports.

502096 You now receive a 'CSV Document Extension is not working. Please add a 'CSV' Document Extension to the MS Excel Document Class.' validation prompt when trying to import a CSV document if the CSV document extension has not been added to the MS Excel document class.

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

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

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505651 Exhibitor Account (aka the exhibitor's "Company Account") will now be successfully removed from campaigns when selecting it from the dropdown on the "Remove From Campaign" window.

507415 Exhibitor Account (aka the exhibitor's "Company Account") will now be successfully added to campaigns when selecting it from the dropdown on the "Add To Campaign" window.

Patch Note

482749 The Contact Birth Date column will now be formatted correctly when importing accounts and contacts based on the local set (on User Settings, or Organization, or Site Configuration, or a combination of the 3).

503288 When manually removing results from a campaign and retrieving it will now update with the correct number of results and total records. The Last Retrieved On and Updated field stamps will also be updated correctly after the campaign retrieval process is complete.

504060 Accounts and Contacts are now imported successfully when ticking Check for Duplicates checkbox on Process - Check for Duplicates window.

What's New in 30.98

Imports

482146 Template imports are now supported in v30.

Cash Book

30.98 Service Release F

Patch Note

499421 Core dimensions value, book control and department are now available on bank statement detail.

505907 Cash Transaction-

Now deleting cash transaction attached to deposit will not set deposit header status Error. Header will be in new status

Transaction amount attached to deposit will not be editable (by design)

509592 Code change to get rid of validation on journal entry detail amount which comes from distribution that sets the error in this process.

What's New in 30.98

Cash Forecasts

485654 We are excited to announce that a new feature has been added for Cash Book users called 'Cash Forecasts.' This window offers the ability to set up templates and run Cash Forecasts as often as needed. The forecasts can pull from Open Invoices, Open Payment Plan Steps, and Vouchers to help determine incoming and outgoing cash flows.

There is also the ability to create one-off or recurring cash entries as needed. For example, Payroll can be setup as a recurring forecast item to ensure that we are factoring in Payroll as an outgoing cash item.

Another feature is the ability to designate an expected collection percentage of an item or to remove an item from the forecast when needed.

Additional licensing is required to access this feature. Please contact your Customer Success Manager or Account Manager to discuss how to start enjoying the benefits of this new feature.

Contract Administration

30.98 Service Release E

Patch Note

501406 Documents will now be saved correctly in Contracts when running a contract report and sending via email.

30.98 Service Release F

30.98 Service Release C

502648 testing completed

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

Patch Note

505953 Fixed an issue where the V30 application would hang or freeze when revising a contract to a new firm status and incrementing revision when the audit log tracker for contract status change was enabled.

507961 You can no longer check in a word merge document that has revision tracking turned on.

Credit Card Processing

30.98 Service Release F

30.98 Service Release C

506993 Fixed an issue where the OSB application would incorrectly route users to the Confirmation page when they were on the payment page and attempted to save but failed due to a back end business rule for payments.

Users will now instead get an Error modal with a unique tracking ID and remain on the payment page.

CRM

30.98 Service Release E

Patch Note

500845 The Change Account Rep window in Accounts will now open successfully when selected.

501057 You are now able to add a lead from Lead ID dropdown on Lead Activities window successfully without error.

501514 When changing a relationship status to retired it will now display in gray on the Contacts tab. Selecting retired does not retire either the account or contact but retires the relationship that exists between the two.

503354 When accessing the Company - Account field on an Opportunity it will now show the company information correctly.

504955 You are now able to save Additional Filter fields selected through Advanced Search for Sales Goal Types.

516620 Now accounts will merge successfully when there are multiple addresses on each account record.

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

30.98 Service Release F

30.98 Service Release C

503065 Account hold text will not show for accounts that are not set on hold.

507542 Go to https://usisample.ungerboeck.com/app85.cshtml -> Put User name as - sayyed.umair78 @ungerboeck.com Password as-Umair@786 ->Go to account -> Go to add account -> In city drop down city name list is not populating

508564 Typing into a null time mask for the 1st time when using military time will no longer lose the 1st number typed

520312 Hello! I have attached the solution to the issue in the documents tab, you might have to use Microsoft Edge to be able to download and open the file. Have a wonderful rest of your day!

Patch Note

498155 You are now able to import multiple opportunities for the same account by the 'Create New' and 'Update' options on Update Duplicates Method field on Step 1: Set Import Default Values window.

498987 Reference - Session Contributors has been removed for selection from all designation layouts except Abstract Accounts. Logo Image should now show correctly in all cases if already uploaded.

507171 Market Segment will now show on the edit account window for Campaign Results.

508039 You can now update an Account name without receiving an error message.

508541 Now a contact with multiple related accounts/contacts will load correctly and show the correct Last Account Activity date and time on the Account/Contact window.

509426 Now when changing the Company on a contact the address of the new company will be synced to the contact correctly.

509427 Now when selecting Set as the Primary Relationship on a Contact it will update to the Primary Account correctly.

513605 You will now be able to update the account status of an contact successfully without error.

What's New in 30.98

Ability to Categorize a Lead

490066 There is now a field avaliable on the layout for "lead category". To set this up go to the main menu and enter "lead categories" This will allow you to enter different categories for your leads. This will help facilitate filtering of leads.

Account Leads

460217 When editing a lead, you can now select a Qualified lead status if the lead has been converted to an account/contact. Changes have also been made to the process for converting leads to accounts/contacts. If there is only one active Qualified lead status, leads will be set to that during the conversion. If there is more than one, the process will use the one with the latest update stamp. If none are defined, the status will not be updated.

Last Activity

482717 The Last Activity field has been removed from the account and contact grids to aid in performance. The field is still available on the Edit and Reading Pane pages.

CRM

Merge Account Status Window

494734 There is now a new window off the main menu called "Merge account status". Since merging accounts runs in the background so you can continue to utilize USI while it is working, we now have a status window where you can check on the status of your merge. You will see here if it has completed or failed. You can check and see where it failed under the status data if it failed.

Opportunities

504670 In .98 Service Release B, express users for Ungerboeck for Venue - Enterprise customers can now view Opportunities.

Dashboards

30.98 Service Release E

30.98 Service Release B

505834 Newly added custom fields will display on report window properly.

509833 Error no longer occurs loading the Report list window reading pane when the Chart tab is selected.

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505112 Corrected issue with PY Budget YTD column not loading if budget amount column is not shown on the grid.

505834 Newly added custom fields will display on report window properly.

507157 Events gadget will respect org parm EM 850.

509833 Error no longer occurs loading the Report list window reading pane when the Chart tab is selected.

Patch Note

507106 The Activities grid will now load successfully without error when Prompt and Text columns are included in view.

509899 Service order views will now display correct results on a dashboard gadget as well as the pop out window, whether they are from an event or a job.

What's New in 30.98

Tabular Reports

493382 An Edit Report action is now available on tabular report gadgets.

Destination Management (DMO)

30.98 Service Release E

Patch Note

502419 When editing bulletin notes on an Event Opportunity the Edit Bulletin Note window now opens correctly without error.

Dictionary

30.98 Service Release E

Patch Note

514002 Registrant type item description will now display properly in exhibitor history message.

516297 Issue has been fixed error message is getting translated in German.

30.98 Service Release F

30.98 Service Release C

507040 The USI-defined views on the Translate Phrases subject will no longer load by default.

Document Management

30.98 Service Release E

Patch Note

500758 User will now receive 'Documents cannot be created because they do not use version control' validation message that stops the copy process when copying documents that do not use version control.

518528 Now when adding the Account Logo Image Wildcard to a template document it is placed correctly without error.

519267 You are now able to drag and drop documents for Event Registrants.

519382 You are now able to drag and drop documents for Invoices.

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

521960 You are now able to drag and drop documents for Invoices.

30.98 Service Release F

Patch Note

501292 When merging a template document with bullet points the formatting is now preserved.

502114 You can now add document to a task from a task set without issue.

503648 You can now import documents that are not of the original file classes allowed extensions including .vwx files.

504761 Template document font controls are now respected on an added template.

505436 You are now able to drag and drop a PDF document and import successfully without error.

507590 You can now access the Save Add-In Token from Tools in User Settings. The action for generating an app access token is no longer restricted to SSO or Windows Authorization.

507618 You can now import documents as well as drag and drop for documents on Registration Orders. Documents will be saved successfully in documents grid on Edit Registration Order window.

508670 You will no longer receive an action error involved with retrieving the document information caused by bad document data. There is now a conversion step to correct PDF's with bad checked out status on the versions grid.

510289 Files with an .SKF extension can now be imported into the Documents grid via import document and drag and drop document feature.

513139 View Document on Document Properties Versions tab now correctly downloads the document version.

513567 You can now import documents as well as drag and drop for documents on Registration Orders. Documents will be saved successfully in documents grid on Edit Registration Order window.

What's New in 30.98

Documents

487526 Event end date has been added as a filter on Documents.

509005 When working with documents (checking out, exporting, etc...), the process to find the path to use to place the document will now fail if the path cannot be found or is invalid. Prior to this change, the process would continue to go through logic to find a path to use if this was encountered. To make the process more predictable and to ensure the proper location is used for automated processes, the decision was made to modify the process.

If you are running into problems after upgrading to .98, please ensure you have the proper Web Add-In installed and that you have access to the path defined for the working directory for your user. If the working directory is blank, the process will use C:\USLP900\.

Export Documents

502381 In .98 Service Release B, it is now possible to export multiple documents at the same time.

DocuSign

30.98 Service Release E

Patch Note

497531 DocuSign now respects the signing order when there is a Carbon Copy signer as well as other signer recipients on an Electronic Signature Profile.

519453 Electronic Signature configurations will now generate missing keys if they do not exist.

522509 Docusign now validates the BYOE configuration correctly.

Email

30.98 Service Release E

Patch Note

499573 The Send Email window will now load when selecting an email address link from Email-Account column for Services off an Event.

500346 You now receive a warning message when saving html templates that have a title or style tags in them.

502228 Nested tags in the email subject on an email template now correctly pull in the subject from the nested tag. You will no longer receive an error when sending email template.

503576 You now have the option to choose a blank row in the Save Reports in Folder dropdown on the Registration Confirmation report prompt window to not save a copy of the report in the folder.

512331 The merge of a table in the header and no table in the details will no longer merge the details into the header table.

520356 Tested as per the client care recreation steps using COWF and found that the Subject Prompt appears before Add Email Template window opens, this prompt will appear anywhere while adding email template. User can select proper subject and fill details on email template, only the valid template gets added on COWF, else it shows the validation message to the user, so user gets aware and can select the proper subject. The issue has been resolved and hence it is now working as expected.

30.98 Service Release F

Patch Note

504423 You can now save an SQL query successfully in an EZWriter Data Source.

504695 The Default Value height and width on Link Parameters for images are now correctly set on an email template.

504814 You will no longer receive an error when trying to save after selecting a document on Select Document dropdown on Insert Ungerboeck Link window. Download document link now correctly builds the link to the document.

504893 You can no longer save an EZWriter Data Source with columns that would have a space in the name.

506749 Importing images through the email links now works correctly.

506763 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

507258 Clicking an email hyperlink on Email-Contact column from Services will now fill in the correct email address in the To field on Send Email window.

507706 You will now be able to copy an email template correctly without issue.

509305 Now when renaming a report and sending via email to myself the document attached in email from report will show the correct name.

509566 When clicking the View Full Email hyperlink on an activity it now opens the View Email window correctly.

510585 An image from an email template will now show correctly on confirmation email from public facing application.

511471 There is no longer an issue using send email action. Email addresses will now load correctly on Send Email window.

511577 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511600 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511665 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511739 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511992 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

513204 You can now send an email using encrypt link from email and merge template successfully without error.

514463 The decimal, integer and date formats from Ungerboeck fields will now display correctly from an email and merge template.

What's New in 30.98

Email Templates

496061 A new field, Detail Subject, has been added to subject based email templates. This new field allows a user to specify a different subject for the details area of the template. This can be used to produce an event-based email that lists out the bookings for the event in the details section. Prior to this change, a separate template would need to be created and maintained to accomplish the same thing.

496997 When sending a test email for an email template, you now have the ability to enter a recipient email address. This allows the test email to be sent to someone other than the logged in user.

Event Management & Coordination

30.98 Service Release E

30.98 Service Release B

499870 Fixed an issue where the Event Season and Event Series dropdown fields on Events window were not org specific.

500338 Changed On/By columns will be populated in list data when any change occurs.

504263 The order item phase fields have been opened for changes when adding event from profile.

30.98 Service Release E

515755 Issue fixed where Events with Closed/Completed Order Items weren't able to be copied.

518448 Issue was fixed where Completed Events were unable to be copied.

521011 Issue was fixed where Completed Events were unable to be copied.

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.

Patch Note

498589 Events now correctly retrieve the note type when the event is tied to an Event Opportunity. All notes show correctly when enlarged to full screen.

500486 Copy Event window now displays a friendly message when copying Events and a Price List details error occurs.

501511 Fixed an issue where changing views on the Event page when the filter layout has cancel reason but not event id would throw an error.

502062 Right clicking on the Event Calendar should now properly se the date on the sidebar and the date when opening the add event window

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30.98 Service Release C

510755 Event calendar now loads smoothly, Issue is fixed in .98C, .97E, .97D hotfix.

510765 Fixed loading of calendars, now they load smoothly. case fixed in .98C, .97E, .97D hotfix.

511056 Fixed an issue where restoring an event could throw an error.

517319 Out Time and In Time is now defaulting and updating correctly and is now consistent with how Start Time and End Time defaults and updates.

Patch Note

503302 The Advanced Search Events window now opens correctly when expanding Notes to full view window and selecting Copy Notes From Event from Tools.

503746 When accessing the Event Calendar in Mobile the correct event will now show for the specific date selected.

507811 Javascript error will no longer occur after restoring an event.

507928 There is no more errors observed for edit multiple action on event grid.

511341 Subheading is respecting the input data. Verified this in all versions and found issue is fixed as per the requirement so completing the case.

Patch Notification

518162 Testing is completed successfully, we are able to restore canceled events without an error.

What's New in 30.98

Co-Promoter Event Fields

478116 Three new fields have been added to Events, designed for use by Performing Arts venues. Co-Promoter, Co-Promoter Contact and Co-Promoter Split.

Event Profiles

495937 Flex Professional users can now add and edit event profiles.

Event Management & Coordination

Events

502841 In .98 Service Release B, the Edit Multiple action on Events will no longer show for a single event.

Retain Cancellation Date when Restoring Event

487989 A new checkbox has been added to the Restore Event window - Retain Cancellation Date/User. If checked, upon restore, original cancellation date/user information will be retained on the event and bookings. If the restored event is then re-cancelled, the original cancellation date/user information is also retained.

Event Opportunities

30.98 Service Release E

Patch Note

514982 The Activities are working fine, User can perform Add/Edit/Delete operation correctly, as per the notes the issue was only for two specific activities, the code fix is done, and the exception is handled properly so no more blown-up error occurs for such type of activities.

30.98 Service Release F

Patch Note

505788 Fixed the part that is causing the issue in the Total Rooms and Total Attend filter when they are set to 1-[blank] and 50-[blank] respectively. Fixed in .99, .98C, .97E

511106 Now when setting the Preference Start Date filter on Event Opportunities to Last Year it will only pull in event opportunities for the previous year.

Event Portal

30.98 Service Release E

Patch Note

500050 Columns headers as well as word formatting with column text will now be wrapped correctly on Event Portal Registrants page. Column text with monetary values will now show 2 decimals instead of 3.

502715 Functions will now be loaded correctly on the Schedule page for the selected event in Event Portal.

503244 The Event Portal task chart will now use the same colors for task statuses as the task status headers.

30.98 Service Release F

30.98 Service Release C

512040 Getting error while adding task set to event
Steps to recreate:
1) Goto event id - 54670
2) Navigate to task tab
3) click on Add task set from Add dropdown
4) select any task set
5) click on continue
6) Throws error message
Please do find attached document for the reference.

Patch Note

505669 You are now able to open Event Portal function schedule links with "–" in the description.

506848 Fixed the event hyperlink on Tasks. It now shows the event info on hover and opens the Edit Event window properly now on click.

506949 There is no longer an issue when adding a document to a task on a task set.

507492 Ungerboeck Flex customers will no longer receive a license violation error when trying to access Event Portal.

513104 Now when a document section has not been added to EP Base Configuration the section and documents will no longer show on EP home page.

What's New in 30.98

Event Selector

492862 Now events that are on-going will appear on the active tab & will move to the past tab once the event end date has passed.

Messages

492515 No more chasing down emails or playing phone tag! Your portal users can connect with you directly through Event Portal via Event Portal Messaging. Backend users can respond directly to the EP User through our backend messaging center while also deep linking where the messages are created to ensure no details are missed.

Order Bill-To

497876 In .98 Service Release B, 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. 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 if the checkbox is set.

Tasks

492879 The file upload configuration has been introduced to Event Portal tasks. This control also supports submitting multiple documents to a single task, has more improved security and creates more uniformity between all our applications.

Event Registration & Housing

30.98 Service Release E

30.98 Service Release B

500599 Functions and Function Items will now be marked as sold out properly.

500915 When users attempt to sign in they will no longer have a chance to see personal information from other individuals.

501119 Capacity will now be synced properly with public facing and backoffice.

503445 Fixed issues regarding overselling capacities.

503657 Fixed issues where overselling functions/items were possible.

507286 Added a special session id for public registration that persists across browser tabs and instances.

507739 Decreased loading time between the registration payment page and other pages by 43 percent.

30.98 Service Release E

521360 The Required checkbox is now available showing for the main function section when using "Custom" Group By.

Patch Note

508953 There was an issue with moving registration orders where one of the items didn't have a resource code. This has been fixed.

513096 AR/project permissions errors no longer display to a registrant if they haven't successfully logged in.

513550 The function item throws proper item exceeded excpetion if capacity set having volume pricing on it.

514221 The year box for Expiration Date under Registrant Profile now shows the proper date value.

515140 Tthe language doesn't get reset to any other language if Housing is set on initial page and we process for Sign in or next page on Public Registration.

516197 Registrant Order Account Code on the reg order items grid now shows the correct account on the Registrant Account Code column.

517443 The Reported issue has been resolved now, the $ is now showing for taxes which are getting added on Public Registration.

518844 There was an issue where a required field restriction for an event function was incorrectly being enforced on registration functions. This has been fixed.

518951 The reported issue has been resolved, the cancellation reasons are now getting added without any issues. hence completing the case as of now.

519575 The error on Dependent Custom Fields window will no more occur on registration setup after adding an existing function.

520998 Transfer registrants no longer throws object null errors when transferring registrant profiles.

30.98 Service Release F

30.98 Service Release C

507286 Added a special session id for public registration that persists across browser tabs and instances.

507739 Decreased loading time between the registration payment page and other pages by 43 percent.

508418 Current sold will now properly reflect based on item level capacities

516772 Verified the Copy Function issue and found the Copy Function Row action is working as intended without any issues on an Event.

Patch Note

508870 The housing section will now be expanded by default on the Add Reg Order Items window.

509802 Additional registrant can be added without required field check of the payment section.

511595 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511899 Fixed issue when selecting products and services for registration orders.

513881 Reported issue has been fixed, the Function with past date are no more showing on Public Registration.

What's New in 30.98

Order Registrants

492549 In .98 Service Release B, the Order Registrants action is now available on the right-click and reading pane menus on Events. Please note that the Event Registrants action has been removed from these menus as well.

Event Registration & Housing

Page Settings

500234 In .98 Service Release B, a new option, Page Settings, has been added to the main menu. Page Settings allow you to define specifications to be used on Name Badges for registrants. The system comes with default settings, but additional options can be added for your use.

Registration

426417 Back-office users now have the ability to edit a web registration. The team has added a new action on the registration orders window to allow you to go in to make edits to a registration order in public-facing registration!

467128 You now have the option to hide the order details table in public facing registration.

471506 Now you can copy the registrant details when transferring a registrant. Just check the "Copy Registrant Details" checkbox on the Transfer Registrants window and the details will be moved to the new order created for the registrant!

475858 Public facing registration now has an improved experience if you are using functions with registrant dependent pricing and only a single registrant type on the configuration form. There will no longer be a page break inserted in this circumstance.

477629 You now have the ability to require registration on behalf of another. When enabled the admin section will be visible and they will be required to register on behalf of others.

483983 The newly created event fields, Event Series, are now available on the Registration Orders, Registration Order Items, and Order Registrants windows.

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. This is available as of .98 C.

493255 There are now more options to setup function requirements in the public registration form. New options include the ability to set a minimum or maximum per function group as well as being able to set the exact number of functions required per group.

494965 We've improved the duplicate contact checking when using the "Add Web Registration" action and the user was signing up a new account. Now the Ungerboeck user will see a duplicate account message if they are attempting to sign up a registrant but the email already exists in the database.

495814 To increase the security of registration URLs, registration links now have been updated to now utilize access tokens. What this means is that the links hide the parameters in use on the registration form and no longer support manually adding or manipulating the links with parameters.
An organization parameter has been added to allow for the parameters to be used again but activating the parameter will be at the customers own security risk.
Additional refinements to registration links will come in the next release and will allow back-office users to securely generate tokenized registration links with registrant type, account code, and other parameters.

496292 We've added 6 organization parameters to strengthen the password complexity requirements for users creating account in registration.

Registration Badges

446682 The badge template design window has been redesigned and implemented in v30. You can now create badges, design the layouts, link merge fields, and place event, account, or company images. The new implementation of badges supports the three standard Avery 5392, Avery L7418, and Zebra 4x3 but allows and supports custom sized badge templates. For badge templates, the acceptable barcode format has changed starting with version .97. A new wildcard has been added to the badge design window and is available to produce a usable QR code.

Registration Capacities

487450 Added an update utility for the Item Reservations table. This utility adjusts the 'Claimed' column to accurately reflect the number of ordered items. This was part of the larger story to improve capacities and the registrant experience in the ordering process.

Registration Functions

377509 You can now easily choose to hide the 'No Charge' labels by registration function. This setting can be configured from the 'Edit Registration Functions' window.

Event Room Blocks

30.98 Service Release F

Patch Note

508584 Fixed an issue where decimal values for prices on room types would round to the nearest integer when Use Same Rates is checked.

508675 There was an issue where prices on housing blocks were not imported into registration housing correctly. This has been fixed.

Exhibition Floor Plan

30.98 Service Release E

Patch Note

497942 Users will no longer receive the OOPs message on the floor plan when the user has very limited access to the ribbon actions.

516986 Removed any context actions from booth text. They should never have any actions in any context.

No tests were added do to changing a client side interaction

521190 We have updated coding to allow for saving highlight schemes appropriately. Having the Sales Stage field present in the filters of a highlight scheme will no longer add the "0" value for Sales Stage on the highlight scheme window when the scheme is saved.

30.98 Service Release F

30.98 Service Release C

511725 The Orders Total column on the Exhibitor List in the Exhibition Floor Plan is now correctly refreshing after clicking OK on the Manage Order window.

Patch Note

507643 After discussion with Eric Lowe, decided that since the Resources in the Booth Resources drop-down lists have already been filtered to the Event's Default Exhibition Order Price List, we can display that Price List's Item decription instead of the Master Resource's Description

In the function AssignmentValidationUtil.GetEventPriceListBoothResourcesDataMap(), swapped out EV370_CODE_DESC (master resource desription) in favor of CC716_DESC (price list item description).

508290 An error will no longer on the split booth window with customized locale settings.

Without any error able to perform Split Booth action

What's New in 30.98

Exhibition Floor Plan

Auto Booth Charging

491058 Introducing Automatic Booth Charging.
This is a redesign of our Booth Validation feature, where salespeople can manage booth assignments and allow the system to automatically keep the booth charges accurate with the booth assignment on the exhibitor 's booth order. The system can automatically create the booth order, add the appropriate service order items and accurately set the item quantities based on the booth details.
Workflow Design Improvements:
1. Added new "Auto Booth Charging" window that shows the user a before and after view of the order and booth size before the user saves the order. This helps users fully understand what the system will do automatically to the order before it is done.
2. Users can choose to select a different charge and they can choose to skip a specific charge, provided the admin has allowed it.
3. Added a new "Manage Order" window that shows the changes to the order before they are saved. The user can choose to confirm those changes, manage them, or discard them. This is a very helpful confirmation of the previous Auto Booth Charging window.

Setup Changes:
1. Admins can configure the event to automatically charge based on multiple of the charging type options, independently of one another. As an example, an admin could setup an event to have all charging type options enabled: by area, by dimensions, and by number of open sides. Or they could configure it to only charge by open sides.
2. Admins can configure the charges to be used for specific booths, and they can configure multiple charges for each charging type.

Main Goals:
- Redesign an existing feature to make it more desirable and usable for all customers.
- Provide more flexibility in the setup of how the system will automatically charge for different booths. Provide ability to charge differently across the floor plan, some by area, some by dimensions, some by area and open sides, some only by open sides, some booths have multiple charges, some booths only have 1 charge, some booths have no charges, etc.
- Provide ability to skip validations on specific booths or within a specific action, like moving an exhibitor from one booth to another booth location. Maybe you like the system automatically charging when placing the exhibitor in their booth assignment, but not when moving to another location since you might be just moving them temporarily.
- Ability for users to easily see and understand the changes to the order before saving. We want to make sure the user fully understands what the charges will be for the booth before the system automatically makes the changes for the user.
- Ability to update existing order items instead of deleting and re-adding, leaving them out of desired sequence in the order.
- Provide ability to update booths without auto updating surrounding booth assignment orders.
- Refactor and centralize code to make it higher quality, more stable, and easier to maintain.

Move Exhibitor

487348 The Move Exhibitor window has been changed to be a special context of the Edit Exhibitor window. The reason for this change was to simplify the code and utilize the same booth control that is used on Edit Exhibitor so that users get a consistent experience and consistent results when managing exhibitor booth assignments and helps when utilizing Automatic Booth Charging (formerly known as Booth Validation). This applies to the “Move Exhibitor” action that is accessed from the Tools menu on the Edit Booth window in v30, or from the “Move” action from Exhibition Floor Plan.

Upgrade Conversion for Retired Booth Record Types

522443 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.

Exhibition Management

30.98 Service Release E

30.98 Service Release E

520567 Users can now successfully delete Exhibitor Cancellation Reasons.

Patch Note

520888 Sections and Tabs will now correctly display based on the settings on the Add/Edit Exhibitor layout.

30.98 Service Release F

30.98 Service Release C

509596 The Service Order window will now remain open when the user clicks the "Save" button when coming from the Add or Select Booth Order link on an Exhibitor.

Patch Note

507726 Customers will now be able to update exhibitor statuses when the booth order statuses are set to closed or cancelled.

What's New in 30.98

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.

Booth Number & Banner Name Syncing

483972 IMPORTANT - Changes to Booth Number and Banner Name syncing process.

To improve quality and performance, we refactored lots of code around assignments that contained error prone sync processes, which would end up showing incorrect data. The sync processes centered around the Booth Number and the Banner Name fields. We recommend users/admins ensure reports and views are using the correct fields.

For Booth Number in v30 grids/lists, we recommend using the "Exhibitor Booth Number" field, which is available on Service Orders, Service Order Items, Work Orders, and Work Order Items.

For Booth Number in reports, we recommend using CC385_ASSIGN_CODE. Please work with Ungerboeck Support if you need assistance navigating to the booth record.

For Banner Name, we recommend using EV290_BANNER_NAME. Please work with Ungerboeck Support if you need assistance navigating to the exhibitor record.

Booth Record Changes

483972 IMPORTANT - Changes to Assignment Type [CC385_REC_TYPE].

The Co-Exhibitor ('C') Assignment Type has been officially retired. Older versions of code use to create a duplicate CC385 co-exhibitor assignment record for every co-exhibitor order. But this extra 'C' record provided no value while often causing some problems, showing up in queries where we didn't want it. Making developers explicitly filter these records out was an unnecessary burden.

Additionally, we opened up the Assignment Type [CC385_REC_TYPE] field to display and be filtered in a booths list. The reason for this is to give the end user a way to clear out some of these old record types in the case that they have snuck in the database through copy event or some other means. We can clear up 'Bad Data' using this window's delete action instead of having to write a query.

The logic of the filter is as follows:
If no filter values set, then the list will be filtered to Main 'I' records by default, just as it always has.
If filter values are set by Assignment Type, then those filters will be honored.
We can "Mark for Delete" here and clear out the record types we do not want.

Exhibition Management

Booths

483972 All booth windows (Edit Booth/Reading Pane/Booth Tooltip) are now consistent. They were modified to remove the contexts (Events (1), Functions (23), Service Orders (4)) that were being applied to the various layouts leading to inconsistencies around the software depending on where you came from. Now all these Booth layouts should be consistent and use No Context (0).

Exhibition Management

Database Changes

483972 IMPORTANT: Officially Retired

Tables:
[CC384_ASSIGN_SIDES] (Assignment Open Sides)

Columns:
[ER100_MAIN_EXHIB_ORDER] (Main Exhibitor Order Number)
[CC385_MAIN_EXHIB_ORDER] (Main Exhibitor Order Number)
[CC385_ORD_LINE] (Order Line Number)
[CC385_CNTCT_CODE] (Contact)
[CC385_COMBINE_INTO] (Combined Booth Number)
[EV290_EXH_NAME] (Company Name)
[EV290_EXH_NAME_ALT_1-5] (Alternate Name 1-5)
[EV290_PRIMARY_EXHIBITOR] (Primary Exhibitor)

483972 IMPORTANT: Booth/Assignment- Still Supported but Targeted for Retirement/Replacement Soon

[CC385_ORD_NBR] (Order Number): Currently used as the way to make an assignment of a booth to a booth order. Future design improvement will be to eliminate the Booth Order concept and remove all assignment related fields from the booth record and move to a separate Assignments table. The booth record and the assignment record should exist as two independent database records.

[CC385_REC_TYPE] (Assignment Type): Currently this exists as a way to make multiple assignments to same booth. Future design, this should be moved to separate assignments table(s) that will represent different assignment types. Main (I), Multi-Main (M), Waitlist (W), Co-Exhibitor - Retired (C), Non-Exhibitor - Retired (N), Account - Retired (A)

[CC385_RENTED_STAMP] (Booth Rented Date/Time): Currently filled in with the time stamp that the assignment was made. This should be moved to the new Assignments Table

483972 IMPORTANT: Values Synced from the Order and saved on the Assignment Record:

While technically not retired yet, synced columns should not be relied upon for reporting as they can become stale and out of date.

[CC385_ACCT_CODE] (Account): Currently filled in with the Company Account Code of the assigned exhibitor. Should be retired in future and value should only be retrieved via join.

[CC385_ACCT_NAME] + [CC385_ALT_ASSIGN_NAME_(1-5)] (Banner Name + Alternates): Currently filled in with the Banner Name of the assigned exhibitor. Should be retired in future and value should only be retrieved via join.

483972 IMPORTANT: Order - Still Supported but Targeted for Retirement/Replacement Soon

[ER100_BOOTH_NBR] (Booth Number): Currently used in 2 ways
1) As a way to display a summary of assigned booths (comma-delimited list)
2) Used during Save process to make assignments for a modified order record.
Future design should retire this column and not utilize column for either purpose. Both making assignments and displaying them should all happen through computed columns.

[ER100_ASSIGNMENT_NAME] + [ER100_ALT_ASSIGN_NAME_(1-5)] (Banner Name + Alternates): Currently filled in with the Banner Name of the assigned exhibitor. Should be retired in future and value should only be retrieved via join.

483972 IMPORTANT: Values Synced from the Assignment and Saved on the Order Record

While technically not retired yet, synced columns should not be relied upon for reporting as they can become stale and out of date.

[ER100_ASSN_LENGTH] (Ordered Length): Value from CC385_NET_LENGTH. If multiple assignments, Ordered Length = 0 on order.
[ER100_ASGN_WIDTH] (Ordered Width): Value from CC385_NET_WIDTH. If multiple assignments, Ordered Width = 0 on order.
[ER100_ASGN_OPEN_SIDES] (Ordered Open Sides): Value from CC385_OPEN_CRNR. If multiple assignments, Ordered Open Sides = 0 on order.
[ER100_ASGN_TOT_SIZE] (Display Gross Area): Value from CC385_SIZE. If multiple assignments, Display Gross Area is summed on order.
[ER100_ASGN_TOT_DISP_SIZE] (Ordered Net Area): Value from CC385_DISP_SIZE. If multiple assignments, Ordered Net Area is summed on order.

All summary columns above should not exist as real table columns, they should exist as computed columns that are computed at runtime.

Exhibition Management

483972 IMPORTANT: Exhibitor - Still Supported but Targeted for Retirement/Replacement Soon

[EV290_ACT_BOOTH] (Booth): Currently used in 2 ways
1) As a way to display a summary of assigned booths (comma-delimited list)
2) Used during Save process to make assignments for a modified exhibitor record.

Future design should retire this column and not utilize column for either purpose. Both making assignments and displaying them should all happen through computed columns.

483972 IMPORTANT - Values Synced from the Assignment and Saved on the Exhibitor Record:

While technically not retired yet, synced columns should not be relied upon for reporting as they can become stale and out of date.

[EV290_ACT_BOOTH_LENGTH] (Ordered Length): Value from CC385_NET_LENGTH. If multiple assignments, Ordered Length = 0 on exhibitor.
[EV290_ACT_BOOTH_WIDTH] (Ordered Width): Value from CC385_NET_WIDTH. If multiple assignments, Ordered Width = 0 on exhibitor.
[EV290_ACT_OPEN_SIDES] (Ordered Open Sides): Value from CC385_OPEN_CRNR. If multiple assignments, Ordered Open Sides = 0 on exhibitor.
[EV290_ACT_AREA] (Ordered Area): Value from CC385_DISP_SIZE. If multiple assignments, Ordered Net Area is summed on exhibitor.

All summary columns above should not exist as real table columns, they should exist as computed columns that are computed at runtime.

Exhibitor Access for Express Users

492986 A new feature has been added for Ungerboeck for Venue - Enterprise customers that have purchased the Exhibitor Sales and Records upgrade that will allow express users to view exhibitor information.

Manage Company Account on Exhibitors

483972 Users now have the ability to change the Company Account that is set on existing Exhibitors. This field was disabled in prior versions, but now it is opened up and allows users to change the account when necessary. A code cleanup was done to make sure that all tables related to the exhibitor that also save the account code are kept up to date for an exhibitor account change.

We do not recommend this being a standard process, this should be an exception workflow.

Exhibition Management

Managing Assignments on Service Orders

483972 Managing Booth Assignments on Service Orders - Booth Number Field on Service Orders

Short Story: Please use "Booth Assignment" [cBOOTH] as the field to manage assignments on service orders. Please do not use Booth Number [cBOOTH_NBR].

Long Story: In a prior version (~.94), we created a new booth control field on the order called Booth Assignment [cBOOTH]. This is a formula field which included the existing field Booth Number [cBOOTH_NBR] as one of its formula parts. The intent for Booth Assignment [cBOOTH] was to be a replacement of Booth Number [cBOOTH_NBR], since it had more functionality and was in line with generic architecture, making it easier to maintain and provide higher quality to customers.
The original field, Booth Number [cBOOTH_NBR], was left available on edit layout because we did not want the field to suddenly disappear off layouts. The intent was for customers to phase it out and take the old field off the layout and replace it with the new field. We are seeing bug cases come in where customer layouts have both fields on the layout, and that creates a problem.

The problem with having both fields, Booth Assignment [cBOOTH] and Booth Number [cBOOTH_NBR], on the same layout is that one is a formula field that contains the other. That puts the field Booth Number [cBOOTH_NBR] on the layout twice, once as a stand-alone field and again as part of a formula field. The architecture was not set up to handle having a field on the layout twice. We cannot block the stand-alone field in code because it would block it in the formula field too.

We have now officially retired the stand-alone field, Booth Number [cBOOTH_NBR], from being able to be put on Edit Order layouts.

Booth Assignment [cBOOTH] field is the only one available on Edit Order now. Please use that field for managing booth assignments on service orders.

483972 The "Booth Assignment" field and "Booth Order" checkbox will now be enabled on the Edit Service Order window, even if not linked to an exhibitor or linked to an exhibitor that already has a booth order. This is useful for venue customers utilizing Exhibitor Service Center or the Exhibitor.

Conditions that must satisfied…
- Must be a Service Order that is not cancelled
- Order must be on an Exhibitions Class Function – EV700_FUNC_CLASS = ‘X’
- Order account must be an Organization Account type (not an individual)
- Order must NOT be linked to a Co-Exhibitor

Exhibitor creation logic….
- If assigning a booth using Booth Assignment field or manually checking the Booth Order Flag

o (A) If order is NOT linked to an exhibitor, auto-create a new exhibitor record and mark this order as a booth order linked to the new exhibitor.
o (B) If order is linked to an exhibitor and the exhibitor DOES NOT have a different order marked as a booth order, flag this order as the booth order if it was not already. Do not create a new exhibitor, just keep the existing one already assigned to order.
o (C) If order is linked to an exhibitor and the exhibitor DOES have a different order marked as a booth order, flag this order as a booth order AND auto-create a new exhibitor record for this new booth order. We require a new exhibitor to be created here since we cannot allow a second booth order on the first exhibitor.

If adding an Order Item that is linked to a Booth Resource to an Order
o The rules (A) and (B) described above will apply. But not rule (C); Assigning booth resource items to an exhibitor non-booth order, when the exhibitor already has a separate booth order, should not create a second booth order and new exhibitor. It could be a possible valid use case to add booth resource items to a second order which is not a booth order.

483972 IMPORTANT - Changes to the "Add Booths" link on Edit Order.

When editing an order that is NOT a Booth Order, system will now hide the link for Add Booths. The reason is this could result in a booth getting assigned to a non-booth order when using one of the advanced workflows like “Add from List” (Case# 455114).

The options for the user when editing a non-booth order are:
1) Type in a booth number and save. Upon save, this will make the order a booth order. And do all the logic for creating an Exhibitor if needed, etc.
2) Mark the order as a Booth Order using the check box and save. This will make the order a booth order and enable the “Add Booths” link when the window refreshes after save.

Exhibition Management

Primary Exhibitor Feature

483972 Primary Exhibitor - this is a feature that allows users to create a unique list of exhibiting companies, since the Ungerboeck Exhibitor list is designed to hold all exhibiting opportunities and if a single company is exhibiting in two or more separate booth locations, the system will have two (or more) Exhibitor records for that company, one for each booth.

To improve quality, stability, and performance, changes were made to this feature. We retired an existing column and created a new more performant and reliable column.

Please read below for more details:

Primary Exhibitor [EV290_PRIMARY_EHXIBITOR] – The real database column for this has been retired. It has been replaced with a computed column [cPRIMARY_EXHIBITOR] with the same label -- Primary Exhibitor.

The reason for retiring it as a real column was that it was very difficult and non-performant to try and keep this value up to date. When copying exhibitors or deleting the primary exhibitor, trying to resolve which new exhibitor was the primary exhibitor was costly in terms of query time, and often error prone. Either we would end up with multiple exhibitors on the same account being marked as primary, or we'd end up with none.

The core requirement was that we have a way to filter the list such that we only see one exhibitor per company account on an event. This is now achieved with the computed Primary Exhibitor column [cPRIMARY_EXHIBITOR]. The computed column runs the computation when the list data results are retrieved. When multiple exhibitors are found with same Company Account on the same event, then the first one (lowest Exhibitor ID) is listed as primary. When filtering on this value, you can achieve the requirement of only seeing one Exhibitor per Account in your list data results.

Reporting

479822 Added ability to define And/Or logic for the Exhibitor Category filter on Exhibitors and Exhibitor Portal Tasks. This allows users to indicate if they want the results to contain all categories or if they must have at least one of them. There is a new filter to add to the layout. It is recommended to be placed below the Exhibitor Categories filter. This filter will dynamically display after the user selects more than 1 Exhibitor Category in the filter.

Retired Prompt

483972 We simplified the release booth assignment workflow and removed the prompt that allowed users to select which order status to set after releasing and make it consistent everywhere. The prompt was only displayed in certain workflows, so not reliable to users.

Org Parm (EM 957): Set Booth Order Status upon Release - This Org Parm was previously used as a way to prompt the user to select a booth order status upon release. The value in the Org Parm is still respected, it will set automatically instead of prompting.

Sales Agent Feature

495038 Added a new Agent feature to the Exhibitor. This is useful when the internal salesperson has an agent selling to this exhibitor and both are needing to be tracked.
- Allows tagging the Sales Agent, in addition to the internal Salesperson.
- Allows you to Cc Sales Agent when sending emails, same as existing functionality for Salesperson.
- Allows you to Bcc Sales Agent with the Task Confirmation that was sent to the exhibitor contact and saved in Exhibitor > Documents.

Updated Resource Fields on Booths

483972 Updated Resource Fields on Booths.

We updated the Resource fields on the Booth to be multi-select (previously was limited to single select). They also will capture the Price List form along with the resource.

Additionally, we opened up the Resource field to be edited after assignment has been made. Changing a resource will trigger booth validation prompting, so that user can also decide to (or decide against) updating the order to reflect the resource change.

New resource fields will be available on Edit Multiple. Note that when in Edit Multiple, it gets really complicated trying to filter the available options based on dimensions, since edit multiple could cross booths of different dimensions, so all options will display to keep things simple.

Exhibition Management

Workflow

488441 Provided ability to select booth resources (area, dimensions, open sides, pillar) on Edit Multiple Booths window. This is useful when users need to set the resources across multiple booths of the same type/charge. This is useful with the new Auto Booth Charging design.

Exhibitor Portal

30.98 Service Release E

Patch Note

494830 If a merge template has a heading set, that heading will now be set on the confirmation document created on the Exhibitor 's record when submitting a task.

503022 The Save button is now enabled when all mandatory preferences are checked in an ACM Durandal application.

520320 The Exhibitor Portal Task and Exhibitor Portal Task Status filters will now work correctly from the Event Exhibitors window.

30.98 Service Release F

30.98 Service Release C

507850 "Return to Exhibitor Portal" button now displays correctly on SOP confirmation page.

509109 Admin users will now be able to log into the Onsite Sales Portal when only allow exhibitors on the event to sign in is checked on the Exhibitor Portal Config.

What's New in 30.98

Booth Proposals

483907 Exhibitor Portal can now update service order item quantities to match the booth area when the exhibitor accepts a booth proposal in the Exhibitor Portal task. This is very useful when the sales team wants to upsell the exhibitor. They may have agreed upon a 200 sqft / 18 sqm booth and sales builds up their custom order but also wants to attempt to upsell the exhibitor with a 400 sqft / 36 sqm booth in a better location. Sales can propose both booths, allowing the exhibitor to accept what they agreed upon or accept the better, more expensive booth. If the exhibitor accepts the more expensive booth, the system will automatically update the exhibitor 's order. The exhibitor can then continue through the portal task when they might have to pay a deposit, agree to terms, electronically sign, and submit.

494862 Enhanced the booth proposal card that displays to the exhibitor in the Exhibitor Portal to include the Booth Area. This was added to help soften the sticker stock of the price before the exhibitor clicks the button to view the booth and then know the booth area.

495255 Added ability for user to set the Rate to be used when the Exhibitor Portal automatically adds Service Order Items to the Service Order when the exhibitor accepts the booth proposal. This is useful when the salesperson needs to provide a proposal that extends across a pricing cutoff deadline, but they want to override the deadline date.

Document Downloads On-Demand

483907 Added ability to pre-set the Document Category and Document Sensitivity for the various reports/documents that can be automatically generated when an exhibitor submits a task. This is useful when organizers want all documents to be available to the exhibitors to download on-demand. It is common to have a task that is designated for downloading documents. This gives the exhibitor one location to find anything they might be missing, like a contract report, confirmation, etc.

Exhibitor Registration

What's New in 30.98

Exhibitor Registration

477666 Using the "Recalculate Order" action on the Registration Orders window, exhibition organizers and registration managers can now easily recalculate a registration order if the size of the booth has changed, the number of free badges has changed, or the exhibitor has moved booths.

496681 We've updated the "Booth" field on Registration Orders to reflect the booth fields set on the Exhibitor record. We 've also added the ability to select a booth if the exhibitor is assigned to multiple booths. This field will update automatically if exhibitors move booths or additional booths are assigned.

Exhibitor Service Center

30.98 Service Release E

30.98 Service Release B

497526 When you remove item and cart is empty on the edit order, the message is displayed and stops you from going to next page

497788 Resource time slots phrase now translates correctly the first time visiting the site

500625 Fixed a problem with order items where rows from a related order item table were not being deleted in all cases, which was leading to orphaned rows in the related table. This led to errors when trying to make changes in orders, mostly when adding new order items.

501054 ESC payment page credit card control no longer sometimes incorrectly hides the security code control

508048 ESC event name and dates now display correctly.

511768 Saved cart total now displays correctly on the grid.

30.98 Service Release E

515549 Now the confirmation emails are being sent consistently out to exhibitors. All required documents now show in the system.

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

522149 By adding the missing column (EnableCustomHTML) it now allows the Configuration Form to be Edited. You can now open and edit the Shop Configuration Form with no issues.

523168 ESCV no longer throws an error when clicking manage account from the booth page.

Patch Note

498673 The payment control will now correctly shows alternate descriptions for transaction types.

519609 Communication Types are now stored under MAIL code instead of PERS when both of them have the communication class set as Email. Now a contact is able to sign in to public facing apps with their email without issue.

30.98 Service Release F

30.98 Service Release C

503008 Loading spinner added to the item tile -> item details window load and improved item details modal loading time.

503477 ESC configuration copy process no longer copies event level only deadlines.

505482 When choosing "Use Organization account" on the individual account prompt, the account on service order will have organization account value and not the order account value. The account on the Add Service Window will be reassigned with the organization account.

507505 ESC now filters bill-to/ship-to prefixes by gender and displays genders in the selected language.

508471 ESC event name and dates now display correctly.

509761 Function in the dropdown on the SOP Options page now display in ascending start date order instead of alphabetical.

509762 The deadline date format displays correctly.
English (Weekday/Month/Day/Year)
German (Weekday/Day/Month/Year)

510547 The ESCV configuration now deletes correctly.

510745 Signing up at checkout now correctly associates the order with the newly created exhibitor.

510941 Now you are able to upload file successfully. There is now a safety check when a document ID is called for that does not exist.

511768 Saved cart total now displays correctly on the grid.

517352 You can have multiple exhibitors with the same booth number on the same event as well as on the same function within that event.

Patch Note

507505 ESC now filters bill-to/ship-to prefixes by gender and displays genders in the selected language.

What's New in 30.98

Place New Order Redirect

485850 Within ESC, upon completion of an order, exhibitors will now have the ability to order for another event, place another order for the current event, edit their order (if configured), or return to the Exhibitor Portal (if configured). Previously, users did not have the ability to immediately place a new order for the current event.

Expense Reports

30.98 Service Release F

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.

What's New in 30.98

Expense Report Next Approver

483780 A new field has been added to Expense Reports and Review Expense Reports called 'Next Approver.' This field allows for selecting a specific user to be the Next Approver from the list of possible expense report approvers.

Expense Reports

498020 Expense Reports now support the addition of tax details when AP taxes are configured.

Expense Reports Journal Entries

491644 Expense Reports are now enabled to allow for Dimension posting. This allows for assigning the Core Dimension components to the expense report entry and posting to create the dimension-based journal entry for the Expense Report.

Expense Reports: Email Receipt Automation

486014 Email Receipt Automation has been added to the Expense Reports module. The Email Receipt Automation allows for the ability to email receipt attachments to an expected location. Once the emails are received, the expense report header will be created with the email attachments assigned to the Documents tab of the expense reports.

Facility Booking

30.98 Service Release E

30.98 Service Release B

501165 Repricing some booking orders, but not all booking orders on an event now correctly completes the prompt to include all of them.

30.98 Service Release E

517841 The booking grid dropdowns no longer stayson screen after double-clicking with the mouse to start editing bookings on the grid in events with more than 50 records when the server is running slow due to latency, or app pool recycle or resetting the server cache.

518198 Fixed errors related to Deleting a Spaces or Replacing a Spaces Code.

519814 Booking Restriction is showing correct results after Edit Multiple records.

520043 Rates are being displayed correctly after split by day option and the event is also getting saved properly.

Patch Note

500934 Fixed an issue where the expanded/collapsed state of the hierarchy would sometimes get lost when paging between dates on the calendar

511614 Users should now be able to Move/Edit an Event Booking without any errors. There was an issue with checking the Organization Code of connected Orders which should now be resolved.

517841 Field dropdowns (Space/Bookings, Function Usage/Status, etc.) no longer stay on screen after double-clicking with the mouse to start editing within the grid with more than 50 records.

30.98 Service Release F

30.98 Service Release C

517841 A script error will no longer occur when opening the Space dropdown on the Bookings grid on the Edit Event window with enough booking rows in the grid so there is a vertical scrollbar, then, while the Space dropdown is still open, scroll up or down.

517841 The booking grid dropdowns no longer stayson screen after double-clicking with the mouse to start editing bookings on the grid in events with more than 50 records when the server is running slow due to latency, or app pool recycle or resetting the server cache.

518198 Fixed errors related to Deleting a Spaces or Replacing a Spaces Code.

519814 Booking Restriction is showing correct results after Edit Multiple records.

520043 Rates are being displayed correctly after split by day option and the event is also getting saved properly.

Facility Booking

Patch Note

496034 Same event conflicts are now processed separately than outside event conflicts.

When same event conflict checking is enabled, and conflicts are found in an event, users will get a single warning prompt indicating this, with an option to continue.

The existing potential conflicts prompt will now only show outside event conflicts, and no longer show if there are only same event conflicts.

504549 Fixed an issue that would cause daily notices to not be displayed when the calendar's intervals did not include midnight. fixed in .98C and .97E

506870 When splitting bookings across several days, the booking row that is used to "Split By Day" will now have the save pencil display, and the existing row will now save correctly with the proper dates.

508002 Fixed error when adding a new event.

508003 copy event functionality working as expected without any error

508666 'Add Event' and 'Add Booking' functionality will work as designed without any pop-up validation errors now.

Patched the fix to current, .98SP and .97SP

511614 Users should now be able to Move/Edit an Event Booking without any errors. There was an issue with checking the Organization Code of connected Orders which should now be resolved.

511624 On Export to Excel window the unavailable fields are no longer present on, as per the requirement . So completing the completing the case.

513947 Issue of cancel and save does not work in booking grid reading pane on edit event with multiple pending rows is working fine.

514640 Fixed an issue where adding bookings to existing event through availability search would throw an error.

What's New in 30.98

Availability Search Enhancements

482803 The following enhancements have been added to Availability Search. The primary goal for these enhancements is to improve the user experience around common searches, and overall improvement to the searching and sharing of space availability:
- Views are now available on the Availability Search window.
- The date selection on Availability Search now supports exact or relative ranges, as well as other pre-defined time ranges consistent with other areas in the system.
- Selections on the Search Results window can now be added to an existing event, as well as a new event.

Booking Restrictions Redesign

445355 Booking Restrictions have been redesigned. Starting in v30.98, legacy booking restrictions will no longer be enforced in VA/OSB. The new Booking Restrictions are configured in a master table, then can be assigned to spaces individually or via Edit Multiple Spaces. Key features of the new Booking Restrictions include ability to enforce restrictions by Role, Account Type, back office or online, holidays, days of the week, time range, date range.

Bookings - Split By Day

498103 The Split By Day action on bookings is now available when selecting multiple booking rows, and is available on existing/previously saved bookings and events.

Spaces - In/Out of Service Date Fields

490812 Two new fields are available on Spaces - In Service Date, Out of Service Date. These fields are used to indicate when a space came online, or became available to be booked, and likewise, when it was no longer available for booking. These fields can be used in calculating space utilization, generally over longer periods of time. These fields are informational only and do not have other functionality associated with them at this time.

Fixed Assets

30.98 Service Release E

Patch Note

499625 Event/ Jobs field now open edit job window where a job is tagged to the assets.

30.98 Service Release F

Patch Note

510621 Updated to ensure the dimension would be passed to the GL distribution mapping on all transactions where present

Fulfillment Orders

30.98 Service Release E

Patch Note

518930 Fixed issue where opening Add Fulfillment order would crash if Opportunity field was not on view

What's New in 30.98

Fulfillment Orders

466933 Upon customer request, the field for 'Balance Status' has been added as a filter in the Fulfillment Orders window.

Functions

30.98 Service Release E

Patch Note

521504 Clicking the level numbers when the heading text is wrapped will now collapse the grid to that level on a hierarchy grid instead of sort the grid. Clicking the asterisk (*) will reset.

30.98 Service Release F

Patch Note

511730 Changes to refresh events after scripting functions from another event. This is required to correctly retrieve inline order items values so record has already changed message is not displayed.

Patch Notification

516313 Testing completed successfully. We are not getting any errors after copy functions.

What's New in 30.98

Event Function Calendar Enhancements

489187 The Function Calendar window, when accessed from within a specific event (View - Event Planning - Function Calendar) has been enhanced with the following:
- Only spaces that are either booked directly on the event or assigned as a function anchor space will be displayed. The Spaces filter has been removed.
- Only functions that belong to that event are listed. The Event filter has been removed.
- Due to the above innate filters on the window, the Views/Favorites menu has been removed. However, the settings used derive from the main menu Function Calendar window: whatever is set as the user's default Function Calendar (main menu) view will determine the settings on the Event Function Calendar.
- The sequence of spaces is based on the Order field, then Space Description (both ascending).

General Accounting & Analysis

30.98 Service Release E

30.98 Service Release B

496934 Corrected issue when none option is selected as part of multiselect dropdown filter.

Patch Note

500459 Corrected issue where if a voided invoice was associated with orders that had no lines - the clearing account entries were being generated on the voided invoice journal entry. Issue caused by zero line orders not being marke as transferred to the GL.

506324 Now item status will not close if not selected.

520759 Corrected issue received when recognizing revenue for payment plans from the Event Deferred Revenue Recognition window.

522022 GL Account Security Fields will now be editable on Main GL Accounts window.

30.98 Service Release F

30.98 Service Release C

507913 The Save and Cancel button panel will now correctly display on the Finance Charges list window after clicking toggle calculation on the context menu

510037 If GL dimension is enabled (GL DIM org parm value is Y) then changes for Edit multiple of Event and management report code gets rejected.
(Event and management report code will be editable on Edit multiple but changes will not saved)

Patch Note

499427 Core dimensions are now available on:
1. Review PO window as read only fields.
2. Review PO item window as read only fields.
3. Cash transaction window as filter
4. GL transaction inquiry window as filter
5. Asset transaction inquiry as column and filter.

516157 Year Period Filter is now editable on GL transaction inquiry window.

518059 The book control on the bank account will now populate on the book control for the payment/cash side of the journal entry. If using event balance sheets or books are enabled - the book will also appropriately pass through on the AP credit if configured in this manner (with book based AP control accounts)

What's New in 30.98

GL Transaction Inquiry

493256 Upon customer request, the 'Asset' field is now available as a filter within the GL Transaction Inquiry window.

Journal Entries

496355 A new field has been added to journal entries called 'Integration Status.'

Recurring Journal Entries

491517 Recurring Journal Entries have been updated to allow for dimension-based postings.

Resources: Revenue and Cost GL Accounts

493235 To simplify configuration for General Ledger users, two new fields have been added to Resources: Revenue GL Account and Cost GL Account.
When these fields are configured on the resource, the Invoicing and Cost journals will utilize the GL Account or Main GL Account specified in the Revenue GL Account or Cost GL Account fields instead of looking to the GL Distribution Scheme to determine where the revenue should go.

What's New Entries

By Module

Global Behavior

30.98 Service Release E

30.98 Service Release B

504984 The add activity button will now always be displayed for sub sections in a layout.

30.98 Service Release E

518691 Software fix provided to current and 30.98 service pack for this issue.

522331 Corrected issue with grid export on invoices when grouping on month year column.

Patch Note

501573 You are now able to successfully Export Campaign Results to Excel without error.

516641 Text wrapping will now be applied in a grid after starting an edit and not making any changes. As a workaround you can use the tab key to navigate to the next cell which will scroll the selected row into view.

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

522161 The reported issue has been resolved. Now Price list details numeric columns are showing the correct number of decimals when exporting the grid.

30.98 Service Release F

30.98 Service Release C

504984 The add activity button will now always be displayed for sub sections in a layout.

510937 Users no longer randomly see an error checking for full text index error when signing in.

What's New in 30.98

Moving Records

501016 In .98 Service Release B, improvements have been made to moving multiple records up and down when those records are displayed in hierarchy mode (example - Print Sequence for Service Orders). If the records that are highlighted are contiguous, have the same parent and don't have children, they can be moved up and down under their parent.

Quick Find

489926 The Quick Find feature on add/edit pages has been enhanced to search over actions and sections as well as fields. To activate the Quick Find, use Ctrl-Q on an add/edit page.

Taskbar

483141 The Taskbar can be opened using Ctrl+Shift+F6. In addition to this new hotkey, you can also use the tab key to cycle through your current windows and recent history. Enter will close the Taskbar and go to the select window while Escape will close the Taskbar.

483142 An indicator will now appear next to a page on the Taskbar if there is a pending change on that page.

Visual Effects Setting

495822 A new field, Visual Effects, has been added to the user record in Ungerboeck. This field allows a user to choose whether or not they wish to see visual effects such as window transitions in the software.

iEBMS

30.98 Service Release E

Patch Note

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

30.98 Service Release F

30.98 Service Release C

508523 The Password Retrieval field on the Add/Edit Logon Configuration window now load with dropdown values that are dictionary-enabled and when selecting Upon Request Only, the correct value will be stored in MM472 - UponRequestOnly

Patch Note

509112 The WRI report page now loads the links that are set in the WRI Text tab.

509137 WRI Pages now load correctly without error.

Inventory Management

30.98 Service Release E

Patch Note

519899 The order item lead and start dates will now carry over for multi-day orders appropriately when the parameter is enabled to interrogate within the day for resource requirements (EM X01).

Previously - it was only carrying over partial information from the original order

520143 Code has been updated to fill UOM with Stock UOM on the Issue Items from Mass Entry process. One up process still fills from Selling UOM, this code will not change as per PM review

30.98 Service Release F

Patch Note

512527 Added barcode field for physical count details and enabled search of it.

512529 Removed validation for supplier for receive transaction on Inventory app.

What's New in 30.98

Inventory Access for Express Users

495349 A new feature has been added for Ungerboeck for Venues - Enterprise customers that have purchased the Basic Inventory upgrade that will allow express users to view inventory items.

Inventory Reconciliation

486309 The Inventory Reconciliation window has been converted for v30.

Inventory Requirements

493172 The primary supplier field can now be viewed from the Inventory Requirements window.

Inventory Transactions

493974 When adding items to an Inventory Transaction batch, a field called Location Quantity has been added to show the quantity of the item for the specific space the item is being moved from instead of the quantity across all spaces.

496073 In the Inventory Transaction Batches window, the ability to create Issue and Transfer transactions from the Add Items window has been enabled.

Inventory Transactions - Mass Posting

489173 Upon customer request, the ability to post multiple inventory transaction batches has been added.

Mobile Inventory Application

479081 Dark Mode is now supported in the Mobile Inventory Application.

492012 The ability to create 'Return' transactions has been added to the Mobile Inventory Application.

492015 The ability to create 'Receipt' transactions has been added to the Mobile Inventory Application.

492018 When creating PO receipts via the Mobile Inventory Application, the application has been updated to respect the Access Privilege: Allow Access to Purchasing/Vouchers by Department.

499454 The Mobile Inventory Application has been updated to support Jobs.

Negative Inventory Balances by Space

497290 Prior to .98, the ability to allow negative inventory balances was set as an organization parameter. This meant that all spaces were allowed or disallowed to have a negative balance.

A field has now been added to Spaces called "Allow Negative Balances", which will allow the determination of whether negative inventory is allowed by space instead of across all spaces.

After upgrading to 30.98, all space values will reflect the status of the organization parameter prior to the upgrade. The organization parameter will no longer be available in 30.98, as this property will be set by space.

Membership Services

30.98 Service Release E

Patch Note

511922 Saving a membership with a closed order no longer throws an order closed error message.

516893 An error will no longer occur when preparing a standing memebership order for invoicing

30.98 Service Release F

30.98 Service Release C

507464 Department filter on Order Items window will now search over the "Item Department" column.

510186 Resolved issue with deleting membership orders that have no membership account items.

What's New in 30.98

Member Portal

487212 A new Member Portal is available in Ungerboeck Public Facing!!!

The purpose of the portal is to extend the Ungerboeck platform for membership organizations at clubs, stadiums, museums and others in the events industry by building a modern and easy to use membership tool to help drive engagement, retention, loyalty, and management so that members can enjoy their hobbies and passions.

The Member Portal is a brand-new application done with the collaboration of our customers that provided input and feedback in all steps including requirements, design and development processes.

Among the features our customers can find:

- Manage your members within the CRM using membership-specific fields
- Create online membership sign up and renewal forms
- Create different installment plans, offer multiple installment options per membership
- Incentivize upfront payments by offering discounts
- Set membership periods to control the timeframe in which memberships are active
- Configure different membership types to allow an individual to own multiple memberships
- Manage membership dues cycle billing and revenue recognition
- Configure Member Categories and Statuses to help create powerful reports and simple renewal workflows
- Create member directories for targeted communications
- Track membership statuses for automatic price calculations
- Report on total member spend and engagement
- Manage your members within the CRM using membership-specific fields
- Create online membership sign up and renewal forms
- Create different installment plans, offer multiple installment options per membership
- Incentivize upfront payments by offering discounts
- Set membership periods to control the timeframe in which memberships are active
- Configure an easy-to-navigate Membership Portal using your organization's branding to elevate your members' experience with efficient self-service tools
- Allow members to manage their own CRM record and membership details
- Allow members to manage their billing options, default payment option, and view and download past orders and invoices
- Offer payment processing within the portal with real-time credit card verification
- Allow members to easily renew their membership either manually or automatically
- Allow prospective members to review membership options and purchase a membership independently
- Manage both individual and group memberships within the same portal
- Personalized experience for members and prospective members based on member type and membership status
- Featured events, announcements, social media feeds, and even memberships
- Web Themes allows for the portal to be designed in accordance with your brand standards
- Member Portal supports multiple languages
- Build multiple portals to serve different memberships or groups at your organization

Additional licensing is required to access this feature. Please contact your Customer Success Manager or Account Manager to discuss how to access and start using this great new feature!

Membership Types

490692 Notes can now be added to membership types. These notes are used on the Member Portal.

Merging Data (Accts, Master Tables)

30.98 Service Release F

Patch Note

506639 The contact's address will now be updated with the new account's address when merged. Invoices created after the merge will use the new account's address.

Migration-Cloud

30.98 Service Release F

Patch Note

508459 Integration Status field is now available on JE endpoint.

Mobile Work Orders

30.98 Service Release E

Patch Note

517182 Discount order item is now being properly calculated on the order and should no longer calculate as a negative value once the work order items are completed both in backoffice as well as in the Mobile Work Orders app.

What's New in 30.98

Ability to Save Filtering Against a User

457206 The user in MWO can now have filtering selections to save so that they're available the next time the user enters the application. Before, filters selections were not saved next time the user entered the application.

Enforce Access Privilege on Item Checklist

478611 Work Order Access Privileges are enforced on the item checklist and item detail page which includes, Allow Access to Work Order Status by Department, Allow Editing of Work Orders, and Work Order Completion. While other Work Order privileges are not enforced or wouldn't make sense to enforce on the item checklist and detail page which includes, allow assignment of work order items to others, allow assignment of work orders to others, and allow opening of work orders.

Inline Notes

488956 Within this enhancement, inline note will now be displayed in the MWO app. In Backoffice, there will check boxes for "note", "Reference", and "User Text" for inline note display. In the app, on the details page, there will be a new tab under notes that will display inline notes. The item detail page will display inline notes as well. Before this enhancement, the only notes that would display was on the WOs and Items.

Item Card Redirected to the Item Details Page

483585 Within this enhancement, when the item card is clicked, users will now be directed to the item details page. Before, users were directed to the item checklist.

Signature Documents

486350 Within this enhancement, there will be more information on the signature document. This will include Org Logo, Event, and Order Account. This will give the document to appear more official.

Notes

30.98 Service Release E

30.98 Service Release B

499699 Adding a Service Order Item note with HTML in EXP will now display in plain text in backoffice.

Patch Note

521157 Rich text inline notes now check the value to see if its valid html before creating a note.

Online Event Ordering (OEO)

30.98 Service Release E

Patch Note

511188 The error that was occurring when users had an OEO payment configuration set up with only the option to Pay Later has been resolved. Users should be able to select the Pay Later option on the payment page and submit the order successfully.

513928 Users should notice improved performance when loading items in public apps like OEO, OSB, and EP.

30.98 Service Release F

Patch Note

511188 The error that was occurring when users had an OEO payment configuration set up with only the option to Pay Later has been resolved. Users should be able to select the Pay Later option on the payment page and submit the order successfully.

513928 Users should notice improved performance when loading items in public apps like OEO, OSB, and EP.

What's New in 30.98

Introducing Online Event Ordering

484255 Ungerboeck is pleased to announce our new Online Event Ordering module. Online Event Ordering, or 'OEO' for short, is a streamlined eCommerce solution aimed to assist your catering operation to capture quick events & orders. This web-based application allows for your venue's patrons to easily order their catering or A/V items, communicate key event & ordering details, and select from a number of payment methods.

OEO also gives venues a tool which will help as their staff & patrons begin coming back on site, but where staffing levels may not yet be back at pre-COVID levels. The more efficient capture & servicing of orders, and subsequent decrease in emails & phone calls, will allow for venue staff to maximize their impact on the day-to-day operation without getting bogged down by traditional communications.

Upcoming service releases will include support for Single Sign-On/Active Directory, the ability to change menus by date/time/location, and full analytic support.

Additional licensing is required to access this feature. Please contact your Customer Success Manager or Account Manager to discuss how to access and start capturing orders today!

OEO Configuration > New Sections

500926 Within this enhancement in 30.98B, additional sections have been added to the configuration to further organize & streamline the window.

Online Order Processing (OP)

30.98 Service Release E

30.98 Service Release B

502638 Fixed inventory not being checked on-save for Equipment items in OSB.

30.98 Service Release F

30.98 Service Release C

510811 Fixed incorrect dates/times on substituted items in OP/OSB.

What's New in 30.98

Performance Improvements - Item Details

504602 Within this enhancement in .98B, 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.

Online Space Booking (OSB)

30.98 Service Release E

30.98 Service Release B

500961 Fixed an instance where items would be duplicated inside the OP store.

30.98 Service Release E

513951 Corrected issue which caused required fields (notes and others) in OSB to fail to be marked as filled/completed.

518634 Added style adjustments for padding and font size to help inline error text display for time and date entry errors without wrapping the text.

519300 Fixed an issue where the OSB application would not send the forgot/reset password email using the correct public sign in email template based on the logged in users currently selected language preference.

520928 Fixed an issue where some time/date labels on the search page would not change when changing the language.

30.98 Service Release F

30.98 Service Release C

506283 Fixed duplicated substitution options in Order Processing.

506544 Fixed resource descriptions not using alternate descriptions based on language preference in OSB.

Patch Note

505451 Now when the default country has been set in ACM the country field on Angular ACM Sign Up page will default in the country selected.

508473 Fixed an issue where OSB would incorrectly calculate the cart order total display, which includes taxes, when a user changed the times on an individual space such that the space would be assigned a new rate type because of criteria based rates.

508569 An image from an email template will now show correctly on confirmation email from public facing application.

What's New in 30.98

Add Bookings to Existing Events

482688 Online Space Booking (OSB) now supports the ability to add new bookings to an existing event. If the feature is activated (Allow Changes to Existing Events), from the My Events - Event Order page, a user is able to conduct a new search and add new spaces. They are also able to order items or services for the newly added space(s), as well as make payments.

Banner Image Display

496758 In Online Space Booking (OSB), the Banner Image field has been retired/removed from the OSB configuration. A banner image can now be added in the web theme that's associated with the OSB configuration. Upon upgrade, please add the image used on the OSB configuration to the banner image field on the associated web theme.

Cancel Bookings

482690 Online Space Booking (OSB) now supports the ability to cancel bookings on an existing event. This feature is activated with a configuration option in OSB, as well as the ability to control number of days out to restrict booking cancellations, a status up to which a booking can be cancelled, and the status to which a cancelled booking is set.

Configuration Filter/Column on Bookings Windows

489291 An Online Space Booking (OSB) Configuration filter and column are now available on the Event Bookings and Daily Bookings windows. This allows a user to filter for only bookings that were created with a particular OSB Configuration or view the column that indicates the OSB configuration with which the event/booking was created.

Event Details - Column Control for Field Layout

491774 The Event Details page in Online Space Booking (OSB) now allows configuration of how many columns the fields are laid out in, with options being 1 through 4 columns. This is configured on the associated Content Builder Layout, in the Configuration of the Component Settings for the OSB Event Info component(s). The field name is Display Columns. The default is 2 columns.

Online Space Booking (OSB)

Features, Setups Filtering on Space Details

491985 A change has been made to the display of Features and Setups on the Space Details page in Online Space Booking (OSB). Only Features and Setups that are both assigned to a space and are set as filters on the Features and Setups tabs on the respective OSB configuration will display on the Space Details page. Previously, all Features and Setups assigned to a space showed on Space Details.

Limit Items Available for Ordering by Space(s) Booked

486917 Resource Spaces now control which items are available for selection in Online Space Bookings (OSB)/Order Processing (OP). If configured on the resource, an item/resource will only be available for selection in OP if the user is adding the item to a space configured on the resource. If no Resource Spaces are configured on an item, it will be available for all spaces.

My Events

496702 In Online Space Bookings (OSB), the My Events page has been updated with the following:
- The Date column now shows a single date for single day events, or a date range for multi-day or recurring events.
- The default sort is now by Date (Ascending).
- The Start Date/End Date filters now search/filter events by their booking dates.

Rate Per Attendee

493204 Online Space Bookings (OSB) now supports the ability to charge space rates based on the number of attendees of an event.
This configuration option is available on Space Specific Rates and Criteria Based Rates. If checked, the number of attendees entered will be multiplied by the space's rate (whether daily or hourly). For example, if a space is charged at $100 per day, the rate per attendee is checked on the space and it is a two-day booking for ten attendees, the total charge will be $2,000 (2 days at $100 per day = $200 multiplied by 10 attendees = $2,000). This calculation uses the Units field on the booking - basically the attendance field on the event is used as the Units on the booking(s) that have this option checked.
Please note that if any rates have the rate per attendee checked, changing attendance with spaces already in the cart will prompt the user to clear their cart.

Show/Hide Attendees and Capacities

486688 Online Space Booking (OSB) now has the option to show or hide the Attendees and Capacities fields in the public-facing workflow. The Show Capacity/Attendance checkbox (defaulted to checked) controls whether the # of Attendees field appears on the search, search results and summary pages, as well as the Capacity field on the space details page. If unchecked, the space search process does not take into account capacities when searching for spaces.

Summary Page

491987 The Online Space Booking (OSB) Summary Page has been changed in the way it displays spaces and order items. Order items will now be listed under the space/date to which they have been added. Previously, spaces and order items were listed in separate sections.

Operations Portal and Tasks

30.98 Service Release E

Patch Note

514146 Error where users were unable to add or edit a Task on a Task Set when the URL field was not set on the page layout has now been fixed. Users should be able to add/edit Tasks without error.

30.98 Service Release F

Patch Note

515479 Users should no longer receive an error in the Operations Tasks application where the task 's assigned account would un-assign when the task's status was changed.

What's New in 30.98

Assign Yourself or Others a Task

487055 Within Tasks, users are now able to 'Assign' yourself or others a task (if configured). Before, users were not able to assign a task within the mobile app

Deletion of Tasks: Grid Action

483582 Within Backoffice, on the 'Tasks' grid off the main menu and within the event / function, grid action for deletion was added. Before, deletion was only available on the 'edit task' window.

Include Task in the Copy Event Process

486351 Within this enhancement, the user would have the ability to include Tasks in the 'Copy Event' process. Before, users were unable to include Tasks in the 'Copy Event' process.

Task App: Note Support

483659 Within this enhancement, the user is now able to add notes to a Task from the app. The user can also add notes from Backoffice to the event's and function's task tab. This will be viewable in the Task app depending on selected note classes for display. New icon added in Task app to view added notes. Before, notes were not viewable on the Tasks app.

Payment Applications

30.98 Service Release E

30.98 Service Release E

519537 Payment can now be made.

Patch Note

509026 The default template is now filled in, even when the base template does not have template text.

516857 Dictionary changes will now be reflected in the payment portal.

30.98 Service Release F

Patch Note

511356 On payment processing window date no longer automatically reverts after I change it when immediately clicking the Select checkbox on the "Open or Available for Payment" grid

What's New in 30.98

E-Payment Application

488084 E-Payment can be configured to filter the transaction types allowed on an order, invoice, or payment plan step by the currency of the source transaction. This is designated in the Payment Configuration by checking 'Filter Transaction Type by Currency' and the respected when using the E-Payment Application.

Example: Payment Configuration has transaction types configured for US dollars and Euros. The field = Filter Transaction Type by Currency is checked on the configuration. If E-Payment link references an invoice in Euros, the transaction type filter will only display the payment options configured as Euros.

Payment Portal Rewrite

492223 We are excited to announce that a new Payment Portal has been released. The new Payment Portal allows for a more well-rounded experience where there are two tabs to help separate Open Items and Billing History.

Open Items will show all the open items (orders, invoices, or memo payment plan steps) in one grid based upon configuration.

Billing History will show the history of the accounts Invoices, Charges, and Payments.

Payment Plans

30.98 Service Release E

30.98 Service Release B

501361 Added some better UI rules to prevent modifying memo payment plan steps if other steps have been paid/notified.

Patch Note

516549 An error will no longer occur when removing an order from a payment plan.

30.98 Service Release F

30.98 Service Release C

506142 Update to default view to allow Payment plan id to be shown in selection view. The view selection is created from the Payments Schedule window.

Patch Note

510741 Suspecting that this is a concurrency issue with certain fields (Last Invoice) being copied back to the database after voiding an invoice from the Edit payment plan window. This issue has been resolved if it was the underlying cause. Please resubmit if this issue continues to occur on future versions.

Performance

30.98 Service Release E

30.98 Service Release E

520408 Fixed the issue with loading vouchers on payment processing window.

30.98 Service Release F

30.98 Service Release C

501218 Long loading time for dropdowns has been fixed.

506950 The Edit Webskin window will now load without getting a SQL timeout error.

506989 Dashboard will load voucher in a reasonable time. Code was modified to load using an aggregate query.

Patch Note

505433 The Notes column on the Service Order Items grid should now perform better in instances where more than 1000 rows are in the grid. Performance may still be slow loading so many rows, but users should no longer receive error messages.

510591 Filtered account for modified rows to speed up performance.

Personnel Management

30.98 Service Release E

30.98 Service Release E

519365 The error no longer occurs when you change the start date of the personal scheduling function. Handle Workforce Scheduling validation messages when working on functions.

Patch Note

517889 The reported issue has been resolved, now the function time is getting updated successfully on function grid.

What's New in 30.98

Adjust Workforce Schedule Following Service Order Edits

483662 With this enhancement, the Workforce Schedule will automatically update when the corresponding service order is edited.

Filter Accounts by Resource Type - Workforce Scheduling

482731 Within this enhancement, the user can now filter accounts by resource type in workforce scheduling. The filter will display as 'Resource type' in the layout and grid.

Personnel - Filter Personnel by Skill When Scheduling

489079 While using the Workforce Scheduling in Backoffice, the user can now filter personnel by skill when scheduling. If the user clicks on the 'advanced search' in the accounts drop-down, users are able to filter the personnel accounts by skill.

Workforce Scheduling - Various

489077 Various changes with workforce scheduling within this enhancement. Within Backoffice, the workforce scheduling window can now filter for "Event." On the workforce scheduling reading pane, then personnel schedule will have the option to edit-multiple action for schedule status, daily, work start/end date, work start/end time. Also in the reading pane, the 'Remaining Units' will be highlighted in red when the value is > '0'.

Phone

30.98 Service Release E

Patch Note

503372 All fields and information are now visible and show correctly in dark mode for Ungerboeck Mobile.

What's New in 30.98

Account Leads

499228 Account Leads are now available in Ungerboeck Phone starting in .98 Service Release B. Users can view, add and edit leads. In addition to standard fields like name and email, users can take a picture of a business card or use talk to text to add in summary notes for the lead.

Accounts and Contacts

499229 In .98 Service Release B, it is now possible to add and edit accounts and contacts from your phone using Ungerboeck Phone.

Events

474785 In .98 Service Release B, it is now possible to add and edit events from your phone using Ungerboeck Phone.

Exhibitors

501915 Exhibitors are now available in Ungerboeck Phone starting In .98 Service Release B. User can view, add and edit exhibitors.

Searching for Accounts and Contacts

504212 In .98 Service Release B, you can put quotes around a value in the search on the Accounts and Contacts page to perform an exact search for the entered value.

Purchasing

30.98 Service Release E

30.98 Service Release B

482920 Now a user can copy items with Entry and Awaiting Approval Status only. Added generic result validation if copying the invalid status items.

496536 Users can now create requisition from Service Order, the process no longer stops after clicking OK on the Required Fields window.

498628 Creating a purchase order from a service order with multiple items having multiple required field prompts will now work correctly.

499324 Updated Purchase Order Items and Requisition Items to read from the main accounts on the purchase order item object. When saving - this main account selected will push down to the GL distribution automatically just as it does in a non-dimensional setup (no main accounts).

Additional change made to ensure that the main account specified on the AP demographics record would automatically carry down to the PO item distribution in cases where no distribution was setup on the major / minor group

500582 Updated purchase orders classes to default the dimensions and book from the Event Defaults. The values can then subsequently be overridden on the Purchase Order or Requisition if desireable.

500841 Error when approving a purchase order that has a voided actual has been fixed.

30.98 Service Release E

521399 If Supplier Contact and Space fields are modified on PO, GL Distributions should not drop.

Patch Note

517138 Modified column settings to show the date in/out and in/out indicator as separate columns in the list view - but leave as a combined field in the add/edit purchase order item window. Although not the root cause - it is the way this particular field set should function and will resolve the issue

518427 Error has been fixed when Issuing PO from email link.

519048 Webhook notification should now appear upon adding a Purchase Order Item.

30.98 Service Release F

30.98 Service Release C

506332 Add Links on Supplier drop down has been added

507518 Code has been added to "view Documents" from Voucher approval page. All document options were not enabled from Voucher approval page, for now just enabled the "view"

508934 Now event function will be save successfully on Requisition.

Additional windows-
Purchase Orders
Journal Entry Details
Voucher Distribution

509878 Made code changes to reflect the status of the inventory item on the market lists in compliance with the status of the supplier item and also the item itself.

Patch Note

511394 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511700 You will now be able to view a sent email that has an invalid email address without error.

511787 Made code changes to fix the issue when receiving zero cost items with variance.

What's New in 30.98

AP Automation - Purchase Order Matching

475184 The AP Automation feature now has the ability to match invoices against a purchase order in Ungerboeck.

Copy Purchase Orders

489421 Upon customer request, a new option has been added to the Copy Purchase Order window called 'Copy Distribution.' The default is that this will be checked and the distribution will copy as-is. If unchecked, the distribution will refresh.

Purchasing

Fulfillment Order to Purchase Order/Requisition

482881 Upon customer request, the ability to create purchase orders and requisitions from Fulfillment Orders has been added.

Membership Orders to Purchase Order/Requisition

482881 The ability to create purchase orders and requisitions from Membership Orders has been added. This is for new Membership Orders and does not apply for Legacy Membership Orders.

Paid by Credit Card Indicator

483456 Upon Customer request, a new field called' Paid by Credit Card' has been added to Purchase Orders to allow for indicating if a PO has or will be paid by Credit Card.

Purchase Order Descriptions

492265 Upon customer request, the Description field on Purchase Orders has now been adjusted to Default as blank instead of as 'Purchase Order.' Field Restrictions have been implemented to allow for requiring users to enter a purchase order description. If no description is entered and the field restriction is not in place, the default 'Purchase Order' description will be used.

Purchase Order Items

482920 Upon customer request, the ability to copy purchase order items has been added.

Purchase Order Next Approver Emails

486150 In Purchasing, there is a configuration option to send automatically send emails to possible approvers for a Purchase Order. When this parameter is set and the Next Approver field is populated on the Purchase Order/Review Purchase Order window, the email will be automatically sent to only the person listed as the Next Approver of the Purchase Order.

Purchase Orders Next Approver

482879 For those who use Purchase Order Approvals, a new field has been added called 'Next Approver' to the Purchase Order and Review Purchase Order windows. This allows for selecting a specific user to be the Next Approver of the Purchase Order from the list of possible Purchase Order approvers.

Requisition Next Approver Emails

486151 In Purchasing, there is a configuration option to send automatically send emails to possible approvers for a Requisition. When this parameter is set and the Next Approver field is populated on the Requisition/Review Requisition window, the email will be automatically sent to only the person listed as the Next Approver of the Requisition.

Requisitions Next Approver

482880 For those who use Requisition Approvals, a new field has been added called 'Next Approver' to the Requisition and Review Requisition windows. This allows for selecting a specific user to be the Next Approver of the Requisition from the list of possible Requisition approvers.

Query & Reporting

30.98 Service Release E

30.98 Service Release B

508428 The send email from generic report prompt no longer filters out valid email addresses.

30.98 Service Release E

518918 CBL150: Payment Plan Invoice has been updated.

Patch Note

497634 When using an event template on a function the template no longer prompts for a function. The function id is now passed to templates for event subject documents.

500937 You no longer receive an error when clicking Attach To Email on Report Viewer for Invoice - Proforma for Events By Department. The ContextObjectID on Send Email is now set to Events correctly.

501672 The Microsoft Jheng Hei font is now available for selection and defaults as the font on the rich text editor in v30 when set as the default font on Default Font for Note Text Organization Parameter (AA 149) configuration.

502236 Sending work orders to the printer or to the department email/user email now displays correct messages for how many are sent.

502285 You will no longer receive an error when running the Account Labels Report. The Label Format dropdown will now load the correct data.

502591 When running a registrant report from an order registrant the wildcard set on the EZWriter word template now fills in the registrant account name correctly on the report.

503149 The Function data map now loads the None wildcard and gets passed to report viewer as 0 correctly.

503539 Missing parameters from an email template after attaching a report from the report viewer no longer prompts for the reports parameters. It now correctly displays the missing parameters for the email template.

504332 Sending work orders to the printer or to the department email/user email now displays correct messages for how many are sent.

514001 Numeric and currency parameters on the generic report prompt now allow decimals.

516452 Added defaulting of the sub account to be a non null value when not present on the layout to avoid join issues. Update script provided to client care for the interim

519265 The Daily Work Order report now works correctly when selecting more than one event on the prompt window.

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.

30.98 Service Release F

30.98 Service Release C

502330 Resolved issue with save as new view window opening in incorrect mode.

508388 The order parameter now appears under the iebms sop report list.

508428 The send email from generic report prompt no longer filters out valid email addresses.

509424 Sending work orders via email to myself no longer respects the printing org parm of ZZ 320.

Query & Reporting

Patch Note

497244 You will now receive a prompt message for additional attachments found when exporting a report to Word. The only option you will not get a prompt is Export to PDF.

499655 All columns on Asset Activity Report are now aligned when exported to Excel.

506004 Now when running a report and As Of date is selected through the calendar picker it will appear on the report viewer and the correct data will be pulled in.

508423 You are now able to add contract documents to a contract without issue.

508492 Word reports and non-Crystal missing parameters no longer default 'All' for the order or function parameters.

508861 Running the Space Master report now passes *ALL value and pulls in correct information.

510224 The print flag now gets set correctly when sending confirmation emails for service orders.

510707 The Utilization Analysis by Space report no longer adds the event start dates to the bookings date filter. The report now correctly filters when space types are selected.

510920 You can now run reports from exhibitors successfully without error.

513872 You will now be able to edit a report list on the report master without error.

What's New in 30.98

Report Audit Log

483244 It is now possible to rerun an Excel or Word report from the Report Audit Log.

497921 Report Audit Log files will now be kept for fifteen months to allow for more accurate usage tracking. Prior to this change, logs were only kept for six months. This change requires a new Report Server version.

Report Parameters

501896 In .98 Service Release B, a new report parameter, ANCHORVENUE, has been added. This will list all spaces that are designated as anchor venues.

Registration Check-In

30.98 Service Release E

Patch Note

518097 Reports window now properly opens when "Print badge and check in" action is selected in back office.

521774 The reported issue has been resolved, order status column is no more available for Edit Multiple registration order item.

What's New in 30.98

Registration Check-In

472097 You can now assign custom fields to be answered at check-in through Registration Check-In Web and iOS application.

483978 Registration Check-In will now use new fields on Order Registrants and Registration Order Items windows. This story represents the work to remove the deprecated field "Event Check-In Date/Time" and convert time stamps to the new fields.

Resources and Price Lists

30.98 Service Release E

30.98 Service Release B

498312 Display the correct tooltip window when hovering over Setups or Menus

501574 The error when saving pricing scheme has been resolved.

502781 There is no longer an error when the package is assigned to the resource. The resource 's U/M switches to what the package U/M is and saved successfully.

503868 The price list item control now saves and shows as required correctly in the Resource Time Slot details window.

505613 Made performance improvements to the Update Resource Departments process during Synchronize Resources.

513528 Double scheduling has been fixed. You can no longer double schedule resources that are already scheduled within the same order.

30.98 Service Release E

521632 The copy resource process was loading the add/edit window but not filtering the tax rates loading to the newly created tax resource. Because no tax rates are copied during this process - the tax rates section should be blank after copying.

Patch Note

502389 Users will no longer receive an error when changing the Substitution Type from Mandatory to None when there are Substitutions already saved on the Package Item. Existing substitutes will be deleted on Save.

513789 Users should now be able to copy Resource Types without the Resource Code field being required.

519463 The Price Lists button, as well as all other buttons under the view dropdown areworking correctly now.

519546 The reported issue has been resolved. now I can add price list item to the price list in 98E.

520610 The reported issue has been resolved. now No Sorting option is available in the dropdown.

30.98 Service Release F

30.98 Service Release C

510862 Hide Use Tier Cost and Tier Price columns from column selection on price list items grid.

511674 Pricing schemes now calculate correctly.

513528 Double scheduling has been fixed. You can no longer double schedule resources that are already scheduled within the same order.

513528 System functioning as expected. You can no longer double schedule resources already scheduled on the same order. SQL query now accounts for Ungerboeck Midnight when querying existing orders.

Patch Note

509379 Resource code column in Add Service Order Items window now correct shows code instead of type description.

513789 Users should now be able to copy Resource Types without the Resource Code field being required.

What's New in 30.98

Price List Items > Provide Visibility which Package(s) the Price List Item Pertains

484548 Within this enhancement, there's a new section on the price list items for 'Packages'. Within that section, there's a grid showing the packages in which the price list item is connected as a header, package detail, or substitute.

Resources > Resource Sequence Number Added

485710 Within this enhancement, the 'Resource Sequence Number' is now available on the Resource Grid & Edit Resource window.

Room Diagrams

30.98 Service Release F

Patch Note

504862 Room diagram does not get disappeared after selecting multiple functions

508952 There is no longer an issue attaching word merge templates to the send email window.

510735 Added server validation to prevent deleting a locked Room Diagram.
Not able to delete locked room diagram
working as expected

511524 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

511565 There is no longer an issue using send email and loading email addresses.

513880 Grid settings window styling display properly

What's New in 30.98

Attaching Room Diagrams to Reports

485374 In .98 Service Release B, Room Diagrams can now be attached to Work Order reports.

502386 In .98 Service Release B, Room Diagrams can now be attached to the Event Order, Event Plan and Event Resume reports.

Exports

488753 Fixed an issue where exporting large measurements would scale the text size very small on the PDF export. They should now reproduce what users view on screen.

Object Properties

498107 Added ability to set the Line Thickness property in room diagrams.

Reporting

496759 Added ability to quickly find all spaces that have or do not have a Space Diagram attached. New "Has Diagram" field has been added to spaces.

Room Diagram Integration with Template Documents

483364 Enhanced reporting integration to work with Event Template Documents so that Venue Event Manager users could send nicely formatted diagram views to Event Organizers. There is a new wildcard for the room diagram, which tells the system where to insert the room diagram image.
Also patched to .97B.

Table Numbering

495603 Room Diagram has the ability to number Items individually or in mass.
Notes:
- The mass numbering works best with horizontal or vertical rows. If selection is rotated, please rotate the selection to 0 degrees before numbering, then rotate back.
- The "Move" action has the ability to rotate by entering an exact angle.
- Holding the Shift key will unlock the 15 degree snap rotation.
- Items must be linked to resources to number
- The numbering feature is designed for tables and not chairs.

Usability

498004 Added new menu for "Advanced" tools and placed next to the existing "File" menu. This is designed to hold advanced tools like Table Numbering.

User Experience

483992 To help ensure users have a performant experience in diagrams, we added an object count threshold when importing objects from DWG, like building lines or new Diagram Items.
Users will be warned that they may experience poor performance if a DWG file has between 10,000 and 50,000 objects.
Users will be stopped if a DWG file has over 50,000 objects.

Room Diagrams

Workflow

483136 Added ability to add new Room Diagram from functions, as well as manage existing Room Diagrams linked to the function. Also patched to .97B.

496252 Added ability to move items, shapes, and text with the keyboard arrow keys.

498003 Added quick link to the Event, which allows quick access to all event menus, like:
- Event Reports
- Event Functions
- Event Service Orders
- and many more...

Sales Goals

30.98 Service Release F

Patch Note

510483 An Event filter is now available on Sales Goals and Sales Goal Periods windows. A tooltip has also been added on Event field to see event information.

Service Orders

30.98 Service Release E

30.98 Service Release B

497913 Fixed deleting multiple other actuals at the same time.

499842 Fixed error completing service order with item outside of the function date/time.

500954 Edit Layout link opens on Move Service Orders window.

501276 Testing was impacted by the set Account Defaults (Available from the tools dropdown on the Event Sales - Contacts list window) The account defaults have been cleared and the flow is now working as intended.

501638 Fixed error where service order item UDFs would not be editable on the service order item grid.

502010 Fixed error when reopening a service order, where the order items would reopen at the same time.

502835 Error fixed on the Add Service Order/Add Service Order Items window where the resource Type search field would show Type descriptions repeated on the same line in the Recently Used Items section of the dropdown.

503246 Handle situation where the order item has no resources to schedule gracefully

504505 Rate type dropdown now functions correct in the Add Service Order Items window after saving item changes

506221 System now allows resources to be scheduled back-to-back (end at 4, start at 4).

512100 Actual Net Due column now fills correctly.

30.98 Service Release E

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 Package or resource notes do not copy when the note is already on the order item.

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

522349 Package or resource notes do not duplicate when the note is already on the order item.

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

511710 The reported issue has been resolved. now service order Notes are displaying on front as well as on preview screen.
hence completing the case.

515062 The reported issue has been fixed. I observed that set time values on copy order window are copied correctly into the new service orders.
I have tested it by changing time zone between CDT and EDT.

519703 The reported issue has been fixed now. The unit chrage and extended charge doesn't get change after changing the respective item description.

519885 The reported issue has been resolved. Now I can successfully add service order with items to a function.

520929 The reported issue has been resolved. now I an move order successfully without any error message.

522781 The resource code field now does display the code and user can search using code number hence marking it as Ready to distribute.

30.98 Service Release F

Service Orders

30.98 Service Release C

502379 Reprice order now re-checks for valid discounts and applies them when applicable.

504505 Rate type dropdown now functions correct in the Add Service Order Items window after saving item changes

504794 Clicking the grid cell image that sets quantity to attendance now saves correctly.

505224 Issue fixed resulting in the use of an incorrect price list for some Exhibitor Service Orders.

506221 System now allows resources to be scheduled back-to-back (end at 4, start at 4).

507180 Fixed error that would show when attempting to open Print Sequence from an order item.

507250 Actual net due column now fills correctly.

507953 The reported issue has been resolved.The service order window is getting open from Main menu when the Search-Function field is available on the grid.

508907 No longer able to double book resources - Filter previously utilized resources when scheduling and making use of midnight for the end time.

513375 The reported Issue has been resolved. now Service order discount calculate correctly.

Patch Note

507741 Copy order by selecting same function does copied Booth assignment now

509407 Fix error that shows up after closing an open service order

510660 Error during inventory check has been fixed.

511769 Error where the order notes grid was not properly showing notes has been fixed. Service Order and Work Order level note grids should now display expected notes.

What's New in 30.98

Ability to Lock Down a Forecast Order

486920 Within this enhancement, users now have the ability to lock down a forecast & revised forecast order so that no other users are able to make changes.

Ability to Move Package Details/Order Items to a Different Function

483866 Within this enhancement, users will now have the flexibility to assign individual order items and/or package details to a different function on the event. Before this enhancement, an order and all corresponding order items needed to be listed on the same function. This essentially enables the user to place orders at the event level and then move the individual items to a different function. The item moving to a different function should automatically inherit the start date/time for that function.

This feature is off by default. It is strongly recommended that each client wishing to use this feature first discusses this with their CSM or consultant as there could be significant process & reporting implications, especially for those that have custom reports.

Access Privilege - Add/Edit/Delete Package - Enable Filters

486458 Within this enhancement, the package filters are now enabled while the Access Privilege for Add/Edit/Delete Package is utilized. Previously, the filters were locked down.

Edit Multiple Items

485067 Within this enhancement, order item UDFs are now available on 'Edit Multiple'. However, there are multiple conditions in which the order item UDFs to work: (1) Selected items should have the same UDF type, (2) UDF columns are on the layout instead of the UDF section on Edit Multiple, and (3) if the item doesn't have a UDF record it will add a new one.

Event Orders No Longer Require a Function on a Service Order

483867 Within this enhancement, users will now have the flexibility to no longer be required to select a function on a service order. This essentially enables the user to place orders at the event level. Prior to this enhancement, users were required to select a function on a service order.

This feature is off by default. It is strongly recommended that each client wishing to use this feature first discusses with their CSM or consultant as there could be significant process & reporting implications, especially for those that have custom reports.

Service Orders

Pricing / Cost Schemes - Ability to Determine Price/Cost by Tier

493036 Within this enhancement, Tiered Pricing and Costing Schemes will now have the ability to configure different tier price/cost. In v19 different tiers could be set based on the number of units or the total price of the items ordered. Implementing this feature in v30.

Service Order Items > Internal Added as a Filter

468660 Within this enhancement, the Internal field is now a filter on the Service Order Items window.

Session Proposals

30.98 Service Release E

30.98 Service Release E

510560 The Sessions are now properly filtering as per the event on Function Grid.

30.98 Service Release F

Patch Note

510882 Manager and evaluator notifications are now saved when adding them to a submission setup on an event.

511214 Fixed error on Send Email for Contributors in Session Proposals.

What's New in 30.98

Session Proposals

388156 Session Proposals now supports parent/child custom fields in submitter mode.

470779 You now have the ability to require, make optional, or hide contributors in the submitter portal. This makes the session proposal tool able to handle additional scenarios that may not require contributors on a submission.

488634 We've added a new field to the Session Proposal Submissions called "Program Code". This new field provides a way for back-office users to add an alpha-numeric program code to a submission. This provides a way to organize your submissions for export and use on program guides.

Session Proposals - Contributors

430196 You can now set a default role for contributors in submitter mode. This will make it quicker easier for submitters to add contributors.

Shopping Cart Registration

30.98 Service Release E

30.98 Service Release B

508024 The progress bar is no more visible on final summary page.

Suite Management

30.98 Service Release E

30.98 Service Release B

501188 Fixed issue where changing data on the "Contact Us" Configuration would throw an exception.

501202 The description field is now editable on the Home, Contact Us, and Upcoming Events main navigation links.

501674 Users with no past attendees will now be able to manually distribute tickets.

501965 When sending multiple suite tickets we now correctly save a link to each for later reissuing and cancelling.

503807 Select Documents action now has features for Suite Management

503877 Method of payment control now validates required status correctly.

509781 Padding has been removed from the top and bottom of the selector effectively fixing the text cutoff issue.

513320 The invitations app sign up no longer throws an error.

Patch Note

501773 The main navigation drop down menus will now display properly on top of other fields/content within the Suite Management app.

30.98 Service Release F

30.98 Service Release C

504508 Fixed issue where extra navigations were being added, and copied.

504887 When creating a new Event Suite from Suite Ownership, it adds the correct Capacities.

505137 Resolved issue where Car Park Capacity was breaking the add suites function if not included.

509773 Number of guests phrase in Invitation app now shows correct number.

509781 Padding has been removed from the top and bottom of the selector effectively fixing the text cutoff issue.

509783 Issue has been resolved where moving from waitlist to invitation list caused emails to send blank.

510888 Signing up with an allergy no longer throws an error in the invitation app.

What's New in 30.98

Ability to Configure the From Address for Suite Invitation Emails

489816 Within this new field, venues will be able to configure the "From Address" for emails sent as part of the Suite Invitation process. Previously, the "From Address" would default to be the suite owner's email address.

Add Edit Multiple Windows for Event Tasks and Alerts & Promos on the Suites Config

486248 Within this enhancement, we added Edit Multiple Windows to 'Event Tasks' tab and 'Alerts & Promos' tab within the Suite Management Configuration window. Previously, users would have to make changes, one at a time, for Tasks and Alerts/Promos. Now the changes can be made in mass.

Add Filter to Display Only Active, Available Suites When Adding an Event Suite

495501 With this enhancement, a filter was added to Suites so only active, available Suites are displayed when adding an Event Suite.

Display & Filter By Function Start & End Date

495383 Within this enhancement, we added the ability to filter by Function Start / End Date in the grid on the Event Suites window.

Display Function Description Within the Suites App

487866 Within this enhancement, we added ability to display the Function ("Show") description. Now, when there are multiple sessions for the same event record, we have the ability to display the function description through the app so that it’s easier for the user to understand what they’re ordering for.

ESC/Suites > 'Retire' Field as a Filter

497209 Within this enhancement, the 'Retire' field on Suite Management and Exhibitor Service Center configuration window will now be available as a filter.

Suite Management

Re-Send Invitation Action

429929 Within this enhancement, suite owners will now have the ability to resend invitations on the Attendee Management Menu.

Suites > Contact Us > Updated Text

494721 Within this enhancement, the auto-generated text for the 'Contact Us' feature will now include "suite owner" when coming from the Suite Management application and "exhibitor" when coming from the Exhibitor Service Center application.

System Administration

30.98 Service Release E

30.98 Service Release B

499081 Now access level dropdown value gets copied on copying user.

Patch Note

501642 Activity Email Notification Template links will now work and point to v30 correctly.

501922 Order Processing content builder layouts Components no longer display "Option Not Available" when clicking the Configure action.

30.98 Service Release F

Patch Note

505889 Issue has been fixed in current and .98

What's New in 30.98

Configuration Tables

495938 Flex Professional users can now add and edit the following configuration tables:
- Content Rating
- Genres
- House Configurations
- Late Seating Policies
- Opening Lead Time
- Ticket Fee Method
- Ticket Fee Payment Source
- Ticket Sales Method
- Ticket Seat Type

Content Builder

489274 In .98 Service Release B, a Copy action has been added for Content Builder.

Copy User

499081 In .98 Service Release B, Access Level is an available field to be added to the Copy User page. If this field is not in the layout, the newly created user's access level will be set to the same value as the copied user. If the field is in the layout, the field will default to the copied user's access level but it can be changed if you have the proper access.

Edit Multiple Users

504478 In .98 Service Release B, Auth Configuration has been added to Edit Multiple Users.

Error Messages

489853 The default setting for error messages is now "Message Only". Prior to this change, the default was Verbose.

Manage Workflows

495602 The Manage Workflows process is now supported in v30.

New Themes

491758 Two new Ungerboeck defined themes have been introduced. Each is tailored for a specific market segment and/or type of users. The new themes are for Fairs/Fairgrounds and Flex customers

Purging v19 Actions

485073 In the upgrade to .98, most v19 actions are being purged from various tables in the system such as action exception and restrictions. As most v19 actions were removed from the user interface in .97, no impact to users is expected with this change.

States

498230 The description field on States has been increased to 100.

Task Engine

30.98 Service Release E

Patch Note

503243 The locales now get loaded for the logged in user correctly when a scheduled report is run from the task engine.

521531 Now tokens are prevented from expiring in Cloud Task Engine.

30.98 Service Release F

Patch Note

510369 The task engine now correctly validates emails. When an email is sent from process task action it will show as successfully sent in email log.

510821 The task engine now correctly validates emails. When an email is sent from process task action it will show as successfully sent in email log.

Ungerboeck Spreadsheet

30.98 Service Release F

30.98 Service Release C

506700 Now excel file opens without any error.

User Setup/Password Reset

30.98 Service Release E

30.98 Service Release B

507338 The Password Reset (ActivateUser.aspx) page no longer causes an audit log error and now again correctly redirects to v30. Also, the user will display in the textbox at the top of the page.

The following will no longer display in EBMSLog.log many many times due to adding database audit log entries: AuditLog.GetConfigRow has a blank org code passed in. astrOrgCode cannot be blank.

508263 The access level will now be set when copying a user.

30.98 Service Release F

30.98 Service Release C

507338 The Password Reset (ActivateUser.aspx) page no longer causes an audit log error and now again correctly redirects to v30. Also, the user will display in the textbox at the top of the page.

The following will no longer display in EBMSLog.log many many times due to adding database audit log entries: AuditLog.GetConfigRow has a blank org code passed in. astrOrgCode cannot be blank.

512276 Send User ID Email Now works correctly

Venue Sales

What's New in 30.98

Event Opportunity to Event, Calendar Workflows

491855 When adding an event from an Event Opportunity or booking space on the calendar from an Event Opportunity, several workflow changes have been made:

- When opening the Booking Calendar or Event Calendar from an Event Opportunity, if space(s) are booked which results in an event being created, the event will inherit the account, contact, bill-to, category, class, type, salesperson, attendance, public, sensitivity, event description, legal name and alternate descriptions from the original Event Opportunity. The resulting event will also be saved on the Event Opportunity.

- The Event Opportunity Dates grid now offers right click actions to Create Event and (view) Booking Calendar. Both of these actions will take the start/end, in/out of each date pattern into account on the resulting event (Create Event action) or establishing the initial dates when opening the Booking Calendar.

- If an event is already linked to an Event Opportunity, the Create Event action and the view Booking Calendar options will be unavailable.

- If the Create Event or Booking Calendar actions are selected from the Event Opportunity Dates grid, and new events are created via these methods, the resulting events will be linked to the alternate date sets and indicated as such in a new column - Event.

UDFs on Group Profiles

490721 User Defined Fields are now available on Group Profiles. Organization Parameter CM 256 must be set to specify the Event Sales Opportunity Type to use for the default set of UDFs. Once configured, the UDFs will be available to add to the layout on Group Profiles.

Views and Favorites

30.98 Service Release E

30.98 Service Release B

503297 Users should now be able to do Totals on the following columns:

Discount Amount, Net Amount, Count, Gross Total, Net Total, Total

30.98 Service Release F

30.98 Service Release C

506241 Retired users no longer show for selection in View user & role in .98 and .97, which uses a VB ServerUI file not C# ServerUI file due to offshore migration that left old VB files in the source code.

510831 User's Booking Calendar Favorite saved with view id that they no longer have access to no longer loads incorrectly

Web Themes/Skins

30.98 Service Release E

30.98 Service Release B

500863 Added code to only load a minimal set of required columns when loading the panel window.

Work Orders

30.98 Service Release E

30.98 Service Release B

500505 Fixed error when reopening a service order, where the order items would reopen at the same time.

501059 Fixed error when reopening a service order, where the order items would reopen at the same time.

501259 An error has been fixed where completed work orders were not being re-opened if a new item was added to the service order.

501720 Changed text color in Work Order Status column to be more legible.

502931 Work order items staying closed when re-opening service orders.

503296 Error has been fixed where package substitute items (that have 0 units set in their substitute setup detail record) would show 'actual' order units of 0 after running the Complete Work Orders action on a service order.

506187 Work Order Items now working as expected and complete via event window.

30.98 Service Release F

30.98 Service Release C

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