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Account Portal/Online Account Management

What's New in 2023.2 - More Enhancements

Account Portal

530372   It is now possible to pass a token on the URL for an external gadget on the Account Portal. This enables the ability to authenticate the user if configured properly. Currently, organization parameter AA XAT must be set to Y for the token to be passed. In a future release, a configuration option will be added to the gadget configuration to control if the token is passed.

Accounts Receivable

What's New in 2023.2 - Major Enhancements

Changes to Standard Payment Method

527385   Behavior Change: The following changes have been made related to Saved Credit Cards.
1. The Standard Payment Method window that is available via the View dropdown of the Account has been converted to a new window called Accounts Wallet. This window allows back-office users to see if customers have multiple stored cards.
2. The ability to add a standard payment method to an account manually has been removed.
3. Stored Payment Methods can be viewed and deleted but cannot be edited/changed.

What's New in 2023.2 - More Enhancements

Memo Payment Plans with Registration

527385   Behavior Change - Upon customer request, when paying memo payment plan steps via online registration, if the payment amount is equal to the amount of the payment plan step, the paid indicator will flip to Paid = Yes.

Receivable Transaction Inquiry

527385   Upon customer request, the Book Control field is now a filter for the Receivable Transaction Inquiry.

Activities

What's New in 2023.2 - More Enhancements

Activities

530382   To aid in building reports and email templates, columns for the start date, start time, end date, end time, and space for the activity 's function have been added to the Activities subject.

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API and Webhooks

What's New in 2023.2 - Major Enhancements

Create Event from Event Opportunity
530371   A new endpoint is available to create an event from an event opportunity.

Event Opportunity User Defined Fields
530371   The Event Opportunity API endpoints now allow access to user defined fields.

What's New in 2023.2 - More Enhancements

Availability Search
530371   The Include Conflicts field has been added to the booking Availability Search API end point.

Spaces
530371   The Venue field has been added to the list of supported fields in the Spaces API.

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

- Event External IDs: Add
- Event External IDs: Delete
- Event External IDs: Edit
- Event External IDs: Read
- Event Opportunity External IDs: Add
- Event Opportunity External IDs: Delete
- Event Opportunity External IDs: Edit
- Event Opportunity External IDs: Read
- Event Opportunity Flow Pattern: Add
- Event Opportunity Flow Pattern: Delete
- Event Opportunity Flow Pattern: Edit
- Meeting Attendees: Add
- Meeting Attendees: Bulk Add
- Meeting Attendees: Delete
- Meeting Attendees: Edit
- Meeting Attendees: Read
- Registration Automatic Voucher: Add
- Registration Automatic Voucher: Delete
- Registration Automatic Voucher: Edit
- Registration Automatic Voucher: Read

Tasks
530371   The Authorize External Link field in Event Portal has been added to the Tasks API.

Webhooks
530371   A webhook has been added to indicate that a meeting attendee has been checked in.

Audit Log

What's New in 2023.2 - More Enhancements

Audit Log

530369   To aid in building onscreen reports for user activity and auditing, filters for Changed By and Entered By User Group and Access Level are now available on the Audit Log.

Audit Log - Recipient List Activities

530369   Upon customer request, activities created via Recipient Lists from the Audit Log will now be generated in a New status instead of a Completed status.

Corporate

What's New in 2023.2 - Announcements

Events Across Time Zones

530386 The ability to manage events that take place in spaces across more than one time zone has been introduced for the Corporate market. A time zone can be defined at the organization level as well as for the user and space. When moving through the supported areas of Momentus Enterprise, users will see dates and times according to their time zone. They will also be able to see dates and times according to the space's time zone via columns/fields added specifically to areas that are related to spaces such as Bookings, Functions, Service Orders, and Work Orders.

The Booking Calendar has also been enhanced to support looking at spaces across time zones. The spaces will be aligned so that you see what is happening at the appropriate time regardless of the space's time zone. The Availability Search feature has also been enhanced to properly display availability when looking for spaces in different time zones. A new configuration option has also been added to Online Space Booking (OSB) to support the new feature. We plan to extend this feature to other areas of Momentus Enterprise in future releases.

Supported Areas:
- Booking Calendar
- Availability Search
- Events
- Bookings
- Functions
- Service Orders
- Service Order Items
- Work Orders
- Work Order Items
- Meeting Attendees
- Online Space Booking (OSB)

Events Across Time Zones does require you to be licensed to the feature. If you are interested in this option, please reach out to your normal Momentus contact to discuss this exciting new feature.

Meeting Attendees

530386 The ability to track meeting attendees for an event has been introduced for the Corporate market.

On an event, attendee details can be collected and include first name, last name, company, email, phone, an employee flag, and a note. Attendees can be checked in and out and a report list is available if needed for items like badges and passes. Full API support is also available for this feature.

A configuration option has been added to Online Space Booking (OSB) to enable the ability to collect and manage meeting attendees. Meeting attendees can be added during the request and can be managed from the My Events page after the request has been submitted.

Meeting Attendees does require you to be licensed to the feature. If you are interested in this option, please reach out to your normal Momentus contact to discuss this exciting new feature.

Credit Card Processing

What's New in 2023.2 - More Enhancements

Credit Card Information

530364 Storing credit card information in the Momentus Enterprise database is controlled through system parameter AR 000. In keeping with our best practice recommendation of not storing the information in the database, it is no longer possible to set this parameter to reenable the storing of credit card information in the database once it has been turned off without help from Momentus staff.

Momentus Payments: Failed ACH Handling

530364 When using Momentus Payments and accepting bank transfers, if the bank transfer fails to settle due to bad account information, insufficient funds, etc, then the payment will be auto-reversed in back-office upon the settlement status turning to Failed or Returned.

Momentus Payments: Processing Fee and Principal Amount Fields

530364 When using Momentus Payments, there is a new field on the payment record called Processing Fee which will hold the amount taken from the payment for the Momentus Processing Fee. The Payment record will also have a new field called Principal amount to show what the overall amount paid towards the order or invoice was outside of the fee passed on to the customer.

CRM

What's New in 2023.2 - More Enhancements

Change Internet Password

527337   Changing a password for a CRM record through the Change Internet Password page will now enforce public password schemes. The process will first look to see if there is a public password scheme at the organization level. If one is not found at that level, it will look to see if there is a public password scheme configured at the site configuration level. If none is found there as well, it will behave in the same manner as before this enhancement.

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Document Management

What's New in 2023.2 - More Enhancements

Replace Heading

530374 The replace heading/subheading process will no longer check if the document is on a locked contract. Prior to this, you could not replace a document heading/subheading if it was on a locked contract.

Email

What's New in 2023.2 - More Enhancements

Access Privileges

   530376   The Limit Number of User Mass Communications access privilege has been renamed to Limit Number of Mass Emails. No functionality changes were made with this change.

Email Logs

   530376   During the upgrade/update process, any email log records older than sixty days will be purged. Email log records indicate if an email was sent or failed. The email record attached to an account, event, etc... still remains.

Order Registrants

   530376   The Order Registrants subject is now supported in email templates and can be used when sending emails from registration orders.

Event Management & Coordination

What's New in 2023.2 - Announcements

External ID's

527399   Event External ID's have been introduced in the 2023.2 release. This feature allows you to store identifiers for other systems against an event. Prior to this enhancement, many of these values were stored in user defined fields.

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

At the event level, a new section for External IDs is available to define the IDs for an event.

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

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

Please note that this feature was introduced for accounts and contacts in 2023.1.

Event Portal

What's New in 2023.2 - More Enhancements

Event Portal - Registrants

527401   Company, City and State have been added as displayable columns on the Registrants tab in Event Portal.

527401   Registrant Company, City and State have been added as standard fields on the Registrants page in Event Portal, as well as in the export of Registrant data.

Event Registration & Housing

What's New in 2023.2 - More Enhancements

Registrants

530385   You can now see a list of registrants on the Functions page. If you need the ability to report on registrants per function, you have the ability to do that now by adding the Order Registrants section to the Functions page.

Registration

530385   You can now set a default payment plan in the registration payments configuration if there are multiple options available.

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Exhibition Management

What's New in 2023.2 - More Enhancements

Booths

530384   Company Account has been added as a column on the Booths page.

Copy Exhibitor Portal Setup

530384   Order Processing Configuration (OPC) has been added as a column to the Tasks grid in the Copy Exhibitor Portal Setup page, which helps identify ordering tasks so that users/admins can quickly set the new price list on the new event.

Edit Multiple Exhibitors

530384   Shell Scheme, Sponsorship, and Drayage have been added to the Edit Multiple Exhibitors page.
Added "Company Account" column to the Booths list window.
Exhibition Defaults – Added ability to define Booth defaults in Exhibition Defaults so that users can denote the new booth status default when users add new booths

Exhibition Defaults

530384   It is now possible to define the default booth status under Exhibition Defaults.

Exhibition Floor Plan

530384   One meter is now the default unit for the drawing grid for metric units, instead of 3 meters.

Exhibitions

530384   The summary page for tasks on Exhibitor Portal has been updated to:
- allow confirming summary details, which provides quick access to the payment section
- have a modern look and feel when exhibitors choose a payment option
- have a modern look and feel when exhibitors manage billing information

Exhibitor Portal

530384   When a user changes the language selection on the Exhibitor Portal, the preferred language of the user will no longer be updated.

Expense Reports

What's New in 2023.2 - More Enhancements

Expense Reports

527409	Imported credit card transaction details will now map to the Expense Card file to get the personnel account. This must be an exact match of the last 4 to the last 4.
527409	Imported Credit Card transactions can now be assigned to a personnel account via Edit Multiple.

Facility Booking

What's New in 2023.2 - More Enhancements

Edit Multiple Spaces

    527400   The Bookable and Visible flags are now available in Edit Multiple Spaces.

General Accounting & Analysis

What's New in 2023.2 - Major Enhancements

Fulfillment Order Item - Deferral Schedules

530360 Fulfillment Order Items can now be assigned a Deferral Schedule. This allows more flexibility in the case where the revenue recognition of a fulfillment order item needs to be allocated across months as opposed to being recognized all at once.

When a Fulfillment Order item has a deferral schedule assigned, upon invoicing the order, the invoice Journal entry will recognize the item towards the specified liability account. There is a monthly journal entry process which can be run to allocate revenue and back out deferred revenue per the schedule.

GL Accounts and Main GL Accounts

530360 Upon customer request, the ability to import GL Accounts and Main GL Accounts is now available via Main Menu > Import GL Accounts. The basic import will follow a standard format of the following fields and should be entered as a CSV format.
Fields for Importing are:
1. Mask Code
2. GL Account or Main GL Account
3. Description
4. GL Account Type
Any field not represented upon import can be assigned once imported via Edit Multiple, in most cases.

What's New in 2023.2 - More Enhancements

Journal Entries

530360 On the Journal Entries window, a new column has been added called "Documents.' When a Journal Entry has a document assigned to it, the documents column will display an icon that the user can click to open the attached document. If more than one document exists, then the documents window will open and allow selection of which document to open.

Global Behavior

What's New in 2023.2 - Major Enhancements

Changing Passwords in Public Applications

527551   When a public user changes their password in an online application (examples - Registration, Online Space Booking, etc...), they will now be required to enter their current password as well. If a public user does not know their current password, they will need to contact someone that can reset it for them inside Momentus Enterprise or use the reset password workflow.

Export to Excel/PDF

527551   It is now possible to specify the file name and heading that appears on the report created during the export to Excel and PDF workflows. When the export options prompt appears, a new field, File Name/Header, is available. This field will default to the view description but can be changed if needed.

Export to PDF

527551   Have you ever dropped your PDF export and struggled to put them back in order? Have you ever opened up an electronic copy of a PDF export and wondered when it was really created? If you've answered yes to either question, help is on the way! The Export to PDF workflow will now include page numbers and a date/time stamp at the bottom of the page.

Inventory Management

What's New in 2023.2 - More Enhancements

Physical Count Batches: Event Allocation

530361   Physical Count Batches can now be tagged to events at the batch level. Any adjustment transactions created when posting the batch will be assigned to that particular event and can be utilized in GL distribution as needed.

Notes

What's New in 2023.2 - More Enhancements

Contract Clauses and Notes

530377   The event will now be filled out when adding a contract clause or note. This allows event filters to be used to view contract clauses and notes for the selected event.

Exhibitor Notes

530377   The event will now be filled out when adding an exhibitor note. This allows event filters to be used to view exhibitor notes for the selected event.

Notes

530377   Display columns and filters for Event Category, Class, and Type have been added to the various Notes pages.

Online Space Booking (OSB)

What's New in 2023.2 - More Enhancements

OSB - Space Venue Field

527398   If activated on the Online Space Booking (OSB) configuration, the Venue field will now show on the Space Results page for each space, as well as on the Summary/Checkout pages. This provides the user more clarity throughout the entire OSB workflow to indicate in which Venue their selected spaces are located.

Payment Applications

What's New in 2023.2 - Major Enhancements

E-Payment Application

    527408   Upon customer request, the E-Payment application now allows for accepting Partial Payments when configured to do so.

Purchasing

What's New in 2023.2 - More Enhancements

Mobile Purchase Orders

530381   Behavior Change - Upon customer request, when emails are sent with Purchase Order Links and opened using mobile Purchase Orders, the window will default to View Purchase Order instead of review Purchase Order to ensure that details can be adequately reviewed before 'Approve/Reject' is selected.

Purchase Order Contracts

530381   Upon customer request, purchase order contracts can now be adjusted as needed on Closed Purchase orders.

530381   Upon customer request, a new access privilege has been added related to Purchase Order Contracts = Allow Access to Purchasing Contracts by Department.

     This access privilege allows for access to Purchase Order Contracts to be determined by the departments this user has access to. This is independent of the Access privilege for Purchase orders by Department. To use this parameter, assign the users who should have access to PO Contracts and then assign the departments which they can access contracts for. If no one is assigned, then all users with access to purchase order contracts can see any contract regardless of department.

Query & Reporting

What's New in 2023.2 - More Enhancements

Report Naming Schemes

   530379   Report Naming Schemes are now supported for Requisition based reports.

Resources and Price Lists

What's New in 2023.2 - More Enhancements

Resource Spaces

527684   When configuring the spaces where a resource is available, it is now possible to view the spaces according to their hierarchy on the Manage Resource Spaces page.

Room Diagrams

What's New in 2023.2 - More Enhancements

Room Diagram

    530383   One meter is the default unit for the drawing grid for metric units, instead of 3 meters.

System Administration

What's New in 2023.2 - More Enhancements

Window Usage

527335   Dashboard gadgets and reports can now be built over the Window Usage subject.

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Venue Sales

What's New in 2023.2 - Announcements

External ID's

530359   Event Opportunity External ID's have been introduced in the 2023.2 release. This feature allows you to store identifiers for other systems against an event opportunity. Prior to this enhancement, many of these values were stored in user defined fields.

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

At the event opportunity level, a new section for External IDs is available to define the IDs for an event opportunity.

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

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

Please note that this feature was introduced for accounts and contacts in 2023.1.