What's New in 30.98 (Service Releases A-B)

By Module

30.98 Announcements

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

Accounts Payable

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.

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

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

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

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.

Purchase Order Approvals API

496172 Upon customer requests, an API endpoint for Purchase Orders Approvals is now available.

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.

API and Webhooks

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

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

Imports

482146 Template imports are now supported in v30.

Cash Book

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.

CRM

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.

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

Tabular Reports

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

Document Management

Documents

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

Export Documents

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

Email

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

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.

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 Portal

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

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.

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.

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 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.

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.

Exhibition Management

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.

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

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

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

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

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

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.

Fulfillment Orders

Fulfillment Orders

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

Functions

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

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.

Global Window Behavior

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.

Inventory Management

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

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.

Mobile Work Orders

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.

Online Event Ordering (OEO)

Hours Lead-Time Cutoff

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

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 Config > Require Confirmation Fields

502258 Within this enhancement in .98B, the "Confirmation From Email Address" and "Confirmation Email Template" fields are now required in the Online Event Ordering Configuration.

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.

SSO Support within Online Event Ordering App

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

Online Order Processing (OP)

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 Bookings (OSB)

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.

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 controls 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.

Online Space Bookings (OSB)

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

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

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.

Personnel Management

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'.

Purchasing

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.

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

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 be kept for fifteen months now 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

Registration Check-In

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

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.

What's New in 30.98 (Service Releases A-B)

By Module

Room Diagrams

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.

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...

Service Orders

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.

Add Discount - Shift Discount Category

486345 For this enhancement, in the 'add discount' window, Category will not be dependent on the adding of a resource. This will give the ability to apply a discount category for all discounts.

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.

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 > Filter > Personnel Position Order Account Rep

500925 Within this enhancement in .98B, The Service Order Item will have "Personnel Position Order Account Rep" as a new field that will inherit from the Service Order. Users are able to filter by "Personnel Position Order Account Rep" on the Service Order Item window.

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

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.

Suite Management

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.

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

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.

Ungerboeck Phone

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.

Venue Sales

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.

Work Orders

Work Orders - Inventory Fulfillment Location

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