



30.98 Service Release E

By Module

From 5/24/2022 to 9/7/2022

Activities (AC)

- 1 518670 Activity Email notification hyperlink doesnt work.**
06/27/22 The shipped Activity Email Notification Template has now been updated to have the correct wildcard in the link.

API and Webhooks (API)

- 2 520487 API - You are able to use the /api/v1/Communication Post to enter records for accounts that do not exist**
07/15/22 Now Communications POST request will not create a record for an account which is inactive or does not exist and returns 400 status code. When setting an inactive account on AccountCode field on Communications POST user will now receive Request Body validation response of 'Unable to add a Communication whose account code is either inactive or does not exist. Please enter a valid account code and try your request again.'

Accounts Receivable (AR)

- 3 516168 Can't Edit Bank statement straight after import.**
06/16/22 When bank statement is imported , it open window where we can straight edit, match bank transaction and post.
- 4 517843 Quick Invoice "Create and Print" no working in v30.98C**
06/16/22 The success message for invoice now shows correctly and invoice reports with Invoice Additional copies Prompt (861) as the object window now run correctly.
- 5 518667 Upgrade 30.98c - Event Prepayment Reversal journal**
07/22/22 When generating an event prepaid entry, the entry will now continue to stay at a status of New - as it does for a majority of all other entries generated manually (with the exception being invoice specific entries)

Facility Booking (BS)

- 6 517841 Space dropdown stays on screen after editing bookings on the grid with more than 50 records**
07/06/22 Field dropdowns (Space/Bookings, Function Usage/Status, etc.) no longer stay on screen after double-clicking with the mouse to start editing within the grid with more than 50 records.
07/25/22 The booking grid dropdowns no longer stay on screen after double-clicking with the mouse to start editing bookings on the grid in events with more than 50 records when the server is running slow due to latency, or app pool recycle or resetting the server cache.
- 8 518198 Unable to delete space / replace space code**
06/07/22 Fixed errors related to Deleting a Spaces or Replacing a Spaces Code.
- 9 519814 Edit Multiple > Booking Restrictions acting incorrectly.**
06/22/22 Booking Restriction is showing correct results after Edit Multiple records.
- 10 520043 Rates don't display after Split By Day and event doesn't save**
06/29/22 Rates are being displayed correctly after split by day option and the event is also getting saved properly.

CRM (CM)

- 11 516620 Merge account Problems**
06/28/22 Now accounts will merge successfully when there are multiple addresses on each account record.
- 12 522668 Opportunity window displays an Event UDF issue**
08/19/22 Tested the scenario and records on mentioned version and its working fine now hence marking it as Complete.

DocuSign (DCS)

- 13 519453 Electronic Signatures Configuration window no longer saves settings**
07/07/22 Electronic Signature configurations will now generate missing keys if they do not exist.
- 14 522509 DocuSign - BYOE Electronic Signature Configuration not validating**
08/16/22 Docusign now validates the BYOE configuration correctly.

Dictionary (DCT)

- 15 514002 Phrase nicht übersicht in Ausstellerregistrierung**
06/30/22 Registrant type item description will now display properly in exhibitor history message.
- 16 516297 Dictionary Translation: Error Message on declined credit cards**
07/22/22 Issue has been fixed error message is getting translated in German.

Document Management (DM)



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From 5/24/2022 to 9/7/2022

Document Management (DM)

- 17 518528 Wildcard logo image error**
06/21/22 Now when adding the Account Logo Image Wildcard to a template document it is placed correctly without error.
- 18 519267 Unable to drag and drop documents in Event Registrants folder**
06/20/22 You are now able to drag and drop documents for Event Registrants.
- 19 519382 Unable to Drag & Drop in Invoice Window**
06/20/22 You are now able to drag and drop documents for Invoices.
- 20 521865 AV Forms not displaying under the Invoice - Document tab**
08/18/22 Now you can Add Document From Template on Invoices reading pane and Edit Invoice windows without issue.
- 21 521960 Unable to drag and drop at the Invoice Level v98C**
07/26/22 You are now able to drag and drop documents for Invoices.

Exhibition Floor Plan (EFP)

- 22 516986 EFP: Floor Plan - Observe error (OOPS uncaught error page) while performing copy action for Booth Attribute**
07/14/22 Removed any context actions from booth text. They should never have any actions in any context.

No tests were added do to changing a client side interaction
- 23 521190 EFP: Highlight Scheme Filter Behavior (always adds Stage = 0)**
07/29/22 We have updated coding to allow for saving highlight schemes appropriately. Having the Sales Stage field present in the filters of a highlight scheme will no longer add the "0" value for Sales Stage on the highlight scheme window when the scheme is saved.

Event Management & Coordination (EM)

- 24 515755 Copying Event to New Event ID**
07/28/22 Issue fixed where Events with Closed/Completed Order Items weren't able to be copied.
- 25 518448 Unable to Copy Event - Order Units is a Required Field**
07/18/22 Issue was fixed where Completed Events were unable to be copied.
- 26 521011 Event cant be copied**
07/18/22 Issue was fixed where Completed Events were unable to be copied.
- 27 522941 'Occurs Within = Today' Event filter no longer working correctly**
08/17/22 The Event filter for "Occurs On" when it is set to "Today" will correctly display Events spanning the current date, of course also with respect to other filter settings which may impact the results.

Event Registration & Housing (ER)

- 28 508953 Registration Orders**
07/27/22 There was an issue with moving registration orders where one of the items didn't have a resource code. This has been fixed.
- 29 513096 v30.98 - registrations - incorrect username/password combination bringing "you do not have sufficient permissions to access this page. "**
07/05/22 AR/project permissions errors no longer display to a registrant if they haven't successfully logged in.
- 30 513550 Item Maximum Quantity Not Working For Registration Functions**
06/18/22 The function item throws proper item exceeded exception if capacity set having volume pricing on it.
- 31 514221 Medicare Year box not showing correctly on Rego form**
07/08/22 The year box for Expiration Date under Registrant Profile now shows the proper date value.
- 32 515140 HP3314 - Registration Website automatically returns to default language on Order page**
07/04/22 Tthe language doesn't get reset to any other language if Housing is set on initial page and we process for Sign in or next page on Public Registration.
- 33 516197 Edit Registration Order: Incorrect information displayed in the Registrant Order Account - Registrant modal box**
07/11/22 Registrant Order Account Code on the reg order items grid now shows the correct account on the Registrant Account Code column.



Event Registration & Housing (ER)

- 34 517443 Online Registration not displaying \$ symbol where expected.**
06/01/22 The Reported issue has been resolved now, the \$ is now showing for taxes which are getting added on Public Registration.
- 35 518844 SPACE IS REQUIRED FIELD - error on registration set up**
06/24/22 There was an issue where a required field restriction for an event function was incorrectly being enforced on registration functions. This has been fixed.
- 36 518951 Can't add cancellation reason**
08/08/22 The reported issue has been resolved, the cancellation reasons are now getting added without any issues. hence completing the case as of now.
- 37 519575 Dependent Custom Fields error message**
07/20/22 The error on Dependent Custom Fields window will no more occur on registration setup after adding an existing function.
- 38 520998 Unable to Transfer Registrants**
07/15/22 Transfer registrants no longer throws object null errors when transferring registrant profiles.
- 39 521360 Registrations - unable to get same screenshots as Mike Schepker**
07/27/22 The Required checkbox is now available showing for the main function section when using "Custom" Group By.

Exhibitor Portal (ESC)

- 40 520320 View filter portal tasks does not work**
07/14/22 The Exhibitor Portal Task and Exhibitor Portal Task Status filters will now work correctly from the Event Exhibitors window.

Exhibitor Service Center (ESV)

- 41 515549 ESC: Confirmation Emails Intermittently Not Sending**
06/30/22 Now the confirmation emails are being sent consistently out to exhibitors. All required documents now show in the system.
- 42 516552 Exhibitors are having issues accessing the ESC - script error: JSONH is not defined**
08/10/22 Changes made to remove the script bundles and load the script files directly on start up to resolve script file not found errors.
- 43 519609 MTCC - ESC Sign Up**
07/28/22 Communication Types are now stored under MAIL code instead of PERS when both of them have the communication class set as Email. Now a contact is able to sign in to public facing apps with their email without issue.
- 44 522149 MOVE CLOUD ESC can't open the shop confirmation form**
07/26/22 By adding the missing column (EnableCustomHTML) it now allows the Configuration Form to be Edited. You can now open and edit the Shop Configuration Form with no issues.
- 45 523168 ESCV error when managing account**
08/19/22 ESCV no longer throws an error when clicking manage account from the booth page.

Exhibition Management (EXH)

- 46 520567 Exhibitor Cancellation Reason (Status)**
08/08/22 Users can now successfully delete Exhibitor Cancellation Reasons.
- 47 520888 Edit Exhibitor window layout displays incorrectly after saving - Ausstelleransicht - Wechsel der Reiter nach Speichern**
07/18/22 Sections and Tabs will now correctly display based on the settings on the Add/Edit Exhibitor layout.

Fulfillment Orders (FO)

- 48 518930 INTERNAL: Fulfillment Orders Created from Opportunities not linking back to the Opportunity**
06/27/22 Fixed issue where opening Add Fulfillment order would crash if Opportunity field was not on view

Functions (FS)

- 49 521504 Clicking the level 1 grid heading on the Event Functions grid does not work correctly**
07/26/22 Clicking the level numbers when the heading text is wrapped will now collapse the grid to that level on a hierarchy grid instead of sort the grid. Clicking the asterisk (*) will reset.

General Accounting & Analysis (GL)



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By Module

From 5/24/2022 to 9/7/2022

General Accounting & Analysis (GL)

- 50 506324 Voucher - item status closing when not selected**
07/21/22 Now item status will not close if not selected.
- 51 520759 Issue 30.98C 2022062201 using the Deferred Revenue Recognition – Tool Recognise Revenue**
07/27/22 Corrected issue received when recognizing revenue for payment plans from the Event Deferred Revenue Recognition window.
- 52 522022 Main GL Accounts: GL Account Security Fields are not editable and should be**
07/25/22 GL Account Security Fields will now be editable on Main GL Accounts window.

Global Behavior (GWB)

- 53 516641 Text Wrapping goes away when editing Item Status dropdown on Work Order Items grid with long Item Notes**
07/13/22 Text wrapping will now be applied in a grid after starting an edit and not making any changes. As a workaround you can use the tab key to navigate to the next cell which will scroll the selected row into view.
- 54 518691 Journal Entries – mouse focus determining keyboard focus for scrolling**
07/25/22 Software fix provided to current and 30.98 service pack for this issue.
- 55 521015 Copy/paste in the activities rich text editor, the information is copied in a block**
08/19/22 Now when viewing an activity the correct spacing is respected on Activities window.
- 56 522161 Wrong numbers on export of Price list**
07/29/22 The reported issue has been resolved. Now Price list details numeric columns are showing the correct number of decimals when exporting the grid.
- 57 522331 Invoices: Issue With Grid Excel Export When "Month-Year" Column Grouped**
08/11/22 Corrected issue with grid export on invoices when grouping on month year column.

iEBMS (IE)

- 58 518127 iEBMS EZWriter WRI: Error Occurring When Accessing Link**
08/18/22 Now you will no longer receive an error when accessing an iEBMS EZWriter WRI link.

Inventory Management (IM)

- 59 519899 [AHOY] Resource Requirements + Parameter EMX01**
07/25/22 The order item lead and start dates will now carry over for multi-day orders appropriately when the parameter is enabled to interrogate within the day for resource requirements (EM X01).

Previously - it was only carrying over partial information from the original order
- 60 520143 M2206 0621 Automatic change content measure**
07/22/22 Code has been updated to fill UOM with Stock UOM on the Issue Items from Mass Entry process. One up process still fills from Selling UOM, this code will not change as per PM review

Email (ML)

- 61 512331 Re: Copying text into emails results in empty emails**
07/28/22 The merge of a table in the header and no table in the details will no longer merge the details into the header table.
- 62 520356 Issue adding email template (Subject Field is greyed out)**
07/12/22 Tested as per the client care recreation steps using COWF and found that the Subject Prompt appears before Add Email Template window opens, this prompt will appear anywhere while adding email template. User can select proper subject and fill details on email template, only the valid template gets added on COWF, else it shows the validation message to the user, so user gets aware and can select the proper subject. The issue has been resolved and hence it is now working as expected.

Membership Services (MS)

- 63 511922 [Jaarbeurs] Check Error Message in Group Membership when changing status**
07/15/22 Saving a membership with a closed order no longer throws an order closed error message.
- 64 516893 Error received when preparing SMO for invoicing (Legacy Membership)**
07/26/22 An error will no longer occur when preparing a standing membership order for invoicing

Event Opportunities (MTS)



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From 5/24/2022 to 9/7/2022

Event Opportunities (MTS)

65 514982 Error message with Activities

08/01/22 The Activities are working fine, User can perform Add/Edit/Delete operation correctly, as per the notes the issue was only for two specific activities, the code fix is done, and the exception is handled properly so no more blown-up error occurs for such type of activities.

Mobile Work Orders (MW)

66 517182 Discount line becomes positive Actual when completing Work Order in MWO

07/19/22 Discount order item is now being properly calculated on the order and should no longer calculate as a negative value once the work order items are completed both in backoffice as well as in the Mobile Work Orders app.

Notes (NOT)

67 521157 Script

07/22/22 Rich text inline notes now check the value to see if its valid html before creating a note.

Online Space Booking (OSB) (OSR)

68 513951 Texts entered in Required Note Fields don't get captured at times

07/08/22 Corrected issue which caused required fields (notes and others) in OSB to fail to be marked as filled/completed.

69 518634 Ungerboeck - OSB Date/Time Error Message Display issues

06/03/22 Added style adjustments for padding and font size to help inline error text display for time and date entry errors without wrapping the text.

70 519300 Re: [Jaarbeurs] Reset Password Email OSB is not correct

07/20/22 Fixed an issue where the OSB application would not send the forgot/reset password email using the correct public sign in email template based on the logged in users currently selected language preference.

71 520928 OSB - Available Search Range not Translating

07/19/22 Fixed an issue where some time/date labels on the search page would not change when changing the language.

Performance (PF)

72 520408 Payment processing page hanged

07/22/22 Fixed the issue with loading vouchers on payment processing window.

Campaigns & Imports (PJ)

73 519133 Campaign_status of contacts not copied from original campaign to the new campaign

08/08/22 Now you can copy a campaign with results successfully without error.

74 520839 [LMS] Campaigns not working properly when merging accounts

08/15/22 Now Campaigns will work correctly after merging accounts tied to the same campaign.

Payment Plans (PP)

75 516549 Error removing order from payment plan.

06/20/22 An error will no longer occur when removing an order from a payment plan.

Payment Applications (PPT)

76 516857 Pay Portal v2 - Dictionary Change is not taking effect

07/08/22 Dictionary changes will now be reflected in the payment portal.

77 519537 E-Payment Portal Configuration

07/26/22 Payment can now be made.

Personnel Management (PR)

78 517889 Error When Updating Function Time

06/09/22 The reported issue has been resolved, now the function time is getting updated successfully on function grid.

79 519365 Replanning personnel - date change conflict

07/06/22 The error no longer occurs when you change the start date of the personal scheduling function. Handle Workforce Scheduling validation messages when working on functions.

Purchasing (PU)



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By Module

From 5/24/2022 to 9/7/2022

Purchasing (PU)

- 80 517138 IN/OUT date - Purchase Order**
06/13/22 Modified column settings to show the date in/out and in/out indicator as separate columns in the list view - but leave as a combined field in the add/edit purchase order item window. Although not the root cause - it is the way this particular field set should function and will resolve the issue
- 81 518427 Re: Error whilst issuing the PO**
06/13/22 Error has been fixed when Issuing PO from email link.
- 82 519048 Purchase Order Item Update Webhook - No Info Message on Save**
07/21/22 Webhook notification should now appear upon adding a Purchase Order Item.
- 83 521399 Purchase Orders - updating Space & Contact drops the GL distributions**
08/03/22 If Supplier Contact and Space fields are modified on PO, GL Distributions should not drop.

Query & Reporting (QR)

- 84 497634 EZWriter template additional prompts**
07/22/22 When using an event template on a function the template no longer prompts for a function. The function id is now passed to templates for event subject documents.
- 85 514001 Currency Rate field**
07/06/22 Numeric and currency parameters on the generic report prompt now allow decimals.
- 86 516452 Re: Bank Reconciliation**
06/14/22 Added defaulting of the sub account to be a non null value when not present on the layout to avoid join issues. Update script provided to client care for the interim
- 87 518918 Reprint Invoice pulling in invoice created after as 'previous invoice'**
07/13/22 CBL150: Payment Plan Invoice has been updated.
- 88 519265 Daily Work Order Report**
06/21/22 The Daily Work Order report now works correctly when selecting more than one event on the prompt window.
- 89 520065 Invoice report naming scheme doesn't work when selecting "Email to Myself" in the Report Prompt**
08/11/22 Now when running a report with a naming scheme tied to it the file name on email attachment shows naming scheme correctly when selecting Email to Myself in report prompt.
- 90 523021 Event is pulling by function id rather than start date/time**
08/15/22 Now the Event Order Confirmation report will show function date and time on report viewer correctly when selecting report format on report prompt.

Registration Check-In (RCI)

- 91 518097 .98 Test - Checkin and Print Badge not working from Order and Event Registrants tab**
07/01/22 Reports window now properly opens when "Print badge and check in" action is selected in back office.
- 92 521774 UAT Testing : Update multiple Order status to 'Ticket Sent'**
07/21/22 The reported issue has been resolved, order status column is no more available for Edit Multiple registration order item.

Resources and Price Lists (RPL)

- 93 519463 In resources menu, button "price lists" doesn't works**
06/20/22 The Price Lists button, as well as all other buttons under the view dropdown are working correctly now.
- 94 519546 Unable to add price list item in production - URGENT**
06/28/22 The reported issue has been resolved. now I can add price list item to the price list in 98E.
- 95 520610 Re: No Sorting option in Right Click Drop Down when in Copy Price List items screen**
08/01/22 The reported issue has been resolved. now No Sorting option is available in the dropdown.
- 96 521632 Taxes are not shown nor calculated again**
07/27/22 The copy resource process was loading the add/edit window but not filtering the tax rates loading to the newly created tax resource. Because no tax rates are copied during this process - the tax rates section should be blank after copying.

Service Orders (SO)



30.98 Service Release E

By Module

From 5/24/2022 to 9/7/2022

Service Orders (SO)

97 515062 Copying Service Orders - Time changes

07/01/22 The reported issue has been fixed. I observed that set time values on copy order window are copied correctly into the new service orders.
I have tested it by changing time zone between CDT and EDT.

98 519703 Auto changing of charges in Service Order

06/28/22 The reported issue has been fixed now. The unit charge and extended charge doesn't get change after changing the respective item description.

99 519885 Adding service orders to a function issue

06/29/22 The reported issue has been resolved. Now I can successfully add service order with items to a function.

100 520266 Substitutions on resource packages does not warn when there is a shortage on inventory item

08/16/22 There is now be a Real Time Inventory Warning Window when trying to set a substitution that already exists instead of just closing out of the window without any explanation to the Client.

101 520929 Error Message When Trying to Move Order

07/21/22 The reported issue has been resolved. now I can move order successfully without any error message.

102 521595 Resource notes are doubled during the copy process / Ressourcen-Notizen werden beim Kopiervorgang verdoppelt

08/05/22 Package or resource notes do not copy when the note is already on the order item.
08/11/22 Resource notes are no longer doubling during the copy process.

104 522349 After upgrading to 98D when copying Orders some item notes are duplicating

08/04/22 Package or resource notes do not duplicate when the note is already on the order item.

105 522781 Resource Type Code is missing from SO windows since patch update

08/19/22 The resource code field now does display the code and user can search using code number hence marking it as Ready to distribute.

106 522836 Service Order Items by Resource Type

08/19/22 The column was being removed from the grid for service order items tab within events, however, it was still an option within available fields in the show column selection view. With this code change the Resource field is not displayed in available fields to select when selecting show columns within service order items tab grid.

Session Proposals (SP)

107 510560 Re: SESSIONS of different EVENT displayed

06/15/22 The Sessions are now properly filtering as per the event on Function Grid.

Task Engine (TE)

108 521531 Re: Cloud Task Engine

08/16/22 Now tokens are prevented from expiring in Cloud Task Engine.



30.98 Service Release D

By Module

From 3/9/2022 to 5/24/2022

Activities (AC)

- 1 **512287 Activity Email Notification Template Showing in Email and Merge Templates Window**
04/08/22 The field to filter out the activity email notification template now works correctly on email and merge templates.

Accounts Payable (AP)

- 2 **510546 Last Paid Date filter on Open Payables**
03/21/22 Code changes to fix last paid date filter on open payables window.
- 3 **511342 Voucher Error 22-OR42-12004 - Cannot Refund Payments**
03/25/22 Code change to fix error on receivable ledger when trying to refund payments
- 4 **513227 Issues with Voiding items in Purchase orders**
05/19/22 Skipped the validation in this process.
- 5 **513845 Voided payments are being included in emails when bulk sending remittances to suppliers.**
04/01/22 Corrected code to filter out Void Payments when prompted to exclude on the remittance email.
- 6 **514495 error message when importing e5 voucher batches**
04/19/22 Updated messaging to provide an account code or an invoice number with the error encountered.

API and Webhooks (API)

- 7 **514243 GET /api/v1/ServiceOrders/{OrgCode} ignoring multiple search terms with and/or**
04/27/22 Orders API now correctly filters when including order number in the filter.

Access Privileges/Access Management (APM)

- 8 **517362 Receiving error when attempting to copy multiple access privileges to organization**
05/18/22 Able to copy multiple access privileges to organization without any error

Accounts Receivable (AR)

- 9 **514599 AR synchronisation - wheel of death & timeout**
04/06/22 Updated AR Synchronize performance for rebuilding AR balances / last payment, unapplied cash and balances information. Skipping processes on the AR demographics that need only be run outside of the AR Synch process.

Process was successfully completed 10 minutes prior to change and 30 seconds after changes. Expected that performance in production will be consistently under 1 minute regardless of the number of accounts that are required to be updated.
- 10 **515847 30.98C upgrade, Quick Invoice and complete work order step fails due to open work orders**
04/28/22 Fixed a bug where work orders couldn't be completed when quick invoicing causing the invoice to fail
- 11 **515849 30.98C upgrade, error when invoicing**
04/28/22 Error with quick invoicing has been fixed.

Facility Booking (BS)

- 12 **511478 Problem printing calendars to PDF version using 30.98B - quarterly two spans (6 months)**
04/29/22 Fixed issue causing an error when exporting the Booking Calendar to PDF
- 13 **515320 Unable to remove space tied to an event**
05/19/22 Fixed an issue where deleting any booking while on an organization that was not numeric would throw an error.
- 14 **517841 Space dropdown stays on screen after editing bookings on the grid with more than 50 records**
05/24/22 A script error will no longer occur when opening the Space dropdown on the Bookings grid on the Edit Event window with enough booking rows in the grid so there is a vertical scrollbar, then, while the Space dropdown is still open, scroll up or down.

Contract Administration (CA)

- 15 **516271 Testing 30.98C in our TEST DB and i cant seem to add a payment plan**
05/04/22 Fixed the Payment Plan action on Contracts not doing anything.

Credit Card Processing (CC)

- 16 **507920 AR138: Adjust parameter to allow string + wildcarding**
04/21/22 AR138 parameter now allow for wildcard for order account, event ID and pay number.



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By Module

From 3/9/2022 to 5/24/2022

Credit Card Processing (CC)

17 516473 Declined Cards and Auto Apply Vouchers Issue

05/19/22 Fixed issue where auto voucher number used would be updated incorrectly when a credit card was declined.

CRM (CM)

18 512196 Merge Accounts not retaining AP demographic information

04/04/22 The original AP Demographics record will no longer delete the original AP Demographics record of the merge from account and allow users to move this information manually post merge.

19 513660 Issue with Legal Name Updating

04/19/22 On Contact the automatic update functionality of Legal Name has been removed and now the Legal Name will update only after clicking on the Save/Ok Button. Legal Name is configured based on languages in the database. So, user might view different format for different languages this is how the system is configured. Another important part is that if the User wants its own personalized Legal name, then user can make changes to the field. If user wants it as per the parameters, then user can delete the personalized legal name to have the default functionality back.

20 517441 Addressline 6 missing on alternate addresses

05/17/22 Address Line 6 is now available on the edit layout for an alternate address on organizational accounts and individual accounts. There are now 10 address labels available as well.

Document Management (DM)

21 511885 Email Attachment - Document Headings not displayed correctly

05/03/22 The heading descriptions now correctly display on document attachments.

22 513539 PDF Email Issue

04/19/22 There is no longer an additional copy saved as a wrong type when exporting a report from the report viewer when there is a flag of save in folder.

23 514567 Cannot Drag and Drop Files into the Document Folders

04/13/22 You are now able to drag and drop documents successfully for a registrant when coming from Order Registrants and Events.

24 515291 Attachments in with heading/subheading in Requisition when converted to PO are not bringing across the heading/subject

05/19/22 Copying requisition documents to purchase orders now uses the copy 2 process so it works like other copy areas in the system.

25 515596 Importing documents from events pop up window

05/13/22 Clicking the Import Document(s) action from the Event peek tooltip will no longer close the peek immediately. It will stay open until 1 or more documents are selected or the cancel button or X button is clicked on the file dialog.

26 517090 event documents

05/13/22 A user is now allowed to undo a check out of a document that has a header record checked out and no details checked out.

Event Management & Coordination (EM)

27 511374 Occurs On/Within Field Not Filtering Correctly in Events Screen

05/19/22 Fixed the relative date occurs on/within search filter so that it now filters events correctly.

28 512455 MOVE CLOUD - Error modifying an event profile

05/19/22 Fixed an issue where modifying an event profile could throw an error.

29 517319 Time is defaulting and not updating

05/18/22 Out Time and In Time is now defaulting and updating correctly and is now consistent with how Start Time and End Time defaults and updates.

Event Registration & Housing (ER)

30 510807 Error when trying to add registration items to registrant in kindergarten conferencer

05/19/22 Performance should now be improved when using current sold columns on the event functions grid.

31 512134 Issues with the new Waitlist capacities starting from .97/98

04/30/22 Fixed issue where waitlist and sold out would be triggered for the other registrant type options when only one capacity was left and you could not switch to the other types.

32 513881 "Hide functions with past end date" does not work on registration

05/19/22 Reported issue has been fixed, the Function with past date are no more showing on Public Registration.



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By Module

From 3/9/2022 to 5/24/2022

Event Registration & Housing (ER)

- 33 514554 30.98 Registration Configuration Upgrade Issues**
05/19/22 Fixed issue where function group sections were no longer required.
- 34 514791 v30 error - searching registration functions**
05/19/22 Registration function search will now work properly.
- 35 514946 EV870_IndividualAccountLastNamelsRequired when requiring registering for others**
05/19/22 Fixed error when saving administrator data when Registering For Others is required.
- 36 515049 Registrant Profile Grade Level field displays ID vs Description**
05/19/22 Current Grade Level field will now show description instead of ID in the Order Registrants grid
- 37 516363 Save Draft - Registration**
05/20/22 The Save Draft issue has been resolved successfully. Registrant are now showing as per the sequence they have been added on the order.
- 38 516405 Registration Function Conflicts**
05/04/22 Fixed issue where function conflicts would not function properly for radio button controls.
- 39 516772 Event Function Error**
05/12/22 Verified the Copy Function issue and found the Copy Function Row action is working as intended without any issues on an Event.

Exhibitor Portal (ESC)

- 40 511750 EXP contact dropdown fields not listing contacts in alphabetical order**
05/06/22 The Exhibitor Contact dropdowns in Exhibitor Portal now display in alphabetical order.
- 41 514750 Dropdown list out of order**
05/17/22 Exhibitor Categories will now display in the Exhibitor Portal in the same order as selected and saved in the Exhibitor Category Section Configuration.
- 42 515652 EXP phrases not translated in French**
04/22/22 The two phrases mentioned in the case are now able to be translated.
- 43 515901 EXP phrase not translated in French**
04/22/22 Phrase is now able to be translated.

Exhibitor Service Center (ESV)

- 44 517352 Repeated issues with ESC - CRITICAL**
05/19/22 You can have multiple exhibitors with the same booth number on the same event as well as on the same function within that event.

Exhibition Management (EXH)

- 45 513185 Link exhibitor status and probability of winning are not separable in search at the exhibitor level.**
04/01/22 Searching by Exhibitor Status will no longer auto-fill the Win Probability search filter.

General Accounting & Analysis (GL)

- 46 513190 Error**
05/19/22 Updated GL Accounts save and load process to ensure the default effective fiscal period would be the appropriate constant (000000) rather than blank or null
- 47 513713 .98B GL Dimensions - Main GL Account not set for Membership Deferred Revenue on invoice**
03/30/22 Main account (deferred or recognized GL account) not being populated for membership deferred revenue entries when GL dimensions are enabled. The deferral account is stored in the Main Account field and the Recognition in the alternate GL account field. This was not an issue on the recognition entries
- 48 514513 Journal Entries list window splitter does not work after script error loading Year - Period search filter field**
05/19/22 Loading the Journal Entries list window no longer causes a script error loading Year - Period search filter field. The splitter will now work correctly.
- 49 516690 Cannot edit/update recurring journal entries**
05/19/22 Corrected issue saving a recurring journal entry with any amounts.

Global Behavior (GWB)



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By Module

From 3/9/2022 to 5/24/2022

Global Behavior (GWB)

50 512120 Formula fields seems broken since .98B - all our reporting view using formula fields

05/19/22 All custom formula fields for the Service Order Items (5) subject will now work correctly after following the steps listed.

- 01. Upgrade to the latest 30.98hotfix (or run the SQL statements below and reset the server cache)
- 02. Adjusting the formula to use the newly added fields: "Order Status Code - Order" and "Order Item Phase Code".

Make sure to use the code in the formula conditional logic and not the description.

Replace
 {Order Status - Order}
 with
 {Order Status Code - Order}

Remove description in the conditional. Always check the code "A" or "C" or "V" etc.

See formula field: "DEV Debug with ORDER STATUS CODE field in conditional"

Replace
 {Order Item Phase}
 with
 {Order Item Phase Code}

Remove description in the conditional. Always check the code "1" or "5" etc.

"DEV Debug with ORDER ITEM PHASE CODE field in conditional"

As a workaround until the latest 30.98B hotfix is applied (or 30.98C when it is released), run the following SQL Statements and reset server cache and the "Order Status Code - Order" and "Order Item Phase Code" fields will be available on the Service Order Items (5) subject

```

INSERT INTO ZZ920_COLUMNS VALUES
(419191,9119,363,'COMP_ER100_NEW_STS','VARCHAR',2,NULL,'N','N',NULL,'Order Status
Code',NULL,'A','N','N','ERIC','ERIC','2022-03-31 13:29:07.090','2022-03-31
13:29:07.090',NULL,NULL,NULL,NULL,NULL,NULL,'N',NULL,NULL,NULL,'N','N','Y',NULL,'N','Y','N','Y',
N',NULL,NULL,8497,366039,0,0,NULL,NULL,NULL,NULL,NULL,'N',NULL,6,NULL,NULL,'N',NULL,'N',NULL,N
ULL,NULL,6,'Y',NULL,NULL,NULL,NULL,NULL,NULL,0,NULL,NULL,NULL,NULL,'Order Status
Code','N','N',NULL,'N',NULL,'Y','N')
INSERT INTO ZZ920_COLUMNS VALUES
(419192,9364,266,'COMP_ER101_PHASE','CHAR',1,NULL,'N','N',NULL,'Order Item Phase
Code',NULL,'A','N','N','ERIC','ERIC','2022-03-31 13:31:07.613','2022-03-31
13:31:07.613',NULL,NULL,NULL,NULL,NULL,NULL,'N',NULL,NULL,NULL,NULL,'N','N','Y',NULL,'N','Y','N','Y',
N',NULL,NULL,8499,364481,0,0,NULL,NULL,NULL,NULL,NULL,'N',NULL,6,NULL,NULL,'N',NULL,'N',NULL,N
ULL,NULL,6,'Y',NULL,NULL,NULL,NULL,NULL,NULL,0,NULL,NULL,NULL,NULL,'Order Item Phase
Code','N','N',NULL,'N',NULL,'Y','N')

```

```

INSERT INTO MM031_OBJECT_COLUMN VALUES (123863,4,419191,'2022-03-31
13:32:35.653','ERIC','2022-03-31
13:32:35.653','ERIC',0,0,NULL,"0","N',NULL,'N','N','N','N','Y','Y','N','N','N',NULL,'N','N',NULL)
INSERT INTO MM031_OBJECT_COLUMN VALUES (123865,5,419191,'2022-03-31
13:35:14.887','ERIC','2022-03-31
13:35:14.887','ERIC',292,0,NULL,"0","N',NULL,'N','N','N','N','Y','Y','N','N','N',NULL,'N','N',NULL)
INSERT INTO MM031_OBJECT_COLUMN VALUES (123866,5,419192,'2022-03-31
13:36:23.030','ERIC','2022-03-31
13:36:23.030','ERIC',0,0,NULL,"0","N',NULL,'N','N','N','N','Y','Y','N','N','N',NULL,'N','N',NULL)

```

51 514161 Excel export excludes results when grouped on empty value

05/19/22 Exporting will work correctly when grouping on blank values.

52 515375 user interface - req approval - OK/SAVE & Issue/Cancel - disappears

05/04/22 Added a software fix to try and prevent the issue with Page Footer disappearing from happening.

53 516308 Cannot export grouped view in GL Transaction Inquiry

05/04/22 Corrected issue with collapsed group rows not exporting as collapsed.



Global Behavior (GWB)

- 54 516469 GL Transaction Inquiry Export not respecting grouping levels**
05/19/22 Corrected issue with collapsed group rows not exporting as collapsed.
- 55 517882 Logout : OIDC Error while logging out Usisample**
05/19/22 Does not observe error after sign out

Mail Merge - Documents (MG)

- 56 511244 Numbered and Bulleted List margins are not properly aligned**
03/17/22 Numbered and Bulleted list margins are now properly aligned.

Email (ML)

- 57 513923 Template not working**
03/29/22 Now when having multiple tables in the details section on an email template the correct information will be shown in each table and no longer be merged together.
- 58 514004 CANNOT send Document from Space**
05/03/22 Now you can send a document from a space successfully without error.
- 59 514954 email template does not fill in wildcards**
05/19/22 Wildcards are now being filled in with the appropriate data
- 60 515042 Merge field not working**
04/20/22 Fixed an issue preventing the "All Booths" wildcard from working correctly when sending emails to an exhibitor
- 61 516710 Cloud Migration UAT: Error when sending test email from email templates**
05/23/22 You will no longer receive an error when sending test email from a template when you do not have a shell word document.

Ungerboeck Phone (MO)

- 62 513738 View on Mobile does not allow scrolling through the entire list**
04/14/22 Now on Ungerboeck Mobile you can scroll through multiple pages on a view where all results will show.

Membership Services (MS)

- 63 517185 Prepare Membership Order 'Save Unsuccessful'**
05/23/22 Error has been fixed.

Destination Management (DMO) (MT)

- 64 514436 Attempts to delete bulletins result in an error**
04/25/22 Now you can delete a bulletin with related approvals successfully without error.

Event Opportunities (MTS)

- 65 514318 Event opportunity error**
05/19/22 Fixed an issue where adding or editing event opportunity dates would throw an error.

Notes (NOT)

- 66 512282 Automatic Note Class Sensitivity**
04/19/22 Now when the Account Rep is changed the sensitivity set on Account Rep Change note class will show correctly on automatic note created.

Online Event Ordering (OEO) (OEO)

- 67 511188 PATCH Error with payment method for Nike OEO**
03/18/22 The error that was occurring when users had an OEO payment configuration set up with only the option to Pay Later has been resolved. Users should be able to select the Pay Later option on the payment page and submit the order successfully.
- 68 513928 Ungerboeck - PATCH Nike OEO Packages**
03/25/22 Users should notice improved performance when loading items in public apps like OEO, OSB, and EP.

Operations Portal and Tasks (OPP)

- 69 514146 Error Message displaying when editing a task step in Task Sets**
04/18/22 Error where users were unable to add or edit a Task on a Task Set when the URL field was not set on the page layout has now been fixed. Users should be able to add/edit Tasks without error.



Operations Portal and Tasks (OPP)

- 70 515195 Operational Tasks - Error Message when trying to change due time using edit multiple**
05/22/22 Users should no longer get an error when editing internal tasks on the Edit Multiple window. Users should now be able to edit multiple internal type Tasks from a Task Set with exact due times.
- 71 515479 Re: Task gets unassigned to the user whilst changing the status**
04/21/22 Users should no longer receive an error in the Operations Tasks application where the task 's assigned account would un-assign when the task's status was changed.

Online Space Booking (OSB) (OSR)

- 72 506544 Tax Resource is not using Alternate Description in OSB**
05/18/22 Fixed tax resources to now display alternate descriptions (when defined in OSB Language configuration) when viewed from the My Events page in OSB.
- 73 514546 [Jaarbeurs] UDF in OSB is not translated**
05/19/22 UDFs on the Event Details page in OSB now display the correct alternate text for the selected dictionary.
- 74 514758 Multiple transactions occurring when one payment made through OSB+OP**
04/07/22 Updated a flag for batch electronic payments and It should have one control number for all the ar020 now for angular apps.
- 75 516598 CVV field on OSB integrate credit card payment section does not accept "0" as a leading digit when 3 characters are used.**
05/16/22 CVV code for Credit Card Transactions now accepts leading zeros.

Performance (PF)

- 76 497322 General Performance Issues**
05/19/22 Function checkin will now open faster with added indexes.

Campaigns & Imports (PJ)

- 77 510246 Mailing from Campaign to multiple accounts - All created word documents have the first recipient's data**
03/22/22 Now when sending Direct Mail from a Campaign to multiple accounts the document data will show the correct account information.

Payment Plans (PP)

- 78 517408 98C - when Editing Multiple Payments we are getting a message display that prevents the option working**
05/24/22 Error with Edit Multiple payments has been fixed. Due SQL error it was not selecting the rows correct for edit multiple.

Personnel Management (PR)

- 79 516283 Darmstadtium - Workforce Scheduling - Items with unallocated hours are not displayed in red**
05/03/22 Row highlight [in red] occurs now when there are fractional values > 0 and <> 1.

Purchasing (PU)

- 80 511787 Error received when receiving zero cost PO's**
03/30/22 Made code changes to fix the issue when receiving zero cost items with variance.
- 81 514975 Express License omission in Purchasing Module**
05/19/22 An express Purchasing user can now access the Add Items from Requisition action.
- 82 515594 Error prompt when try to cancel PO "Ungerboeck.Common.USIBusinessException"**
04/26/22 Loading the Journal Entries list window no longer causes a script error loading Year - Period search filter field. The splitter will now work correctly.
- 83 516169 Converting a req -> PO (note cannot be blank red screen error)**
05/17/22 The issue has been fixed. Now fully approved Requisitions can be converted in Purchase order without any error.
- 84 516177 Unable to cancel PO item**
04/29/22 Removed validation for requisition status when cancelling po item
- 85 516364 Converting a req -> PO (required date later than today red screen error)**
05/20/22 The issue has fixed. No error will show while converting Requisitions to PO even if required date later than today.



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By Module

From 3/9/2022 to 5/24/2022

Purchasing (PU)

86 516551 Supplier Reference Requisitions/Purchase Order

05/20/22 The issue has fixed. Now udf and multi value udf field will get copying while creating po from requisition.

User Setup/Password Reset (PW)

87 512276 Send User ID Email Not Working

03/25/22 Send User ID Email Now works correctly

Query & Reporting (QR)

88 508517 Accounts Payable Report: Checks voided after the as-of date appear on report and should not

03/30/22 Check voided after as of date now is not included on the accounts payable report.

89 510131 Report Prompt not loading saved View settings

03/30/22 The save in folder now correctly respects views for proforma report prompts.

90 514444 Report .pdf sizing off for printing

04/27/22 The landscape page orientation is now passed through correctly when printing a report.

91 514616 Issue trying to email the Deposit Invoice

05/19/22 When sending an email to a payment plan, abstract, or exhibitor contractor that have a duplicate key across multiple organizations, it now will make sure to only use the organization you are in.

92 514799 F&B Plan reporting issue/inconsistency - textbox combobox issue

05/12/22 In USIComboBox.endEdit() method, for Single Select Text Box mode, now checking to clear out a previously selected item if the user has free-form typed text in the input text box that is different from the previously selected item from the drop-down.

93 515180 Payment Plan Invoice Attachment Report Issue

05/19/22 The Standard CBL151 Payment Plan Invoice Attachments report has been updated to not add the cancelled item totals to the Invoice Order Detail.

94 516376 Cloud Migration UAT: Error message when running invoice report

05/16/22 Issue has been fixed. The error message for the report source missing the file now displays correctly when running the as an invoice report.

Resources and Price Lists (RPL)

95 513528 Able to double schedule resources that are already scheduled within the same order (1)

03/25/22 Double scheduling has been fixed. You can no longer double schedule resources that are already scheduled within the same order.

04/20/22 System functioning as expected. You can no longer double schedule resources already scheduled on the same order. SQL query now accounts for Ungerboeck Midnight when querying existing orders.

97 513789 PATCH Copying Resource Types

04/01/22 Users should now be able to copy Resource Types without the Resource Code field being required.

98 515229 Re: Pricing calculation issue

05/19/22

System Administration (SA)

99 508287 Authorization concept: "Add from floor plan" link cannot be hidden

05/23/22 The "Add from floor plan" link can now be hidden with a field restriction on the exhibitors subject.

100 509954 Replace User ID operation fails.

05/24/22 The Replace Userid is now working correctly without any error.

101 514779 Able to save a UDF to TXT_51

05/19/22 The Add Custom window will no longer default the database field to an invalid value such as TXT_51 or AMT_31 or DTS_21

102 515037 Adding new custom field : a formula

04/26/22 Adding a formula custom field now correctly validates the subject which opens Insert Field for user to select wildcard.

Service Orders (SO)

103 505946 Actual items should be 0

03/24/22 Error was caused by using the Extended Charge field as a divisor for Calculating Charges, and dividing by zero is not possible. Error has been resolved, and users should now be able to set the Extended Charge value to zero on the Service Order Actual Items window.



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By Module

From 3/9/2022 to 5/24/2022

Service Orders (SO)

104 510784 Issue while deleting service order items

04/08/22 When choosing 'No' for the following question, 'The order does not contain any ordered items, actual items or payments. Do you wish to delete it?' the service order item is not deleted.

105 514678 Resource Type Description Column/Field Missing from Add Service Order window/Items grid

05/20/22 The reported issue has been resolved. The resource type description column has been added successfully.

106 515414 Update Service Order Issue (auto booth charging issue after assigning multiple booths to exhibitor)

05/24/22 Auto-Booth Charging will now work correctly when placing an exhibitor in a booth after previously placing that same exhibitor in multiple other booths of different sizes with the same resource.

Session Proposals (SP)

107 512343 Error when copy of Session Proposal Configuration

05/19/22 Errors are no longer thrown when copying a SPA config from an event.

Ungerboeck Spreadsheet (SS)

108 511766 EBMS Reporting Issue - Drill down function

04/06/22 Resolved issue where the account on the URL was being disregarded when coming from the addin. The GL period detail window will now accept the GL account from the addin into the search filter when provided

Task Engine (TE)

109 513420 Random person receiving task email

04/26/22 Now the email values for task engine are correctly loaded for saved send option when processing a scheduled task.

Work Orders (WO)

110 513362 Closing Work Orders

03/23/22 Users should now be able to select more than 2 service orders and right-click to Complete Work Orders from the Event > Service Orders grid. The error where not all work orders were closing properly via this workflow has been resolved.

111 515144 Item notes

05/04/22 Filtering work order items by 'note class' with existing work order items that have notes is working correctly.

Dashboards (XD)

112 501225 headers in grid view of Chart/Pivot report show database fields

05/13/22 The detail view that shows the raw data for a chart grid, will now correctly display the column names instead of the database descriptions (example: EVxxx)

113 502300 Drill down on dashboard showing field code instead of headings

05/13/22 Column no longer shows "CSTART_MONTH_YEAR"

05/19/22 The detail view that shows the raw data for a chart grid, will now correctly display the column names instead of the database descriptions (example: EVxxx)

115 504544 Table Headers appear in Gadget Dashboards (INC4526697)

05/13/22 The detail view that shows the raw data for a chart grid, will now correctly display the column names instead of the database descriptions (example: EVxxx)



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By Module

From 11/15/2021 to 3/9/2022

Activities (AC)

- 1 499447 A feature that has disappeared between versions**
02/22/22 You can now view documents added to activities created on Exhibitor and Service Order contexts.
- 2 505720 EBMS Prod upgrade v30.97C issue: 09: File assignment error in Event Activity Reminder and Template discrepancy from email received(INC4522682)**
01/14/22 Activity links no longer throw an error when they do not have a style tag in the html source for Activity Email Notification Template.
- 3 507095 Checklist task not calculating correct dates**
01/25/22 Now due dates of activities imported from checklists will be calculated correctly.
- 4 509819 Email Template Links Not Working**
02/11/22 The activity email notification template links now build correctly when they have the actual application url in the html instead of *Application URL* wildcard.
- 5 509850 USI Email Template issue**
02/21/22 Now the correct information will display in received email when a change is made to template body on send email window.
- 6 512219 [Ver - 30.98 & 30.99] In edit event window under contract tab when adding the activities --add checklist an exception is thrown when trying to add the checklist.**
03/08/22 Going forward, adding an activity checklist under the contracts tab will not throw exception.

Account Portal/Online Account Management (ACM)

- 7 492073 Account Management Config - VAT field displayed for UK accounts**
12/20/21 The VAT number field will no longer be displayed when selecting an EU member country in the Country field dropdown for Account Management Configuration Sign Up.

Accounts Payable (AP)

- 8 506957 Error voiding unpaid voucher**
12/27/21 User should no longer receive error when voiding a voucher.
- 9 507346 External Invoices: Account (Supplier) field is picking up non-Supplier/Personnel Accounts**
01/28/22 The matching supplier logic will no longer look to suppliers with inactive AP demographics records OR any record that is not designated as a Payables / Supplier account
- 10 508678 [M2201 0416] URL voucher link issue**
02/14/22 Users can no longer access vouchers if they don't have access to vouchers. Also denied access by department to the reading pane of a voucher.
- 11 509053 Invoice Amount incorrect on GST line when importing voucher**
02/15/22 Correction to importing vouchers with many distribution lines. Possible workaround exists by importing the taxable amount explicitly as a separate column from the distribution amount and tax amount.
- 12 509182 Browser Refreshes when clicking Payment Instructions link in v30 on Posted Voucher**
01/27/22 Error with site refreshing when clicking on "Payment Instruction" link has been fixed.
- 13 510544 Cloud Migration UAT: Payment Processing - USI view - date defaults from last year**
02/24/22 Now Net Date filter will be defaulted as = Current date + value set in org parm AP002

API and Webhooks (API)

- 14 500880 cannot add order items with api if there is a real-time inventory check warning**
12/14/21 Allow the api to ignore the real-time inventory warning and to override the RTI stop error.
- 15 508508 Webhook Issue - Having multiple Webhooks on Order Updated causes duplicate request bodies to be sent**
01/25/22 There was some shared state between the threads used to process (multiple) async WebHooks. This caused them to overwrite each other's data giving unpredictable results depending upon the timing of the events. Updated to send a copy of the request to the webhook so they are each working with separated data.

Accounts Receivable (AR)

- 16 507611 Batched CC transactions not appearing when trying to make a deposit in UAT 30.98b**
01/10/22 Feature assignment will be correct after the next cut hotfix for 97/98 until then, the user can access this button if they change their role - Features access to allow access to Administration - Cash Book feature.
- 17 508610 Order detail tab is blank in the Invoice Events window (AR2245)**
01/28/22 Fixed issue of the reading pane on the Invoice Events and Invoice Jobs window not displaying correctly.



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By Module

From 11/15/2021 to 3/9/2022

Accounts Receivable (AR)

18 508669 M2201 0386Change A/R demographics

02/24/22 Specific Accounts that have Orders without Events were being caught when changing Tax Registration Status. This has now been fixed and all Accounts and affiliated items should be updated accordingly.

19 509009 Detail Tax Rates: v19 Gap - Retire flag is not available

02/11/22 Retire Flag on detail tax rates window is now available.

20 512477 PROD 98! M2203 0201 Cant choose bank at Cash Receipt Entry Batch

03/09/22 User can now select bank account on cash receipt entry batch on both cash receipt entry window and on the post cash receipt batches when create deposit checkbox is checked.

Facility Booking (BS)

21 496034 Conflicts management

02/06/22 Same event conflicts are now processed separately than outside event conflicts.

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

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

22 504549 Calendar Notice and Notice Categories Issue

12/30/21 Fixed an issue that would cause daily notices to not be displayed when the calendar's intervals did not include midnight. fixed in .98C and .97E

23 506870 The split to daily booking function errors

02/22/22 When splitting bookings across several days, the booking row that is used to "Split By Day" will now have the save pencil display, and the existing row will now save correctly with the proper dates.

24 508002 Observe System Null reference exception while creating event

01/11/22 Fixed error when adding a new event.

25 508003 Getting Null Reference Exception while performing Copy Event

01/11/22 copy event functionality working as expected without any error

26 508666 [Ver - 30.99] Not able to add the booking in add event window

01/18/22 'Add Event' and 'Add Booking' functionality will work as designed without any pop-up validation errors now.

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

27 511614 Issues with moving Event booking

03/09/22 Users should now be able to Move/Edit an Event Booking without any errors. There was an issue with checking the Organization Code of connected Orders which should now be resolved.

28 511624 [Ver - 30.97, 30.98 & 30.99] In Edit layout of Export to Excel (Calendar of Booking) window, the fields are not displayed in window even they are selected the fields that are not visible are - Subheading, bold header & sub-header .

03/02/22 On Export to Excel window the unavailable fields are no longer present on, as per the requirement . So completing the completing the case.

Contract Administration (CA)

29 502648 Vertragsstatus nicht editierbar

12/08/21 testing completed

30 505953 PATCH 30.98B : Unable to Revise the Contract when increment Revision is checked

12/20/21 Fixed an issue where the V30 application would hang or freeze when revising a contract to a new firm status and incrementing revision when the audit log tracker for contract status change was enabled.

31 507961 Error when trying to run contracts

01/19/22 You can no longer check in a word merge document that has revision tracking turned on.

32 508224 Ungerboeck - Add Conversion for New Contracts Feature

01/14/22 A new feature has been added for Ungerboeck for Venue - Enterprise customers that will allow express users to view contract information.

Cash Book (CB)



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From 11/15/2021 to 3/9/2022

Cash Book (CB)

33 499421 Make Core Dimensions Available on Bank Statement Detail Records

12/16/21 Core dimensions value, book control and department are now available on bank statement detail.

34 505907 Cannot Edit a Cash Transaction Amount attached to Deposit

01/10/22 Cash Transaction-

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

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

35 509592 v30 Cloud Migration UAT: Cashbook issue: Zero dollar deposit batch creates Errored journal entry

02/04/22 Code change to get rid of validation on journal entry detail amount which comes from distribution that sets the error in this process.

Credit Card Processing (CC)

36 506993 OSB and Registration: The Credit Card First Position is not working in public apps but it does work in back office.

01/31/22 Fixed an issue where the OSB application would incorrectly route users to the Confirmation page when they were on the payment page and attempted to save but failed due to a back end business rule for payments.

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

CRM (CM)

37 498987 LOGO (really PIC) of SPEAKER not appearing everywhere

02/23/22 Reference - Session Contributors has been removed for selection from all designation layouts except Abstract Accounts. Logo Image should now show correctly in all cases if already uploaded.

38 503065 Account Hold Text Sticks After Accessing Account On Hold

01/11/22 Account hold text will not show for accounts that are not set on hold.

39 507171 account issue - Market segment

02/11/22 Market Segment will now show on the edit account window for Campaign Results.

40 507542 [Ver- 30.97, 30.98 & USI Sample] While adding the Account, In city drop down menu city name list is not populating

12/28/21 Go to <https://usisample.ungerboeck.com/app85.cshtml> -> Put User name as - sayyed.umair78@ungerboeck.com Password as- Umair@786 ->Go to account -> Go to add account -> In city drop down city name list is not populating

41 508039 M2201 014598.B Change account name

02/01/22 You can now update an Account name without receiving an error message.

42 508541 V30 System error when retrieving Contacts details

01/28/22 Now a contact with multiple related accounts/contacts will load correctly and show the correct Last Account Activity date and time on the Account/Contact window.

43 508564 Bug with time input field on Opportunity

02/01/22 Typing into a null time mask for the 1st time when using military time will no longer lose the 1st number typed

44 509426 Address details and Type are not automatically updating when moving an Individual from one company to a different company - TEST v30.98

03/03/22 Now when changing the Company on a contact the address of the new company will be synced to the contact correctly.

45 509427 "Set as the Primary Relationship" not working - TEST v30.98

02/15/22 Now when selecting Set as the Primary Relationship on a Contact it will update to the Primary Account correctly.

Dictionary (DCT)

46 507040 Re: Error when trying to do a modification in the dictionary

01/19/22 The USI-defined views on the Translate Phrases subject will no longer load by default.

Document Management (DM)



Document Management (DM)

- 47 501292 Account Template Document (Convention Center Sales Proposal) not preserving formatting**
12/09/21 When merging a template document with bullet points the formatting is now preserved.
- 48 502114 Ungerboeck - Error when adding a document to a Task Set**
02/03/22 You can now add document to a task from a task set without issue.
- 49 503648 Vectorworks (CAD - .VWX) Files**
12/27/21 You can now import documents that are not of the original file classes allowed extensions including .vwx files.
- 50 504761 Ungerboeck - Events DC Template Documents Merge Fields**
02/15/22 Template document font controls are now respected on an added template.
- 51 505436 Ungerboeck: Document Import Error Message**
12/27/21 You are now able to drag and drop a PDF document and import successfully without error.
- 52 507590 Allow web add-in to write to roaming config**
01/17/22 You can now access the Save Add-In Token from Tools in User Settings. The action for generating an app access token is no longer restricted to SSO or Windows Authorization.
- 53 507618 Import von Dateien funktioniert bei Registrierungsauftrag nicht**
02/15/22 You can now import documents as well as drag and drop for documents on Registration Orders. Documents will be saved successfully in documents grid on Edit Registration Order window.
- 54 508670 can't pull out an invoice**
01/20/22 You will no longer receive an action error involved with retrieving the document information caused by bad document data. There is now a conversion step to correct PDF's with bad checked out status on the versions grid.
- 55 510289 Unable to import .SKF files using Import or drag and drop**
02/11/22 Files with an .SKF extension can now be imported into the Documents grid via import document and drag and drop document feature.

Event Portal (ECP)

- 56 505669 EPP: Function Schedule Links Are Not Opening Participant List**
01/19/22 You are now able to open Event Portal function schedule links with "-" in the description.
- 57 506848 Tasks View - When clicking on event hyperlink blank event opens**
12/21/21 Fixed the event hyperlink on Tasks. It now shows the event info on hover and opens the Edit Event window properly now on click.
- 58 506949 Event Portal Tasks - Unable to add a Document to a Task**
12/27/21 There is no longer an issue when adding a document to a task on a task set.
- 59 507492 Event Portal Not Loading: License Violation Error**
01/17/22 Ungerboeck Flex customers will no longer receive a license violation error when trying to access Event Portal.
- 60 512040 Ungerboeck - [Current] Getting error while adding task set to event.**
03/02/22 Getting error while adding task set to event
Steps to recreate:
 - 1) Goto event id - 54670
 - 2) Navigate to task tab
 - 3) click on Add task set from Add dropdown
 - 4) select any task set
 - 5) click on continue
 - 6) Throws error messagePlease do find attached document for the reference.

Exhibition Floor Plan (EFP)

- 61 507643 Re: M2110 0455wrong description area resource in Floorplan**
02/07/22 After discussion with Eric Lowe, decided that since the Resources in the Booth Resources drop-down lists have already been filtered to the Event's Default Exhibition Order Price List, we can display that Price List's Item description instead of the Master Resource's Description

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



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Exhibition Floor Plan (EFP)

62 508290 Error message when splitting booths
03/08/22 An error will no longer on the split booth window with customized locale settings.

Without any error able to perform Split Booth action

63 511725 Exhibitor Orders Total not auto refreshed
03/04/22 The Orders Total column on the Exhibitor List in the Exhibition Floor Plan is now correctly refreshing after clicking OK on the Manage Order window.

Event Management & Coordination (EM)

64 503302 Copy Notes From Event
11/17/21 The Advanced Search Events window now opens correctly when expanding Notes to full view window and selecting Copy Notes From Event from Tools.

65 503746 Mobile Calendar is not displaying Events Correctly January 2022
01/17/22 When accessing the Event Calendar in Mobile the correct event will now show for the specific date selected.

66 507811 Error Message Restore Event (98B)
01/21/22 Javascript error will no longer occur after restoring an event.

67 507928 Edit Multiple -Error when editing Parent Event on Events
01/27/22 There is no more errors observed for edit multiple action on event grid.

68 510755 Event Calendar Blank in latest version
02/17/22 Event calendar now loads smoothly, Issue is fixed in .98C, .97E, .97D hotfix.

69 510765 Calendar of Bookings not loading up on latest hotfix
02/17/22 Fixed loading of calendars, now they load smoothly. case fixed in .98C, .97E, .97D hotfix.

70 511056 Restore Event Error
02/18/22 Fixed an issue where restoring an event could throw an error.

71 511341 [Ver - 30.97, 30.98 & 30.99] When exporting the Event Calendar to PDF & Excel format whatever the Subheading is given in input window the same is not displaying in output PDF or Excel file
03/07/22 Subheading is respecting the input data. Verified this in all versions and found issue is fixed as per the requirement so completing the case.

Expense Reports (EPR)

72 511376 Ungerboeck - Need Conversion for New Feature - Expense Reports
02/24/22 A new feature has been added for Ungerboeck for Venue - Enterprise customers that will allow express users to add, edit and view expense reports.

Event Registration & Housing (ER)

73 507286 Public User has accessed and made changes to another unrelated users account
01/19/22 Added a special session id for public registration that persists across browser tabs and instances.

74 507739 Registration Performance Issues - Event 5007
01/28/22 Decreased loading time between the registration payment page and other pages by 43 percent.

75 508418 Unable to update Capacities
01/26/22 Current sold will now properly reflect based on item level capacities

76 508870 Housing section filter search fields not shown/expanded by default on Registration Order Item window
02/07/22 The housing section will now be expanded by default on the Add Reg Order Items window.

77 509802 Can't Add Additional Registrant
02/04/22 Additional registrant can be added without required field check of the payment section.

78 511595 Error Received when sending email
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

79 511899 v30 back office Registrations - products and Services - no products and services display despite none being retired.
03/05/22 Fixed issue when selecting products and services for registration orders.

Exhibitor Portal (ESC)



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Exhibitor Portal (ESC)

- 80 507850 ESC - The action button 'Return to Exhibitor Portal' is missing.**
02/14/22 "Return to Exhibitor Portal" button now displays correctly on SOP confirmation page.
- 81 509109 Unable to login to Onsite Portal Link**
03/02/22 Admin users will now be able to log into the Onsite Sales Portal when only allow exhibitors on the event to sign in is checked on the Exhibitor Portal Config.

Exhibitor Service Center (ESV)

- 82 503008 In ESC the time it takes to open some items is poor compare to others**
02/02/22 Loading spinner added to the item tile -> item details window load and improved item details modal loading time.
- 83 503477 Copy ESC created a new one with multiple Deadline dates**
12/22/21 ESC configuration copy process no longer copies event level only deadlines.
- 84 505482 Adding a service order for an Exhibitor**
12/07/21 When choosing "Use Organization account" on the individual account prompt, the account on service order will have organization account value and not the order account value. The account on the Add Service Window will be reassigned with the organization account.
- 85 507505 ESCV Bill To Gender and Prefix language not working**
02/15/22 ESC now filters bill-to/ship-to prefixes by gender and displays genders in the selected language.
02/17/22 ESC now filters bill-to/ship-to prefixes by gender and displays genders in the selected language.
- 87 508471 Exhibitor Service Center - Front End-Event Logo & Dates not shown -V98.A & B**
01/26/22 ESC event name and dates now display correctly.
- 88 509761 ESC - Functions appear in disorder**
02/21/22 Function in the dropdown on the SOP Options page now display in ascending start date order instead of alphabetical.
- 89 509762 ESC Front End in .98B - ECS Deadlines (date format and time)**
02/11/22 The deadline date format displays correctly.
English (Weekday/Month/Day/Year)
German (Weekday/Day/Month/Year)
- 90 510547 ESC - error message "Problem Saving. Rule MM090_FormSectionBeingUsedRowKey:" when delete an ESC config**
02/21/22 The ESCV configuration now deletes correctly.
- 91 510745 ESC - When new Exhibitor sign up and place order, no Exhibitor is assigned to the ESC order**
02/25/22 Signing up at checkout now correctly associates the order with the newly created exhibitor.
- 92 510941 Issue with document type in the ESC config**
03/09/22 Now you are able to upload file successfully. There is now a safety check when a document ID is called for that does not exist.
- 93 511768 ESCV Saved Cart column on Exhibitors Tab is wrong.**
03/03/22 Saved cart total now displays correctly on the grid.

Exhibition Management (EXH)

- 94 507726 Exhibitor Status**
01/10/22 Customers will now be able to update exhibitor statuses when the booth order statuses are set to closed or cancelled.
- 95 509596 Add Booth Order - Adding order items closes when saving**
02/15/22 The Service Order window will now remain open when the user clicks the "Save" button when coming from the Add or Select Booth Order link on an Exhibitor.

Fixed Assets (FX)

- 96 510621 Fixed Asset Journal Entries: Does not pick up Dimension value on GL dist configuration**
03/02/22 Updated to ensure the dimension would be passed to the GL distribution mapping on all transactions where present

General Accounting & Analysis (GL)



General Accounting & Analysis (GL)

- 97 499427 Add Core Dimensions Columns/Filters to Additional Windows**
12/14/21 Core dimensions are now available on:
 1. Review PO window as read only fields.
 2. Review PO item window as read only fields.
 3. Cash transaction window as filter
 4. GL transaction inquiry window as filter
 5. Asset transaction inquiry as column and filter.
- 98 507913 Unable to calculate finance charges due to missing save button**
01/25/22 The Save and Cancel button panel will now correctly display on the Finance Charges list window after clicking toggle calculation on the context menu
- 99 510037 Ungerboeck - Journal Entry Details: Do not allow edit multiple on Dimension fields when enabled**
02/21/22 If GL dimension is enabled (GL DIM org parm value is Y) then changes for Edit multiple of Event and management report code gets rejected.
(Event and management report code will be editable on Edit multiple but changes will not saved)

Global Behavior (GWB)

- 100 504984 Activity button issues while in event**
01/20/22 The add activity button will now always be displayed for sub sections in a layout.
- 101 510937 Users unable to access system - Red error being received**
03/08/22 Users no longer randomly see an error checking for full text index error when signing in.

IEBMS (IE)

- 102 508523 Automatic Emails are still being sent after LOGON configuration changed to only email Upon Request Only (IEBMS)**
02/02/22 The Password Retrieval field on the Add/Edit Logon Configuration window now load with dropdown values that are dictionary-enabled and when selecting Upon Request Only, the correct value will be stored in MM472 - UponRequestOnly
- 103 509112 WRI Report portal not working**
01/26/22 The WRI report page now loads the links that are set in the WRI Text tab.
- 104 509137 WRI pages display error when accessing**
01/31/22 WRI Pages now load correctly without error.

Merging Data (Accts, Master Tables) (MAT)

- 105 506639 Rechnungadresse falsch nach Zusammenführen von Konten | GHM**
01/26/22 The contact's address will now be updated with the new account's address when merged. Invoices created after the merge will use the new account's address.

Views and Favorites (MEN)

- 106 506241 Retired users showing for selection in View user & role dropdown?**
01/12/22 Retired users no longer show for selection in View user & role in .98 and .97, which uses a VB ServerUI file not C# ServerUI file due to offshore migration that left old VB files in the source code.
- 107 510831 User's Booking Calendar Favorite saved with view id that they no longer have access to loads incorrectly**
03/01/22 User's Booking Calendar Favorite saved with view id that they no longer have access to no longer loads incorrectly

Migration-Cloud (MH)

- 108 508459 Include the 'Integration Status' field in the journal entries endpoint**
01/24/22 Integration Status field is now available on JE endpoint.

Email (ML)

- 109 504423 .98: You cannot save sql query in ez writer data source on .98A but works on .97B.**
11/19/21 You can now save an SQL query successfully in an EZWriter Data Source.
- 110 504695 EXP - issues with email images**
12/09/21 The Default Value height and width on Link Parameters for images are now correctly set on an email template.



Email (ML)

- 111 504814 Ungerboeck - Unable to attach Document to Template**
12/27/21 You will no longer receive an error when trying to save after selecting a document on Select Document dropdown on Insert Ungerboeck Link window. Download document link now correctly builds the link to the document.
- 112 504893 .98: Ezwriter Template - Insert Field button is not responding and hence can't merge fields**
01/17/22 You can no longer save an EZWriter Data Source with columns that would have a space in the name.
- 113 506749 Unable to add import a JPEG image to an email template**
12/27/21 Importing images through the email links now works correctly.
- 114 506763 Email addresses not automatically filled in when emailing invoices**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 115 507258 erroneous "No email addresses found" message**
01/14/22 Clicking an email hyperlink on Email-Contact column from Services will now fill in the correct email address in the To field on Send Email window.
- 116 507706 Problem copying email template**
01/17/22 You will now be able to copy an email template correctly without issue.
- 117 509305 [JM2201 0610] Changing the report name doesn't show in email**
02/03/22 Now when renaming a report and sending via email to myself the document attached in email from report will show the correct name.
- 118 509566 View Full email in activity does nothing**
02/02/22 When clicking the View Full Email hyperlink on an activity it now opens the View Email window correctly.
- 119 510585 Image in email template not appearing**
03/03/22 An image from an email template will now show correctly on confirmation email from public facing application.
- 120 511471 Send Critique error after patch**
03/03/22 There is no longer an issue using send email action. Email addresses will now load correctly on Send Email window.
- 121 511577 Error emailing contracts after upgrade**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 122 511600 Email/Report error when printing payment receipt**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 123 511665 Error when sending Emails**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 124 511739 Getting an Error when trying to send emails**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 125 511992 Error Message when emailing Tools menu in Edit Event Screen and using Account option**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

Membership Services (MS)

- 126 507464 Error Message in Legacy Membership Orders**
02/21/22 Department filter on Order Items window will now search over the "Item Department" column.
- 127 510186 Ungerboeck - Delete Membership Order error**
02/15/22 Resolved issue with deleting membership orders that have no membership account items.

Event Opportunities (MTS)

- 128 505788 Total Rooms filter causing error**
12/28/21 Fixed the part that is causing the issue in the Total Rooms and Total Attend filter when they are set to 1-[blank] and 50-[blank] respectively. Fixed in .99, .98C, .97E



Event Opportunities (MTS)

129 511106 Error in filter with field Preferred Dates in EO

02/22/22 Now when setting the Preference Start Date filter on Event Opportunities to Last Year it will only pull in event opportunities for the previous year.

Online Order Processing (OP) (OP)

130 510811 Online Space Booking (OSB) - Resource times on substitute items

03/09/22 Fixed incorrect dates/times on substituted items in OP/OSB.

Online Space Booking (OSB) (OSR)

131 505451 Default Country field not working

01/06/22 Now when the default country has been set in ACM the country field on Angular ACM Sign Up page will default in the country selected.

132 506283 OP - Detail Pricing Packages - Package substitutions displaying multiple times

01/14/22 Fixed duplicated substitution options in Order Processing.

133 506544 Tax Resource is not using Alternate Description in OSB

02/02/22 Fixed resource descriptions not using alternate descriptions based on language preference in OSB.

134 508473 Problems with VAT calculation

02/06/22 Fixed an issue where OSB would incorrectly calculate the cart order total display, which includes taxes, when a user changed the times on an individual space such that the space would be assigned a new rate type because of criteria based rates.

135 508569 Automatic email confirmation

03/03/22 An image from an email template will now show correctly on confirmation email from public facing application.

Performance (PF)

136 501218 Long loading time for dropdowns

12/27/21 Long loading time for dropdowns has been fixed.

137 505433 OutOfMemoryException occurs due to Notes column on Service Order Items view id 6805 (Fakturerade Leadsscanners per event)

12/07/21 The Notes column on the Service Order Items grid should now perform better in instances where more than 1000 rows are in the grid. Performance may still be slow loading so many rows, but users should no longer receive error messages.

138 506950 SQL timeout error on Edit registration webskin window due to 22 table join

01/13/22 The Edit Webskin window will now load without getting a SQL timeout error.

139 506989 Performance issue Payment Batch

01/14/22 Dashboard will load voucher in a reasonable time. Code was modified to load using an aggregate query.

140 510591 Slow Data Saving Process

03/09/22 Filtered account for modified rows to speed up performance.

Campaigns & Imports (PJ)

141 482749 Re: v30: Import Accounts and Contacts - Dates not importing

12/21/21 The Contact Birth Date column will now be formatted correctly when importing accounts and contacts based on the local set (on User Settings, or Organization, or Site Configuration, or a combination of the 3).

142 503288 CRM campaigns do not receive results

12/21/21 When manually removing results from a campaign and retrieving it will now update with the correct number of results and total records. The Last Retrieved On and Updated field stamps will also be updated correctly after the campaign retrieval process is complete.

143 504060 Import Contacts - when 'Check for Duplicate' checkbox ticked the contacts are not imported

12/02/21 Accounts and Contacts are now imported successfully when ticking Check for Duplicates checkbox on Process - Check for Duplicates window.

144 505651 Removing exhibitors from campaigns.

01/12/22 Exhibitor Account (aka the exhibitor's "Company Account") will now be successfully removed from campaigns when selecting it from the dropdown on the "Remove From Campaign" window.

145 507415 Exhibitor Accounts not added to Campaigns, but contacts will

01/12/22 Exhibitor Account (aka the exhibitor's "Company Account") will now be successfully added to campaigns when selecting it from the dropdown on the "Add To Campaign" window.



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Payment Plans (PP)

146 506142 Zahlungsplan Auswahl ohne ID Anzeige

12/20/21 Update to default view to allow Payment plan id to be shown in selection view. The view selection is created from the Payments Schedule window.

147 510741 Payment Plan Journal Entry: Errors out - Void invoice Scenario

02/18/22 Suspecting that this is a concurrency issue with certain fields (Last Invoice) being copied back to the database after voiding an invoice from the Edit payment plan window. This issue has been resolved if it was the underlying cause. Please resubmit if this issue continues to occur on future versions.

Payment Applications (PPT)

148 511356 On payment processing window date automatically reverts after I change it

03/01/22 On payment processing window date no longer automatically reverts after I change it when immediately clicking the Select checkbox on the "Open or Available for Payment" grid

Purchasing (PU)

149 506332 Cannot Add Supplier Accounts in Purchase Orders

12/15/21 Add Links on Supplier drop down has been added

150 507518 Custom link Find Documents doesn't work at all places

01/10/22 Code has been added to "view Documents" from Voucher approval page. All document options were not enabled from Voucher approval page, for now just enabled the "view"

151 508934 V30 Event Function not sticking during Add Requisition

02/21/22 Now event function will be save successfully on Requisition.

Additional windows-
Purchase Orders
Journal Entry Details
Voucher Distribution

152 509878 after inactivate an item in the item master, the item stays active in the market list(s)

03/09/22 Made code changes to reflect the status of the inventory item on the market lists in compliance with the status of the supplier item and also the item itself.

153 511394 Cloud Migration PROD: Purchase order - Adding PDF to email errors

03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.

154 511700 Document - email file - requisition view error

03/09/22 You will now be able to view a sent email that has an invalid email address without error.

User Setup/Password Reset (PW)

155 507338 INTERNAL - Password Reset page does not redirect to UB login page on success

01/15/22 The Password Reset (ActivateUser.aspx) page no longer causes an audit log error and now again correctly redirects to v30. Also, the user will display in the textbox at the top of the page.

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

Query & Reporting (QR)

156 497244 D25: Getting cryptic error message when using Export to Word on report

02/11/22 You will now receive a prompt message for additional attachments found when exporting a report to Word. The only option you will not get a prompt is Export to PDF.

157 499655 Asset Activity Report: Does not line up correctly when exported to excel

02/03/22 All columns on Asset Activity Report are now aligned when exported to Excel.

158 502330 Saving Schedule of Events Views

01/05/22 Resolved issue with save as new view window opening in incorrect mode.

159 506004 Accounts Payable Report: Date Selection Issue

02/16/22 Now when running a report and As Of date is selected through the calendar picker it will appear on the report viewer and the correct data will be pulled in.



Query & Reporting (QR)

- 160 508388 SOP : Crystal report confirmation attachement**
02/23/22 The order parameter now appears under the iebms sop report list.
- 161 508423 Contract Revision Report Document Not Generating**
01/21/22 You are now able to add contract documents to a contract without issue.
- 162 508428 Unable to email from service order window**
02/20/22 The send email from generic report prompt no longer filters out valid email addresses.
- 163 508492 Creating a new view causes a field to default to a bad value**
01/26/22 Word reports and non-Crystal missing parameters no longer default 'All' for the order or function parameters.
- 164 508861 Standard report - space master**
01/31/22 Running the Space Master report now passes *ALL value and pulls in correct information.
- 165 510224 Service Order Confirmation - Print flag not set when sending confirmation e-mail**
02/21/22 The print flag now gets set correctly when sending confirmation emails for service orders.
- 166 510920 Angebotsbericht funktioniert nicht - Fehlermeldung**
02/21/22 You can now run reports from exhibitors successfully without error.

Event Room Blocks (RBK)

- 167 508584 Decimals disappear when you tick USE SAME RATE box**
01/24/22 Fixed an issue where decimal values for prices on room types would round to the nearest integer when Use Same Rates is checked.
- 168 508675 HP3253 - No decimals on block reg creation**
01/25/22 There was an issue where prices on housing blocks were not imported into registration housing correctly. This has been fixed.

Room Diagrams (RD)

- 169 504862 Room Diagram get disappeared after selecting multiple functions**
12/08/21 Room diagram does not get disappeared after selecting multiple functions
- 170 508952 Ungerboeck - Room Diagram - Export - Email as PDF with Tempalte Document = System.NullReferenceException**
02/03/22 There is no longer an issue attaching word merge templates to the send email window.
- 171 510735 Able to delete locked Room Diagram**
02/23/22 Added server validation to prevent deleting a locked Room Diagram.
Not able to delete locked room diagram
working as expected
- 172 511524 Room Diagrams: Email as PDF Error**
03/03/22 There is no longer an issue using send email action. Email addresses will now load on Send Email window correctly.
- 173 511565 Room Diagram - Observe Error while performing Email as PDF**
03/03/22 There is no longer an issue using send email and loading email addresses.

Resources and Price Lists (RPL)

- 174 509379 Resource Code column shows type in Add service order Items gridview**
02/11/22 Resource code column in Add Service Order Items window now correct shows code instead of type description.
- 175 510862 Field that dissappear**
03/02/22 Hide Use Tier Cost and Tier Price columns from column selection on price list items grid.
- 176 511674 Liste de prix - plan de tarification qui ne fonctionne pas 30.98B**
03/08/22 Pricing schemes now calculate correctly.

System Administration (SA)

- 177 505889 Cannot add function usage**
12/30/21 Issue has been fixed in current and .98

Sales Goals (SGL)



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Sales Goals (SGL)

178 510483 Sales Goals Enhancement: Add Event filter to Search Criteria in Reports

03/09/22 An Event filter is now available on Sales Goals and Sales Goal Periods windows. A tooltip has also been added on Event field to see event information.

Suite Management (SMG)

179 504508 Bug When 'Copying' Suite Management Config

12/14/21 Fixed issue where extra navigations were being added, and copied.

180 504887 Suite Capacity and Car Parking Not Pulling Through

12/14/21 When creating a new Event Suite from Suite Ownership, it adds the correct Capacities.

181 505137 Error Message when adding Suite (Suite Management)

11/30/21 Resolved issue where Car Park Capacity was breaking the add suites function if not included.

182 509773 Invite Attendee Application is not showing the correct number of guests (98B)

02/21/22 Number of guests phrase in Invitation app now shows correct number.

183 509781 Layout Check in Suite Management Portal (98B)

03/09/22 Padding has been removed from the top and bottom of the selector effectively fixing the text cutoff issue.

184 509783 Suite Management: Send Invite to person on Waitlist is not working (98B)

03/01/22 Issue has been resolved where moving from waitlist to invitation list caused emails to send blank.

185 510888 Invite Attendee Application giving error when signing up

02/21/22 Signing up with an allergy no longer throws an error in the invitation app.

Service Orders (SO)

186 502379 Price Class configuration not applying to booking order

12/16/21 Reprice order now re-checks for valid discounts and applies them when applicable.

187 504505 Issue when entering additional service order items

12/27/21 Rate type dropdown now functions correct in the Add Service Order Items window after saving item changes

188 504794 v30: Service Orders - not adding correctly when clicking grid cell image that sets quantity to attendance

11/24/21 Clicking the grid cell image that sets quantity to attendance now saves correctly.

189 505224 Error with price list and price class

01/25/22 Issue fixed resulting in the use of an incorrect price list for some Exhibitor Service Orders.

190 506221 Scheduling resources not working (second ticket)

12/13/21 System now allows resources to be scheduled back-to-back (end at 4, start at 4).

191 507180 Print Sequence Red Screen Error

01/06/22 Fixed error that would show when attempting to open Print Sequence from an order item.

192 507250 Actual Net Due column blank on Service Orders

01/03/22 Actual net due column now fills correctly.

193 507741 30.98 Testing, Copy order does not copy assignment

02/24/22 Copy order by selecting same function does copied Booth assignment now

194 507953 Error message when opening "Service orders" from main menu on TEST

02/04/22 The reported issue has been resolved. The service order window is getting open from Main menu when the Search-Function field is available on the grid.

195 508907 Able to double book resources in Resource Scheduling when 00:00 > 00:00 times are chosen

02/17/22 No longer able to double book resources - Filter previously utilized resources when scheduling and making use of midnight for the end time.

196 509407 [V-USI SAMPLE] getting exceptions while closing service order

02/08/22 Fix error that shows up after closing an open service order

197 510660 Changing Function Date Error for Gear Orders

02/22/22 Error during inventory check has been fixed.

198 511769 Service order notes have disappeared/or only old notes are showing.

03/07/22 Error where the order notes grid was not properly showing notes has been fixed. Service Order and Work Order level note grids should now display expected notes.



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Session Proposals (SP)

199 510882 Email Notification Template is not saved for Managers & Evaluators

02/17/22 Manager and evaluator notifications are now saved when adding them to a submission setup on an event.

200 511214 No Email address found

03/01/22 Fixed error on Send Email for Contributors in Session Proposals.

Ungerboeck Spreadsheet (SS)

201 506700 Excel cannot open . XLSX template files "Excel cannot open the file XXX because the file format or file extension is not valid.

01/12/22 Now excel file opens without any error.

Task Engine (TE)

202 510369 Task Scheduler

02/22/22 The task engine now correctly validates emails. When an email is sent from process task action it will show as successfully sent in email log.

203 510821 Scheduled Task Not Working

02/22/22 The task engine now correctly validates emails. When an email is sent from process task action it will show as successfully sent in email log.

Work Orders (WO)

204 501259 Add item to Completed Work Order

12/03/21 An error has been fixed where completed work orders were not being re-opened if a new item was added to the service order.

205 503296 Service Order Items not carrying to Actual Tab when work orders are completed

12/03/21 Error has been fixed where package substitute items (that have 0 units set in their substitute setup detail record) would show 'actual' order units of 0 after running the Complete Work Orders action on a service order.

206 506187 Work Order Items do not complete via event window

12/10/21 Work Order Items now working as expected and complete via event window.

Dashboards (XD)

207 505112 Tabular Report - Not bring up PY Budget YTD

01/14/22 Corrected issue with PY Budget YTD column not loading if budget amount column is not shown on the grid.

208 505834 Newly added Custom Summary Field does not display on the Columns field on the Edit Report window

01/12/22 Newly added custom fields will display on report window properly.

209 507106 Error message in View of Activities - Column cannot be null error in ActiviesServerUI.SetCustomValuesForListData

01/04/22 The Activities grid will now load successfully without error when Prompt and Text columns are included in view.

210 507157 Dashboard Reports Not Respecting Org Parm EM 850

01/14/22 Events gadget will respect org parm EM 850.

211 509833 Error message when working in reports since upgrade to .98 last night

03/01/22 Error no longer occurs loading the Report list window reading pane when the Chart tab is selected.

212 509899 Service Order Search View doesn't load in Dashboard Gadget

02/21/22 Service order views will now display correct results on a dashboard gadget as well as the pop out window, whether they are from an event or a job.



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

By Module

ungerboeck

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



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

By Module

ungerboeck

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.



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

By Module

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.



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

By Module

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.



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

By Module

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.



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

By Module

Campaigns & Imports

Imports

482146 Template imports are now supported in v30.



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

By Module

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.



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

By Module

ungerboeck

CRM

Ability to Categorize a Lead

490066 There is now a field available 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.



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

By Module

Dashboards

Tabular Reports

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



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

By Module

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.



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

By Module

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.



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

By Module

ungerboeck

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.



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

By Module

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.



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

By Module

ungerboeck

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.



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

By Module

ungerboeck

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.



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

By Module

ungerboeck

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).



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

By Module

ungerboeck

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_INT0] (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.



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

By Module

ungerboeck

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.



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

By Module

ungerboeck

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 be 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.



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

By Module

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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.



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

By Module

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.



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

By Module

ungerboeck

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 shock 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.



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

By Module

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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.



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

By Module

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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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).



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

By Module

ungerboeck

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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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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 AV 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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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.



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

By Module

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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.



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

By Module

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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.



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

By Module

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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'.



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

By Module

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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.



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

By Module

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.



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

By Module

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.



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

By Module

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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

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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...



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

By Module

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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.



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

By Module

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.



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

By Module

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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

495381 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.



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

By Module

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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.



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

By Module

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.



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

By Module

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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.



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

By Module

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.