

## Logics 2023 Q1 Release Notes

The items below are released as fixes or features as part of the products listed below. The release will be effective close of business April 3, 2023.

Logics has upgraded the reporting engine to the next version 12.8 SP4 so that we can provide better support for Chrome based browsers. The main benefits of the upgrade will be improved graphics for dashboards and graphs. Existing standard reports will have as few changes as possible to prevent comparison issues.

### Cash Collections Build

#### New Features

Item #	Subject	Description
365	Add date checks to Collections	<p><b>Create Batch</b> - If batch date entered is in past or is not within the current year, give warning message allowing to continue.</p> <p><b>Reconcile Batch</b> Verify payment date is within the current fiscal year (from Financial Management) - if not, give warning allowing to continue. If no Financial Management, do not check.</p> <p><b>Update Batch</b> - reverify within current or prior fiscal year. If not, give warning that batch date will not match fiscal year allowing to continue.</p>
382	Add additional dialog to endorsement printing	Added an additional dialog to alert cashiers when the printer did not correctly load a check for endorsement printing. This was causing the endorsement text to print halfway down the check instead of at the top. When the dialog appears on screen, the check will be ejected from the printer, and the cashier will be asked to re-insert the check to print the endorsement.
481	Add new setting to auto print receipt after endorsement	If the setting CC_AutoReceiptPrintAfterEndorsement is set to 1 and the receipt balance is 0, a checked checkbox will be added to the endorsement dialog. The checked checkbox will cause the receipt to print immediately following the endorsement print. If the cashier unchecks the checkbox before the endorsement prints the receipt will not print.



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## Bugs

Item #	Subject	Description
458	Check Length Truncating	Expanded the length possible for check numbers as business checks can have much longer numbers than standard checks.
479	Voucher created without a voucher number	Customer was able to create a voucher without a voucher number, put check in place to prevent this from occurring in the future.
485	Credit Convenience fee override	To enable the ability to add a tender if the tender had been voided the Credit Convenience fee has been made so that it can be overridden.
487	Not printing batch & receipt number on check endorsement	Added the ability to print batch and receipt number on check endorsements for Revenue Management invoices.
497	System Error when trying to distribute or print from collections	Fixed distribution error which was partially the issue with the System Error. The error was caused by an old config.asp file that needed to be updated.
499	Fix incorrect text boxes for payment entry on the register page	The text boxes were displaying the incorrect values for payment code 10.



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## Financial Management Build

### New Features

Item #	Subject	Description
775	Show serials removed by physical inventory in history as <i>serialNumber-Removed</i>	Show Physical Transaction serial numbers added. Serial numbers that have been removed from inventory will be displayed with -Removed after the serial number.
974	Allow customers to create year end backups	Provide a means for customers to generate year end backups without requiring them to contacting Support or their IT. The file name should be in the format YEBU- <i>customerName</i> -Phoenix-YYMMDD.bak. The backup should be compressed and should be saved to the default backup location on their system as it will not require us to set the permissions for the folder.
984	Prevent users from saving an attachment file that contains "#", "%", "&", or "+" in the filename	Prevent customers from saving attachments with illegal HTML characters in the file name. The characters can cause the failure of the file to be found once the rendering engine tries to find a filename that contains a "#", "%", "&", or "+".
1080	Display message to user if importing Purchase Orders where detail lines target different funds	Changes were made to display a message to the user if importing Purchase Orders where detail lines target different funds. If user does not use central depository and there is a different bank account for each fund display message to user when importing a Purchase Order so that lines for one fund do not get imported into an Accounts Payable batch for a different fund.

### Bugs

Item #	Subject	Description
529	Write ins resequencing into sort	Changes made to add a sequence number to physical inventory batches allowing inserts to not be sequenced into the sort. Customer can then resort as desired.
757	Budget export is not working	A progress bar has been added and when the export is finished it displays "File Complete" and a download button to click to download the file.
947	Add Due From and Due To accounts in system settings for inventory journals.	Added the ability to set a due from and due to for inventory journals that need to move charges between accounts.
976	System error when trying to edit a custom report. Fix needed for accounting period filter.	Changed the section of code that handles filters from 'Journals Accounting Period' to 'Journal Accounting Period' in the CustomReportTableColumn table.



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Item #	Subject	Description
985	Issue with open invoice report	Removed the Due Date input box and moved the Open as of input box up to the top where the Due Date input box was. The Due Date was not being used by the filter.
993	Issue with default GL number in invoice detail entry	Changed the invoice detail page that is displaying the account number from the General Ledger Account record for that GL account ID and the current set of books ID rather than the account number found from the very first General Ledger Account record found for that GL account ID.
1031	System Error when inputting Invoice against a Purchase Order	On the Purchase Order Details Import page when adding detail to invoice and the account number is not found display message instead of giving system error.
1035	Add additional status filters to the Requisition Listing Report	Add the additional status Incomplete and Active filters to the Requisition Listing Report. The current report gives the users options to show a status of - All, Rejected or Approved.
1036	Duplicate journals created from UM	Made changes to the query so that if a journal already exists the appropriate message will be displayed to the user.
1044	Do not include purchase orders with closed status on Items Received Not Invoiced report	The view, vwItemsReceivedNotInvoiced, has been modified to not include purchase orders with a closed status.
1045	Add Address2 on 1099 forms	Added the Address2 lines to the 1099-NEC and 1099-G forms
1046	Add option to filter checks by fiscal year in custom reports or not	Added the option to filter by Fiscal Year or not in custom reports so that customers who wish to run reports based on calendar year have this ability.
1047	Import journal for the Payroll journal is creating 2 journals	This was caused by double clicking on the Save button. Changes were made to not create a duplicate journal if the Save button happens to be double clicked.
1048	Message in inventory is incorrect when adjusting item quantity to zero	Receiving the message "Quantity for item ### after Inventory Adjustment is less than zero" when it would have been zero. Fixed code to prevent this from coming up again.
1049	Issue with check run because invoices put on hold after selected for check writing	Corrections have been made so that if an invoice happens to be put on hold after being selected for check writing to set that invoice as not selected.
1051	Purchase Order with open status shows on report but cannot access it because it is older than 61 months	Made change to the Updated Purchase Order grid to include Purchase Orders older than 61 months.

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Item #	Subject	Description
1055	Custom reports not working after update	Correction made in query used for 'Accounts Payable - Vendors' option in custom reports when selecting fields under 'Checks' category.
1056	Inventory - Populate GL Account for inventory receipts with no Purchase Order	Change was made to populate the GL account number for receipt transactions without a Purchase Order.
1066	Correct spacing issues on physical inventory count sheets	Changes have been made for the inventory count sheets report.
1068	Cannot import payroll check file created from Kronos - Vendor Name not in correct format	Modification in Import Payroll Checks to ignore blank records in the file being imported. Corrections made on standard format display. For Check Amount, position changed from showing as 27-35 to showing as 27-36 and the length from showing as 8 to showing as 10. For Filler that comes after Check Amount, position changed from showing as 36-54 to showing as 37-54 and the length from showing as 19 to showing as 18.
1070	Correct spacing issues on physical inventory report	A correction has been made for the physical inventory count sheets and the inventory count sheets report.
1073	Issue with Purchase Order journals - Displaying "Journal is not balanced" message	A correction has been made and it is now in place.



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## Fixed Asset Management Build

### New Features

N/A

### Bugs

N/A

## Revenue Management Build

### New Features

N/A

### Bugs

Item #	Subject	Description
235	Show Utility Management account balances in Revenue Management	Fix Balance/Due Now values in sidebar when no Revenue Management accounts
236	Performance issues when loading a revenue customer	Reworked logic and data queries in customer sidebar code to improve performance issues when loading a customer. This impacts performance on the main customer view page and all customer edit pages in RM and also the Customer view tab in Account Maintenance in UM.
297	Adjustment batch is not updating.	Fix handling of Payment Arrangements when invoice adjusted to zero
333	Filter templates for adjustment print based on function link to account	Template print from adjustments is based on template type and not linked function type. Allow all template types to be used for all functions to avoid needing duplicate templates
340	Error on customer sidebar if no address record	The code is now using the Customer class from Utility Management rather than CondorServices to get the customer data and there is an issue with how that code handles the case where there is no associated address record.



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## Utility Management Build

### New Features

Item #	Subject	Description
1674	Prevent users from saving an attachment file that contains "#", "%", "&", or "+" in the filename	Prevent customers from saving attachments with illegal HTML characters in the file name. The characters can cause the failure of the file to be found once the rendering engine tries to find a filename that contains a "#", "%", "&", or "+".
1732	Add New Backflow Assets Custom Report View	The existing Backflow custom report view predates the backflow model centered around assets and is the old, non-standard form. Added a new view with Asset, Account, Schedule, Task and Inspection information and flags to mark Most Recent Task, Inspection and Passed Inspection.

### Bugs

Item #	Subject	Description
54	Remove Update button in Readings	Removed the unnecessary Update button on the reading tab.
965	Refund Check Description in History	Changed the display so that the adjustment reason code description in addition to the adjustment code description. The adjustment reason code description first, a hyphen, and then the adjustment code description.
1256	Add a comment when a service application or service order is voided	Display who and when a service order is voided.
1324	Empty journals created in Financial Management if no non-zero totals for batch	Need to skip writing journal if the resulting journal will be empty.
1517	Fix Payment Arrangement sorting and layout after rebind	Set the default sort for Payment arrangements to be by date arranged in descending order. Fix the sort for Date Arranged so that clicking on it will change the sort.
1525	Report of Accounts with and without current assets	Removed the Active Assets checkbox and the Asset Status drop down was added with the All, Active, Current, No Asset, and Removed options to the Asset Listing report.
1535	Modify view UBvwReadingDetail to properly handle Previous Read for Updated Batch	Changed the UBvwReadingDetail view so that it uses the asset history record written from the reading detail if the detail is updated and finds the most recent asset history record for the asset before the one from this reading detail if any.
1583	On Line Service Application spinning after submit never produces application	Increase column length definitions in Data Access Layer for Service Application table to prevent errors on longer values when saving from Online Service Application.



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Item #	Subject	Description
1584	Void Button to Be Removed / Deactivated in Billing History	Removed the Void button in Billing history to prevent to prevent user from voiding an account that has active billing records in a billing batch.
1617	Limit length for account name and bill to address in Mailers +4 export file	Limited the length for an account name to 30 characters and limited the length for bill to address to 32 characters in the Mailers +4 export file.
1631	Show bill update in progress	Made change so billing batch would appear with outstanding billing batches but showing a status of 'updating' rather than not appearing in either outstanding or updated until the update is complete
1676	Unposted RM Payments not showing under Customer tab in Eagle	o Fixed grid queries for Customer grid in UM to match RM
1683	Meter reading interface - pass leak flag	Added a field in reading detail and asset maintenance to show tamper code from Badger Beacon import. Value available to show on reading reports.
1685	Delinquent Status Batch is not displaying the sort by account number correctly	Changed the sort to allow customers to sort on account number as requested.
1686	Asset Cost Report	Added an asset cost report for customers that have the cost of their assets stored in the system. The report will display the fiscal year the asset was purchased, the purchase cost of the asset and using a depreciation calculation the current value of the asset.
1697	Refund batch update showing incorrect Invoice batch #	A change was made in the code to show the Batch Number rather than the Batch Id in the message.
1700	Budget Adjustment on a non-budget bill	Changed budget billing balance calculation to include non-budget bill records with budget adjustments on the basis that the budget adjustment makes the bill implicitly a budget bill.
1703	Export Longitude before Latitude for Neptune360 only	Reversed Latitude and Longitude order in Neptune 360 layout only. This now matches the current specification. The previous order was based on an old error in the specifications for the earlier versions of the software; because of that error there are settings in the earlier versions to account for the reversed ordering. Since customers using the older versions that have the setting configured for the previous ordering those versions of the Neptune interface keep the previous ordering. Neptune 360 is the first version without the ability to reverse to accommodate that old error.





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Item #	Subject	Description
1710	Add Service Order Number and Service Order Status to grid for service orders in the Service Application Console	Made changes to display the Service Order Number and Service Order Status in the grid on the Service Orders tab in Service Application entry.
1727	Draft batch Totals Different for ACH file and collection Batch	Added validation to prevent changing an existing bank to have a duplicate number and simplified new or existing save code, also added bank number to the grid.
1738	Remove CondorServices Dependencies in Utility Management	The customer tab (Account Maintenance - View Mode), Contact maintenance (Account Maintenance - Edit Mode) and Service Applications have dependencies on Condor Services. If Condor Services isn't started early in the day and the RAM usage is high on the server, it occasionally fails to start and errors on these items (most often on Service Application entry). Removing these dependencies removes this issue for customers not using Revenue Management.
1739	Revise Mailing Label Report to Include Range for Account Numbers	Made a change to the existing Mailing Label report to allow the customer to select a range of account numbers to be printed.
1756	Voided Adjustment Batch transactions showing in Adjustment by Service Code report	A correction has been made in the query for the Adjustments By Service Code report to prevent voided batches appearing in the report.
1767	Report of service address with no active tenant - Add 'By Service Address' option to Vacant Accounts Listing	Added the option By Service Address to the Vacant Accounts Listing report.
1800	Deposit pages in Account maintenance freezing and timing out	Modified indexes and reworked the logic in the view UBvwDeposit to improve the performance of the query that was timing out.
1812	Comparison Usage methods based on billed usage (e.g., Same Month Last Year) break across a billed usage scale change (e.g. change from billing in thousands to billing in single units)	Add a comparison usage multiplier to scale the historical usage to match the new usage
1814	\$0 journal entries (when debits and credits net to zero) are no longer created from adjustment and billing batches	Add configuration to allow reverting to older behavior where \$0 entries are allowed

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Item #	Subject	Description
1827	Budget Adjustments write account history incorrectly if service is not flagged for budget billing when adjustment update is processed	Change adjustment update logic to write to Account History as budget if the adjustment record is set as a budget adjustment rather than based on the service budget flag.



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## Online Bill Payment

### New Features

Item #	Subject	Description
143	Conditional text in bill ready and bill reminder emails for customers enrolled in auto pay or bank draft	Added ability to add customizable blocks of text to the bill ready and bill reminder emails. There can be a block of text for customers enrolled in auto pay, and another block of text for customers enrolled in bank draft. The blocks of text are designated by placing the appropriate tag at the beginning and end of the text to include for the group of customers. The tags are listed on the email configuration page. For example the text placed between the tags <code>{LinkedBill_AutoPayActive_StartCond}...{LinkedBill_AutoPayActiveEndCond}</code> will only be displayed for emails sent for bills enrolled in automatic payments.
249	Incomplete Tenders page	Added a page for administrators to view and edit customer tenders when the Blue Pay response does not reach Online Bill Pay. Notification of these rare incomplete tenders will be included in the daily scheduled task summary.
256	Add search feature for Admins	Added new page to search for utility accounts, invoices and service applications that customers have linked using Online Bill Pay. Double clicking on a linked bill in the search results will take you to a page which list all customer profiles that have linked the bill, the last 20 payments to this bill using Online Bill Pay, and the last 20 emails sent to customers that have linked the bill.
256	Scheduled Payments page	Added new page to view the payments scheduled by customers.

### Bugs

Item #	Subject	Description
116	Online Bill Pay - Accepting RM Payments in Open Billing Batches	Updated the database view to prevent invoices in batches which have not been updated being displayed. This will prevent customers from directly linking the invoice and from the invoice being suggested for linking based on the customer number.
143	Draft Payment Message on OLBP bill notification	Fixed the bug within the feature where the tags to identify the conditional text is not being removed before the email is sent.
245	Unable to unlink a Service application	Change the function called to only return active linked bills so that the background stored procedure doesn't relink them.



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Item #	Subject	Description
252	Client Admin's unable to remove login block	Made a change that allows client admins to login when a login block is in place for only their site. Client admins will still not be able to login when there is a group login block put in place by a global admin.
254	Non pay work order did not generate	Fixed the code that was preventing the emails to be sent for this case.
255	ACH Automatic Bill Pay will not enroll a customer	Made the necessary changes to allow ACH payment customers to sign up for Automatic Payments.

## Logics Reports

Changes made to individual Reports are described in the associated product changes.