

## Logics 2023 Q2 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 July 5, 2023.

### Cash Collections Build 310

#### New Features

N/A

#### Bugs

Item #	Subject	Description
513	Add Custom ID2 to Transaction report	To assist in researching where a payment was posted the Logics account number can be placed in the CustomID2 field.
546	Collections Error creating Edit List PDF	Created optional Payment Edit list for large collections batches that can handle more transactions. This is for customers that have been getting a timeout error when attempting to create PDF files on large batches.

### Financial Management Build 822

#### New Features

N/A

#### Bugs

Item #	Subject	Description
1064	Inactive accounts not showing on PDF but do show in excel	Changes made to show for inactive accounts on pdf when running expenditure or revenue statement with both Include Inactive Accounts and Print Lines with Zero Amounts selected.
1076	Phoenix Financials - Delete Active Inventory Item	Made changes to display a message to the user and to not allow an item to be deleted if the item has an active status, an active location, an active serial number, or the qty on hand is not zero.



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1087	Need to show alert message if AP batch is for CD fund but invoice has GL account for fund not part of CD	Made changes to show an alert message if AP batch is for central depository fund but invoice has GL account for fund that is not part of central depository.
1088	Make length of invoice number on check stub configurable for the CheckConfig check format setting	Made the length of the invoice number that prints on the check stub configurable for the CheckConfig check format setting. The default will be 15. The setting can be up to 50.
1090	Get message - The general ledger account for a selected line is not associated with the batch bank account	Change made so that the 'The general ledger account for a selected line is not associated with the batch bank account'. The message is not displayed in the case where there is only one fund, and it is flagged as central depository.
1091	Security info report	Created the Security Group Report added it to the security group maintenance page.
1100	Server error when select View Check from vendor payment history	Made a change to the view check code so that it filters on the electronic payment flag.
1102	Add a 'Reversed' flag for Journal record and set flag if a journal gets reversed	Added a 'Reversed' flag for Journal record and set flag if a journal gets reversed. Then in Utilities Management when a billing or adjustment batch is exported to GL and it is checking to see if a journal already exists, it will check if there is an existing journal that is not deleted and that is not reversed.
1103	Add Federal ID and SSN as options for Accounts Payable - Vendors in custom reporting	Changes have been made to add the Federal Id and Social Security Number as options for custom reporting. It will display them based on the masking setting on the security group (No masking, Partial masking, or Full masking.)
1104	Allowed Clerk to input Requisition to account she was not authorized to use	When the Use GL Security is checked in system settings made a change so that the system will show a 'Security access is needed for this GL account' message.
1105	Server error importing PO details for manual check	A change has been made to prevent this message being shown.
1110	Change Account Listing and Accounts By Revenue Class Code to have a multiple select account status drop down	Active Accounts Only checkbox on the Account Listing and Accounts By Revenue Class Code reports replaced with a multiple select account status drop down.
1115	Error printing bank recon	Added a CommandTimeout line to extend the length of the time for the report query.



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1118	Check numbers out of order in the check print pdf	Added an order by clause to the stored procedure, uspCheckConfigChecks.
1120	Correct check number confirmation message	Corrected the language of the check number confirmation message.
1121	Add date and time to CheckPrint.PDF to provide a unique filename	Added a date timestamp to the PDF file creation to ensure unique filenames on the system.

## Fixed Asset Management Build 647

### New Features

N/A

### Bugs

N/A

## Revenue Management Build 616

### New Features

N/A

### Bugs

Item #	Subject	Description
343	Fix customer sidebar errors on blank city/state/zip fields	Added a tag "Adjustments With Bill Adj" and modified the reprint template to use that tag.
345	Error when click on one account.	Zip code was in the wrong format made changes to prevent incorrectly formatted zip codes.
350	Fix adj entry history select does not save correct billing detail	Fixed issue where the incorrect billing detail was referenced when creating an adjustment when a history item is selected. It now correctly references the billing detail with which the history item selected is associated.
352	Add tag for Adjustments with Bill Adj to templates	Handled blank/null values in city/state/zip in customer sidebar in both Utility Management and Revenue Management.
360	Fix Show updating bill batch in outstanding bill grid	Performance issue, reworked the underlying view and it now returns less than 1 sec.



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## Utility Management Build 1692

### New Features

Item #	Subject	Description
1553	Add CSV GL export format to be imported into financials	Made changes to allow Utility Management to export a Journal Import file for Financial Management.

### Bugs

Item #	Subject	Description
1459	Service Order will not generate from Service Application	Changes made to disable the 'Create Cut-Off Service Order For Previous Account?' check box and enable it only when a Previous Account is entered. Display 'Previous Account not found' message if invalid account is entered for the Previous Account.
1585	Contact phone showing a deleted phone number	Made changes to the UBvwGridAccountContact to exclude 'IsDeleted' phone records.
1616	Request to add field to SO Dispatch grid	Cycle has been added as option for the Service Order dispatch console.
1634	Tried to remove the \$100 deposit, but now get a server error when they try to view the SA	Correction made to not give server error on service applications deposits tab if an invalid value was put in for the previous account field.
1645	Payment arrangements not displaying as voided	Made changes to the Payment Arrangement grid to include the payment arrangement status. Also changed the balance of the payment arrangement as zero if the payment arrangement is voided.
1729	Add Technician Name as a custom report field	Created scripts to be run during update that will modify the view UBvwReportServiceOrder that will add Technician Name to the UBReportColumn table.
1745	Returned Check adjustment fails to increment Bad Check History Array for multiple adjustments in a single month	Changed to function in OnLine Bill Payment to loop through the characters and add the numbers.
1759	Rate Schedule showing up differently from Steps in the preview view.	Rate schedule not showing up correctly in preview view after making multiple changes.

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1770	Allow Customer To Be Able to Change Service Code On Service Application	A setting, Service Code is Editable, has been added in system configuration under the ServiceApp category. When checked, the user will be able to change the service code when editing a service on a service application. When unchecked, the service code will be un-editable as it has been.
1771	Service Application Lookup, by App date is not working	Corrections made for Service Application lookup by App Date and by Date Required.
1774	Ability to print SA (sales proposal) before creating SO	Changes to allow printing of a Service Application using the default Service Application template when no services and no SO stubs are specified on the SA
1789	Deposit charged to bill - no adj batch entered	Made changes so that when the service order is updated it is now checking if there are deposits flagged to charge to bill. If there are charges and no adjustment batch has been entered, then it displays a message "There are deposits to charge but no adjustment batch specified" and does not continue with the update until an adjustment batch has been entered.
1834	Server error exporting multiple reading batches	Made changes to the code so that if the handheld vendor in the System Console is either blank or null, there will not be an error.
1840	Prevent void bill if updated batch still showing in open batches	Made changes to prevent voiding a bill if the batch has been updated and is still in the updated batches list.
1844	Add Phone Number in the Service Application- Additional Contacts not working	Made changes to allow adding a Phone number to an existing Service Application additional contacts.
1846	Custom report - Record Count not displaying	Made a change to the CutOff Report to include Record Count.
1847	Customer Summary Totals Wrong	Made a change to the UBvwAccountAmountDue view so that the correct totals are shown.
1848	Adjustment batch didn't create a journal	Made a change when checking to see if a Journal exists to reference the SourceReference column instead of the JournalDesc column.
1862	Billing Register Change Sales Tax to Utility Tax	Added a field for Sales Tax Description in the Billing Register section of the System Config
1868	Change font size from 7pt to 8pt for some PDF pages	Changed font size from 7pt to 8pt on selected PDF pages.
1871	Revenue Analysis by Rate, rate description not printing for additional rate codes	Changed the group filter in the Revenue Analysis by Rate report.

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1872	Add a Records Processed total to SA Listing By Date report	Added a Records Processed total to the Service Application Listing by Date report.
1874	Fix most recent synonym scripts to work for CCU DB names	Made change to update script to use dbo.fnGetRelatedDBName instead of using the database prefix.
1880	Fix Home/Work Phone Save to Customer from SA	Made change so that HomePhone and WorkPhone are saved to the customer TRCustomerPhone in the Revenue Management database.
1883	Fix Connection Errors from open data readers	Changes have been made to fix an issue with a DataReader remaining open.
1885	Fix read import error when update Latitude/Longitude enabled but interface does not support it	Fixed null/blank handling when saving latitude/longitude in reading import so that it does not fail if Update Latitude Longitude is enabled in system configuration, but the interface used does not parse latitude/longitude.
1887	Fix usage not saving to billing detail if using PPU override	Changes to better support fixed usage resulted in PPU override logic exiting the calculation method before the usage is saved to the billing detail.
1888	Entries made to updated adj batch	A message is displayed, and no adjustment entry allowed into the batch if the batch status is in the process of being updated, has been updated, or has been voided.
1905	Duplicate comments being created	A stored procedure is now being called when a comment record is added it verifies that there is not already a comment record created by the same user, same type, same priority, same description, same comment, same linkrowid within the last 30 seconds before adding a comment record.
1914	Changes to Consumption Analysis Reports	Corrections have been made for the consumption reports to correctly show rate descriptions.
1933	Adjustment Batch has status of Reconciled	Prevent reconciling updated adjustment batch.



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## Online Bill Payment

### New Features

Item #	Subject	Description
259	Pop Up window for Balance Due	Created a pop-up window that will display when there is no balance due for an account.
273	Add Captcha to OLBP Quick Pay	Added a reCaptcha to the OLBP Quick Pay to help prevent fraudulent attempts to use the site for testing stolen credit cards.

### Bugs

Item #	Subject	Description
199	Due Now Payment amount	A change has been made so that the Due Now and Total Due are the same amount.
249	ACH payment approved but not on account	A new page was written to complete transactions when the result is not automatically received from BluePay. The information to complete the transaction will need to be looked up in the client's BluePay account.
260	Reconnect Message	Added a fix to the code which checks the Use Reconnect setting in Utility Management.

## Logics Reports Build 364

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