



Version 9.3 Builds

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VERSION 9.3 BUILDS

BUILD 5778

FIXES

Address in Phone Book Only Displaying City & Zip

Within the Phone Book (under the Home menu), when viewing the details of an entry, the address was only displaying the city and zip code of the address. The phonebook entry is now displaying the entire address attached to the record.

“System.Int32” Error Message When Adding an Organization in Assurance

When creating an organization engagement in Assurance, the following error message was appearing – “The specified cast from a materialised ‘System.Int32’ type to the ‘System.String’ type is not valid.” This has been resolved and the error message no longer occurs.

BUILD 5787

FIXES

Unable to Import File Containing Line Breaks Using Import Control

When trying to import a file that contains line break using Import Control, an error message was received. This has been resolved to allow for importing of data that contains line breaks.

Recent Items Client Listing Not Updating After Confirming Invoice from Fee Portfolio

After confirming a fee within the Fee Portfolio for a client, the client’s name did not appear automatically in the Recent Items listing until after a page refresh. The client’s name will now appear immediately after the fee is confirmed.

Prospects Pages are Not Globalized

The prospects pages will not display field names in either EN-US or EN-GB based on browser settings.

Assurance Request Staffing Fields Need Resizing

Within an Assurance Request – Engagement section – Staffing, the fields were too small and entered data could not be viewed. These fields have been resized.

Allow for Customization to News Dashlet Display Times

The News Dashlet news items display time can now be customized. Contact PE Support for assistance.

Show Me Link on Draft Fee Confirm Dialog Box Not Working

Within a Draft Fee, if the AR & WIP values do not match and the ‘Check’ button is selected, a dialog box will appear notifying that the values do not match and provide a ‘Show Me’ link to take you to the error. This ‘Show Me’ link now works and takes you to either the AR or WIP tab.

Certain Links on Diagnostic Page Causing Permission Error

When certain links were selected on the Diagnostic page under the Admin menu, an error message would appear relating to permissions. This error has been resolved and the links should now redirect you to the proper pages.

Error Message When Creating New Staff Using Windows Trusted Login

Error message was occurring when setting up new staff members using Windows Trusted Login. This error message should be resolved.

BUILD 5795

FIXES

Preferred Contacts Checkmark Not Flowing To Client Details from Assurance Request

Within an assurance request, on the Relationships tab, if a connection was marked as 'preferred' via the checkbox after the contact/client was approved, the checkmark was not displaying on the Connections tab in All Client or All Contact Details. The preferred checkmark is now displaying when applicable.

My Portfolio Schedule Not Displaying Schedule Items for Jobs Logged In User Is Responsible For

The My Portfolio Schedule under the Portfolio menu was only displaying jobs for which logged in user was scheduled, and was not including the scheduled items for the jobs the logging user was responsible. Now, the Portfolio Schedule will display all jobs where the logged in user is either Partner, Manager or In-Charge or the schedule items for those jobs. As well as any jobs where the logged in user is scheduled.

Adding Details Dashlet to Contact or Client Dashboard on Dashboard Defaults Page Produces Error

The Details dashlet can now be added to the Contact or Client Dashboard on the Dashboard Defaults page without error.

Zero Bill Date Not Saving in Draft Window

The date field within a draft zero bill would not save when changed. This field can now be edited and the updated date will remain.

Address Field in Assurance Request Not Outlined in Red when Set to User Required

The address field will now appear as outlined in red if set as 'user required' in Assurance Request Setup.

BUILD 5799

FIXES

Returned Assurance Questionnaire Messages Now

The returned reason entered when a questionnaire is returned to the requestor in Gatekeeping will now appear in the requestors Messages Dashlet on the Staff Dashboard.

Appearing in Staff Messages Dashlet

Deadline End Date on Job Template Not Transferring to Job Created Using Template in Assurance

If a Deadline End Date was set on the job template, the date would not flow through to the job created using that template when created via Assurance. The Deadline End Date will now appear on a job created via Assurance when set on the job template used to create the job.

BUILD 5816

FIXES

Added Option to Set Assurance Default Values

In Assurance Request Admin under the Admin menu, there is now an option to set the 'Default Value' for a specific field.

BUILD 5823

FIXES

OriginalAttention Column Size Increased in Tables

The OriginalAttention column was updated to increase the size of the Contact Field in Client Details – AR/Collection tab to allow for more characters.

Full Name Field in Staff Extended Search Not Working

The full name field in Staff Extended Search now works as expected.

Unable to Delete a Prospect Event

A prospect event can now be deleted by using the Delete button within the Event Details.

BUILD 5827

FIXES

Problems With Emailing In PE

PE Email Service bugs which caused processing of emails to stop have been fixed.

Unable to Print Client Reports under Client Menu

Previously, an error message appeared when trying to print reports under the Client menu. This has been resolved and the reports will now print without error.

Added Filters to Job Template Creation

Filters were added to the Job Template Definition page (under Admin menu – Task Pad) to allow the ability to lessen the amount of templates/services appearing on the page at once.

Department Schedule Not Filtering Staff Names Based on Filters Selected

In the Department Schedule (under Portfolio menu – Task Pad), all staff names were appearing for those staff members that had schedule items regardless of what filters were selected. The filters will now filter staff members and schedule items for those staff members and only show the staff members that belong to the selected department, office, and/or organization.

Tax Jobs Created Through Assurance Not Appearing on Client Jobs List

If a tax job is created through the Assurance process, the job will now appear on the client jobs list as expected.

Inactive Organizations Appearing In Assurance and Security Administration

Now, only active organizations will appear in Assurance and Security Administration pages.

BUILD 5830

FIXES

Department Schedule Displaying Client Code for Internal Clients

The Department Schedule has been updated to display the internal client name instead of client code on the grid view of the schedule items.

Assurance & Security Admin Updated to Exclude Inactive Organizations

The Organization field on an Assurance request and the Organization tab in Security Administration no longer display inactive organizations.

Out Of Office Details Saving Without Expiration Date

The Out of Office details will now save when excluding an expiration date, whereas it was previously only saving if an expiration date was entered.

Prospect Events Page Layout Updated

The Prospect Events page layout was distorted. The layout has been updated to appear correctly.

BUILD 5851

FIXES

Unable to Set Default Value for Currency in Assurance Request Setup

Within Assurance Request Setup (under the Admin menu – Task Pad), the option for Default Value within the Currency field setup now works correctly to allow you to set the default currency value to be displayed and selected within an Assurance Request.

Department Schedule – Inactive Staff Members Not Filtering Properly

Inactive staff members will now be included in the filtering when Department, Office, and/or Grade are selected.

<i>Active Directory Group Name Producing Login Errors when Group Name Includes Apostrophe</i>	Errors will no longer occur for Active Directory group names which includes apostrophes.
<i>Able to Submit Client Questionnaires without Required Fields Entered</i>	On the Client Questionnaires page under the Client menu, a questionnaire could previously be submitted without entering information into all required fields. This has been resolved to require all required fields to be entered prior to being submitted.
<i>PE Email Service Updating to Status of 'Stopping'</i>	The PE Email Service has been changed to not update to a status of 'stopping.'
<i>Address Not Appearing on Contact Details Dashlet for Non-Client Contacts</i>	The Contact Details Dashlet was previously not displaying the contact addresses for non-client contacts. This has been updated so that the address will be displayed when entered on the Contact Details page for all contacts.
<i>Extended Client Search Not Displaying Valid Suspended Clients When Searching Valid Clients</i>	For suspended clients that are not locked and that are still valid, the Extended Client Search was not displaying them as a result when searching for 'Valid' clients. This has been updated to now include non-locked suspended clients into the 'Valid' status search results.
<i>Drafts for Creator Portfolio Drop Downs Not Updating Results</i>	Within the Fee Portfolio, the Drafts For Creator portfolio results were not being updated based on the selected staff grade and/or staff name. This has been changed to update the results based on the selection.
<i>Inactive Staff Appearing in Security Administration</i>	All inactive staff members have been removed from view within Security Administration (under the Admin menu – Task Pad).
<i>Job Work Status Order Not Displaying Correctly</i>	The job work status order has been updated to match the order selected within the Work Status setup in Categories, Etc. under the Admin menu.
<i>Performance of Search Filters in Job Template Definition Setup</i>	Performance of search filters has been enhanced within Job Template Definition page.
<i>Job/Jurisdiction Due Date Not Calculating Correctly When 0,0 Entered for Tax Due Date</i>	When a particular jurisdictional tax type has 0, 0 has the due number of months and days, the jurisdictional calculation will be equal to the base date selected within Categories, Etc under the Admin menu.
<i>Current Due Date Displaying Incorrectly Upon Job Creation</i>	Current Due Date has been updated to display correctly upon job creation.

FIXES

<i>Global Tax Job Management Page Displaying Incorrectly Current Due Date</i>	Current Due Date has been updated to reflect the correct date within Global Tax Job Management page.
<i>My Portfolio Schedule Displaying All Managed Clients/Jobs Regardless of Schedule Items</i>	A checkbox option has been added for 'Show All Rows' to allow for collapsing the view so that only Client/Jobs with current schedule items will display if unchecked, or all managed clients/jobs will display if checked (regardless if there are schedule items).
<i>Star Icon Not Appearing Shaded When Selected Within Prospect Pages</i>	When selecting the star icon to add a prospect as a 'favorite,' the star icon was not appearing shaded after selection. This has been updated.
<i>Error Message Received When Creating New Prospect</i>	A prospect can now be created without error.
<i>Spreadsheet Blank When Selecting Data Button from Staff or Client Extended Search</i>	When exporting from the client or staff extended search pages using the Data button, the spreadsheet created will now display data.
<i>Inactive Templates Appearing for Selection When Creating New Job</i>	Inactive templates are no longer appearing when adding a new job.
<i>Job Period End Date Not Displaying Correctly on Job When Created Through Assurance Request</i>	The Job Period End date entered on the Assurance request was not flowing through correctly to the Job once created if the date was different from the client year end or something other than 12/31. This has been updated.
<i>Daily Timesheet Producing Error When First Day of Week Set to Sunday</i>	Unable to access Daily Timesheet when the first day of the week was set to Sunday. This has been updated to no longer produce error message.
<i>Fiscal End Date Displaying Incorrectly On Jobs</i>	Fiscal End Date has been updated to display correctly on Job Details.
<i>Staff Leave Dashlet Displaying Selected Staff Member's Details</i>	Previously, when a staff member was selected from the search menu, their Leave Details would display when selecting the details from the Leave Dashlet. This has been updated to show the information of the logged in staff member, not selected staff member.

BUILD 5864

FIXES

Client Job Details Missing from Global Tax Job Management Page

On the Global Tax Job Management page, the job details of newly created jobs were missing and no information was displayed for the different columns. This has been resolved to display the job details properly.

Jobs List Pages Dates Persisting

Once the date range is changed on a jobs list page (Global Tax Job Management, Standard Tax Job Management, Staff Jobs), the dates will persist.

Jobs Created Via Assurance Displaying Job Code as 'Unknown'

Once a job was created through the assurance process, the job details displayed the job code as 'unknown.' This has been updated to reflect the job code setup within the Job Template Definition for the template selected within assurance request.

Unable to Add/Edit Contact Notes

The Contact Notes dialog window within All Contact Details on the Contact tab will not display as expected and notes can be added and/or edited.

License Numbers Not Matching On Period End Analysis and New Staff Member Creation Pages

The license numbers have been updated to reflect the correct licensing information on both pages.

Work Status Colors Not Displaying on Staff Jobs List

Previously, the work status colors were not displaying on the Staff Jobs List. This has been updated to display the selected colors (from the Admin menu – Categories Etc – Special Categories – Work Statuses – Service Statuses setup).

Job Period End Date Ignored When Adding Jobs Within Assurance

Job Period End date is no longer ignored when adding jobs through Assurance.

BUILD 5871

FIXES

Current Due Date Not Updating After First of Multiple Jurisdictions Marked As Completed

For jobs with multiple jurisdictions, when one jurisdiction is marked as completed, the Current Due Date will now update to reflect the due date of the next jurisdiction that is due once the panel has been collapsed.

Jurisdiction Dates Not Calculating Correctly Based on Base Date Selected

The Jurisdictional Due Dates are now all calculated from a Base Date that is indicated on the Jurisdiction panel for each Job. The Base Date selection for a particular Tax Return Type is made in PEWC: Calendar Year Start, Calendar Year End, Client Fiscal Year End, Job Period Start and Job Period End. The Tax Return Type of a Job can be changed in Bulk Job Admin.

Where Tax Jobs are added to an Assurance Request - Fiscal End Date

The Fiscal End Date on the Jurisdiction panel now reflects the Base Date (see definition above) for the Job. The description of the field has been updated to "Base Date" to better reflect its function. Changes to this date will recalculate the Due Dates on all Jurisdictions for the Job.

**set as Todays date
not Base Date**

**Unable to Change
Order of Selected
Attributes in
Attributes Page**

The arrows to the to the right of the selected attributes section will now allow for reordering of the attributes within the Attributes Pages under the Admin menu.

**URL and Images
Not Working in
News Item Setup**

In Categories Etc, when adding a URL or Image to the News Item setup, the URL/image did not work properly. This has been resolved to work with a URL and/or valid image path.

BUILD 5890

FIXES

.Net versions

Microsoft have announced that they will stop providing security updates and tech support for .Net 4, 4.5 and 4.5.1. To ensure that PE is running on a patched and supported platform the targeted version of the .Net framework in use for V9.3 will be .Net 4.5.2. This change does not have any functional impact but will require that servers are on a supported patch level from Microsoft. This will affect all servers PE is installed upon – both SQL and the Web servers. Further details can be found from Microsoft:

<https://blogs.msdn.microsoft.com/dotnet/2015/12/09/support-ending-for-the-net-framework-4-4-5-and-4-5-1/>

PElerts

It was not possible to configure PElerts within Chrome. This is now working correctly. PElerts will not work on Platform as a Service sites.

PopUp Timesheet

The Workflow Status drop down was not showing as an option on the Pop Up Timesheet. This has been resolved and will now display correctly.

BUILD 5907

FIXES

**Toggle Width
button**

The Toggle Width button would become hidden behind a side scroll bar on grid pages with a large number of lines. The button has now been moved inside the scroll bar so that it is always available.

Job Creation

Jobs were not able to be created unless there was the Client Year End field had been populated. This requirement has been removed and a job can be created without year end details.

Work Timer

The Work Timer was not displaying the hours and minutes recorded correctly within the work timer if the time was over an hour. This has been changed to display the correct amount of time.

MRU

The Recent Client List was not updating if a user was selecting a client from a Classic style portfolio

**Prospect
Opportunity
Colours**

The Prospect Opportunity Colours had an option for Red Background. This was being displayed as a yellow colour. It is now displaying the correct Style choice.

BUILD 5943

FIXES

- Job Schedules** The dates on Job schedules within the Department Schedule, My Portfolio schedule etc were displayed in US date format for all environments. This has now been changed to display based on the browser location settings.
- Duplicate check for Assurance and Prospects** The duplicate check within Assurance and Prospects uses a double metaphone algorithm. This algorithm was not displaying results for common nicknames. The duplicate check has now been enhanced to include a check against a list of common nicknames.
- Prospects** The Staff field information on a Business Card was being lost when a different prospect was being updated. This has been resolved.
- Removing Staff Accounts** When removing a staff account from User Password Control it was unclear that the account had been removed. The page has been modified to update and remove the staff account from the displayed results.
- PElerts** Schedules for PElerts were not being entered corrected into the tables and the associated SQL jobs were therefore not being created. This has been resolved and is now working correctly.
- Reports** When running some reports with parameters within Chrome and attempting to export the data, the pop up dialog for the export was being displayed in the bottom right corner of the browser. This has been modified to display correctly.
- Billing Wizard > DRS/AR** Additional carriage blank lines were being inserted when the page refreshed if the user had used carriage returns within the narrative section. This has been rectified.
- Pop Up Timesheet** The Pop Up Timesheet was not accessible if the user tried to navigate to it as soon as they had logged in. This was due to the authentication not being passed correctly. This has now been resolved.

BUILD 5961

FIXES

- Job Budgets** The Budget figures on the Task panel were not being updated to reflect the budget figures entered into the Budget panel. This has been resolved to display the budgets correctly on the task panel.
- The budget fields on the task details have been removed. Budgets must be edited from the budgets panel.
- Assurance Requests** It was possible to Submit an Assurance Request without saving the details. This has been resolved and the Submit button will not become active until the data on a form has been saved.
- User defined mandatory fields were not being enforced when submitting an Assurance Request. This has been changed to ensure that a user has to complete all mandatory fields before the request can be saved and submitted.
- It was not possible to add multiple engagements correctly. This was also affecting the addition of services. This is now fixed.
- Contacts Dashboard** The Connections dashlet on the Contact Dashboard did not display correctly when there were a large number of connections. The connections overlapped the bottom of the dashlet. A scroll bar has now been added to the dashlet to resolve this issue.

Staff Search

The Staff Email column was not returning data within the staff search. This has been corrected.

Prospects

When creating a prospect and attempting to add additional information after the mandatory First Name and Last Name had been saved, the Save button was not being displayed. The Prospect forms have been updated to display the Save button when any field has been modified.

The Title field has been added to the form when creating new prospects.

BUILD 5967**FIXES****Prospects**

The Save button on any of the Prospects tabs has been disabled until a change has been made.

Contact Clients

The Client focus was not being updated to reflect when a user had navigated to a client's page from the Contact > Clients page. This has been rectified and now passes the client id through to the MRU.

Assurance

The Sex field on the person tab would throw an error if the selection was more than 6 characters long. This has been changed within the tables to allow 10 characters.

Job Budgets

When viewing the job budgets panel using Chrome, the budget type of By Task By Staff By Date was not displaying correctly. This has been changed to display the fields at the correct sizing.

BUILD 5987**FIXES****Search screens**

If a user hit Enter when using the search screens, the form was being reset. This behaviour has been corrected.

Assurance Questionnaires

The History associated with an Assurance Questionnaire can be viewed using the Show History button at the top of the questionnaire.

Job Class

The Job Class field had previously been hidden. This has been changed. By default this field will be hidden but can be exposed on the Job details form by uncommenting a block of HTML.

To show the Job Class:

1. Copy the file /Views/templates/jobs/jobdetails.cshtml to /Client/Views/templates/jobs/jobdetails.cshtml
2. Open the /Client/Views/templates/jobs/jobdetails.cshtml file
3. Edit line 19 (remove the @* "at-sign and star")
4. Edit line 25 (remove the *@ "star and at-sign")

Job Dates

Job dates were not being calculated correctly when being derived from parent tasks. This has been corrected.

Job Details

Parents and Predecessors were not being pulled through from the job template to the job being created from the template. This was also linked to the Job Dates issue in the item above and was due to a change between using task ordinals and task index. This has been resolved.

BUILD 5999

FIXES

Menu order

Menu items were being re-ordered. This has been resolved to order by Menu Ordinal and then by Menu Title.

Job Rollover

The Job rollover dialog had a spelling mistake in 'number'. This has been corrected.

Questions Setup

There was a spelling mistake on 'mandatory' on the question set up dialog. This has been corrected.

Questionnaire set up

Questionnaires using the Build option for the Applies To criteria were using a redundant table when building criteria to be applied to organisations. This has been updated to use the correct table within the criteria.

Spell Checker on Classic pages

The spell checker on classic pages would identify spelling mistakes but would not allow the user to right click and select an alternative. The right click functionality has been activated.

Events

Events were not being deleted when using the Delete Event button within the event details. This has been resolved.

Fee Portfolio

Within Unprinted fees of the DRS node, if email fee was selected, there was no option to be able to exit the Email viewer. A Close behaviour has been added to this view.

Transfer WIP within Client

WIP amounts were being round up when transferring WIP within a client. This has been fixed.

Update Partners/Managers

When using the Bulk Update facility to update the partners and managers at client level, the Last Update By information was not being updated. This has been changed.

BUILD 6013

FIXES

Job Schedule

Task assignments were not being carried over when a job was rolled. This has been corrected.

Staff Budgets Portfolio

The organization filter was not working. Now, when an organization is selected only the staff member in that organization will appear.

Assurance

Upon validating an Assurance request, the user was returned to the 'All Assurance Requests' page. Now, the user will be redirected back to the Validations list.

Jobs

Add a read-only job actual end date to the Dates panel within Job Details and is updated when a job status has been changed to mark the job as completed.

BUILD 6013

FIXES

Client Search	Removed 'locked' as a status option within Extended Client Search
Jobs	Added role change history to the History panel within Job Details.
Job Budgets	Upon rolling over a job, the actuals became the new job's budget regardless if the Automatic Budget option was checked. This has now be resolved to only roll over the previous job's actuals as the new job's budget if the Automatic Budget option is checked.
Reports Dashlet	When using Internet Explorer, using the Reports Dashlet scroll bar would cause the whole dashlet to move with you. This has been resolved.
Contact Extended Search	Contact Extended search was not searching by office, when selected. This has been resolved.
Workflow Portfolio	When changing the status within the Workflow Portfolio, the status was not saving. This has been resolved.
Assurance	The submit button was showing when viewing an Assurance Request that is pending validation. The submit button no longer shows on this view.

BUILD 6100.18974

FIXES

Assurance	All types listed in ownership drop down regardless of Contact type; Jane at Larking Gowen had noticed that when choosing an Ownership type from the dropdown list in the engagement page of an Assurance request, that the Contact "Type" wasn't being taken into consideration by the system. Reported by Jane Trudgill-Larking Gowen- Zen Desk Ticket 5058
Staff Budgets	When adding a staff member to a schedule item, the staff details weren't being brought through to the budget panel, even if the sync budget box had been ticked. Reported by Michelle Harris and Victoria Stephenson
Budgets from schedule screen	Jane at Larking Gowen had found that when adding a budget from the schedule screen, that the details (budget hours) weren't being mirrored in the tasks tab on a job. Reported by Jane Trudgill- Larking gowen- Zen Desk Ticket 5470
Questionnaire Detail screen not showing correct tick box answers	In the Questionnaire Details page, if any of the questions had a checkbox answer with a data type of bit, the page didn't display the answer in the table correctly Reported by Ben Edwards for Burton Sweet- Zen Desk Ticket 5400
String or Binary error on Attributes	HW Fisher were getting a string or binary error message when entering more that 300 characters in the client attributes field. MAX AttrValText entered on the table but on the SP it was restricted to 255 characters. Reported by Tony Doyle for HW Fisher

Email Service sender

The Email Service sender was causing authentication issues.
Reported by Andrew Hambly

Add and Auto Allocate in Fees

Add and Auto allocate in fees getting wrong values. This was to do with credit or zero lines in the Bills WIP allocation.
Reported by Andrew Hambly

RD Cheques rounding issues

RD Cheques rounding to 0 decimal places
Reported by Andrew Hambly

Client SP Mappings

Command interceptor was not replacing Client SP Mappings in some parts of the system. If you were to create a client SP for pes_Job_Addresses, and add the mappings into the client SP Mappings, then open a job on the job screen and look at the Address fields on the billing panel, the Client SP wasn't being called.

Reported by Ryan Posener

BUILD 9.3.6246.17521

FIXES

Jobs service not changed in billing

5317 When using the “add & auto allocate” function on the WIP screen when creating a fee, the system was allowing you to change the job, but the service on the job wasn’t being refreshed and showing the service on the newly selected job

-Reported by Michelle Jenkins

Rolling Jobs doesn’t create the correct budget if not using actuals

5635 When using the Bulk Rollover facility and creating a schedule with the sync budget option turned on to create a budget, if the job is rolled and the create automatic budget is removed, the rolled job then has the correct schedule but the budget is blank. This was corrected so that if a job is rolled with the schedule kept/calculated and that budget isn’t being set to automatic and the existing job has the budget/schedule sync turned on, then the budget is built from the schedule.

-Reported by Michelle Harris

Delete option not clearing cache on client industry

5507 When creating then deleting a category for the client industry field, the value deleted was still showing as a drop down option.

Reported by Tony Doyle on behalf of BKL.

Job Templates flat rate not converting on new clients

5762 When creating a new client if you added a job with a flat rate assigned to it, once the client was approved and created, the job you applied no longer had the flat rate showing, it instead showed the standard rate.

-Reported by Michelle Jenkins on behalf of Muellor Prost

Date picker in my portfolio schedule in chrome not allowing manual date to be entered

5643 An error was received when clearing the current date showing in my portfolio schedule or trying to edit the date manually.

-Reported by Michelle Harris

Add and Auto allocate in fees producing wrong values

4548 This problem was to do with credit or zero lines in the bills WIP allocation.

-Reported by Andrew Hambly

My Portfolio schedule- Automatic scheduling not inserting the hours entered in estimated hours field

5663 If you created a job with Tasks, allocated yourself as the staff member on the task, entered your estimated hours, ticked the automatic scheduling check box and entered a due date, the system was not inserting the hours into the estimated hours field.

-Reported by Michelle Harris

BUILD 9.3.6354.26932

FIXES

Billing Issues

6482 If you had two clients in the same group, and one had the other as a billing client, you couldn't bring in the WIP from the client that had been applied as a billing client on the initial client. For example, Client Alpha, and Client Beta. If I added Client Beta as the billing client on Client Alpha, then created a fee for Client Alpha, selecting "add another client" from the drop down in the WIP screen, when I searched for Client Beta, and clicked onto it, the WIP wasn't brought through.

-Reported by Brad Podzius

Saving a blank category in Admin > Categories (PEWC)

6783 It was reported that when going to Admin > Categories > Categories, if you clicked to add a new category, if you clicked save immediately, the blank category was saved. It was found that once added, the blank category could not be deleted. This caused problems elsewhere in the software in Client Details.

-Reported by Dave Stringer at Fishers.