Release Notes V9.2

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Release Notes

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RELEASE NOTES

These Release Notes give you information regarding changes, modifications and fixes to the Practice Engine software. The information contained within this document refers to changes made since the last version release. (For information pertaining to all changes since a particular release, please contact Support for a Version History.)

PE Collect and Client Monies are not part of the core Practice Engine system and are subject to additional Licence Fees and Service Fees. Please contact support for further information on pricing.

SYSTEM REQUIREMENTS

Practice Engine Version 9 requires a minimum of SQL 2012. V9 also requires an SMTP relay that can be connected to from Practice Engine. This is a requirement due to changes to security and authentication.

Test systems for V9 need to run on a different web server to V8. This is due to V9 requiring a version of the .Net framework which can cause issues with V8.

WHAT'S NEW IN V9.2

PROSPECTS

Prospect Dashboard	A new Prospect Dashboard has been included which will provide the user with information regarding pinned prospects and opportunities, conversion rates of prospects and opportunities, and activity feed of events and visual representation of the information.
Prospects	The Prospects module has been rewritten into the V9 format. New Prospects pages have been created for All Prospects and My Prospects.
Opportunities	Two role types have been added to Opportunities – Opportunity Roles and Target Roles. These allow staff members to be allocated to the opportunity (Opportunity Roles) and contact people to be entered against the opportunity (Target Roles).

MODIFICATIONS IN V9.2

GENERAL

Grid pages	The search facility on the V9 grid pages has been adjusted to allow for multiple search items.
Change Password	A new button has been added to the Change Password dialog pages to redirect back to the Staff Dashboard following the successful change of the password.

STAFF

Charge Rates	The OK button has been changed to an Apply/ Undo button. Once changes have been applied the user will stay on the same page rather than being redirected back to the Staff Details page.

CLIENT

Edit WIP Transactions	A spell check option has been added to the Edit WIP Transaction page on the Client menu and the Edit WIP option within the Billing Wizard.

JOBS AND WORKFLOW

Bulk Job Admin	A Recalculate Job Jurisdiction action has been added to the Bulk Job Admin page.
Job Tasks	Totals have been added to the Budget and Actual columns of the Task panel within a job.
Tax Job Management	The tax job management page has been changed to a Global Tax Job Management page. The refiners have been changed to All, Active and InActive. The Job Rollover Status has been added as a column option to the Global Tax Job Management page.
Job Lists	Group/ Family, Job Complexity, Next Action Date and Rollover Status have been added as a column options to Job Lists.
Next Action Date	A Next Action Date has been created that is the minimum of tasks, jurisdictions and job other and end dates – whichever is the next date,
Job Dates	When setting up a new job, there are fields to hold both the Tax year as well as the Fiscal year for the job..
Job Templates	A new template name placeholder has been created [TTTT]. This placeholder will insert the Tax Year into the job name.

ASSURANCE

Assurance Request	A Quick Add services button has been added to the Assurance Request Engagement page. This can be found by using the menu option available to the side of the Add Service button.

FIXES IN V9.2

GENERAL

IE Compatibility	There were some issues with IE compatibility mode. These have now been fixed.
Most recently Used	The current staff member was being displayed in the Client Most Recently Used list. This has been changed to only display items which are correct for the selected list.
Column sorting	Column sorting was not working correctly if using more than 3 columns. This has been resolved.
Account Setup	The account set up email link was not showing an error message when the link was invalid. An error message has now been included to indicate that the link is invalid.

FEES AND BILLING

Invoice Dates	There was an issue where date changes made to the Invoice Date were not being saved and were reverting back to the current day's date. This has been resolved and will maintain the change made.
Edit WIP	An error message was displayed if the user tried to use the Edit WIP option from WIP Allocation screen of the Billing Wizard. This has been fixed.
Fee Wizard Layout	The Fee Wizard was not displaying correctly with IE 11. This has been resolved.
Fee Wizard	Memos and draft Comments were not being saved when using Chrome. This is now working correctly in Chrome.

JOBS AND WORKFLOW

Job Rollover	Jobs were being rolled over from the Bulk Job Admin page, but not from the job details page. This has now been fixed.
	Roles were not being rolled over when jobs were rolled over in bulk. These are now being maintained correctly.
Bulk Job Admin	There were problems when trying to use the Status update functionality through the Bulk Job Admin page. This has now been resolved.
Job Jurisdictions with Firefox	There was a problem when viewing the job details page with Firefox where the jurisdictions did not display correctly. This has now been rectified.
Global Tax Management	An error was occurring when trying to add jobs to a batch from this page, indicating a missing parameter. This is now working correctly.
	The current Due Date is not being picked up correctly when searching within a date range. This has been resolved.
Job Lists	Jobs were being displayed twice. This has been corrected.
Job templates	Job templates from previous versions were not being displayed. This has been fixed.
	The last task on a job template was not able to be deleted. This is now working correctly.

Job Jurisdiction Dates When creating a new job, the Jurisdictions Due Date was defaulting to the current date and not calculating correctly. This has been resolved.

The Current Due Date will update after a jurisdiction date update after the panel is collapsed. There is no longer the need to use the recalculate button to recalculate the Current Due Date after an extension.

On jobs where there are multiple jurisdictions and one jurisdiction has been completed, the Current Due Date was not reflecting the due date of the extended jurisdiction. This has been corrected.

Job Dates The default job period start and end date were defaulting to the same dates based on the Fiscal Year regardless of which Template, Service or Client were selected. This has been fixed.

CLIENT

Client Pages There was an error when navigating from the client menu or taskpad to the client pages. This was caused by the client code having trailing spaces. The code has been modified to remove any trailing spaces.

STAFF

Staff Details Dates for DOB and DOD were only allowing a date as far back as 01/01/1980. This has been corrected.

ASSURANCE

Request The Client Year end was not being saved on the Assurance Request pages. This is now being saved.

When entering a new Person or Organisation, the Search dialog box was not disappearing when the Add New button was clicked. This is now working correctly.

Validation The Invoice and Statement Delivery format was being lost during the Validation process. This has now been resolved.

PORTFOLIOS AND REPORTS

Portfolios Portfolios that had a link to the Client Dashboard were redirecting through to the Client Search rather than the Client Dashboard. These links are now working correctly.

DATA ENTRY

Expenses When right clicking onto an expense header and selecting View Details from the context menu, the details of the Expense Header below the selected Expense Header were being displayed. This has been fixed and will display the correct details.

Timesheets The Work Status was not being displayed until the job within the timesheet was changed. This has been rectified and is now displaying correctly.

Timesheet Locations	Timesheet locations were not able to be set within Daily Timesheets. This was occurring when the user did not have a default location set. This has now been resolved.

ADMIN

Group Security page	Pages with underscores were causing multiples of the same letter to be displayed. This was a problem with the Javascript and has been corrected.
Questionnaires	The Create New Question dialog window was disappearing after opening from within Questionnaires. This has been fixed.
Categories etc	Users were unable to delete categories. This is now working correctly.