

BillQuick Web Suite 2016: Release Notes

Build 17.0.15.0

Release Date: June 10 2016

1. **Accounting:** In the Preferences screen, Display by Account Name was added. - ENHANCEMENT
2. **Allocation & Forecasting:** Project amount total was not showing correctly in the Calendar View. – FIXED
3. **Billing Review:** Contract Type and Contract Amount columns have been included in the Billing Review screen. – ENHANCEMENT
4. **Billing Review:** In the Global Settings > Billing screen, the ‘Restrict Joint Invoices to Parent Projects’ rule has been added. – ENHANCEMENT
5. **Billing Review:** In the View By Client mode, click Refresh. Joint invoice number is not same even when rules are set at the client and project level. On the Client > Billing tab, “Default to Joint Invoice” is checked, on the Project > Billing tab, “Send as Joint Invoices” is checked, and on the Project > Details tab, “Always Show in Billing Review” is checked. This issue was fixed. – FIXED
6. **Invoice Review:** In Global Settings > Email Settings, we added a capability to define the default settings for Subject and Message for Invoices, Joint Invoices, Statements and Reports. PDF file naming convention uses smart dynamic placeholders that allows file names to be unique and meaningful. The emailed invoices and statements will inherit the file names based on these settings. – ENHANCEMENT
7. **Project:** Now you can create a new service fee schedule, expense fee schedule, budget and estimate directly from the Project screen. – ENAHNCEMENT
8. **Project:** Option to clone projects for selected clients was added. – ENHANCEMENT
9. **Project:** LastUpdated field was set to NULL when project phase was created. – FIXED
10. **Reviewer:** ‘Time & Expense Detail’ report did not preview properly. – FIXED
11. **Simple Time Card:** After selecting a project and then activity, tabbing to the next cell wiped off the activity. – FIXED
12. **Sheet View:** When Overtime (OT) flag is checked, the rates are not populated correctly. – FIXED
13. **Expense Log:** Auto Approve rule does not work when a file is attached to an expense. – FIXED
14. **Invoice Review:** Set Joint Invoice as the default template for a project and create a joint invoice for it. Upon sending this invoice via email, we see the Hourly Invoice template instead, which is incorrect. – FIXED

15. **Invoice Review:** In the Invoice > Time and Expense Details screen, the results used filters that were set in the Time Entry and Expense Log screen. – FIXED
16. **Project Center:** An error is thrown on opening this screen. – FIXED
17. **Project Control:** In the Assign column, the check option did not check the Control Billable option. – FIXED
18. **Security:** Now you can copy security settings from an existing employee/vendor and apply them to groups or employees based on titles or departments. – ENHANCEMENT
19. **Vendor Bills:** *Chrome Browser Only:* When you import time or expenses into Vendor Bills, the chrome browser prompts you with 'Prevent this page from creating additional dialogs'. Now if you check this option and then try to import a time or expense entry, it does not work. – FIXED
20. **Vendor Bills:** After creating a vendor bill, when you use the BillQuick desktop-QuickBooks sync tool, the bill does not transfer to QuickBooks. – FIXED
21. **Log Viewer:** The Entry ID (format), for deleting payments, in the Log Viewer screen was incorrect. – FIXED
22. **Report Center:** When creating a joint invoice, if the latest joint invoice skips some of the projects in the earlier invoices, BTD (billed to date) on the account summary is different from the Net Amount in the Invoice Review screen. The invoice shows wrong BTD and it only shows BTD for the projects on the latest invoice only. – FIXED
23. **QuickBooks Online Sync:** Retainer payments failed to sync with QuickBooks Online. – FIXED
24. **Manage Web Users:** When a company has both vendors and employees marked as users, and on assigning another employee as a user, it displays the 'Assigned Users' count incorrectly. – FIXED
25. **Manage Web Users:** Under certain scenario, the marked web user list disappears and then reappears when the keys are validated. – FIXED

Build 17.0.14.1

Release Date: May 25 2016

26. **Accounting:** Preferences - Display by Account Name added. - ENHANCEMENT
27. **Time Entry:** Forward submittal status image was missing. – FIXED
28. **Group Screens:** Page resizing was handled. – FIXED

29. **Simple Time Card:** Show Memo Option turns off when session revives after timeout happens. – FIXED
30. **Simple Time Card/Simple Expense Log:** Tooltip for Project ID and Project Name column displays both Project ID and Project Name. – ENHANCEMENT
31. **Simple Time Card:** Evaluate time entry against project contract amount rule fails to apply properly when time entry is less than .25 hours. – FIXED
32. **Client:** Search resulted in error message ‘incorrect syntax new the keyword ‘AND’ . – FIXED
33. **Expense Log:** Rejected expense email notification was not working when logged in user was vendor – FIXED
34. **Project – Options – Project Change:** On applying the set of rules on the projects would uncheck previous rules for the selected projects. – FIXED
35. **Project:** Project contract type is ‘Recurring’ and also has Contract Amount set. Now when time contract amount is exceeded the time entries are marked as non-billable. This is incorrect. – FIXED
36. **Project:** Under Global Settings – ‘Auto Increment Project Code’ option is checked. Now when user changes some data in an existing project, behind the scenes Project Code gets updated to different value based on the auto increment rule. This rule is applicable for new projects only. This anomaly causes data integrity issues. – FIXED
37. **Project:** Create a new project with contract type as Hourly. User is required to enter contract amount which is incorrect. – FIXED
38. **Allocate:** When allocation screen has mixed data i.e. data entered directly from the screen and data imported from the budget. Now on updating an allocation entry will set Employee Group flag to true. – FIXED
39. **Budget:** Service Fee Schedule has different employee group with different rates. Now assign this to Budget and add new budget entry and it brings wrong rates for individual activity. – FIXED
40. **Project Control:** Project with “Prevent Expense Entries” rule checked do not display in Project Control. – FIXED
41. **Project Control:** When classification for an existing project control entry is changed, it would not save. – FIXED
42. **Vendor Bills:** Online Flavor with Pro Subscription: On saving vendor bill message is displayed “You need to upgrade to enterprise edition”. – FIXED
43. **Payment - Use Retainer:** Other Current Liability account running balance was not reflecting correct numbers after a payment is deleted that used retainers. This happens due to orphaned records in ARTransactionTable. – FIXED
44. **Payment – Retainer:** Delete Retainer Payment that has not been applied. System displays incorrect message saying ‘The retainer amount has been fully or partially applied to invoice(s). Are you sure you want to delete it?’ – FIXED

- 45. **Invoice Review:** On submitting invoices for review incorrect message “Do you want to submit time entries” is displayed. – FIXED
- 46. **Invoice:** Online Flavor: On viewing invoice an error is thrown when custom template is used with % character in the file name or report name. – FIXED

Build 17.0.12.0

Release Date: April 22 2016

- 47. **Accounting:** In this update we have added below accounting modules. - ENHANCEMENT

Credit Card
Transfer Funds
Enter Credits
Use Register
Other Register
General Journal
Reconcile Accounts
Memorized Checks
Memorized Bills
Print Checks – Coming Soon

Note: The above accounting modules are only available for Enterprise license

- 48. **Expense Log:** Clicking the Print option “Print as Shown on Screen” displays an error message. – FIXED
- 49. **Expense Log:** User is able to edit submitted expenses when their security should prevent them from doing so. - FIXED
- 50. **Expense Log:** When reimbursable approved expense is deleted, its referenced system vendor bill is not getting deleted. – FIXED
- 51. **Expense Log:** Create an expense entry with "Cost Includes Purchase Tax" option on. Each time we make an entry during this session requires to check this option so that it pulls the Purchase Tax from the Expense Codes screen. This makes expense entry tedious. – FIXED
- 52. **Time Entry:** Prevent Time Entries project rule is not working. – FIXED
- 53. **Time Entry:** Calendar control for “Period Including” is not working in Chrome. – FIXED
- 54. **Time Entry:** Filter ‘View By – Employee’, Now select an employee and create a time entry in the quick entry mode. The Bill Rate and Cost Rate are not assigned based on Service Fee Schedule rule

or "Rates from Activity" rule, it always saves the time entry with the employee's Bill Rate and Cost Rate. – FIXED

55. **Simple Time Card:** Fails to control billable entries after edit. Activity becomes billable despite the fact that the project has crossed the Contract Amount after we edit the memo or hours. The issue occurs when we have a project control and the assigned activity's Billable check box is selected in the Project Control screen. – FIXED
56. **Simple Time Card:** Press Tab key in the cell will move the focus to the next cell. However, on pressing 'Shift + Tab' key, focus moves to the next cell instead of previous cell. – FIXED
57. **Simple Time Card:** Project Control on Top of Employee Control does not always seem to work properly. If user enters the first character of a set of tasks, it shows all his tasks. If the user hits backspace and enters it again, then the list is limited to his tasks only on that project. – FIXED
58. **Timer:** The "Change Stopwatch" and "Back to Timer" links on the Timer screen show the text entry cursor instead of the hyper link hand cursor. – FIXED
59. **Timer:** The timer is lost when it is running and you click on another tab. – FIXED
60. **Reviewer:** Internet Explorer 11 shows the grid aligned to the right so it looks like the first column "has been cut" off. – FIXED
61. **Reviewer:** 'Date' filter range is not saved. – FIXED
62. **Project Control:** Project Control screen was allowing NULL values for Project ID field. This caused project control functionality to mal function. – FIXED
63. **Employee Control:** Complete or inactive projects can be assigned to employees on the Employee Control screen. – FIXED
64. **Budget:** The employee rates no longer populate when creating a new line for a budget. – FIXED
65. **Report Center:** Memorized filters were randomly changing. – FIXED
66. **Invoice Review:** When custom template is in use batch printing did not work. – FIXED
67. **Invoice Review:** Project notes are not being saved when a user emails an invoice. – FIXED
68. **Allocation & Forecasting:** Calendar View in the Allocate screen takes a lot of time to load; at times it does not load at all. – FIXED
69. **Project Center:** Customer has many long Project IDs and cannot see them clearly in the Project Center > Overview screen. – FIXED
70. **Billing Review:** 'Custom Period' filter date range is not saved. – FIXED

- 71. **PTO Request:** PTO request fails to send an email to the employee's manager requesting for time off. – FIXED
- 72. **To Do:** View by: Project is selected and select an existing To-Do item. Now update 'Task of' field for the selected To-Do item and it displays saved successfully however it is not saved. – FIXED
- 73. **Retainer Management:** Select client and click Email. The Email screen opens but without the selected email address of the client in the "To" field. – FIXED

**Build 17.0.10.3
2016**

Release Date: February 29

- 74. **Dashboard:** Memorized reports with parameters were not working properly. – FIXED
- 75. **Simple Time Card:** For Fixed and HNTE project type, non-billable time changes to billable upon edit. – FIXED
- 76. **Vendor Bills:** Vendor bill line items were not saved when vendor bill date is set before the project start date even though the Global Settings "Do Not Allow Time and Expense Prior to Project Start Date" is unchecked. – FIXED
- 77. **Invoice - Manual Invoices:** The previous unpaid amount in the Account Summary section at the bottom of the invoice will not reflect the correct amount when the invoice was paid using "Wire Transfer" pay method. – FIXED
- 78. **Allocation – Calendar View:** Temp tables are created to retrieve rates from fee schedule table associated with the allocated records. Sometimes these temp tables were not optimized and took long time and sometimes were not getting dropped if user choose to move away from the screen for any reason. – FIXED
- 79. **Billing Review:** Enter % complete and before processing change it to some other number. Now on processing the invoice, WUD is calculated incorrectly. – FIXED
- 80. **Write Check:** On clicking 'To-Print' check box resulted in error. – FIXED

Build 17.0.9.3

Release Date: February 5 2016

- 81. **Expense Log:** Adding a new expense entry with credit card was not working properly. Randomly credit card was not displayed for the entry. - FIXED.
- 82. **Expense Log:** An expense entry that has check number assigned to it disables credit card field, which is correct however when the same entry is selected and user clicks on new to add an entry it still keeps credit card field disabled. – FIXED

- 83. Expense Log: Global Setting – Time and Expense Rule: “Do Not Allow Time and Expense Prior to the Project Start Date” was not working properly in expense log. - FIXED
- 84. Simple Time Card: Time and Expense Rule: “Do Not Allow Time and Expense Prior to the Project Start Date” was not working properly. – FIXED
- 85. Simple Expense Log: Time and Expense Rule: “Do Not Allow Time and Expense Prior to the Project Start Date” was not working properly. - FIXED
- 86. Billing Review: User enter incorrect value in ‘% Complete’ field, the Net Bill changes and Write Up/ Write Down is calculated incorrectly. – FIXED

Build 17.0.9.0

Release Date: January 27 2016

- 87. General: Fixed issues reported by QA and Beta testers.
- 88. General: Latest Help File
- 89. General: Latest Reports and Invoices
- 90. Released to public.

Build 17.0.5.0

Release Date: January 20 2016

- 91. General: Issues related to amount rounding were fixed in most places especially related to Expense Log charge amount calculations.
- 92. Windows Authentication: Now application can be configured on IIS to run under Windows Authentication. This enables an extra layer of security and also allows auto logon feature inside the network provided the windows logon account matches with your web suite user login. From outside the network, Web Suite will prompt Windows login dialog and once authenticated will allow to logon to Web Suite. - ENHANCEMENT
- 93. Collection Center: Option ‘Send email without preview’ is set. On sending emails contents are blank. – FIXED
- 94. Payment: Parent project has retainer available. Now make payment by “Use Retainer” and select the sub-phase too. We see parent retainer is still there. – FIXED
- 95. Invoice Review: Set "Send as Joint Invoices" and Set “Use Custom Invoice Number” to true. Now when project has phases and processed as DRAFT invoice. When we see this draft invoice the custom invoice number is not applied. – FIXED
- 96. Invoice Review: On mailing multiple invoices to Client Manager or Project Manager, the emails were going to email assigned to client instead of client manager or project manager. – FIXED
- 97. Vendor Bills: Workflow reports were not working for Account specific bill. - FIXED

98. Vendor Bills: Vendor Bills that have account specific details were not showing in Vendor Bill report. – FIXED
99. Vendor Bills: Under Preferences – More – Set option ‘Display Account By:’ as ‘Account Name Only’. This preference is not applied to Vendor Bill - Account Tab. - FIXED
100. Manage Attachments: On deleting all the displayed attachments, an exception is thrown. – FIXED
101. Allocate: “Allow Add New” security fails when “Copy From Project” – FIXED
102. Report and Invoices: Latest set of reports and invoices
103. Performance optimization
104. General fixes

Build 17.0.4.0**Release Date: January 12 2016**

105. User Interface: New UI theme.
106. Project and Sub Phases: Project and Sub Phase navigation was not working. – FIXED
107. Project and Sub Phases: Project and Sub Phase sorting handled. – FIXED
108. Project: Under Manager Drop Down – Filter Options user can now check to see employees only.
109. Report Center: Added Show Active Item filter
110. Retainer History: Ajax type ahead drop down was not working for Client and Project lists. – FIXED
111. Invoices Review: Batch Email Invoices: When invoice with attachment email is send first to Project Managers and then to Client Managers, we see attachments are missing and sometimes attachments are not correct. – FIXED
112. Invoice Review: "Include sub-projects" in preferences rule was not applying correctly – FIXED
113. Invoice Review: Added retainer amount applied column.
114. Expense Log: Credit Card Account with empty card number was not showing up. – FIXED
115. Expense Log: Tax fields are being validated for correct values
116. Budget: Contract amount in project is set to 0 and its assigned budget is also set to 0. On closing the budget message is prompted. – FIXED
117. Reviewer: Security is OFF. On applying update rate, prompt displays that user needs high level of permission. – FIXED
118. Reviewer: Security setting "36. Limit editing to Self Only" is checked. Now when user apply update rate to entries other than logged in user, an unexpected exception is thrown on screen (i.e. column does not belong to table TE".
119. Report and Invoices: Latest set of reports and invoices
120. Performance optimization
121. General fixes

Build 17.0.3.1**Release Date: January 5 2016**

1. Invoices: Batch Print Invoices and Batch Email Invoices
2. Report and Invoices: Latest set of reports and invoices
3. Performance optimization
4. General fixes