



## NEXGEN Product Release Notes

### **2024 GENERAL RELEASE 1 - JULY, 2024**

#### **VERSION: 2024.1.0.0**

Includes changes since NexGen version 2023.2.0.0

### **NEW FEATURES & ENHANCEMENTS**

Fleet Cost & Care is pleased to announce the following featured enhancements introduced with the 2024 General Release 1:

#### **Sage Intacct Enhancements (For Sage Intacct Customers ONLY)**

- Configurable GL Posting Date for AR/AP Invoices
- Group No field is now optional on the Customers & Vendors Screen
- Enabled Bill To and Remit To Address for Customers and Vendors
- Location Dimension added to the Tax Line Items for AR/AP
- Performance Improvements for AR/AP Invoices Export
- Bulk Upload feature for AR/AP (Sage Acumen Customers only)

#### **AvaTax Integration Enhancements**

- Disable editing of invoice numbers on all invoices after the initial tax call to Avalara.
- Pass Yard code to Avalara on all invoice tax calls.
- Require yard address to be present when making invoice tax calls.
- Pass Purchase Order field to Avalara when making tax calls.

#### **NexGen DB Re-indexing Feature for the System Administrators**

- System administrators can now run the DB Re-indexing from NexGen to optimize the NexGen Database performance. It is recommended to run once in 2-3 months or when there are noticeable performance issues with indexes too fragmented (above 20 or 30%). This activity should be scheduled outside your business hours. Please reach out to [support@fleetcostcare.com](mailto:support@fleetcostcare.com) in case of any questions.

#### **Enable/Disable Biometric Authentication or 2FA Authentication**

- System administrators can now turn on/off Biometric and 2FA Authentication for ATOM via NexGen.

#### **DocuSign Anchor Tags for Signature, Date/Time fields**

- NexGen/ATOM now supports DocuSign Anchor tags that allows text to be used in Quote/Job/Invoice template documents as a placeholder for signature, initial, date/time or other tags for the end clients to easily identify. Please note that this requires customizing your existing PDF templates with the anchor tags to control the placement of signature, initial or Date/Time on the DocuSign PDF documents. Please reach out to [support@fleetcostcare.com](mailto:support@fleetcostcare.com) for more information.

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### Quoting:

- **Job Quotes - Require Job Start/End Dates** - Added a validation "Require Job Date/End Date" setting under the Set System Defaults --> Quotes Tab. (Case #28665)
- **Pricelists - Rates not calculated based on the Billing Code Yard Rates** - Adjusted the default rates logic in the Quote and Job screens to get the Yard level rates based on the price list discounts. (Case #30999)
- **Do not default Expired Price list into new quotes** - Added notification for expired price list on the customer screen and changed the quote screen not to default the expired price list. (Case #30789)
- **Don't allow an inactive Pricelist to default into new price quote** - Changed the Quote and Job screens to not to default an inactive price list when create a new Quote/Job. (Case #32261)
- **Crystal Report T&C code change on Quotes & Jobs** - Adjusted the splitting of the content in the Terms and Conditions to 5 different fields when the content is formatted as Left Justified. (Case #33096)

### Work Orders:

- **Work Order from Deficiencies Yard filter logic is incorrect** - Changed the Work Orders Not Billed Report to export data from custom fields added to the report. (Case #26208)
- **Work Order Lookup** - Changed the Work Orders look up by removing the selection of "All Work Orders" and loading the look up data when the look up is accessed the first time. (Case #32257)
- **Concurrency Support - Work Order** - Corrected an issue in the WO screen where the concurrency message was displayed upon saving a WO after an unhandled exception has occurred. (Case #33011)
- **Provide category column to support custom status's** - Added a category column to the work order status screen for filtering the "Open" or "Finished" work orders in Work Orders from Due PM's screen. (Case #31468)

### Jobs:

- **Error when changing job start date when E-Ticket is issued** – Coding change to prevent update of a resource's end date when existing generated e-ticket's start date is changed. This is to prevent a resource's end date from being changed to a date prior to the ticket date. (Case #27655)
- **Display Schedule - Show Jobs "Script Error"** - Corrected the map error by using the default browser to display the jobs. (Case #30913)

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- **Utility Option - Optimize the Image/Blob Size for Signatures** - Added a menu option "Optimize Signature Storage in DB" under the Utilities menu enabling the administrators to optimize the signature image file sizes. (Case #31542)
- **Enable custom shifts via SSD** - Added a new option 'Enable Custom Shifts' in the System Defaults Labor tab to enable the custom union shifts feature. (Case #31269)
- **Add Start and End times to "Audit Hours Report by All Employees"** - Added Start and End times to Hours Audit Reports and Excel export, these fields will be displayed when Enable start and stop times are enabled in system defaults. (Case #32108)
- **Job WPF Screen- Relabel "Previous Bill Date to" to "Next Bill Date" on the Storage Tab** - Changed the column label in the Job WPF -> Storage Tab screen from "Previous Bill Date" to "Next Bill Date". (Case #32517)
- **Field Options - Add "Hook Ready Time" to be configurable ("On Site Time")** - Added 'Hook Ready Time' field as a configurable label under the Maintain --> Field Names. Show the configured label in the Job WPF screen. (Case #32952)
- **Add Work Times workflow to System Default setting** – Provide an SSD setting to enable the work time workflow feature for all customers. (Case #31231)
- **Correct end date pay logic when labor record is entered for a Union employee** - Changed the pay rate logic in the labor screens to retrieve the pay rate from the last available craft code when there is no pay rate for the selected work date. (Case #32518)
- **Do not display 3rd shift selection if union code shift info has not been changed from defaults** - Changed the Labor screens to not to list the 2nd or 3rd shift options in the shift dropdown when there are no changes to the default shift premiums or pay rates. (Case #32798)
- **Modify Labor processing OT/DT calculation.** - Changed the payroll processing logic to include the ST hours in time slot overlap. (Case #32936)

### **Invoicing:**

- **Customer/Invoice and Collection Tab – Sage 300** - Added Current Balances column to the Customer /Invoice & Collection Notes tab. Added 'Current Balances' as a new bucket before 0–30 days in the Invoice/Collection Notes Tab of the customer screen. (Case #30673)
- **Add Export OK as Default Option for Recurring Invoices in SSD** - Added Export OK as a default option for Recurring Invoices in System Defaults. (Case #31362)
- **Print/Email Invoices to Merge Invoice PDF and Paper Ticket Attachments** - Enabled the window to choose the PDF attachments from file links for an invoice to merge invoice as PDF from the SSD flag. (Case #31118)

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### **Purchasing:**

- **Update purchase type on Unit --> Buy/Sell tab** - Added Lease, RPO - as options for Purchase Type on the Unit --> Buy/Sell tab. (Case #31079)
- **Purchase Req, Order, Voucher - Department required field option** - Added a "Need Department" checkbox to the PO tab of the system defaults screen to have the ability to make the department a required field in the PO Requisition, Purchase Orders and Voucher screens. (Case #31462)
- **PO Req/PO/Vouchers - Add Classification Code to the Classification Drop Down** - Added Classification Code to the Classification Drop Down to PO Req, PO, Vouchers and Vouchers from Receivers screens. (Case #31464)
- **Add Created/Modified Users to the "PO Status Report" & "Receivers Not Invoiced Report"** - Added Created/Modified Username (First Name + Last Name of the user) to the output file when exporting the PO Status report and Receivers Not Invoiced report. (Case #31906)
- **Allow Vendor Multiple Remit to's to default by Yard into Vouchers** - Changed the Remit To dropdown to default the Remit To value and dropdown filtering in the PO Req, PO, and all Voucher screens based on the vendor remit to "Yard" and "Primary Remit To" selections. (Case #33314)

### **Accounting Integration:**

- **NexGen Compatibility with Sage 300 2024 & PU1 Update** - Added new versions 7.0 A PU 5 and 7.1 A PU 1 to system defaults screen to support the new versions of Sage 300. (Case #31631)
- **Sage Intacct - Add Configurable GL Posting Date to AR Invoices Screen.** (Case #33463)
- **Sage Intacct - Add Configurable GL Posting Date to AP Invoices/Vouchers Screen** - Added configurable GL Posting Date to all Invoice screens and to AP Export. (Case #33505)
- **Sage Intacct - AR Bulk Upload Integration** - Added Bulk Upload feature to the AR Integration. (Case #33063)
- **Sage Intacct - AP Bulk Upload Integration** - Added AP Bulk Upload feature to Sage Intacct accounting. (Case #33251)
- **Sage Intacct - Customers/Vendors "Group No"** - Changed the "Group No" field to an optional field in the Customer and Vendor screens. (Case #33751)
- **Sage Intacct - Enabled Bill To and Remit To Address** - Enabled the 'Bill To' and 'Remit To' feature for Sage Intacct accounting. (Case #33755)
- **Export Jobs to Sage Intacct only when the relevant fields mapped are modified** - Restricted the export of the job data to Sage Intacct only when the relevant mapping fields are modified. (Case #32494)

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- **Import customer payments from Sage Intacct to NexGen** - Changed the API method for Importing customer payments from Sage Intacct to NexGen. (Case #32612)
- **Exclude \$0 Invoices from Export to Sage Intacct – Sage Intacct** - Changed the Export Invoices to mark the zero amount invoices as exported. (Case #32245)
- **Accounting Interface - Foundation** - Added error handling messages to the customer, vendor and employee exports from NexGen to Foundation so users know the reason behind the failed exports. (Case #32468)
- **MYOB Invoice Interface change request** - Changed MYOB Invoice export to default the Invoice Delivery Status to 'Already Printed or Sent' and to send the Invoice Description for service invoice export. (Case #32469)
- **MYOB AP Bill/Voucher Interface Change Request** - Changed the fields mapping in the voucher export feature. (Case #32470)
- **MYOB - Get Customer Payments & Balances** - Added Get Customer Payments & Balances feature to MYOB accounting. (Case #33253)

### **ITI Integration:**

- **ITI Import certificate** - Changed the import certificate logic to check for duplicates based on the certificate code and certificate number instead of only the certificate code. (Case #31886)
- **ITI Logo - Change datatype from IMAGE to VARBINARY(MAX)** - Changed the datatype of the 'ITILogo' column in FMS\_SYSTEM\_DEFAULT table from IMAGE to VARBINARY(MAX). (Case #32166)
- **Employee Certifications - ITI** - Added a duplicate validation message with a combination of the certification code, certification number and Issue date. Mark certificates for an employee as inactive when a new certificate is received with the same code/name and a different number. (Case #32622)
- **Jobs & Jobs WPF - Incorrect warning with multiple certificates for the employee** - Adjusted the certificates expired message on Job screens to accommodate two entries for the same employee certificate while using ITI. (Case #32623)
- **Configure ITI Logo via Set System Defaults** - Added an ITI Learning Hub Icon selection to the ITI Integration Section to display the selected image on the menu item. (Case #31665)

### **Telematics Integration:**

- **Samsara DVIR - Modify configuration to support Upper and Lower DVIR Unit** – Modified the DVIR configuration on the Units screen to support upper and lower DVIR units. (Case #31952)

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- **Increase character length - Import Telematics --> DVIR Defect name -** Increased the DVIR Defect Name length to 250 characters in import telematics. (Case #32504)
- **GeoTab Telematics -** Modified the GeoTab Telematics import to handle errors that occur due to a missing tag in the data being returned from the GeoTab API. (Case #32385)
- **GeoTab failing to retrieve -** Corrected an error in retrieving the data from the GeoTab GPS when there are duplicate unit codes. (Case #33323)
- **Tadano GPS Interface - Change the integration to support new Tadano API -** Changed the integration to support new Tadano API. (Case #31869)

### **Payroll Integration:**

- **Payroll Dept on Labor Reports Incorrectly displaying when using Paychex for Payroll -** Removed the payroll department fields from the labor reports when the payroll company is PAYCHEX. (Case #32037)
- **Payroll Interface - Criterion -** Added a new external payroll program 'CRITERION'. (Case #32473)

### **Admin:**

- **Enable Biometric Authentication via NexGen -** Added "Enable Biometric Authentication" checkbox in general tab of the system defaults screen. (Case #31907)
- **Enable MFA via NexGen -** Added 'Enable MFA/2FA' checkbox in system defaults screen to enable/disable MFA Authentication for the ATOM Users. (Case #33413)
- **System Maintenance - Run DB Re-indexing Job from NexGen -** Added DB re-indexing Job feature under System Defaults - System Maintenance tab where an administrator can run the re-indexing of the tables to optimize the database performance. (Case #31649)
- **Default all permissions to off when creating a new user record -** Made the User Options checkboxes unchecked by default when adding a new user. (Case #31725)
- **Restrict Users from Multiple Atom Devices -** Enabled the ATOM License Limit features in the user level for all customers. (Case #32685)
- **NexGen email functionality -** Changed the subject line and quoted to email if emailing the quote file links when SMTP and Outlook are enabled. (Case #32688)
- **NexGen 2024 branding updates -** Updated the NexGen branding in Splash, Login & About screens. (Case #33532)

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### AvaTax Integration:

- **Modify Sales Tax codes to not require a state value when creating a code for Avalara - AvaTax Integration** - State reference is not a required field when the tax code is set to Avalara. (Case #31712)
- **Modify Billing Code - WPF form to Group Avalara fields together - AvaTax Integration** - Changed the Billing codes-WPF screen to group the Avalara Tax ID & Operator Provided fields together. (Case #31713)
- **Modify Job Site form to accept Longitude & Latitude input - AvaTax Integration** - Added 'Address Unknown' check box to input the Latitude and Longitude data for a job site instead of address. (Case #31715)
- **Send Longitude & Latitude values when present on Job site records - AvaTax Integration** - Changed the API call to Avalara by sending the Latitude and Longitude values for an 'Address Unknown' jobsite. (Case #31718)
- **Make invoice field un-editable after first API call to Avalara - AvaTax Integration** - Changed the Invoice screens to make the Invoice No field as not editable after first API call to Avalara. (Case #31740)
- **When AvaTax is enabled, disable Order Entry from using NexGen to calculating taxes - AvaTax Integration** - Disabled the tax calculations on the order entry screen when Avalara is turned on for a company. (Case #31744)
- **Tax amount not displaying at the bottom of the service invoice screen - AvaTax Integration** - Corrected the issue of the tax amount not displaying at the bottom of the service invoice screen. (Case #31745)
- **Avalara integration for invoicing - add location code to invoice transactions -** Added a location code (Yard Code) to invoice transactions in the Avalara tax call. (Case #33115)
- **Avalara - Add Customer PO to the invoice API** - Added Customer PO Number to the invoice data export to Avalara. (Case #33557)

### SOFTWARE ISSUES ADDRESSED IN THIS RELEASE

- **Print Invoice with E-tickets No Sort Order on E-Ticket Section** - Corrected an issue when generating a Print Invoice with E-tickets No Sort Order on E-Ticket Section. (Case #28388)
- **Parts Inventory Cost Adjustment Adding - "Not Assigned" Yard** - Corrected an issue of the Parts Inventory Cost Adjustment adding record to a 'Not Assigned' yard and location instead of primary yard and location. (Case #30343)
- **Receiving Screen Keyboard Shortcut** - Corrected the issue of the keyboard shortcut "Ctrl-R" to populate Qty Rec field with the remaining to receive quantity instead of total quantity. (Case #30818)

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- **"Default Print file links" in SSD does not auto select files when "Print with invoice" checkbox is selected** - Corrected the issue of 'Default Print File Links' not working correctly when the Use API for file links is turned on. (Case #31113)
- **Work Order Search Not Showing WO from Due PM Generated WO's** - Corrected the issue of the WO Lookup not displaying the work orders that are generating from "Work Order from Due PM's" screen. (Case #31448)
- **Due date not populating on a credit Memo** - Corrected the issue of due date not calculating for EOM Term when generating a credit memo. (Case #31477)
- **Goto button on Invoice History window greyed out** - Corrected an issue of the Goto button greyed out on Invoice History Window when Parts Job Invoice is disabled in menu security. (Case #31524)
- **Invoice footers not auto populating when making job storage invoices** - Corrected an issue of the footers not populating from the defaults when generating an invoice from Job Storage invoices. (Case #31943)
- **Format on Receivers Report is incorrect** - Corrected an issue on the Receivers Detail Report where the header was printing at the bottom of the page. (Case #32038)
- **Source % applied Fuel charge from Job detail new invoices** - Added a change to Invoice screen to get the % Applied value from the job details for the estimates coming from Job, but not from the billing codes. (Case #32081)
- **Invoice WPF - Customer icon not accessible** - Corrected an issue in the Job & Invoice WPF screens where the customer go to icon is missing for users of a profile who have the save disabled in menu security for the customer screen. (Case #32087)
- **Job Schedule Screen losing cursor focus** - Corrected an issue in the schedule screens where the auto refresh is causing the cursor to lose focus in other screens when the schedules are refreshing in the background. (Case #32142)
- **Voucher Import Screen does not populate the job line-item field from the CSV file** - Corrected an issue in the Import Vouchers screen where the job line-item values are not imported from the csv file. (Case #32233)
- **Unit/Employee Schedule creating Tickets** - Corrected an issue in the Unit/Employee schedule, where a message is displayed, and ticket is not generated when generating a ticket for an operator ticket. (Case #32537)
- **Payroll O/T and D/T not processing consistently** - Corrected the issue of DT hours not processing correctly for a union when OT Eligible is set to blank. (Case #32545)
- **WO Lookup by Unit - Tab Control skips over the unit field** - Corrected an issue in the WO Lookup when selecting 'Unit' in the View By field the tab order is skipping the "Unit" dropdown field. (Case #32780)
- **Data Import Tool for Customer Contacts - Ordered By/Report To Defaulting to "Both"** - Corrected an issue in the Imports screen where the Ordered By/Report To field on the Customer Contacts is defaulting to 'Both'. (Case #32821)



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- **Trucking Quote conversion** - Corrected an error that occurred under certain conditions when converting a Trucking Quote to a Job. (Case #32962)
- **Error Opening a PO from the Job WPF screen** - Corrected an error in the Job WPF screen which occurs when closing the PO screen that is opened from the Job WPF screen. (Case #33213)
- **Exclude Status when syncing Customers/Vendors that are Inactive - Accounting Interface QB Online** - Corrected an issue in QB Online customer and vendor update by not sending the status value for an inactive customer or vendor. (Case #33257)
- **Paychex Export "Column "EmpIDFin" does not belong to table** - Corrected an error when exporting the labor payroll when the payroll company is PayChex. (Case #33452)
- **Display Schedules issues post 2.5.0 update** - Corrected a collation related error in the unit schedule screen. (Case #33533)
- **E-Tickets Not Approved or Invoiced search** - Corrected an issue of the E-Tickets Not Approved or Invoiced screen not retrieving the data correctly based on the company filter selection. (Case #33616)
- **Copy Unit Next Hours & Miles - New Units showing Past Due Maintenance** - Corrected the Unit Next Hours & Miles to copied units and new units are not showing on the Past Due 1 Unit report. (Case #29018)
- **When meter tab is not enabled, blank out the dates** - We implemented when the meter and odometer checkbox is unselected hours upper & lower to "0" and miles/km to "0" and Dates filed should be "Null". (Case #29204)
- **Schedule Jobs - Unable to change End Date** - Fixed the issue by clearing the operator/oiler assigned to the unit by displaying a message when the dates of the unit are beyond the employee date range. (Case #29915)
- **Dispatching/LEM issues** - Corrected an error in the job WPF screen that occurred when a resource end date is changed after an e-ticket is generated. (Case #30371)
- **Invoice WPF performance** - Corrected the performance issue by turning on virtualization for the invoice PO grid. (Case #30710)
- **Error message when trying to look up storage records for 3-year period.** - Corrected an error when retrieving the date for a 3-year period. (Case #30738)
- **Print Invoice include E-Tickets Worked Through Lunch** - Added the WTL checkbox in the invoice printing to the LEM ticket in the same area as how it was displayed on the operator ticket. (Case #30966)
- **MYOB Service Invoices - Map Parts Description to Service Invoice Line-Item Description** - Corrected an issue of a part description not mapping correctly on a service invoice export. (Case #31071)

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- **Job Cost codes fields are appearing on the line-item form - Accounting Interface TIMBERLINE** - Corrected an issue of removing the unused JC Code column on the Maintain Line Items screen. (Case #31191)
- **Payroll Processor causing a rounding issue** - Corrected an issue of the processed labor hours not matching to the original payroll hours. (Case #31313)
- **Trucking Ticket not Changing the date when you choose another job** - Corrected the date fields on the Trucking Ticket report to display the job start date of the job selected when clicking on the prior or next job buttons on the tool bar. (Case #31379)
- **Voucher issue when adding tax or freight** - Corrected the issue of the add tax button not calculating the amount in cases of selecting an existing voucher. (Case #31388)
- **SMTP password length** - Increased the SMTP password character limit to 70 characters. (Case #31412)
- **Work Orders - Activity Date Save Message** - Corrected an issue in the Work Orders - Activities tab to display the last maintenance alert message to be displayed only once during save click. (Case #31441)
- **Sort order on Employee Names in L4PP search** - Corrected the sort logic when doing an employee search on all the labor screens. (Case #31443)
- **Cannot cancel Job that has child L4PP records associated** - Added a change in the Labor screen where changing the Job No on a labor record that is associated with a labor payroll will change the Job No on the labor and labor payroll records with this Job No. (Case #31460)
- **Equipment revenue report - Material fuel equipment not showing up in the export** - Corrected the Equipment revenue report to export the data when a same classification is assigned to multiple Labor and Material records. (Case #31568)
- **Out of memory exceptions when user is running the Open Work Order report** - Corrected an error where we are getting out of memory If we load work orders recursively from work orders report screen. (Case #31601)
- **Read Only Parts Shipment Exception** - Corrected an error when opening the shipment screen for a user profile with save disabled. (Case #31624)
- **Employee ID Field Length - Accounting Interface QB Online** - Changed the Employee ID field length to accept more than 4 characters. (Case #31673)
- **"Execution Timeout Expired" Exceptions** - Changed the SQL query to improve the performance resulted from migrating to SQL 2022. (Case #31821)
- **Job WPF – Performance** - Corrected an issue of the Job taking longer time to load when the job has large number of nested estimate lines. (Case #31830)

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- **Job WPF - Performance** - Corrected an issue in the Jobs WPF screen where the loading of the job is taking longer time when the job end year is set to 2999. (Case #31840)
- **Error: Login failed for user 'sa'** - When a new user is added with copy & paste a username on the dropdown instead of creating new record, the system was editing the default "sa" account. Fixed this issue. (Case #31862)
- **Unit Schedule Inconsistencies** - Corrected an issue in the Unit Schedule screen for Available Units option to check availability only based on date and not on times. (Case #31901)
- **Error when "Saving As" Billing Code Master - Incorrect syntax near ')'.** - Corrected an issue of the Billing Codes screen returning an error when using Save As Excel feature to export 'ALL' status billing codes. (Case #31924)
- **SMTP Email** - Added a custom message-id to each outgoing SMTP email to address the issue of emails going out of NexGen being marked as SPAM by Mail Channels. (Case #31948)
- **Add support for App Password to Google Accounts (SMTP App)** - Added support for App Password while using SMTP for emailing. (Case #32027)
- **ODBC Error when exporting vouchers in batches greater than 4.** - Corrected the issue by removing the checking of the QODBC query for duplicate vouchers which is delaying the export process. (Case #32035)
- **Font Size Change for Equipment Required after converting Job from a Quote - Job WPF screen** - Corrected an issue of font size in the equipment Required and Comments section not being carried over to Job screen when converting a Quote to Job. (Case #32073)
- **Phone Number Error Message upon Employee Sync - Accounting Interface QB Online** - Changed the employee phone number format to match the required format during exporting employee data to QB Online. (Case #32123)
- **Industry Codes on Customer Screen Showing Code instead of Description** - Changed the Industry Code dropdown to show both the code and description instead of only code. (Case #32200)
- **Invoice Export - Accounting Interface QB Online** - Corrected an issue of Invoices not being exported to QuickBooks Online. (Case #32219)
- **Customer Open Invoices list missing invoices – Sage Intacct** - Corrected an issue of few open invoices missing in the Inv/Collection notes tab. (Case #32239)
- **Oiler Showing on E-tickets when not assigned to the Unit** - Corrected an issue in legacy job screen were adding a new employee record and changing the dates beyond the unit dates for the same employee that was assigned as an oiler for a unit record that has ticket generated is clearing the oiler. (Case #32288)

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- **Work Order Status Report Error** - Corrected the error that occurred when retrieving the report which has a Work Order employee record with blank end date. (Case #32303)
- **Schedule Trucking Jobs - user receives a red X after acknowledging the error** - Corrected the error when clicking on the Trucking Jobs - Loads - Unit/People tab. (Case #32312)
- **Display issue with Vouchers** - Corrected an issue in the Vouchers from Receivers screen, where the "use tax payable" and "remaining to distribute" fields are not displaying the correct values when navigating between the vouchers by clicking on Next button on the toolbar. (Case #32318)
- **Duplicate Vouchers to MYOB Export** - Corrected an issue of the duplicate vouchers being exported to MYOB. (Case #32320)
- **Telerik WPF Job Ticket Report - Issue with Unit Checklists not showing in correct order** - Corrected the unit checklist sort order on the Job E-Tickets reports as set in the unit checklist configuration. (Case #32336)
- **Oracle NetSuite Payroll Integration - CSV Export File** - Changed the NetSuite payroll export to include EMPID and employee name. (Case #32355)
- **ITI Certificates imported not populating the "Link To" & "Certificate Type" fields correctly** - Corrected an issue where the imported ITI certificates are not adding the Link To and Certificate Type values correctly. (Case #32386)
- **Canceled Employee Showing on Unit Schedule** - Corrected the cancelled employees are showing up on the unit schedule. (Case #32406)
- **Invoice details out of balance with invoice amount** - Corrected an issue in the Invoice WPF screen where invoice amounts are out of balance when a summary line was added from Job with zero quantity. (Case #32411)
- **Union Pay Rates** - Changed the union pay rate logic to include overscale and craft modifier rates even when the union pay rate is zero. (Case #32421)
- **Job screen Employee name changes value arbitrarily** - Corrected the issue when updating an employee on a job, the employee's name should be refreshed. (Case #32422)
- **Unit Description Report Saving as Excel** - Corrected an issue in the Unit Description Report where the export to excel did not display the system date format. (Case #32465)
- **Duplicate Certificates uploaded against employee** - Corrected the issue by adding a duplicate message when adding the same certificate code and certificate number multiple times for an employee. (Case #32547)
- **Saving changes to an Invoice opened form "Export invoices"** - Corrected an issue where an error is occurring when opening the invoice from the "Export Invoice" screen and updating the invoice. (Case #32575)

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- **Printer Error - Custom Unit List for Salesperson Report** - Corrected the default printer error when retrieving the data. (Case #32582)
- **Vouchers From Receivers Screen** - Corrected the late response when entering the invoice date on the Vouchers from Receivers screen. (Case #32608)
- **Lease Agreement Terms and Conditions** - Corrected an issue of Lease Agreement Terms and Conditions cutting off for specific Terms and Conditions. (Case #32749)
- **Invoice line-item amounts are updated when changed to Sub-Items invoice amounts at Invoice Level** - Corrected an issue in the legacy invoices screen to get the default rate from the job details based on the Jobdtlid instead of billing code. (Case #32756)
- **Unit Schedule crashing** - Corrected an error in the Unit Schedule where an error is occurring when larger number (around 50) of employees are assigned on a particular day. (Case #32804)
- **Import Vendors - Add a missing tax code** - Added tax code field to import vendors. (Case #32813)
- **NexGen Quote Exception (Deleted row information cannot be accessed through the row.)** - Corrected an error when changing the company after the estimate line was deleted before saving the screen. (Case #32817)
- **DocuSign API Customization - Dynamic parameters/Anchors for all Templates** - Added parameter support to Job Templates for DocuSign to recognize the specific fields like Signature, Date, Initials etc. (Case #32830)
- **Work Order Status Report Error** - Corrected the error that occurred when retrieving the report which has a Work Order employee record with blank end date. (Case #32940)
- **ComputerEase - Invoices - Fuel Surcharge (% Billing codes) should send calculated amount instead of %** - Corrected an issue of sending amount value instead of rate when the billing code is of percentage billing. (Case #32950)
- **Vouchers from Receiver approvals** - Corrected an issue in the Voucher from Receivers screen where the details that are crossing the variance threshold are not being tagged as approval needed when Multi Currency is turned on and voucher has same currency as base currency. (Case #32991)
- **NexGen email functionality - identify document being emailed** - Corrected the subject line in the email window to be consistent across all document types. (Case #33047)
- **Unit Schedule Daily Graph - Available Units** - Corrected an issue of the Available Units layout not displaying correctly in the Unit Schedule. (Case #33123)
- **RPT Print Current Page is disabled in Crystal Reports** - Enabled the Current Page radio button in the print dialogue when printing a report with multiple pages. (Case #33132)

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- **Export credit Invoice "Error [42S00] [QODBC] Column not found: DueDate - Accounting Interface QB Online** - Corrected an issue of DueDate column not found occurred during Credit Memo export. (Case #33150)
- **PayWorks Integration - Additional Columns on CSV Export** - Changed the Payworks payroll export by adding additional columns. (Case #33190)
- **Quote Profit Forecast: Billing Code Cost Update Import Failing** - Corrected an error in Import Data screen while importing billing code costs with invalid data in the import file. (Case #33208)
- **Syntax error Customer Jobsite** - Corrected a syntax error in the customer job sites screen which occurred while saving a new line with the single quote in a contact name that is selected in an "Order By" or "Report To" dropdown (Case #33229)
- **Maintain Customer Invoice Collections for Sage 300 ERP** - Corrected an issue in the customer screen Invoice Collections for Sage 300 where the payments are not being displayed for a customer with single quote in the customer code. (Case #33244)
- **Unit Schedule Freezing** - Corrected an issue of the Unit Schedule screen which is taking more time in retrieving the data. (Case #33356)
- **Unable to export Quotes By report into Excel** - Corrected an error in the Quotes By report which occurred when exporting data with department option selected. (Case #33411)
- **Revenue Detail Report by Invoice Date failing to load** - Corrected an error in the Revenue Detail Report by Invoice Date for Bay Crane when retrieving the data. (Case #33543)
- **Job WPF Errors** - Corrected a memory leak error which was occurring while continuously opening and closing the Job WPF screen more than 40 times from the display schedule screens. (Case #33580)
- **Duplicate Exported Invoice – Accounting interface MYOB** - Corrected an issue of duplicate invoices being exported to MYOB accounting. (Case #33650)
- **Invoice WPF - "Row set Column could not be found" - AvaTax Integration** - Corrected an issue in Invoice WPF screen where the tax amounts are not displayed for the invoices created with NexGen tax and before Avalara has been turned on. (Case #33706)
- **Duplicate AR invoices – Accounting interface MYOB** - Corrected an issue of duplicate invoices being exported to MYOB accounting. (Case #33728)
- **Invoice Export Issue to Sage Intacct** – Corrected line-item tax passed on AR/AP invoices (Case #33854)

## NEXGEN Product Release Notes

### **SYSTEM ADMINISTRATOR NOTES**

#### **System Defaults Changes**

##### **General Tab Changes**

- **Updated Accounting Program Version (Sage 300) dropdown in System Defaults** – Added new versions 7.0 A PU 5 and 7.1 A PU 1 to support the new versions of Sage 300.
- **New Field – Enable ATOM License Limit** - Added an enhancement to restrict users from registering multiple Atom devices. Default=unchecked.
- **New Field – Enable Biometric Authentication** - Added an enhancement to Enable Biometric Authentication for Atom users. Default=unchecked.
- **New Field – Enable MFA/2FA** - Added an enhancement to support MFA Authentication for the ATOM users. Default=unchecked.

##### **PO Tab Changes**

- **New Field - Require Department** - Added a field to make it a required field in the PO Requisition, Purchase Orders and Voucher screens. Default=unchecked.

##### **Invoice Tab Changes**

- **New Status – Recurring Invoice Default Export Status** - Added Export OK as a default option for Recurring Invoices in System Defaults.
- **New Field – Enable saving a copy of the invoice PDF when printing or emailing** – Added an enhancement to choose the PDF attachments from file links for an invoice to merge invoice as PDF. Default=unchecked.

##### **Labor Tab Changes**

- **New Field – Enable Custom Shifts** - Added a field in the system defaults to enable custom shifts. Default=unchecked.

##### **Quote Tab Changes**

- **New Field - Require Job Start/End Dates** - Added a validation field to "Require Job Date/End Date" on Quotes. Default=No.

##### **E-Documents Tab Changes**

- **New Field - Enabled Work Times** - Added new field to enable the Work Times workflow. Default=unchecked.

##### **System Maintenance Tab Changes**

- **New Field – DB Re-indexing Job** - Added DB re-indexing job feature where an administrator can run the re-indexing of the tables to optimize the database performance.

##### **External APIs Tab Changes**

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- **New Field – Configure ITI Logo** - Added an option to define a logo displayed and linked to the ITI Learning Portal.

### Menu Security Changes

- **Menu Items Change – Utilities → Optimize Signature Storage in DB** - Added a new menu option enabling the administrators to optimize the signature image file sizes.

### Utilities → Atom Devices

- **ATOM Biometric Enabled** - Added a new field in Atom Devices screen to display biometric authentication status enabled.
- **ATOM MFA Enabled** - Added a new field in Atom Devices screen to display MFA authentication status enabled.

**Menu Security Settings Changes (Admin → Menu Security) & Profile Screen Settings Changes (Admin → Profile Screen Settings)** – Added the following items that are **enabled by default**. Check your Menu Security & Profile Screen settings for all profiles to ensure the access to these latest items are enabled/disabled as appropriate for your organization.

- **Add Security settings for Utilities → Optimize Signature Storage in DB** – Added menu security screen settings to Optimize Signature Storage in DB module.

**Miscellaneous Changes – None in this release.**

## DOCUMENTATION & TRAINING

**The following documents are the current versions and may be of help for System Administrator reference:**

- [MFA & Biometric Authentication User Guide](#)
- [Avalara Setup & User Guide v3.0](#)
- [Responsibility Matrix Setup & User Guide V 1.0](#)
- [Quote Profit Forecast User Guide V 1.0](#)
- [NexGen WPF Dispatch User Guide 5.0](#)
- [Modular E-Ticket User Guide 3.0](#)
- [ITI Integration User Guide V 2.0](#)
- [NexGen WPF Invoicing Guide v4.0](#)
- [NexGen WPF Admin User Guide 2.0](#)
- [Google Play Store Admin User Guide](#)

## PREVIOUS RELEASE DOCUMENTS:

Release [2023.2.0.0](#) (Q1 2024)

Release [2023.1.0.1](#) (Q2 2023)

Release [2022.4.3.0](#) (Q4 2022)