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Progressus Advanced Projects

Release Notes

Build 10.4.0.3, US 10.4.0.0 and CA 10.4.0.0

Requires minimum of BC 22.0

Application Enhancements

Billing

- **Enhancement Request 73439:** Customers requested the ability to:
    - have pre-defined **Subscription Periods** for **Subscription Orders** (example: monthly, quarterly, etc.). Being able to select the **Subscription Period** from a list will reduce the risk of incorrectly set periods.
    - have pre-defined **Subscription Order Types** available when creating new **Subscription Orders**.
    - link to external documents on lines within **Subscription Orders**
    - use **Advanced** or **Arrears Billing** with **Subscription Orders**.
    - hide **Inactive Lines** to make it easier to work with **Subscription Orders** that have many lines.

    New Features:

    New Fields Added:

    - **Period** field is added to **Subscription Order** > **Lines** page. The **Period** field specifies the selected period for the **Subscription**.
    - **Order Type** drop-down field is added to the **Subscription Order** header. The value is selected from a list of **Subscription Order Types**, each having a **Code** and a **Description,** similar to **Project Categories**.
    - **Order Description** field is added to the **Subscription Order** header. **Order Description** is a text field of length 100 where information about the **Subscription Order** can be added.
    - **Ref. Link** field is added to **Subscription Order** > **Lines** page. The **Ref. Link** on each line in the **Subscription Order** is a text field that displays the URL to an external document. Clicking the link opens the URL. The link can be edited using the **Edit Ref. Link** action, found under **Lines** > **Manage** > **Edit Ref. Link**.

- **Billing Type** field is added to **Subscription Order** header. The **Billing Type** field will control the dates for **Subscription** billing. There are two options:

  - **Advance**: Lines will be billed in advance. **Advance** will be the default and work as **Subscription** billing has in the past. **Active** lines with a **Next Date** equal to or earlier than the **Until Date** limit, set in **Batch Post Subscription Orders**, will be posted.

  - **Arrears**: Lines will be billed in arrears. **Active** lines with a **Next Date** *plus the period length*, equal to or earlier than the **Until Date** limit, set in **Batch Post Subscription Orders,** will be posted.

- A new action **Hide Inactive Lines** is added to the **Actions** menu of the **Subscription Order**. When selected, only lines marked as **Active** will be shown.
  New Pages Added:
- **Subscription Periods**: Enables users to create pre-defined **Subscription Periods**, used on the **Subscription Order**. The **Subscription Periods** include a **Code**, **Description**, **Next Date Formula** and **Period Unit of Measure** that can be defined for each **Subscription Period**.

- **Subscription Order Types**: Enables users to create a pre-defined list of **Subscription Order Types** that include a **Code** and **Description**. **Subscription Order Types** are used in the **Subscription Orders** header.

Budget

- **Enhancement Request 61288**: Customers have the need to create **Planning Lines** from **Budget Entries**. Customers have requested the option to determine which **Budget Entry Lines** load into the **Planning Lines**. Prior to the enhancement, all **Budget Entries** were loaded and synched with **Planning Lines** when the **Copy and Update Project Planning Lines** process was run.

  The following features have been added to the synchronization between **Planning Lines** and **Budget Entries:**

  1. Users can select a single **Budget Entry** or multiple **Budget Entries** to load/synchronize by using **Select More**.

  2. Added a new **Delete Unlinked Project Planning Lines** button that allows the user to delete **Planning Lines** that no longer have **Budget Entries** associated with them. The **Planning Lines** with a **Purchase Order** or **Sales Order** created will not be removed.

  3. No other existing synchronization functionality was changed related to **Budget Entries** and **Planning Lines**.

  New Feature: Budget Planning page has been updated.

Costing and Pricing

- **Enhancement Request 68681**: Customer would like the **Update Job Item Cost** process to update all fields in the Project Ledger because the **Project Ledger Total Cost (LCY)** is not modified. This affects the information displayed in the **Project Detailed Ledger** and the **Project Subform, Task List**.

  New Feature: All Project Cost Amounts are now updated

Project

- **Enhancement Request 67931**: Customers would like to have the information in the **External Document No.** on the **Project Card** flow to the **External Document No.** field on the **Sales Invoice** instead of flowing to the **External Project No.** field.

  New Feature: **External Project No.** and E**xternal Document No.** are flowing to their respective fields on the **Sales Invoice**.

Purchasing

- **Enhancement Request 62689**: Customers requested to have the **Purchase Receipt Posting** information default from the **Project Card** during **Purchase Order** creation. In addition, the **Posting** section on the **Purchase Order** should not be editable.

  New Feature: **Purchase Receipt Posting** criteria is populated from the **Project Card** and cannot be changed in the **Purchase Order.**

Sales

- **Enhancement Request 68687**: Customers requested that if the **Item Chargeable** field on the **Project Task** is defined as not chargeable, then **Project Usage** entries created from a **Sales Order** shipment should not be chargeable and the **Project Ledger Entry** should be closed. The transaction should not be included in **Invoice Suggestions**.

  New Feature: The creation of **Usage** from the **Sales Order** will use the **Chargeable** setup from the **Project Task**.

Bug Fixes

<u>Billing</u>

- **Issue 72788: Time entries** show the **Time Entry Status** as **Waiting PM Approval** rather than **Rejected**. These entries are not visible in the **Hours Waiting for Approval** or **Hours in Open Timesheets** on the **Project Plan.** There are 2 reasons for this issue:

  1. Rejecting multiple **Time Entries** at one time from the **Project Plan** drill down.

     Resolution: Using **Select More** in the drill down from the **Project Plan** page results in the appropriate status.

  2. Entering **Rejection Remarks** using the **Rejection Remarks** button in the **Approval** screen without choosing **Reject** or **Reject All.**

     Resolution: The user must choose **Reject** or **Reject All** to enter **Rejection Remarks.**

<u>Budget</u>

- **Issue 72990**: **Work Type Codes** on entries in the **Budget Journal** are not flowing to the **Budget Entries**.

  Resolution: **Budget Journal** entries with **Work Type Codes** include the **Work Type** in the **Project Budget Entries**.

<u>Contracts</u>

- **Issue 64880**: The **Contract Invoice** process uses the **Gen. Bus. Posting Group** of the **Sell-to Customer** instead of the **Bill-to Customer**. The **Country/Region Code** in the VAT transactions was also taken from the **Sell-to Customer.**

  Resolution: The **Contract Invoice** process will use the **General Business Posting Group**, and **Country/Region** from the **Bill-to Customer**.

<u>Expense</u>

- **Issue 75640**: Error message, "The length of the string is xx, but it must be less than or equal to 10 characters," occurs when entering a **Project No.** on an **Expense report** and **Dimension Priorities** have been configured.

  Resolution: The error will no longer occur.

Hour Bank

- **Issue 69939**: When the user runs the **Hour Bank Post G/L** process, it reclassifies all lines on the **Sales Invoice**, even non-**Hour Bank** lines.

    Resolution: An **Hour Bank** entry on a **Sales Invoice** that also has a non-**Hour Bank** entry, posts to the **General Ledger** correctly.

Journals

- **Issue 72575**: The **Project Ledger Entry** > **Remaining Amount** is incorrect for **Sales Entry** transactions that are posted from the **Migration Journal**.

    Resolution: The **Remaining Amount** in the **Project Ledger Entry** will equal zero after posting the **Migration Journal** with **entry Type = Sale** and the **Project Detailed Ledger Entries** will be applied correctly.

Project

- **Issue 71587**: Error message, "You cannot post usage for job number XXXXX because a quantity of 1 remains to be picked," occurs when entering an **Advanced Project Journal**. This is because the **Item** was set up on a **Planning Line** and **Require Pick** and **Bin Mandatory** are true on the **Warehouse Location**.

    Resolution: The **Warehouse Pick** can be created from the **Project Card** using the **Create Warehouse Pick** button. The steps are as follows:

1. Create the **Planning Line**.
2. Create the **Warehouse Pick** from the **Project Card**.
3. Register the **Warehouse Pick**.
4. Create a **Reservation** from the **Planning Line**.
5. Create the **Project Journal** line from the **Planning Line**.
6. Confirm the **Location** and **Bin** are populated on the **Advanced Project Journal** and **post**.

- **Issue 70830**: Project permission error occurs when an empty **Resource No**. permission exists. Error message occurs in **Edit - Timesheet** when selecting a **Task**: "Resource 'XXXX' does not have Timesheet Permissions for project 'YYYY', task 'ZZZZ'."

  This occurs when the **Permissions** setup contains a line:

  - **Type** = **Resource**
  - **Approval** checkbox = selected
  - **No.** field = blank.

  And the **Permissions** setup contains an additional line:

  - **Type** = **Resource**,
  - **Timesheet** checkbox = selected
  - **No.** field = 'xxxxx' (not blank)

    Resolution: **Resources** assigned **Approval** rights in the **Permissions** page can enter time without receiving the **Timesheet Permissions** error message.

- **Issue 71586**: Error received in **Transaction Price Update Journal**: "Validation Results: The Value to Invoice field in the Price Maintenance Jnl Line table must be a FlowField." This occurs when a new **Unit Price** is updated manually.

    Resolution: The user is now allowed to manually update the **Unit Price.**

- **Issue 68441**: The **Usage (Price)** and **Amount to Invoice** fields on the **Suggested Billing Report** do not match the price in **Invoice Suggestions**. This can occur if the **Price** defined on **Resource Prices** is different than the **Price** on the **Usage** entry or if no **Resource Prices** are set up for a specific **Project**.

    Resolution: The **Usage** and **Amount to Invoice** fields are calculated correctly on the **Suggested Billing Report**.

- **Issue 69711**: Error message received when attempting to approve a **Timesheet** or **Expense Sheet**: "You do not have permissions for this task on this project." This occurs when a **Resource** who is the **PM** for a specified **Task**, but not the **Project Manager** on the **Project**, attempts to approve or reject **Time** and **Expense** entries for the **Task**.

    Resolution: The **Resource** assigned as the **Project Manager** on the **Task** can approve or reject time or expense for their **Task**.

- **Issue 72242**: Updating the **Dimensions** on a **Scheduled Billing Line** does not update **Global** and **Shortcut** values.

  Resolution: When a **Scheduled Billing Line** is modified with new **Dimension** values, the system automatically updates the corresponding **Global** and **Shortcut Dimensions** to match the new values.

- **Issue 68073**: The **Project Card** > **Ship-to Address** > **City** and **Post Code**s are incorrect when a new **Project** is created using the **Project Wizard**.

  Resolution: When a user creates a new **Project** with the **Project Wizard**, the **Project Card** is created with the correct **Ship-to Address**.

<u>Purchasing</u>

- **Issue 69508**: Error, "Receipt No. must be equal to " " in Purchase Line: Document Type = invoice," is displayed when choosing **Get Receipt Lines** on a **Purchase Invoice.** This message occurs when the **Purchase Invoice** has **Items** and **Resources** originating from different **Purchase Orders**.

  Resolution: **Purchase Invoices** can be created using **Get Receipt Lines**.

- **Issue 73527:** Error message received "**Quantity (Base) available must not be less than 1….**" when registering a **Put-away** from a **Purchase Order Receipt.** This occurs when:

  - **Project Card** > **Purchasing** FastTab > **Purchase Receipt Posting** option is set to **Inventory Reserved to Project**.

  - **Require Put-away** and **Require Pick** are set to TRUE on the **Warehouse Location Card.**

  Resolution: The transaction successfully completes.

- **Issue 61331**: Posting **Purchase Invoice** gives error message: "The job ledger entry does not exist. Identification fields and values: Entry No.=0." This occurs when **Purchase Lines** are retrieved from a **Receipt**.

  Resolution: **Purchase Invoices** can be created from a **Purchase Order**, using the Function **Get Receipt Lines**, and posted without an error.

Reports

- **Issue 70865**: Date format on **Timesheet Approval Report** does not match the user's **Business Central Region** setting.

  Resolution: **Timesheet Approval Report** displays **Dates** based on the user's **Business Central Region** setting.

Time

- **Issue 69260**: **Time Entry** data cannot be pasted into **Edit Time - Entries** page. Error message received: "Validation Results: The Time Entry does not exist. Identification fields and values: Entry No. = 'xxx'."

  Resolution: The issue is resolved. The **Edit - Time Entries** page allows pasting of data from an Excel spreadsheet.

- **Issue 67320**: Adding a new entry on the **Edit - Time Entries** page, accessed using the drill down on a **Timesheet Entry** line, causes an error: "The Time Entry does not exist. Identification fields and values: Entry No.='xxxx'."

  Resolution: Adding a new entry on the **Edit - Time Entries** page does not cause this error, regardless of whether the **Description** or **Quantity** is entered first.

- **Issue 73901**: Entries for **WIP Reversal** created during **Calculate WIP** process do not group by **Dimension**.

  Resolution: **WIP Reversal** postings are based on the combination of **Account** and **Dimension** postings from the previous **WIP** posting.