

Table of Contents

Table of Contents	1
Progressus Advanced Projects	2
Release Notes	2
Build 11.0.0.2, US 11.0.0.2 and CA 11.0.0.2	2
Requires minimum of BC 22.5	2
Application Enhancements	2
Bug Fixes	6

Progressus Advanced Projects

Release Notes

Build 11.0.0.2, US 11.0.0.2 and CA 11.0.0.2

Requires minimum of BC 22.5

Application Enhancements

Billing

- **Enhancement Request 76557:** Customers have price agreements that include a provision to adjust subscription prices by a percentage, often defined by an index. Updating numerous subscription orders is time-consuming and can lead to errors and omissions. Request is to add functionality to group orders that should be adjusted the same way and to track the adjustments.

New Features:

Rules for price adjustment can be defined using two new fields in the **Details** FastTab of the **Subscription Order**.

- The **Price Index Adjust** field can be set to indicate that the prices should be adjusted. This field is informational and used for filtering.
- The **Price Index Code** field can be set to indicate how prices should be adjusted. The field is a lookup into a list of **Subscription Prices Indexes**, each having a non-blank **Code** and a **Description**. This field is informational and used for filtering.

When running the **Adjust Subscription Prices** batch job, filters can be set on the **Subscription Order Header**. By default, filters for **Price Index Adjust** and **Price Index Code** are available, and more can be added by the user. This allows doing **Price Index Adjustment** on all **Subscription Orders** with a specified **Price Index Code** in one run of the batch job.

For every **Subscription Order Line** where the prices are adjusted, a **Subscription Price** entry with an **Order No.**, **Line No.**, **Price Adjustment Date**, **Previous Price**, **New Price**, **Effective Date**, **Adjustment Factor**, and **Rounding Method** will be saved. The history can be accessed from **Related Information > Price History** on the **Subscription Order Lines** section of **Subscription Orders**.

The **Price Adjusted** field in the **Subscription Order > Details** FastTab will show the last date in the log for the order. Drill-down on the field will show the entry in the **Subscription Prices** page.

- **Enhancement Request 76562:** Sometimes a subscription starts in the middle of a period. An example could be a service invoice monthly on the 1st, but the service is started on the 20th. Currently, an extra line must be added for the first partial period and the price manually calculated. Customers requested the ability for the system to automatically handle partial periods.

New Feature: When posting a subscription order, if the effective length of the period is shorter than the expected period length, then the entry can be prorated to the partial length. The quantity on each entry will be adjusted by the percentage of the period the actual day covers. For example, a line of 7 pcs starting on April 16th and ending April 30th, with a period length of 1M, will generate an entry for 50% of the price. The entries will have "(15 days out of 30)" added to the end of the description.

Enhancement Request 76561: Some businesses have price agreements that include a provision to adjust subscription prices on specific dates, which can fall in the middle of a subscription period. Currently, the only way to handle mid-period price changes is to make lines for the different partial periods.

New Features:

1. An **Effective Date** can be set on the **Adjust Subscription Prices** batch job. If not set, it will default to the current **Work Date**. The **Effective Date** determines when the new price is applied in posting. The **Effective Date** is saved on the **Subscription Price PGS** table. Setting an **Effective Date** of April 1st would not affect entries created for March or earlier.
2. When posting a **Subscription Order**, lines that have entries in **Subscription Prices** with an **Effective Date** before or at the start of the period, but not inside the period, will generate one entry using the price from **Subscription Prices**.
3. When posting a **Subscription Order**, lines that have entries in **Subscription Prices** with an **Effective Date** inside the period, will generate one entry per entry and period.
4. The quantity on each entry will be adjusted by the percentage of the period the **Effective Price** covers. A line of 7 pcs for the month of April (30 days) where a price effective on April 16th exists, will generate two **Project Ledger Entries**: One for 50% (15 of 30) of 7 = 3.5 with the first price and one for 50% (15 of 30) of 7 = 3.5 with the second price. Each of the entries will have (15 days out of 30) added to the end of the description.

Journals

- **Enhancement Request 75074:** Customers requested the ability to edit the **Tax Amount** field in **Expense Journal**.

New Feature: Added the ability to edit the **Tax Amount** field in the **Expense Journal**.

System Wide

- **Enhancement Request 78865:** Customer requested the following **Integration Event** for page 14045821 "Time Entries (PGS)" procedure SendRejectionMail.

New Feature: Integration Event added that includes all the parameters:

```
local procedure SendRejectionMail(var TimeEntryPGSRec: record "Time Entry (PGS)";  
RejectedRemarksRec: record "Rejected Remarks (PGS)"; RejectedComments: Text)
```

- **Enhancement Request 69062:** Business Central changed the **Navigate** caption on menus to **Find Entries**. **Find Entries** allows the user to display transactional entries.

New Feature:

- If **Navigate** is used to display entries, then the name is changed.
- If **Navigate** is used to move to another menu selection, the name is not changed.

Time

- **Enhancement Request 76606:** Customers requested that a reopened **Timesheet** should display the **Timesheet Lines** as originally entered. If more than one line is used for a **Project** and **Task**, reopening the **Timesheet** should not group the lines together.

New Feature: When Reopening a **Timesheet**, the lines will be displayed as originally entered.

- **Enhancement Request 67922:** When an address and/or name on a **Customer Card** is changed it currently does not update the data on the **Projects** or **Contracts**. Customers requested that when updating a **Customer Address** to have **Project Customer Addresses** update automatically.

New Feature: A new menu option on the **Customer Card > Navigate > Update project and contract addresses**. This updates the **Bill-to** and **Sell-to** addresses on any **Projects** or **Contracts** associated to the specified **Customer**. If the **Project** or **Contract** contains unposted invoices, delete the unposted invoice(s) and recreate so the new address is included on the invoice.

- **Enhancement Request 73818:** Modifications have been made to invoice processing code as a new option that can be enabled in **Project Setup > Enhanced Invoice Processing**.

These changes to the base code may impact custom code added for invoicing. It is strongly recommended that users turn on this option in their sandbox environment to test invoicing custom code and apply the code changes, if applicable. Integration Events for the new invoicing will be included in the next release.

Beginning with the **BC Wave 1 release in 2024**, the new invoice code is required, and the old code will be deprecated.

There is an option that allows users to apply and test the new invoice code. From the Role Center, select **Setup > Project Setup > Project Setup > Invoicing** FastTab and click **Use Enhanced Invoice Processing**.

- If **Enhanced Invoice Processing** is enabled in **Project Setup**, all processes to **Create Projects Invoices, Create Project Quotes, Create Contract Invoices, and Create Project Orders** will launch the new **Enhanced Invoice Processing** code and the Report Caption will be:
 - **Create Project Invoices *NEW***
 - **Create Project Quotes *NEW***
 - **Create Contract Invoices *NEW***
 - **Create Project Orders *NEW***
- If **Enhancement Invoice Processing** is not enabled the processes will run as they have in previous versions.

Changes:

These invoice changes will impact several areas as follows:

1. **Project Setup > Use Enhanced Invoice Processing** option that allows users to turn the new code on or off defaults to OFF.
2. Custom code that Customers | Partners have created may need to be coded to use the new invoice code.
3. **Get Usage** functionality for project entries on the **Sales Order** and **Sales Invoice** will be deprecated effective **April 2024**.
4. **Sales Orders** created from a **Sales Quote** will always be in detail even if there is a **Group-by** setting defined in **Invoice Setup**. This is done so that receiving actions can be done on each line.
5. The intermediate pop-up screens, **Create Sales Documents**, which appear when creating invoices have been reduced or eliminated to streamline workflow. The system will go directly to the **Sales Invoice** after clicking **OK** on the **Create Project Invoices** report page when generating only one document.

- **Enhancement Request 74337:** Customers requested the ability to see the total number of hours for each row in Timesheets.

New Feature: A new field, **Row Total**, has been added to the **Timesheet Lines**. It will show the total number of hours in a row. The field is available in the **Timesheet**, **Timesheet Archive**, and the **Archive** table.

Bug Fixes

Billing

- **Issue 48233:** Including the **Charge Specified Client** option on the **Contract Invoicing** screen creates unexpected results.

Resolution: **Contract Invoicing** is not designed to create split invoices. The option to choose **Charge Specified Client** is now hidden on the **Create Contract Invoice** screen and will be considered for a future enhancement.

- **Issue 53877:** Selecting **Only one invoice per customer** in **Create Project Invoices** causes an error "The record in table Project Invoices Entry Tmp already exists. Identification fields and values: Entry No. = 'xx'."

Resolution: **Only one invoice per customer** in **Create Project Invoices** works correctly when the filter is set for **Sell-to** or **Bill-to** and selecting the **Customer No.**

Expense

- **Issue 68668:** Users attempting to approve and post **Expense Sheets** are not allowed to do so because the **General Ledger Setup** or their **User Setup > Allow Posting From...** and **Allow Posting To...** date range restricts the ability to post.

Resolution: **Expense Sheet** entries, outside of the allowed date range in the **General Ledger Setup**, or **User Setup**, will appear in the **Expense Journal** after approval, regardless of period dates and **Project Setup > Post When Approving** setting. A one-time message will be displayed if a user tries to post the entries: "Posting date is not within your range of allowed posting dates. The entries are saved to the Expense Journal for posting."

Project

- **Issue 67548:** The **Project Manager** field on a **Project Plan > Task Line** is disabled, and the field cannot be edited if the **Show as Tree** option is set to true.

Resolution: The **Project Manager** on a **Project Plan > Task** can be changed, regardless of the **Show Tree** setting.

- **Issue 48033:** Changing the **Customer No.** on a **Project** changes the **Source No.** on posted **Scheduled Billing** entries in the **Project Ledger**.

Resolution: **Source No.** field on **Project Ledger** entries for posted **Scheduled Billings** will not change when the **Customer No.** is changed on the **Project**.

- **Issue 73137:** **Customer Email** and **Phone Numbers** are not populating the **Project Card**.

Resolution: **Customer Email** and **Phone Numbers** are available on the **Project Card**.

- **Issue 73065:** The process/report used to calculate **WIP** from the **Project Dashboard**, is different than the **Calculate WIP** process/report called from the **Processing** Action.

Resolution: The **WIP Calculation** process/report in the **Project Dashboard** has been changed to the **Calculate WIP** process/report that is called from the **Project Card**.

Sales

- **Issue 78809:** **Subscription Order** process generated an incorrect amount using the **Sales Price List** function.

Resolution: Information from the **Sales Price List** updates the unbilled **Subscription Order Lines** correctly. The **Document Date** is used to find the **Price**. If the **Document Date** is not used, then it will use the **Posting Date** of the **Sales Line**.

Time

- **Issue 69159:** A time entry from one **Resource** is showing on the Timesheet of another **Resource** when creating a **Timesheet Entry** using the **Email Outlook Integration**.

Resolution: The issue has been resolved.

- **Issue 75620:** **Time Approval** drill down with multiple lines gives error: "Something went wrong – An error has occurred" and the page shuts down when approving the last line. This occurs when the **Project Card > Permission FastTab > Limit Time Entry Project List to Permissions** is set to True.

Resolution: **Time Approval** is working correctly.

- **Issue 77621: Expense Approval** drill down with multiple lines gives error: "Something went wrong – An error has occurred" and the page shuts down when approving the last line. This occurs when the **Project Card > Permission FastTab > Limit Time Entry Project List** to Permissions is set to True.

Resolution: Expense Approval is working correctly.

WIP

- **Issue 53033:** If a Project's **WIP and Revenue Recognition Method = Direct Invoice**, it calculates WIP for Scheduled Billings, it should not. When the **Reverse WIP function** is run, it doubles the resulting GL entries, instead of reversing them.

Resolution: Using **Direct Invoice** for calculating WIP will not allow a **Value and Entry Filter** of Scheduled Billing and will not produce any entries. The filter will default to **None** and cannot be changed.

- **Issue 73825:** The graphic on the Progressus **Power BI Summary Report** displays in the wrong place.

Resolution: The issue has been resolved.

- **Issue 76223:** Delay experienced when opening **Invoice Suggestions** page

Resolution: Invoice Suggestion page loading delay is resolved.

- **Issue 74988:** **Hour Bank Post to G/L** process results in duplicate transactions for a **Posted Sales Invoice**. This occurs if the **Posted Sales Invoice** contains 2 lines for the same **Hour Bank**, but each line is for a different **Project No.**

Resolution: **Hour Bank Post to G/L** process for **Posted Hour Bank Sales Invoice** no longer creates duplicate transactions.