ImagineTime New Features / Enhancements since Version 9.0

Date	Feature or Enhancement: "RED" = Significant New Feature	Priority	Type	Version
01/11/11	Analysis Button/Information on Client/Contact Screen remains visible after the "Hide Account Status Information in the Enter/Edit Client Information Screen" is selected on the staff's general security & permissions tab. Account Balances are not displayed but the Account Analysis can be accessed on the Client Info Screen. This has been corrected.	Medium	Fix/Improvement	9.5152
01/09/11	Fixed a due date cloning issue regarding task start dates on quarterly and fiscal year end items for customers cloning tasks using the "thru year end" option on the due date - status levels/other tab.	Medium	Fix/Improvement	9.5151
01/04/11	Improved QuickBooks import utility to include discounts, journal entries and checks.	High	New Feature	9.515
12/27/10	Bug in the labels when Company has no street address on file. This has been corrected.	Medium	Fix/Improvement	9.515
12/27/10	DMUtility - selective build is throwing an error when the main folders have not yet been created, i.e. wizard has not run at all. This has been corrected.	Medium	Fix/Improvement	9.515
12/16/10	Added a feature that allows rates, amounts and realization history to be excluded from billing history reports for client distribution.	Medium	New Feature	9.5141
12/10/10	Invoice Format Screen - mislabeled "Enter Footer Comments (F4) Lookup;" should read "Enter Global Comments". This has been corrected.	High	Fix/Improvement	9.5132
12/10/10	Due Date Reports: when sort by is Form Id/Name/Form Year/Due Date and multiple forms are selected the report is not sorting in alpha order within each Form listing. (other settings: No Groupings, Blank for Select Client and All Process Levels and Unassigned for Process Filter & Status Level. This has been corrected.	High	Fix/Improvement	9.5132
12/09/10	From the new Client/Contact screen do not have a way to access the marketing list from the company look up list screen. This used to be referral source on the client set up screen. Different from referral source on the old contact screen. The bwslookups and marketing list queries have been consolidated into one union query.	High	Fix/Improvement	9.5132
12/10/10	On BWSClientContact screen, NextID button throws a subscription message about the calendar module if the user doesn't have it. Also, then throws the focus to ID which causes an error (since the ID is at the moment being changed). This has been corrected.	Medium	Fix/Improvement	9.5132
12/10/10	On BWSClientContact screen, type dropdown is not pre-selecting "Client" when user does not have the calendar module. Enable type drop down and say you need calendar module, call us. This has been corrected.	High	Fix/Improvement	9.5132
12/09/10	Printer Tray Default Issue. When printing billings the software is defaulting to Paper Tray 1 even though the Default paper tray setting in Tray #2. This has been corrected.	High	Fix/Improvement	9.5132
12/10/10	The Balance Column on the Edit and View Transaction Screen isn't wide enough to accommodate $100,000.00. This has been corrected.	High	Fix/Improvement	9.5132

Date	Feature or Enhancement: "RED" = Significant New Feature	Priority	Type	Version
11/22/10	Corrected issue resizing due date page of contact management screen.	Medium	Fix/Improvement	9.513
11/19/10	Made the contact search button visible on all tabs of the contact/client screen to improve ease of use.	Medium	Client Request	9.5129
10/19/10	Added feature to hide rates and amounts on time slip history report for presentation to clients.	Medium	New Feature	9.5129
10/19/10	Mailing list selections were not displaying correctly on the more client information tab when scrolling thru clients sequentially. This has been corrected.	Medium	Fix/Improvement	9.5128
11/15/10	Error running Qbooks 2011, when refreshing the account list on the Journal Entry set up screen. This has been corrected.	Medium	Fix/Improvement	9.5127
11/15/10	The Account Balance portion of the Primary Contact Information Screen, the Net Billed isn't totaling correctly. Also the width needs to be increased. #### displayed when 100,000.00 or more. This has been corrected.	High	Fix/Improvement	9.5127
11/08/10	Resizing Issue with Contact Information Screen. Have to go all the way out of IT and log back in for screen to resize properly.	Medium	Fix/Improvement	9.5126
11/08/10	The client search button added to all pages of the client/contact screen to improve ease of use.	Medium	New Feature	9.5126
11/08/10	Released slips flagged a different color to make it easier to prepare for billing.	Medium	New Feature	9.5126
11/08/10	The labels for simple fixed fees now display correctly on the client/contact screen.	Medium	Fix/Improvement	9.5126
11/10/10	New Client/Contact screen does not prompt for billing partner for new client, nor apply default billing partner if none is provided. This has been corrected.	Medium	Fix/Improvement	9.5126
11/03/10	Clone of address and phone number has been added to new client management screen.	Medium	Fix/Improvement	9.5122
10/29/10	From client/contact management screen the drill down for group ID is not showing members of group. This has been corrected.	High	Fix/Improvement	9.512
11/01/10	If After the Fact-Time/Expense window is open, you can not open the ReleaseEdit Slip window in the Billing Dashboard. You must first close the Time/Expense window. When edit release slips is opened from dashboard it should close the after the fact time entry screen. Slip screen now closes automatically.	High	Fix/Improvement	9.512
10/20/10	Improved usability of read only and full rights passwords. Staff levels can now reprint invoices without access to transaction edits. Clients can also be looked up in the contact screen with viewing permissions only. Also clarified initial setup of passwords preventing the possibility of leaving the full rights password blank and the read only password entered - a situation which would allow read only users access to full edit rights simply by ignoring the password dialog box.	Medium	Fix/Improvement	9.5
10/20/10	The contact management and client screens have been consolidated to improve usability and ease of use and give more intuitive access to important information fields.	High	New Feature	9.5

Date	Feature or Enhancement: "RED" = Significant New Feature	Priority	Type	Version
10/22/10	Reconciliation Report of Work In Progress Activity: When there isn't data to show on the 2nd row would like the report to resize to show only 1 row. Applies to Portrait View. On Landscape view -0- appears in the -Exp Recovered column instead of being blank and forces a second row to print that actually isn't needed. Reports running too long now. This issue has been resolved and corrected in current version.	Medium	Client Request	9.5
10/20/10	Footer height wrong on narrative type bill. This has been corrected.	High	Fix/Improvement	9.5
10/20/10	Expense only invoice issues. Expense detail not calculating expenses. Expense only progress bill not calculating tax amount properly and formatting invoice with expenses below total. This has been corrected.	High	Fix/Improvement	9.5
09/17/10	Can't remove default workcode from client screen after selected. This has been corrected.	Medium	Fix/Improvement	9.131
09/04/10	Fixed a problem with the update of the last note to ensure that all notes are viewed.	Medium	Fix/Improvement	9.131
09/04/10	Corrected an envelope issue: #10 envelopes were not printing the return address in the CRM utility.	Medium	Fix/Improvement	9.131
08/25/10	Unposting detail and narrative slip bills was automatically removing the allowance history in the allowance apply table and required a manual rebuild of the table in general utilities. This has been corrected.	Medium	Fix/Improvement	9.124
08/25/10	Made it easier to select clear/release slips all codes in the superbill setup screen.	Medium	Fix/Improvement	9.124
08/18/10	The statement and invoice email program was not allowing the addition of new email body explanations. This has been corrected.	Medium	Fix/Improvement	9.124
08/18/10	Screen resizing has been improved.	Medium	Fix/Improvement	9.124
08/03/10	Added a new feature to display a message when you leave the timer screen when you have paused timers and give dates for those timers.	Medium	Client Request	9.123
07/21/10	Added the ability to import Outlook email and contact information to the ImagineTime notes and contact tables using an optional Microsoft Outlook add-in that shows an export button and drop down contact lookup lists in the email form. If the email is recognized in ImagineTime, it is not necessary to look it up. This requires you to install version 9.122 or better of ImagineTime and select "Download MS Outlook integration tool" from the Microsoft logo at the top left of the ImagineTime screen to install this feature from our website. This feature works with MS Outlook 2007 and 2010.	High	New Feature	9.122
07/21/10	Permit firm return address to be bypassed on envelopes without using a fake blank graphic.	Medium	Fix/Improvement	9.122
07/21/10	The slip entry screen resize screen option in the names staff permissions extended to the timers. This new feature has been added.	Medium	Client Request	9.122
07/14/10	Problem: On file browse page, when file is selected to edit in parent app, the save fails b/c file is already in use (by DM previewer). Solution: On open, unselect the file and close the preview so that the parent app has exclusive use.	Medium	Fix/Improvement	9.121

Date	Feature or Enhancement: "RED" = Significant New Feature	Priority	Type	Version
07/14/10	Service charge note now shows on statements	Medium	Fix/Improvement	9.121
07/07/10	Added a button on the edit/view transaction screen that shows the payment history for the invoices outstanding, a particular invoice or the entire account history. Useful in resolving disputes.	Medium	Client Request	9.121
06/30/10	Security features, email options and nested subfolders (for years) have been added to the first document management update. Drag and drop between windows explorer and ImagineTime has been added and an error in multi-page document scanning has been corrected.	High	Client Request	9.12
06/24/10	Contacts/Email Address screen that pops up when you double click on contact line in the contact manager screen allows you to enter the birthdays and taxpayer Ids for additional contacts. We added the ability to print a list of all the birthdays and SS#s entered in these fields and to sort by month using the ImagineTime report wizard.	Medium	New Feature	9.11
06/24/10	In the firm task pane on the calendar added the ability to filter for unassigned items with no staff set. Many firms want staff to pull the next item from the list, then assign themselves to it as staff assigned.	High	Client Request	9.11
06/15/10	Fixed a formatting issue on superbills when printing the bill excluded codes with detail: underlines and proper labels now appear. The Force dollar sign also now carries over to posted superbills in the bill explanations superbill table.	Medium	Fix/Improvement	9.1
06/12/10	Improved the invoices by date report to include the option to show the invoice distribution report in the report total section and also added the ability to filter by type of bill.	Medium	New Feature	9.1
06/12/10	Removed the floating notes window button in the contact management screen to increase space for entering new notes.	Medium	Fix/Improvement	9.1
06/11/10	Implemented a more obvious way of identifying time slips that are written off in the client time history report. Previously you had to know that a transaction # not appearing in the Slip-Tran# column meant the slip was written off. Also, coordinated report titles with options selected on report selection screen.	Medium	Client Request	9.1
06/08/10	Added the ability to export data to Excel from the client time history report.	Medium	New Feature	9.0772
06/02/10	Statements were not printing the correct balance in version 9.0 when using the "Show balance due with activity from starting date" option. This has been corrected.	Medium	Fix/Improvement	9.0771
06/02/10	Added a feature that allows you to select all staff when distributing appointments on the calendar grid.	Medium	Client Request	9.0771
05/25/10	The new credit feature does not subtotal credits properly in the reconciliation report for full credits and refunds in the invoice column. This has been corrected	Medium	Fix/Improvement	9.077
05/30/10	Superbills using a single time element row with a calculated row not placing double underline or totaling properly. This has been corrected.	High	Fix/Improvement	9.076
05/13/10	This release updates core functions in the time and billing and due date modules to verify data integrity and also includes technical enhancements to the document management system.	High	Fix/Improvement	9.075

Date	Feature or Enhancement: "RED" = Significant New Feature	Priority	Type	Version
05/07/10	Fixed superbill print issue that requires manual paper feed under certain circumstances.	Medium	Fix/Improvement	9.074
05/03/10	Fixed an issue with detail time slip bills not sorting correctly based on system settings.	Medium	Fix/Improvement	9.073