ImagineTime New Features and Customer Requests

Completed	Accepted	Request	Type	Version
07/03/20	07/03/20	**Ability to segregate new business from existing clientele on client invoices and payments report using new business checkbox available exclusively on superbill templates.**	Client Request	18.1000
07/01/20	07/01/20	**Added the ability to segregate new client revenue from recurring revenue using superbills and the client activity**	New Feature	18.1000
06/29/20	06/26/20	The office location drop down menu on the change ID or Status screen lists Registered location not the office name indicated in the location field on the company setup screen. This issue has been corrected.	Fix/Improvement	18.1000
06/16/20	06/16/20	**Most forms and reports, including filters now support a robust multi-office feature for firms that have more than one location and desire segregated reporting.**	New Feature	18.1000
06/16/20	06/09/20	Detail Expense Only Invoices are showing up as unclassified differences on the Inv and Payment Reconciliation Report if the report is run on the CASH BASIS. This has been fixed.	Fix/Improvement	18.1000
06/10/20	02/24/20	**On due date items when the information is received and the date filled in, the start date of the assigned sub-task date is also initialized. Also, added a date received filter on the due date management screen. Also, added a date received filter in the due date reporting screen.**	Fix/Improvement	18.1000
06/09/20	03/24/20	Found when testing due date reports by office: office location option for theses reports did not work: CLIENTS WITH NO FORMS/TASKS and DUE DATE RANGE-INCOMPLETE,FILTER FOR AND LIST SUBTASKS. This has been corrected.	Fix/Improvement	18.1000
06/09/20	03/24/20	Found when testing due date reports by office : All the Status Level Reports will preview fine when office location is ALL. But when you filter for an office location the OfficeLocation Parameter Value screen pops up when you hit yes or no in the Print/preview screen. This has been corrected.	Fix/Improvement	18.1000
06/08/20	05/20/20	Pop-up message triggered when you try to change client ID on client/contact screen still refers to the old traditional menu. Message reads: Edit/change Id using the C2 change ID Utility. This issue has been corrected.	Fix/Improvement	18.1000
06/08/20	05/26/20	Mis-label on Pending Bills Report when grouped by Billing Partner. Report reads MGR instead of Billing Partner. This has been corrected.	Fix/Improvement	18.1000
05/14/20	05/14/20	**On the Manage Edit Deadlines screen right clicking in a date field on the left frame of the screen will display options for enhanced filtering/sorting of the listing in the right frame.**	New Feature	18.1000
05/13/20	05/13/20	The Billing Dashboard option to automatically clear on open has been removed to avoid unwanted clears. You must now choose the Clear Dashboard button from within the opened dashboard to access this feature.	Fix/Improvement	18.1000
04/27/20	04/24/20	Filtering and Formating CLIENT INVOICED AMOUNTS W/COSTS BY CODE reports: When you add FILTERS of Billing/Ptr and/or Originating Ptr to the formats: Group by Work instead of Client and Group by Engagement instead of Client, the Grand Totals at the bottom of the report adds a variance. This issue has been corrected.	Fix/Improvement	18.1000

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04/27/20	04/24/20	Daily/Monthly Reports/Transactions/Payment: When you add FILTERS of office location and Billing/Ptr and/or Originating Ptr the payment breakdown at the bottom of the report is incorrect. (The breakdown is still for the office location- ignoring the other filter). This issue has been corrected.	Fix/Improvement	18.1000
04/27/20	04/16/20	Two issues regarding paid production report. Not working for "Client Referral Totals and referrals with client detail" - office location missing in query. Also, the variance total is incorrect on "Client time and billing adjustments without staff" when filtering for a location. These issues have been corrected.	Fix/Improvement	18.1000
04/27/20	04/28/20	The Pending Bill Report is not filtering for selected partner when entering dashboard for ALL Locations. This issue has been corrected.	Fix/Improvement	18.1000
04/23/20	04/23/20	Fixed an issue on the bill posting screen. If staff goes in globally to create invoices and then later filters by partner when emailing invoices the routine does not filter by partner but sends all. This has been corrected.	Fix/Improvement	18.1000
04/22/20	04/20/20	The pending bills report doesn't list by specific office location. Shows the pending invoices for ALL locations. This has been fixed.		18.1000
04/22/20	04/22/20	Dashboard is not automatically refreshing after you release expenses by going into the release/edit slip screen. Released expenses do not show in the release expense column until after you click somewhere on the dashboard. This has been fixed.	Fix/Improvement	18.1000
04/21/20	04/20/20	Billing Dashboard: lost the ability to double click to release time/expenses and to put time/expense back to hold after you have sorted the billing dashboard by right clicking on a column to sort. Results in Error 3326: This recordset is not updateable - WIP_DblClick. This error has been fixed.	Fix/Improvement	18.1000
04/20/20	04/08/20	**Ability to generate client list by Office Location. The Multi-office feature has been added to all client address, location and information reports.**	New Feature	18.1000
04/10/20	04/03/20	Statements - when using apostrophe or asterisk in statement notes, when printing get The expression you entered contains invalid syntax. Will preview however, shows paystub and totals are overstriked. "S:\Bug List\Bug3276 - syntax error on statement.docx" This has been corrected.	Fix/Improvement	18.1000
04/08/20	04/08/20	**Enhanced the Staff Realization Report - Paid Production report to allow for multi-office filtering.**	New Feature	18.1000
04/08/20	04/08/20	Fix a bug with the aging report when no records are returned. Report is closed instead of reporting an error. This has been fixed.	Fix/Improvement	18.1000
04/07/20	04/07/20	**Enhanced the Staff Realization Report - Invoices and Production report to allow for multi-office filtering.**	New Feature	18.1000
04/06/20	03/26/20	Daily/Monthly Reports: Office location label incorrect on Client Performance Report Client Invoiced Amounts w/Costs by Code. When Reports are run for sample data for the Rutherford Office the report title is All for office location instead of Rutherford. When filtered for Florida office the office title is correct as it reads office location Florida. This has been corrected.	Fix/Improvement	18.1000

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03/26/20	03/24/20	Found when testing due date reports by office: Office location title. When Report is run for sample data for the Rutherford Office the report title is All for office location instead of Rutherford. When filtered for Florida office the office title is correct as it reads office location Florida. This has been corrected.	Fix/Improvement	18.1000
03/25/20	03/11/20	When running report Client Invoiced Amounts with Costs by Code where gaps appear in the columns, please put a header note in the body of information not available. This has been added.	Fix/Improvement	18.1000
03/24/20	03/13/20	On the Service Charge screen the client selection list needs a header describing how it works and a clear selection button. This feature has been added in version 18.	Fix/Improvement	18.1000
03/24/20	03/24/20	The email blast is not handling the additional text/disclaimer section properly. The disclaimer was omitted and a null value error was displayed. This issue has been corrected.	Fix/Improvement	18.1000
02/28/20	02/28/20	When changing from one task to another on the due date management screen the budgeted hours total in the task status screen does not re-initialize and carries forward the value from the previous task. This issue has been corrected.	Fix/Improvement	18.1000
02/26/20	02/26/20	**Added client snapshot to multi-office report feature set.**	New Feature	18.1000
02/19/20	02/03/20	When (2) people editing the Permanent/Priority notes at same time on the same client try and save, a confusing warning message appears to the last user attempting to save. This message has been simplified and makes clear that another person has made and saved changes first. The first user's changes will be kept and the pending changes of the second user will be lost.	Fix/Improvement	18.1000
02/19/20	02/05/20	Regarding the superbill template - Don't clear slips option. If you select workcode "BLK", the clear Option "Don't Clear Slips-Progress Bills" populates. However, the box is NOT automatically checked for Progress Bill. This issue has been corrected.	Fix/Improvement	18.1000
02/19/20	11/26/19	Condensed Time & Expense History report is not filtering for Engagement. This issue has been corrected.	Fix/Improvement	18.1000
02/19/20	01/02/20	Dropdown list of fiscal year ended/years for Periodic Practice Management Reports only goes back to 2017. Previous List started with 2000. Client wants list restored to beginning with 2000 not 2017. This update allows user to type in year rather than using list.	Fix/Improvement	18.1000
02/19/20	01/03/20	On the sync with Outlook. Currently, if the profile does not match the user gets a pop up that does allow them to go ahead with the sync. This causes big problems if the users is in a rush to say "Yes". An additional popup has been added to caution user and prevent them from automatically clicking "Yes".		18.1000
02/19/20	01/09/20	Changed message for single-user data sharing such that when additional user tries to login the program states "Another user currently has the program open, please have them exit to login".	Fix/Improvement	18.1000
02/18/20	02/11/20	Exclusive parameter has been to added on ImagineTime shortcut to prevent multiple copies from being opened by the same person.	Fix/Improvement	18.1000
02/17/20	02/11/20	Need to add an additional Fixed Fee Period/Filter for super bill templates - Semi-annual or Every 6 months.	New Feature	18.1000

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02/17/20	02/12/20	Renamed the Permanent Notes to Priority Notes on the main client screen.	Fix/Improvement	18.1000
02/17/20	01/17/20	When a mail merge is done the dash is stripped out of the address and the Post Office will not accept the envelopes. This issue has been corrected.	Fix/Improvement	18.1000
12/02/19	12/04/19	**Added a transaction tab to the Super Bill Quick Edit template screen to allow users to verify the use of templates, the and the transactions for specific date ranges.**	New Feature	18.1000
11/25/19	11/07/19	Tabbing on Client Time History Report screen. The tabbing doesn't tab in a logical sequence. This has been corrected.	Fix/Improvement	18.1000