

Star 2023 Releases

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2023.1.0

All modules Enhancements

Enhancement	Reference
A new Help icon has been added. This links to the new Star Help Hub portal.	23779

AR Enhancements

Enhancement	Reference
The Current WIP Value at Client level has now been added to the AR Provisions module to view the overall exposure or lockup position on the client.	23771

AR Provisions Enhancements

Enhancement	Reference
The current WIP Value at Client level has now been added to the AR Provisions module to view the overall exposure or lockup position on the client.	23771

Billing Fixes

Bug Fix	Reference
There was an issue when a Future Bill Invoice text has been edited in Job Future Billing it does not appear on the bill by default in Billing. This has now been fixed.	22626
When Avalara integration feature is enabled the Nominal Ledger field cannot be edited without the maximum (No limit) privilege. This has now been corrected.	23786

Credit Control

Fixes

Bug Fix	Reference
Credit Control notes can now only be edited in Billing if the user has the appropriate Credit Control privileges as well as the normally required Client/Job privileges.	4696

Job Rollover

Fixes

Bug Fix	Reference
There was an issue during the job addition process to a Job Rollover batch, it did not register the batch as Unsaved which led to an incorrect message being displayed when adding recently created jobs. This has now been fixed.	23456
If an exception occurred during rollover processing rather than being correctly logged, a secondary error would occur masking the original exception. This has been fixed.	23461
Closing an uncompleted batch resulted in an inability to edit the active task list in Due Dates. This has been fixed.	23473
Processing of Due Dates in Job Rollover raises an exception if the batch had not been saved. This has been fixed	23479
There was an error when obtaining a calculated start date from a customised calculation. This has now been fixed.	23501
Previously any action taken to delete, include or exclude a job from the batches job list did not update the completion status accordingly. Consequently, closed batches were susceptible to containing unprocessed and unexcluded jobs. This has now been fixed.	23505

Setup

Enhancements

Enhancement	Reference
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Prior to this release, when Admin Fees were added to bills, the ability to edit Admin Fee rates was not required to be controlled by a specific Privilege. In this release the editing of Admin Fee rates now has its own privilege. This is now controlled by access to a new Privilege 'Edit Admin Fee' under Privilege section "Post Billing (more)"

Prior to this release, when Admin Fees were added to bills, the ability to edit Admin Fee rates was not required to be controlled by a specific Privilege. In this release the editing of Admin Fee rates now has its own privilege. This is now controlled by access to a new Privilege 'Edit Admin Fee' under Privilege section "Post Billing (more)"

22703

Key - PrivKeyID = 643, Privilege = "Edit Admin Fee".

The new PrivKeyID 643 works in two ways, depending on the version of Admin Fees in use:-

With Basic admin fees (BillingAdminFee = 1): This privilege controls Admin Fee Rate dropdown and Admin Fee Amount.

With Advanced admin fees (BillingAdvancedAdminFee = 1): This privilege controls Admin Fee Rate dropdown only. Admin Fee Amount is always disabled by design.

Time and Expenses

Fixes

Bug Fix	Reference
Previously an Active Timer will be lost when the browser is refreshed or closed along with any unsaved active time. This has now been fixed Timer now saves when created, and subsequent saves occur at 5 minute intervals.	4678
Previously there was a problem where copying a running timer would create two running timers instead of one. This has now been fixed. Now the copied timer is always in a dormant state, ensuring that only one timer remains active	13939
There was an issue where double clicking the timer would result in the creation of a duplicate timer. This has now been fixed.	22674

Previously there was an issue where sending timers to timesheets could result in a duplicate entry if the button was clicked twice in a quick succession. This has now been fixed.	23682
In the List view a copied line is lost when the amount is edited. This has now been fixed.	23696

UDF (Custom Forms)

Fixes

Bug Fix	Reference
Favourites and Recent tabs in UDF were not working correctly when column titles containing spaces are present. This has now been fixed.	21752
There was an error when saving any of the UDF Forms when launched from the Credit Control module. This has now been fixed.	23267
There was an issue in Contact UDF where saving and closing on the new contact form did not automatically add the contact to the client. This has now been fixed.	23500
The Staff Control time grids had missing columns in the Staff UDF. This has been corrected and all columns are now being displayed accurately, regardless of any changes made to the time format configuration.	23360
There was an issue with the Autosave feature when the Start and End dates in the Contacts tab in Client UDF were modified. This has now been fixed.	23788

WIP Provisions

Fixes

Bug Fix	Reference
There was a 500 error when attempting to open a period. This is now fixed.	23515

2023.1.1

Billing

Fixes

Bug Fix	Reference
In Billing, there was an issue in the Edit Bill option on the Approvals tab, whereby after clicking the option it was possible to click it again whilst the bill was loading. This has now been fixed. The Edit button is now disabled and not selectable while the bill is loading. Furthermore, while editing the bill, if the user attempts to navigate back to the Approvals tab and click the Edit button again, they will now receive a helpful message stating, "You must save current bill before editing another".	23765
In Billing, there was an issue in the Edit Bill option on the Approvals tab, whereby it was slow to open the bill. This problem was noticeable when the bill contained a significant number of jobs. Enhancements are now included in this release to improve the performance in this area by optimizing the process of retrieving jobs. Instead of fetching each job, all jobs are now retrieved all at once.	23720
An issue was reported in the Billing tab - Client / Job Selection regarding the right-mouse context menu option View Client Fees Ledger, whereby the Fees Ledger displayed was not the one relating to the currently selected row. This happened when using the following keystrokes: - • Right click on a client • Select view client fees ledger from the context menu • Very quickly (i.e., before the Client Details form has opened!) Right click on the client again • Select view client fees ledger again • Close the Client Details form • Right click on a different client • Select view client fees ledger Enhancements have now been included in this release to prevent the second selection of the same client's Fees Ledger with a progress overlay which will help prevent most users encountering the issue. However, where network traffic slows down, the issue could potentially be experienced.	12919

Credit Control

Fixes

Bug Fix	Reference
In Credit Control, the Aging columns did not retain layout changes when moved to the beginning of the grid. This has now been fixed.	23758

Expense Approval

Fixes

Bug Fix	Reference
There was an issue where child items for one parent row in the approval grid displayed under another row in the grid which resulted in a mismatch of total amounts when grouped by Staff. This has now been fixed.	23759

Job Budgeting

Enhancements

Enhancement	Reference
In Budget Template setup a new value "Staff and Values" has now been added to the dropdown to reduce extra clicks and user errors when setting up a new Budget.	23732

Job Rollover

Fixes

Bug Fix	Reference
There was an issue where the scripts that perform the roll were using a function not supported by Older versions of SQL Server. This has now been fixed.	23795

Time and Expenses

Enhancements

Enhancement	Reference
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Time grids row filter display is now governed by a firm switch TEGridFilter. When the switch is off the row filters will not be displayed.

The new switch is in Functional Area = 5 - T&E/ASTEE

Setting 1 = Show filters in List View, Grid View and Expenses.
Setting 0 (the default when inserted on upgrade) = No filters show in List View, Grid View and Expenses.

23730

By default the switch is off (0), prior to this release the filter row was displayed by default. Firms that require the row filters will need to update the switch settings (1).

Fixes

Bug Fix	Reference
When entering a timeline, an issue was reported whereby a job listed in the dropdown for the selected client was not actually a job on the client. A fix has now been made for this preventing the incorrect job from displaying in the dropdown.	12745

UDF (Custom Forms)

Fixes

Bug Fix	Reference
In Client UDF, the tab "Child Clients" (Child Customers) was displaying a Delete button. Delete was not valid for child rows and the button has now been removed.	5752
When a user double-clicked on the Save and Close button it resulted in a validation error. This has now been fixed.	19820
There was an issue in UDF where the Cascade Client changes form did not ghost the relevant fields. This has now been fixed. The appropriate fields in the form are now correctly ghosted as intended.	12468

2023.1.2

AR

Fixes

Bug Fix	Reference
There was an issue where cross currency allocations caused incorrect records in the nominal tables. This has now been fixed. Changes are as follows: • Discounts now record currency amounts and allocate in currency. • Split discounts has been modified to account for this • Extra column on both grids, re-naming of functional column. • Edits to the new currency columns are manual like functional -There are checks to ensure that amounts total up and that you don't put currency amounts on the exchange difference account. • Receipt Allocation History now records currency allocations for the discounts. • Undo Allocations now accounts for the currency on a discount in Receipt Allocation History. • Reverse Item now accounts for the currency on a discount in Receipt Allocation History.	23710
There was an issue with the Client Fees tab where the grid was limited and fixed to 25 rows per page. The paging size can now be set by the user in the Client Fees and WIP Grids.	23906

AR Provisions

Fixes

Bug Fix	Reference
In the AR Provisions grid, greyed out lines were unreadable. Greyed out lines in the grid now use a lighter shade of grey to improve readability.	23914

Billing

Fixes

Bug Fix	Reference
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There was an issue where the switch WPNoWIPProvInTbIWIP was not being honoured correctly in certain circumstances. The SP used by StarPDM Billing to calculate current provision amounts has now been fixed.	15259
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Credit Control Enhancements

Enhancement	Reference
The context menu item "Mail To..." which enables emailing of bills and transactional notes attachments have been added to the credit control Invoice and Notes grid respectively. The Mail To feature uses the same email settings as setup for E-billing.	12544
Aging and Balance grid column groups can now be reordered in Credit control.	19098

Fixes

Bug Fix	Reference
Multiple column sorting is now supported in all Credit Control grids.	23903
The filter row in all Credit Control grids now automatically dropdown the filter values whenever the user clicks in the filter.	23904
There was an issue in theme colour where Aging and Balances sub headers column text colour could not be amended. The sub headers are now consistent with the main column headers.	23907

Dashboard

Fixes

Bug Fix	Reference
There was an issue that was preventing the editing of Radial Gauge controls in the Dashboard config module. This has now been fixed.	23803

Time and Expenses

Fixes

Bug Fix	Reference
There was an issue when entering expenses with multiple analysis levels, the second level was not sorted alphabetically. All dropdowns are now sorted alphabetically.	23899

UDF (Custom Forms)

Fixes

Bug Fix	Reference
In UDF Multiline text boxes appeared in a different colour. All Multiline text boxes on all custom forms now show text in black.	23902
There was an issue with the Client Fees tab where the grid was limited and fixed to 25 rows per page. The paging size can now be set by the user in the Client Fees and WIP Grids.	23906

2023.1.3

AR

Enhancements

Enhancement	Reference
The following improvements have been implemented to minimize the frequency of calls made to the Avalara Integration: <u>Change to use SalesOrder for quotes</u> - Before a bill is saved the doc type is set to Sales Order in Avalara (which effectively just calculates tax) so that the transaction is not stored in Avalara after every edit. This type of call incurs less cost to the client. <u>No longer void and create....use createoradjust instead</u> - When the bill is saved the doc type of Sales Invoice is used with a CreateofAdjust call meaning the same transaction in Avalara is simply updated if the bill amount has changed since the last save. This eliminates the need for lots of Creating and Voiding after every bill edit and again reduces the number of calls to Avalara the client had to pay for. This also means there is less history in the Avalara database of lots of voided transactions. Voids are still used when undoing a bill , creating a credit note and overriding the tax to be zero and when reversing approved bills. All other calls remain unchanged and functionality is identical.	24019

Fixes

Bug Fix	Reference
There was an issue where successive allocations on an AR record (e.g. receipt) would corrupt the record type of any discount created during a prior allocation. This has been fixed.	23982

There was an issue with incorrect values in combined cross-currency and cross-client/entity allocations. The following issues have now been fixed:

1. The currency portion of a transfer was being written with the wrong sign to the working tables.
2. The exchange difference was not being accounted for in the transfer, resulting in a second discount being generated against the original receipt.
3. The exchange difference record on a transfer was not being approved.
4. When a cross-entity transfer is multi-currency, allocation is not populated to the RAH for the contra, which means that on approval, currency amounts on the contra and receipt can remain in draft.
5. When working with highly devalued currencies (e.g. Yen), fractional discounts when the functional currency is of stronger value can result in a 0 discount in functional. In this situation, the discount split was not being written.

23959

Billing Fixes

Bug Fix	Reference
There was an issue where users were unable to send an email without at least one recipient or attachment. This has now been fixed.	24012
There was an issue where the second contact displayed 'for the attention of' section of the Invoice/Bill was not cleared for the next bill resulting in some invoices displaying contacts that were not related. This has now been fixed.	23989
There were performance issues encountered when billing Jobs with no WIP, including slowness when adding Jobs; editing Job bill amounts and allocations; and both editing and saving the bill. The performance was negatively impacted as more jobs (without WIP) were added the bill. This has now been fixed.	23950

Scheduling Fixes

Bug Fix	Reference
User experienced delays of approximately 15 seconds when refreshing Schedule Wallcharts especially when there were large number of bookings displayed (e.g. 5000 bookings). Optimizations have now been made to the Refresh process of the Schedule Wallchart.	23968

Time and Expenses

Fixes

Bug Fix	Reference
In Time & Expenses entry, the stage field dropdown was displayed in a random order. This has been updated to use the Stages sort order to ensure that the dropdown is organized and easier to navigate.	23882

2023.1.4

Time and Expenses

Fixes

Bug Fix	Reference
There was an issue where Timers in T&E were exhibiting incorrect behaviour: the second timer failed to start after the first timer was already started. This issue has now been fixed.	24015

2023.1.5

Billing Enhancements

Enhancement	Reference
Std Paragraphs that are assigned to a Job are now brought into the Invoice text screen when the Invoice grouping is set to Job. Users will be prompted for any input required for all jobs and their default std paragraphs when a bill is saved or when Invoice Grouping is changed to Job. The system remembers the input so users only have to enter the details once. This re-instates functionality that was available in the StarPDM product.	22827

Due Dates Enhancements

Enhancement	Reference
- Added Process Template column to main grid (allowing firms to group by template) - Added Notes column, the same as in Due Dates process view (icon shows if there are notes)	24038

Fixes

Bug Fix	Reference
Columns and Grids - If multiple columns are chosen to sort, the sort priority (small number) is now visible. (Save layout and clear sorts added to column header context menu) - Grid layouts now automatically save after resizing, moving, hiding and grouping - Due Dates splitter now saves layout, so remains hidden between sessions if user hides it Calendar Date Picker Users previously had to enter date manually as calendar picker did not allow selection. Now allows user to select year, month and day (only valid year ends will be enabled)	24067

Scheduling

Fixes

Bug Fix	Reference
Staff's holidays are now flagged on the Staff Wallchart screen (icon, shading and a tooltip) - like they are on a Schedule.	23949

2023.1.6

Billing

Fixes

Bug Fix	Reference
There was an issue in databases with Multiple Sales Tax turned on where the item "API Tax" would appear in the taxes dropdown. This has now been fixed so the item no longer appears if entity switch UseTaxIntegration is turned off. Please Note: UseTaxIntegration should never be turned on in Multi sales Tax databases as the Star-Avalara integration does not currently support it.	23895
There was an issue with penny differences being introduced due to rounding errors when a multi currency bill was being approved. This has now been fixed.	23992
There was an issue where multi-currency progress bills where being allocated on Approval. This has now been fixed.	24048

Scheduling

Fixes

Bug Fix	Reference
There was an issue in Scheduling - Other Diaries where the loss of a user session triggered a persistent silent loop error resulting in the creation of numerous entries in the event log. This has now been fixed.	24011

Time and Expenses

Fixes

Bug Fix	Reference
There was an issue with changes to Timesheets being made in the mobile app not being properly reflected in the web application. This has now been fixed.	24062

2023.1.7

Billing

Fixes

Bug Fix	Reference
There was an issue in the Billing module when the user billed multiple jobs in quick succession, allowing the billing of jobs from different entities. This has now been resolved.	24032
There was an issue in the Billing module causing the Bill Date control to be disabled when editing a bill with entity based multi currency turned on. This has now been resolved.	24076
There was an issue with the Stock Item Purchases user control which prevented anyone but no-limit users from being able to add new records. This has now been resolved and the add permission is correctly controlled by the UDF tab privileges.	24065

Dashboard

Fixes

Bug Fix	Reference
The Outstanding items dashboard was not looking at all approval levels. This has now been fixed.	24074

Due Dates

Fixes

Bug Fix	Reference
There was issue with the Due Dates modules that prevented the Collator and Second Responsible columns from displaying. This has now been resolved.	24069

Job Budgeting

Fixes

Bug Fix	Reference
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Grouping options have been re-enabled in the Variance and Actual tabs of the Job Budgeting module

11346

Planners Wallchart

Fixes

Bug Fix	Reference
In Planners Wallchart, there was an issue with moving a booking from a leaver, if the new date was after the leave date despite moving to a different member of staff (non-leaver). This has now been resolved.	23891

Time and Expenses

Fixes

Bug Fix	Reference
There was an issue in Time & Expenses module that allowed a user to create duplicate lines of entry if they clicked OK multiple times in the comments dialog. This has now been resolved.	24041

UDF

Fixes

Bug Fix	Reference
Staff UDF's WIP control was showing WIP at Cost when Margin Accounting is disabled. This has now been fixed.	24073
There was an issue that prevented the display of the Pick Contacts button when editing Invoice Address for an approved Invoice. This has now been resolved.	24042

2023.1.8

Billing

Fixes

Bug Fix	Reference
Improved performance for Editing of draft bills. The performance issue that caused delays when editing draft bills has been resolved.	23753
The performance issue that caused slow adding of jobs to a bill has been resolved.	24016
Performance has been improved to address the issue encountered while editing draft bills.	24039
The frequent deadlock issue in Billing which caused over 7000 daily deadlocks has been resolved.	8986

Scheduling

Fixes

Bug Fix	Reference
Improved Schedule save performance. Schedule saves are now faster and more resource-efficient, addressing previous slowness and high costs.	24052

Time and Expenses

Fixes

Bug Fix	Reference
SQL Validation process for Time and Expenses entries when filtering charge accounts by job type has been optimized. It was previously using excessive memory.	24093

2023.1.9

Billing

Fixes

Bug Fix	Reference
There was an issue in Billing where editing filters and clicking the "X" or "Me" buttons would not clear the records the from the underlying list. This has now been resolved.	24106
There was an issue when changing the expense bill amount on a pro-rata bill that would cause incorrect totals to be displayed. This has now been resolved	19224
Re-instate Bill function now correctly copies WIP analysis records from the original bill.	23901
A New Billing preference has been added "Retain Use Client Address after saving bill". When ON the Use Client Address checkbox will retain its setting for the entirety of a users session. The default for the preference is OFF.	23981

Credit Control

Fixes

Bug Fix	Reference
There was an issue in Credit Control where right click options do not appear selectable until a left click was performed. This has now been resolved.	24125

Due Dates

Fixes

Bug Fix	Reference
In Due Dates, there was an issue where New Steps would be created a year too early when replicating a User Defined Basis Process. This has now been resolved.	21540

Job Budgeting Fixes

Bug Fix	Reference
There was an issue in Job Budgeting where editing a stage would cause it to lose its Charge Account, Staff Type and Hours value. This has now been resolved.	24103
There was an issue in Job Budgeting that would cause Stages to have blank Stage names. This has now been resolved.	24114

Time and Expenses Fixes

Bug Fix	Reference
There was an issue preventing client from being selected when using a Client Auto-Complete field in Time & Expenses. This has now been resolved.	23909
There was an issue in Time & Expenses where the user could create duplicate expense records by dbl-clicking the save button. This has now been resolved.	24094
There was an issue with the State Division functionality in Time & Expenses such that a user could not tab correctly through all the fields and the State Division would not be saved. This has now been resolved.	24128
There was an issue with the State Division functionality in Time & Expenses grid view, such that it would incorrectly consolidate 2 lines where state was the same but state division was different. This has now been resolved.	24129

2023.1.10

Billing

Fixes

Bug Fix	Reference
We have introduced a new Firm switch, <code>BillingGeneratePDFAsBackgroundTask</code>, to enhance billing workflows. Feature Highlights Improved Efficiency: Generate bill PDFs in the background, allowing uninterrupted use of the Billing Module. Optimized Performance: Perfect for processing 50+ bills at once, reducing delays during approvals. A Progress Spinner: when the app is approving bills (the same spinner used when saving bills). This prevents the user from interacting with the billing module until the DB process to approve bills has completed. Note: Bills generating PDF documents cannot be completed until the generation process finishes. Enabling the switch: Activate the <code>BillingGeneratePDFAsBackgroundTask</code> switch in Firm Settings to start using this feature.	24140

2023.1.11

Billing
Enhancement

Enhancement	Reference
A new Firm switch called BillingSkipAutoSave has now been enabled. When enabled, the Billing module will no longer perform an AutoSave when navigating to the Bill text tab.	24153

2023.1.12

Billing Enhancement

Enhancement	Reference
A countdown feature has been added for bulk approval, displaying the remaining number of items to approve. This enhancement improves user visibility and tracking, ensuring a smoother approval process.	24145
The system caches the draft bill list, reducing calls to select_draftbillList by only executing it once upon entering the Bill Approvals tab. The cache is maintained for 5 minutes, after which data reloads from the database. A new Firm switch has now been introduced called BillingUseCachedBillList. It allows firms to disable caching for real-time loads if preferred. By default, caching is enabled to improve performance.	24162

Bug Fixes

Bug Fix	Reference
The Save Actions (Save + Close, Save + Send to and Save + Approve actions) were slow due to synchronous PDF generation. Hangfire for asynchronous PDF generation has been included when the switch BillingGeneratePDFAsBackgroundTask is ON, speeding up save actions. The PDF is generated as normal when a user saves the bill without closing it. This ensures the user can preview the bill.	24155
Pass to Approve action previously triggered redundant refreshes of the Approvals tab, causing unnecessary extra calls to BillApproveGridRows and ClientJobView. The issue has been resolved by removing redundant calls to BillApproveGridRows and limiting ClientJobView calls to only when the user returns to the Client Job Screen	24156
Optimized performance by reducing unnecessary calls to ps_sdldc_tblKirkJobBalances_UPDATE_ByClientID during "Save and Send To", "Save and Pass To Approve" action Calls, improving system efficiency and reducing load. Stored	24160

Procedures `ps_sdmc_tblDraftBills_INSERT_NewBill` and `ps_sdmc_tblDraftBills_UPDATE_ApproveBill` were modified for clients using the user defined variant. Please refer to technical notes for more details.

2023.1.13

Billing
Enhancement

Enhancement	Reference
The application has now been modified to apply Job Invoice Groupings even if Invoice text is supplied in the Future Bill template. The invoice text from the template will be used instead of the default client and job name text.	24154
Database objects used during the Bill save process have been modified to significantly reduce deadlocks and timeouts.	24163

Bug Fixes

Bug Fix	Reference
A new database Index has been added to improve performance when saving a bill.	24165

Scheduling
Enhancement

Enhancement	Reference
Performance improvements when opening the Scheduling module with Staff Pools not in use.	24132

SDC
Bug Fixes

Bug Fix	Reference
In SDC Configuration the import functionality was failing to import files. This issue has now been resolved.	23849

2023.1.14

Billing
Enhancement

Enhancement	Reference
Bill Approval routine has been updated to approve all bills in the batch rather than failing on the first error and having to repeatedly interact with validation failure messages.	24169
The Bill approval routine has been updated to provide meaningful error messages for any bills that fail to Approve. Possible failures: 1e - Imbalance between WIP and AR 2e - No existing Bill number to increment 4e - Bill already approved 5e - Unable to obtain next Bill number (unlikely to occur now with Approval SP change) 6e - Imbalance in WIP 7e - Exchange Rate not found	24170
Bill approval routine has been updated to set the Bill number to "PENDING" during the transaction and then just obtains a real bill number after approval is complete. Any Bills that get left with "PENDING" bill number will need a bill number assigned before user prints / completes or emails the bill. New context menu in Bill Approvals grid called Assign Bill Number that allows user to obtain real bill number for bills with PENDING Bill number.	24171