

PRODUCT RELEASE NOTE



Version	1.1.3.1	Server	Production
Date of Release	30-Jun-2024	Release No	1.0
HIGHLIGHTS			
Notes	Record activity as notes on party, contract, invoice or receipt.		
Dashboard	New widgets on dashboard and customer portal dashboard		
Notifications	New customer notifications		
Tax Rates	Import tax rates and automated end date update when new record is entered for same combination		
Enhancements	Minor enhancements.		
Bug Fixes	Minor bug fixes.		
NEW FEATURES			
Notes	Record activity and tasks as notes with tags on specific party, contract, invoice or receipts. Details of user, date and time are stamped with the note.		
ENHANCEMENTS			
Customer Portal Dashboard	The following are displayed on customer portal dashboard <ul style="list-style-type: none">Tile - Amount FinancedTile - Amount DueTile - Unapplied PaymentsTable - Invoices DueTable - ContractsTable - Unapplied Payments		
Dashboard	New widgets <ul style="list-style-type: none">Tile for average remaining lease term in monthsTile for end of lease asset valueGraph by contract profitabilityGraph for delinquency by ageing bucket 0-30, 31-60, 61-90, 91-180 and greater than 181		
Contract Details	Add asset details on contract details page by clicked green plus sign		
Notifications	New notifications <ul style="list-style-type: none">Past due invoicesInvoice pdf		
Import	Tax rates		

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Settings > Tax Rates	When a new tax rate is entered with the same state, county and zip, the prior record is automatically updated with an end date
BUG FIXES	
Amort schedule	Moved the following from contract header to amort schedule header <ul style="list-style-type: none">• Financed Amount• Total Rent• Term• IRR / Interest p.a• Total Income
Loan payment amount	Fixed error for quarterly payment
KNOWN ISSUES	
None	