

PRODUCT RELEASE NOTE

2024 Annual Summary



Versions	1.1.1.1 – 1.1.9.1	Server	Production
Period	30-Apr-2024 – 31-Dec-2024	Releases	9 monthly releases

RELEASE TIMELINE		
Version	Date of Release	Headline
1.1.1.1	30-Apr-2024	Exposure calculation; new domain links
1.1.2.1	31-May-2024	Import error file; tax rate table
1.1.3.1	30-Jun-2024	Notes; new dashboard widgets; customer notifications; tax rate import
1.1.4.1	31-Jul-2024	Structured payments; tax on invoice; auto logout
1.1.5.1	31-Aug-2024	Stripe account unlink/relink; tax reports
1.1.6.1	30-Sep-2024	Remote-login debugging; maintenance fee frequency; invoice templates
1.1.7.1	31-Oct-2024	Scheduler; transaction restructure; receipt reverse/edit
1.1.8.1	30-Nov-2024	Inventory
1.1.9.1	31-Dec-2024	Customer billing

2024 HIGHLIGHTS		
Area	Description	Release
Contracts & Assets	Exposure calculation for lease, loan and rent; structured (step) payments for leases and rentals; independent maintenance fee frequency; inventory assets selectable on new contracts.	1.1.1 / 1.1.4 / 1.1.6 / 1.1.8
Billing & Tax	Tax rate table with import and automatic end-dating; tax computed on invoices with contract override; tax reports; three invoice templates; customer-level billing (pre-bill days, consolidation).	1.1.2 – 1.1.6, 1.1.9
Receipts & Accounting	Transactions restructured into header and line records, with all accounting based on lines; reverse receipt application; receipt edit and cancel.	1.1.7 / 1.1.8
Automation & Data	Scheduler for batch jobs; import error file download and re-upload; processing summary screen.	1.1.2 / 1.1.7 / 1.1.9
Dashboards & Collaboration	New dashboard and customer portal widgets; notes on parties, contracts, invoices and receipts; new customer notifications.	1.1.3
Platform & Security	New domain links; auto logout after inactivity; Stripe account unlink and re-signup; user-granted remote login for support debugging.	1.1.1 / 1.1.4 / 1.1.5 / 1.1.6

NEW FEATURES		
Area	Description	Release
Contracts & Assets		
Exposure	• Finance Lease = Amount Billed not paid + Outstanding Capital Recovery • Loan = Amount Billed not paid + Outstanding Principal • Rent = Amount Billed not paid	1.1.1.1
Structured Payments	Create leases and rentals with step payments. Payments are updated on the contract details page.	1.1.4.1

Maintenance Fee	Set a payment frequency for the maintenance fee that differs from the rent frequency (e.g. quarterly rent, monthly maintenance fees).	1.1.6.1
Inventory	Assets in inventory can be selected on new contracts: <i>Available for Lease</i> on Lease contracts, <i>Available for Rent</i> on Rental contracts and <i>Inventory</i> on Loan contracts. On activation, the status changes to Leased, Rented or Sold.	1.1.8.1
Billing, Tax & Payments		
Settings > Tax Rates	Add tax rates by state, county, city and zip to apply on invoices.	1.1.2.1
Tax Reporting	Tax reports for tax rates and for tax charged to customers.	1.1.5.1
Stripe Payments	Remove the link between Athena and Stripe and sign up with a different Stripe account.	1.1.5.1
Invoice Templates	Three invoice templates are available: centre aligned, right aligned and left aligned.	1.1.6.1
Customer Billing	Define pre-bill days, bill consolidation and invoice generation on the customer record.	1.1.9.1
Receipts		
Receipt Reverse Application	Select invoices to reverse the application of partially or fully applied receipts.	1.1.7.1
Receipt Edit	Edit existing receipts to change the contract number, receipt amount and comments.	1.1.7.1
Operations & Platform		
New Domain Links	• athenafintech.app: Production • demo.athenafintech.app: Demo • test.athenafintech.app: Test	1.1.1.1
Import	Download the import file with errors, correct it and upload it again. An error is displayed on each line that fails.	1.1.2.1
Notes	Record activities and tasks as tagged notes on a party, contract, invoice or receipt. Each note is stamped with the user, date and time.	1.1.3.1
Auto Logout	Users are logged out automatically after 5 minutes of inactivity.	1.1.4.1
Improved Debugging	Support can simulate logging in as the end user when that user grants remote login access.	1.1.6.1
Scheduler	Schedule batch processing jobs to run daily, weekly, monthly or at a specific time.	1.1.7.1

ENHANCEMENTS		
Area	Description	Release
Contracts		
Loan Field Renames	• Financed Amount → Loan Amount • Installed Location → Collateral Location • Asset → Collateral; Asset Type → Collateral Type • Asset Cost → Loan Amount • Total Income → Total Interest • Capital Recovery → Principal	1.1.1.1
Contract > Amort Schedule	IRR and Total Income moved from the contract header to the amort schedule.	1.1.1.1
Contract Details	Add asset details on the contract details page with the green + sign. The field order was updated for this flow.	1.1.2.1 / 1.1.3.1
Bill To Address	Bill-to address shown on active contracts.	1.1.4.1

Contract Search	Search contracts by type and status, in addition to customer and contract number.	1.1.5.1
Maintenance Fee	Set the number of payment periods for the maintenance fee. Multiple maintenance fee lines are supported.	1.1.5.1
Amort Schedule	Total depreciation amount added for rental contracts.	1.1.5.1
Contract Activation	A confirmation message appears when activating a contract with a future start date.	1.1.5.1
Periodic Payment Amount	The page opened by the + sign is now titled Payment Lines.	1.1.6.1
Payment Schedule	Leap year handling added.	1.1.6.1
Invoicing & Tax		
Invoice	Manual invoices can be deleted before they are marked complete.	1.1.4.1
Tax on Invoice	Computed from the tax rate table, or overridden on the contract.	1.1.4.1
Tax Rates	Tax rates can be imported. When a new rate is entered for the same state, county and zip, the prior record is automatically end-dated.	1.1.3.1
Invoice Template Preview	The preview generates a document on your local computer for review.	1.1.6.1
Generate Invoice	Choose the bill-through date for the ASAP and On Time scheduler options. The Periodic option uses the processing date.	1.1.7.1
Receipts, Payments & Transactions		
Payments	Shows <i>Please sign up for Stripe to process payments</i> when the user cannot process payments. Additional information can be captured on the payments screen.	1.1.1.1 / 1.1.6.1
Receipt	The unapplied balance is shown on receipts that are not fully applied.	1.1.6.1
Receipt Cancel & Date	Unapplied receipts can be cancelled. Users can enter the receipt date.	1.1.8.1
Receipt Edit (non-financial)	Receipt method, remittance bank, receipt reference and comments can be edited without creating transactions or accounting.	1.1.8.1
Transactions	Restructured into header and child records, with all accounting based on transaction lines. Source, a hyperlinked source transaction number and an independent transaction number are shown.	1.1.7.1 / 1.1.8.1
Accounting Setup	Download account codes, transactions and rules as PDF or CSV.	1.1.6.1
Dashboards, Portal & Notifications		
Overview → Dashboard	Overview renamed to Dashboard.	1.1.2.1
Dashboard	• Tile: average remaining lease term (months) • Tile: end-of-lease asset value • Graph: contract profitability • Graph: delinquency by ageing bucket (0-30, 31-60, 61-90, 91-180, over 181 days)	1.1.3.1
Customer Portal Dashboard	• Tiles: Amount Financed, Amount Due, Unapplied Payments • Tables: Invoices Due, Contracts, Unapplied Payments	1.1.3.1
Customer Portal	Renamed <i>Create user for this party</i> to <i>Customer Portal</i> . Option to reset customer portal user passwords.	1.1.1.1 / 1.1.5.1
Notifications	Days in advance defaults to 30 and is editable. New notifications for past-due invoices and invoice PDFs.	1.1.2.1 / 1.1.3.1
Notes	WYSIWYG editor enabled.	1.1.5.1
Reports, Import & Platform		
Report > Asset Register	Filter by contract or asset number, select fields and export.	1.1.1.1 / 1.1.4.1

Import Party Address	Lookup added to confirm the correct combination and spelling of country and state.	1.1.1.1
Processing	New summary screen showing status, with drill-down into input parameters and error messages. Customer pre-bill days are applied by the generate invoice program.	1.1.9.1
Settings Menu	Moved to the right with a grey background, and the home icon removed. On mobile, it opens from the three-line menu at top left.	1.1.5.1
Unhandled Exception	Shows a message asking the user to log a support ticket.	1.1.5.1
Deactivate User	The last active user cannot be deactivated. Their access is removed when the subscription lapses.	1.1.9.1
Branding	Login page image and Ask Athena logo updated.	1.1.1.1 / 1.1.5.1

BUG FIXES		
Area	Description	Release
Contracts & Amort Schedule		
Contract > Key Information	Correct next due date and due amount. Payoff amount and concurrent contracts hidden. Remaining term and exposure corrected, and exposure renamed to Net Investment. Next due amount includes rent and fees.	1.1.1.1 / 1.1.2.1 / 1.1.5.1
Contract > Details	New parties have the installed address checked automatically. Picklist removed and negative loan interest prevented.	1.1.1.1 / 1.1.2.1
Input Validation	Fractional terms and zero or negative asset cost or periodic payment amounts are not permitted.	1.1.4.1
Payment Schedule	Duplicate rent payments prevented. The schedule is view only (edit on contract details). Due dates on the last day of the month corrected.	1.1.2.1 / 1.1.4.1 / 1.1.6.1
Start Date	Changing the start date updates the rent and fee payment schedules.	1.1.5.1
Amort Schedule	Tax rate fees removed. Financed Amount, Total Rent, Term, IRR/Interest p.a. and Total Income moved to the amort schedule header. Values after maturity are visible. Format and dates fixed.	1.1.2.1 / 1.1.3.1 / 1.1.5.1 / 1.1.9.1
Loan Payment Amount	Quarterly payment error fixed.	1.1.3.1
Inventory	Status changes from Available for Lease to Leased on lease activation.	1.1.9.1
Receipts, Invoices & Accounting		
Receipt	Applied amount uses currency precision. Receipt accounting is generated, and application is limited to the unapplied amount. Cancelling a receipt generates an accounting entry.	1.1.2.1 / 1.1.6.1 / 1.1.8.1
Invoice	Generated for the correct due date and in the selected invoice format.	1.1.6.1 / 1.1.7.1
Tax	Invoice tax matches the tax calculation report. The report uses currency precision. Bill transactions show amounts inclusive of tax.	1.1.7.1 / 1.1.8.1
Activation Accounting	Residual accounting for leases is now available.	1.1.7.1
Income Recognition	In-processing status fixed.	1.1.7.1
Accounting Entries (Report)	Shows correct entries with a hyperlinked transaction number to the source. Downloadable as PDF and CSV.	1.1.7.1 / 1.1.8.1 / 1.1.9.1
Other		
Party > Details	Company removed.	1.1.2.1
Report > Asset Register	Hyperlinks added to asset and contract numbers.	1.1.2.1
Users	Renamed <i>Manage Customer Users</i> to <i>Manage Customer Portal Users</i> .	1.1.2.1

Notifications	Run as of the current date.	1.1.4.1
Dashboard	Charts displayed in a two-column format.	1.1.5.1
Cancel Subscription	Available under Settings > Profile > Change Subscription Plan.	1.1.5.1
Import	Loan contract import needs only the interest rate, not periodic payments. The loan payment schedule is calculated automatically after the asset cost is added.	1.1.5.1 / 1.1.6.1
Scheduler	Processing completes when set to run periodically.	1.1.9.1
Messages	Invalid error messages removed.	1.1.6.1

KNOWN ISSUES		
Area	Description	Release
Receipt	Reported in 1.1.1.1: the cancel receipt option was available only for receipts in <i>Unapplied</i> status. From 1.1.8.1, cancelling unapplied receipts is supported. No known issues were reported for releases 1.1.2.1 to 1.1.9.1.	1.1.1.1