

PRODUCT RELEASE NOTE

2025 Annual Summary



Versions	1.1.10.1 – 1.1.21.1 (12 Releases)	Server	Production
Period	31-Jan-2025 – 31-Dec-2025	Releases	12 monthly releases (Jan - Dec)

RELEASE NOTE

Version	Date	Headline
1.1.10.1	31-Jan-2025	Import Inventory - create existing inventory; Invoice rearchitected; Inventory Register renamed
1.1.11.1	28-Feb-2025	Automate invoice dispatch & reminders - auto email PDF on generation
1.1.12.1	31-Mar-2025	Receipt cash application rules - Lease / Loan / Rental priority
1.1.13.1	30-Apr-2025	Technical Rearchitecture - Data Isolation, Security, Auto Scaling, KMS Encryption, Observability
1.1.14.1	31-May-2025	Document Management - Party/Contract/Invoice/Receipt; Contract creation flow simplified
1.1.15.1	30-Jun-2025	Dashboard split Command Center / Operations / Finance; ACH Setup
1.1.16.1	31-Jul-2025	Companies & Lines of Business segregation; New party & asset fields
1.1.17.1	31-Aug-2025	Additional Parties & Party Roles - guarantor, insurance, private label
1.1.18.1	30-Sep-2025	ACH Payments - Generate ACH file for bank; Customer Portal
1.1.19.1	31-Oct-2025	ACH Returns upload; Loan invoicing monthly/quarterly/annual; Rounding fix
1.1.20.1	30-Nov-2025	Email Notifications configuration; Contract Modification on active contracts
1.1.21.1	31-Dec-2025	User Guide online, Audit Trail old/new values, Interest Only Payments on loans

2025 HIGHLIGHTS

Area	Description	Release
Inventory	Import inventory to create existing inventory. Status flow: In Transit → Leased / Rented / Sold on activation. Item number auto/manual.	1.1.10.1
Billing	Invoice rearchitected on new model. Taxable amount reflects invoice amount. Currency precision on PDF. Auto email invoice PDFs on generation. Upcoming due date & past due reminders. Loan invoicing monthly/quarterly/semi-annual/annual. Interest-only loans. Rounding adjusted in last period. Pre-bill days, bill consolidation.	1.1.10.1 / 1.1.11.1 / 1.1.19.1 / 1.1.21.1
Receipts	Cash application when receipt < invoice: Lease/Rental = Rent first then fees with proportionate tax. Loan = Interest → Principal → Fees. Unapplied Receipts renamed Unapplied Payments. Reverse receipt application. Receipt Edit. ACH Generate file and ACH Returns upload to reverse receipts and mark invoices unpaid.	1.1.12.1 / 1.1.15.1 / 1.1.18.1 / 1.1.19.1
Security	Technical Rearchitecture: Data Isolation (prod/non-prod separate), Daily Backups, Least Privilege, IAM minimal, Private network + SG + HTTPS, KMS at rest, Auto Scaling, Observability.	1.1.13.1
Document Mgmt	Upload/download documents for Party/Contract/Invoice/Receipt tagged to entity. Not visible on portal.	1.1.14.1
Contracts	Screen flow simplified to Basic Info → Asset Details → Payment Details with right panel review. Contract Modification - change payments on active with payoff quote & amort review.	1.1.14.1 / 1.1.20.1
Dashboards & Reports	Dashboard split Command Center / Operations / Finance. Widget Library. New reports Asset Concentration, Contracts by Status, Average Term Original/Remaining. View All drill-down.	1.1.15.1
Companies & LOB	Multiple Companies & LOB segregation on contracts & accounting. Filter reports by company/LOB.	1.1.16.1
Parties & Roles	Multiple additional parties (guarantor, insurance, private label) with Party Roles globally.	1.1.17.1
Compliance	Online User Guide under Support. Audit Trail old/new values report. Email template editor. Permission Groups: Admin, Company User, Support, Customer. Email Notifications configurable.	1.1.20.1 / 1.1.21.1

NEW FEATURES

Area	Description	Release
Billing - Invoice	Invoice rearchitected based on new revised model. Taxable amount reflects invoice amount. Invoice PDF uses currency precision.	1.1.10.1
Billing - Auto Dispatch	Automatically email invoice PDFs on generation, reminders of upcoming due dates and past dues. Requires Generate Invoice PDF flag.	1.1.11.1
Billing - Loan Invoicing	Loan calculation considers interest + principal for invoice period whether monthly/quarterly/semi-annual/annual. Interest only payments on loan contracts.	1.1.19.1 / 1.1.21.1
Receipts - Cash App	Rule based cash application when receipt < invoice: Lease - Rent first, fees next proportionate tax. Loan - Interest → Principal → Fees.	1.1.12.1
Receipts - ACH Payments	Define ACH provider, Generate ACH file for bank/payment processor, View/download under Settings > Payments > ACH File.	1.1.15.1 / 1.1.18.1
Receipts - ACH Returns	Upload ACH Return files to reverse receipt and mark invoices unpaid.	1.1.19.1
Import Inventory	Import inventory to create existing inventory records.	1.1.10.1
Rearchitecture	Data Isolation, Daily Backups, Least Privilege, IAM minimal, Private network + SG + HTTPS, KMS encryption, Auto Scaling, Observability.	1.1.13.1
Document Mgmt	Upload/download docs for Party/Contract/Invoice/Receipt tagged accordingly.	1.1.14.1
Companies & LOB	Setup multiple companies and LOBs, set defaults on contracts, filter reports.	1.1.16.1
Additional Parties	Associate multiple parties besides customer/vendor with roles e.g. guarantor, insurance, private label.	1.1.17.1
Email Notifications	Configure email notifications sent to customers.	1.1.20.1
Contract Modification	Change payments on active contracts. Review updated amort schedule before activating.	1.1.20.1 / 1.1.21.1
User Guide	Online access to user guide under Support menu.	1.1.21.1
Audit Trail	Record existing and new values for comprehensive audit trail.	1.1.21.1