Release Notes

Version 3000.2024.3

Service Pack 6

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Contact Information

If you require further assistance, please contact Catalis.

Catalis

3025 Windward Plaza, Ste 200

Alpharetta, Georgia 30005

Toll Free: 1.800.280.5281

Office: 407.321.7434

www.catalisgov.com



All Excise™ software, trade names, Documentation manuals, report libraries, and any other material are Copyright 2007-2024 by Catalis, ALL RIGHTS RESERVED. Any use of materials in this manual, including reproduction, modification, distribution, or republication, without the prior written consent of Catalis, is strictly prohibited.

All the following are service marks of Catalis, or its affiliates and are protected by inclusion herein; Excise™.

Revision History

Name	Date	Description	Version
Kyle Wilson	7/10/2020	Finalized Release	9.0.2.10
Kyle Wilson	11/12/2020	Finalized Release	9.0.2.11
Kyle Wilson	3/24/2022	Finalized Release	9.0.20.10
Kyle Wilson	12/20/2022	Finalized Release	3000.2022.1.7
Kyle Wilson	1/4/2022	Finalized Release	3000.2022.1.8
Ana Luisa Munoz	10/17/2023	Finalized Release	3000.2023.1.5
Ana Luisa Munoz	10/31/2023	Finalized Release	3000.2023.1.8
Ana Luisa Munoz	11/16/2023	Finalized Release	3000.2023.2.0
Ana Luisa Munoz	6/14/2024	Finalized Release	3000.2024.3.6

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Table of Contents

Contact Information 2
Revision History 2
Release 3000.2024.3 Service Pack 6 5
Corrected Issues 5
Added Features 7
Release 3000.2023.2 Service Pack 0 14
Corrected Issues 14
Added Features 15
Release 3000.2023.1 Service Pack 8 16
Corrected Issues 16
Added Features 20
Release 3000.2023.1 Service Pack 5 21
Corrected Issues 21
Added Features 31
Release 3000.2022.1 Service Pack 8 35
Corrected Issues 35
Added Features 36
Release 3000.2022.1 Service Pack 7 37
Corrected Issues 37
Added Features 42
Release 3000.0.0 Service Pack 4 49
Corrected Issues 49
Added Features 51
Release 9.0.20 Service Pack 10 52
Corrected Issues 52
Added Features 53
Release 9.0.2 Service Pack 11 56
Corrected Issues 56
Added Features 57
Release 9.0.2 Service Pack 10 58
Corrected Issues 58
Added Features 59
Release 9.0.2 Service Pack 6 60

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Corrected Issues 60
Added Features 61
Release 9.0.2 Service Pack 2 62
Corrected Issues 62
Added Features 63
Release 9.0 Service Pack 2 65
Corrected Issues 65
Added Features 66
Release 9.0 Service Pack 1 67
Corrected Issues 67
Added Features 68

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.2024.3 Service Pack 6

Notice:

1. **Before a county can put Service Pack 6 v3000.2024.3.6 into production the manual correspondence letters must be migrated.**

There are two types of Correspondence letters. (1) Nightly Batch Jobs such as a Monthly Reminder Letter and (2) Manually letters created by the clerk such as Audit Letters. To accomplish this the test environment database and Crystal folder must be refreshed from the live environment. As always, the safety scripts must be executed against the updated TEST database. Then each letter must be tested to verify the letter format has not changed. Correspondence letters with tables are most prone to format issues after Service Pack 6 is installed. CATALIS Support can verify the Safety database scripts have been correctly executed. CATALIS Reports can help address formatting issues created by the Service Pack.

2. **Scheme Updater missing statement. Please verify this statement is run by the county database administrator.**

```
IF COL_LENGTH('tblCorrespondence', 'AttachmentDataAKA_RTF_Changed') IS NULL
BEGIN
   alter table tblCorrespondence add AttachmentDataAKA_RTF_Changed bit default(0);
END
```

Corrected Issues

EX-888: Disable Stored Bank Information After User Reassigned

Expected Result: The system should not share payment or bank information when the account is reassigned to a new profile.

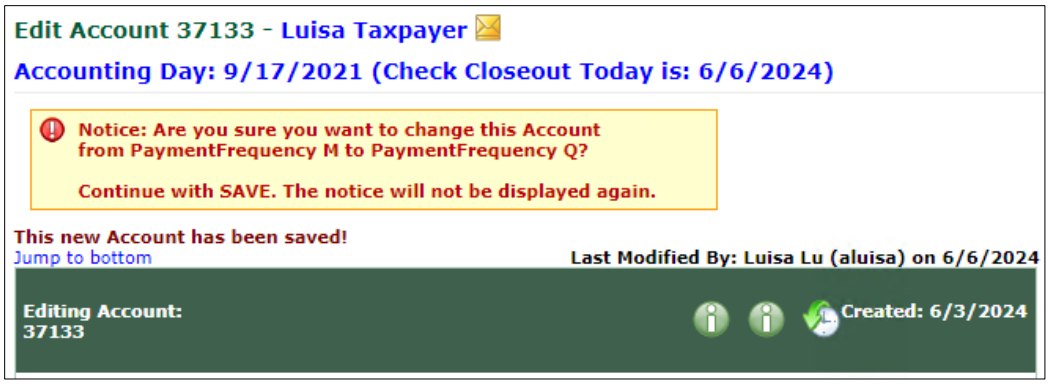
Resolution: Fixed issue where after assigning a new profile to an account, the system displayed the bank information related to the first assigned profile. Now, the user must add the bank information after reassigning to a new profile***.***

EX-891: Account Payment Frequency Unexpectedly Changing to Initial Status

Expected Result: In the Edit Account screen, adding a property should not cause the Payment Frequency to default back to the initial status.

Resolution: Fixed issue where after adding a property to the account the Payment Frequency field was defaulted to the initial status. To prevent these circumstantial changes, a new setting was added **EnableAccountPaymentFrequencyChangeWarning**, if the setting is set to true the following warning will be given when a Payment Frequency changes, the account must be older than 5 minutes to see the warning, if the setting is set to false the warning will not appear. This is only a notification, and the user can continue and save the changes.

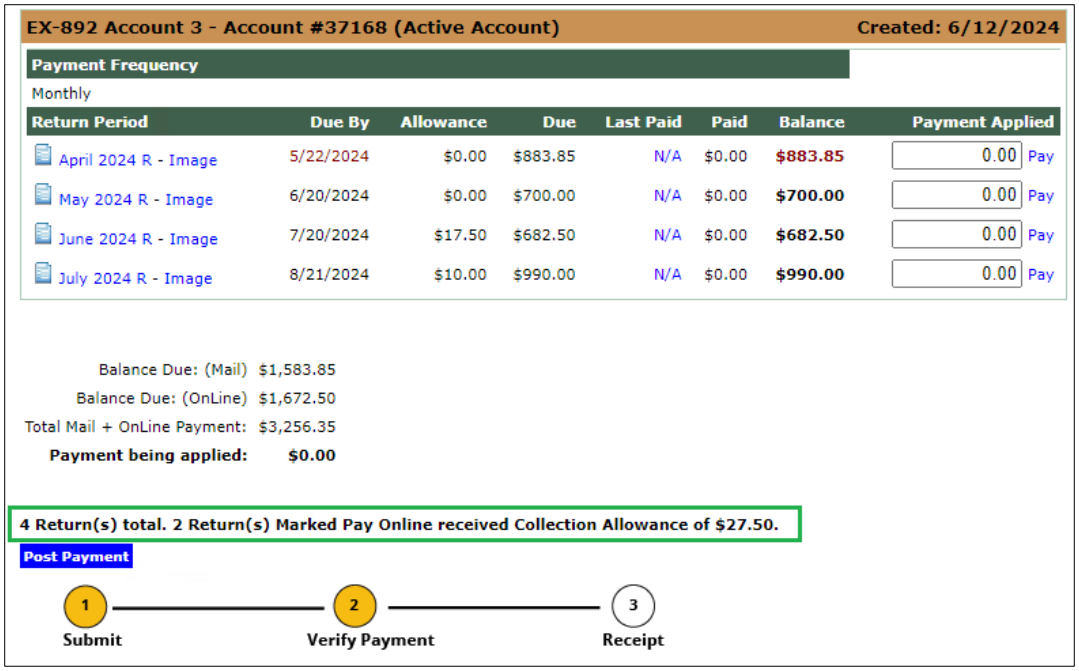
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



EX-892: Employee Warning when Taxpayer Indicates Pay Online but Mails a Check

Expected Result: In the Enter Payment screen, users should be able to see if there are Pay Online returns with a Collection Allowance.

Resolution: A new informational text was added to alert the Clerk they are processing a Return the Taxpayer has taken a Collection Allowance because the Taxpayer indicated they would pay online. This message is only visible to employees.



This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

EX-861: Correspondence – Rework of Correspondence Module

Request Details: Letters being sent to a web-based email reader should be done as an attachment and not in the email body. Keep presenting some letters to the clerk as editable HTML, avoiding the clumsy step of editing an RTF, but when emailed must converted to PDF format. Add dynamic field to add the related county phone number.

Resolution: Excise will use "DefaultGreetingsFile.Html", if one is necessary and a specific greeting letter is not defined. Counties can tailor the DefaultGreetingsFile.Html as needed. On a per letter basis the general greeting can be defined in tblLetterTemplate/ReportFileNameRTFGreetingsFile to link it to a specific correspondence. Any HTML edit can be used to write these files.

There are tokens that allow for dynamic data in the greeting letters. The "CountyPhoneNumber" value comes from the new setting **CountyPhoneNumber**. This is the default greetings text to be used as a starting point for letter specific greetings. This greetings letter is built into Excise; to override it users should create their own file as explained above. Please use UTF-8 only.

```
<!DOCTYPE html>
<html>
<head>
  <meta charset="UTF-8">
  <title>Attached PDF from [_CountyName_], Florida</title>
</head>
<body>
  <p>Dear [_UserName_],</p>

  <p>Please find attached a PDF document from [_CountyName_], Florida. Kindly review the document at your earliest convenience.</p>

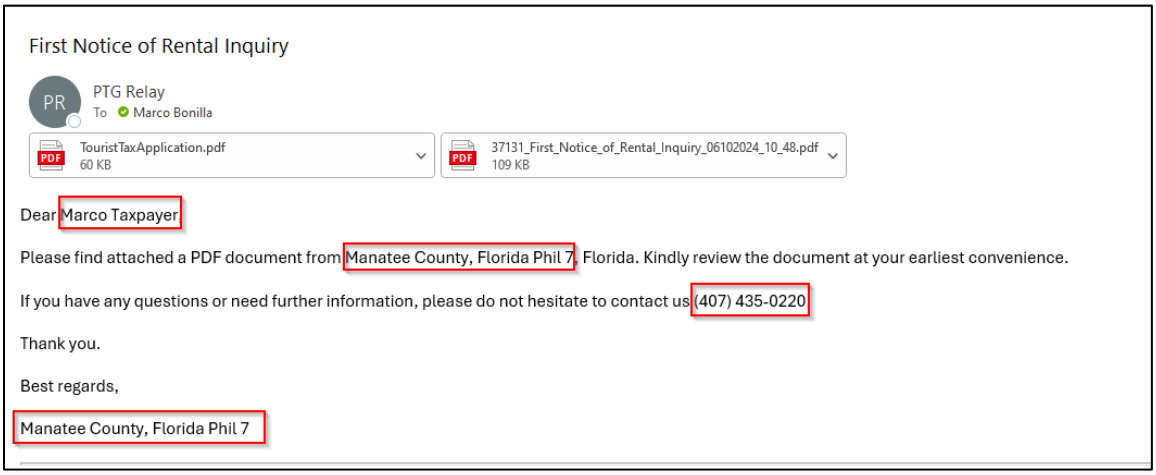
  <p>If you have any questions or need further information, please do not hesitate to contact us[_CountyPhoneNumber_]</p>

  <p>Thank you.</p>

  <p>Best regards,</p>
  <p>[_CountyName_]</p>
```

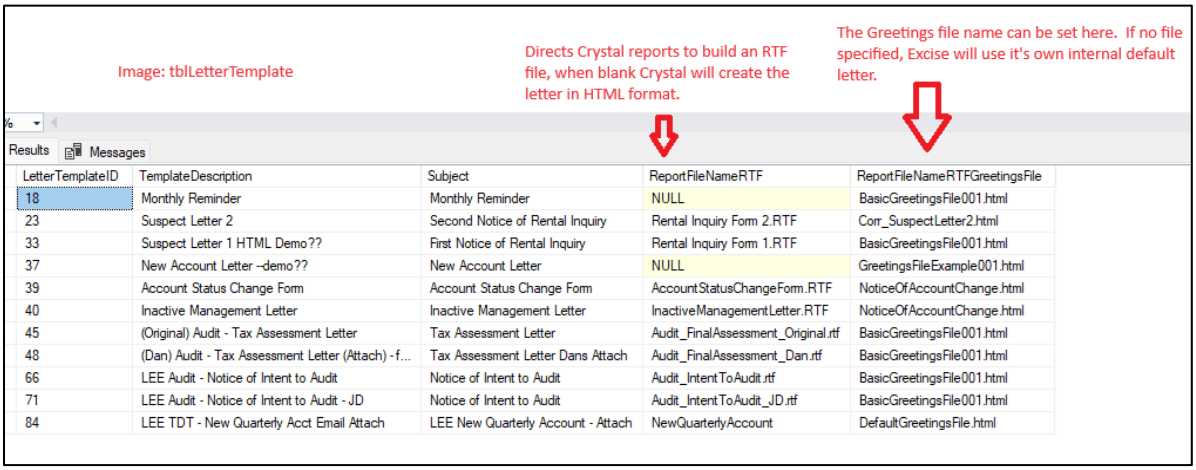

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resulting greetings letter:



• If ReportFileNameRTF is not blank, the Crystal builds an RTF file, that will always be shown as an attachment.

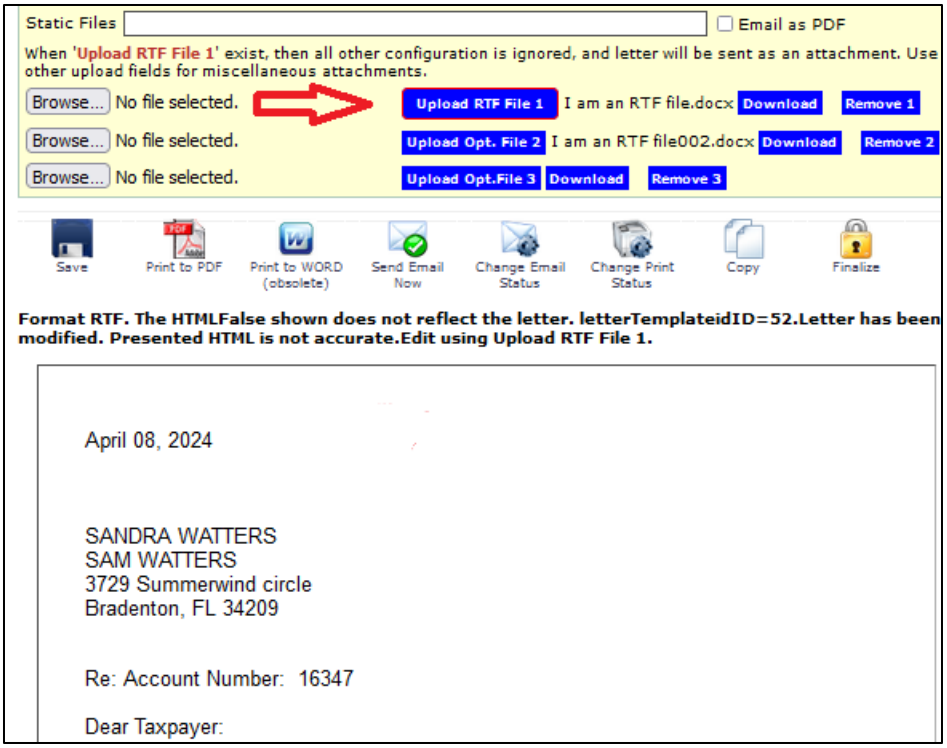
• If optional ReportFileNameRTFGreetingsFile has a value, then that specific HTML file will be used for the letter.



LetterTemplateID	TemplateDescription	Subject	ReportFileNameRTF	ReportFileNameRTFGreetingsFile
18	Monthly Reminder	Monthly Reminder	NULL	BasicGreetingsFile001.html
23	Suspect Letter 2	Second Notice of Rental Inquiry	Rental Inquiry Form 2.RTF	Corr_SuspectLetter2.html
33	Suspect Letter 1 HTML Demo??	First Notice of Rental Inquiry	Rental Inquiry Form 1.RTF	BasicGreetingsFile001.html
37	New Account Letter --demo??	New Account Letter	NULL	GreetingsFileExample001.html
39	Account Status Change Form	Account Status Change Form	AccountStatusChangeForm.RTF	NoticeOfAccountChange.html
40	Inactive Management Letter	Inactive Management Letter	InactiveManagementLetter.RTF	NoticeOfAccountChange.html
45	(Original) Audit - Tax Assessment Letter	Tax Assessment Letter	Audit_FinalAssessment_Original.rtf	BasicGreetingsFile001.html
48	(Dan) Audit - Tax Assessment Letter (Attach) - f...	Tax Assessment Letter Dans Attach	Audit_FinalAssessment_Dan.rtf	BasicGreetingsFile001.html
66	LEE Audit - Notice of Intent to Audit	Notice of Intent to Audit	Audit_IntentToAudit.rtf	BasicGreetingsFile001.html
71	LEE Audit - Notice of Intent to Audit - JD	Notice of Intent to Audit	Audit_IntentToAudit_JD.rtf	BasicGreetingsFile001.html
84	LEE TDT - New Quarterly Acct Email Attach	LEE New Quarterly Account - Attach	NewQuarterlyAccount	DefaultGreetingsFile.html

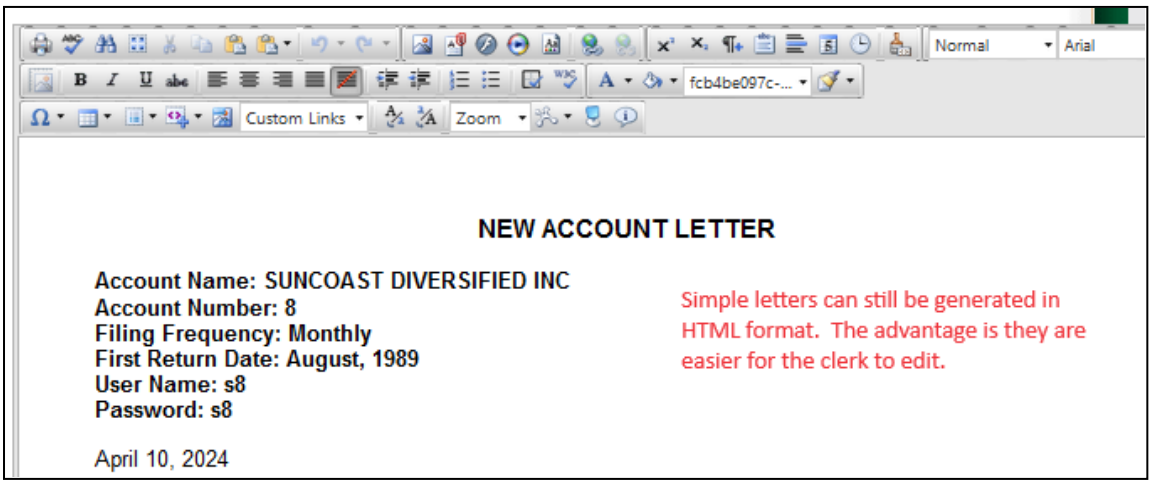
Regardless of how letters are configured to generate, once a clerk manually appends an RTF/PDF, all other configuration is superseded by the presence of the attachment. The rule is “Upload Rtf File 1” always wins. The static files are just files sent with every letter. Optional files 2 and 3 are any PDF files the clerk explicitly attaches.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



There is no longer a conditional process. Every letter is emailed as an attachment. This process did appear to be reliable, sending different formats based on "yahoo" or "Gmail". However, Office.com, the web version of Outlook, would not support the line breaks and other formatting that Outlook would properly present.

Regarding letters configured to generate as HTML. Crystal produces slightly different HTML for each version and in a few cases each service pack. Therefore, this method will always require more long-term maintenance.



For letters configured to generate as an RTF. Notice this letter has been configured to always be an attachment. It does not have on-screen editing options; editing must be done via MS Word.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



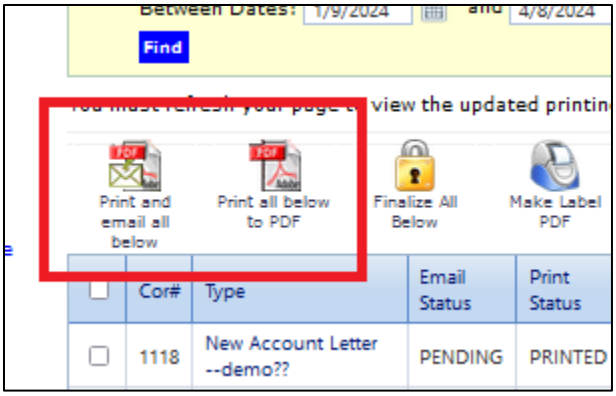
RTF file preview:



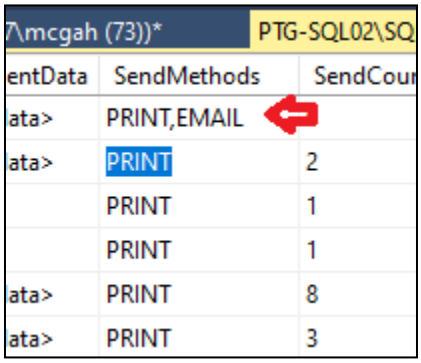
Additional Information on unclear behavior:

How the “Print and email all below” and “Print all below to PDF” buttons work is not obvious. These have not been modified because it would be a change a long-standing behavior:

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

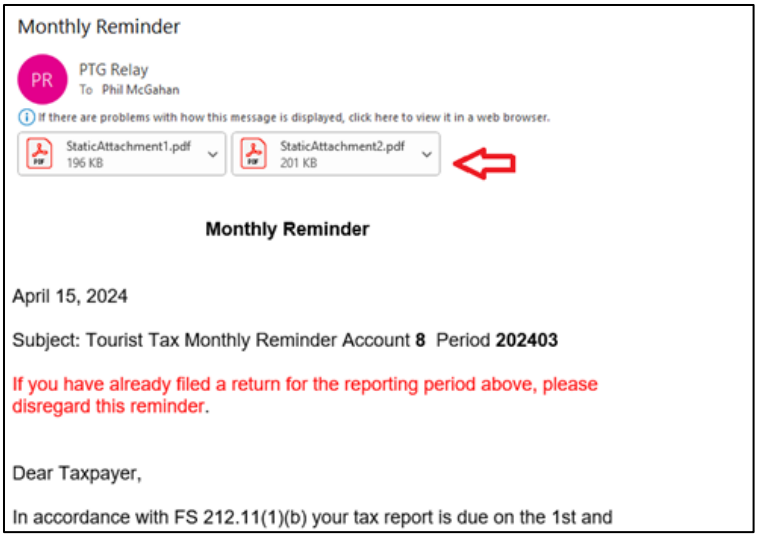


No letters will email or print unless are defined with these behaviors. They do not print or send unless the letter is configured as such:



Regarding the Excise Batch. The following images just show the AFTER UPDATE, the batch job will behave like the Web.

Letter created by the batch job at night without an attachment:



This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

The same letter from the batch job when configured as an RTF:



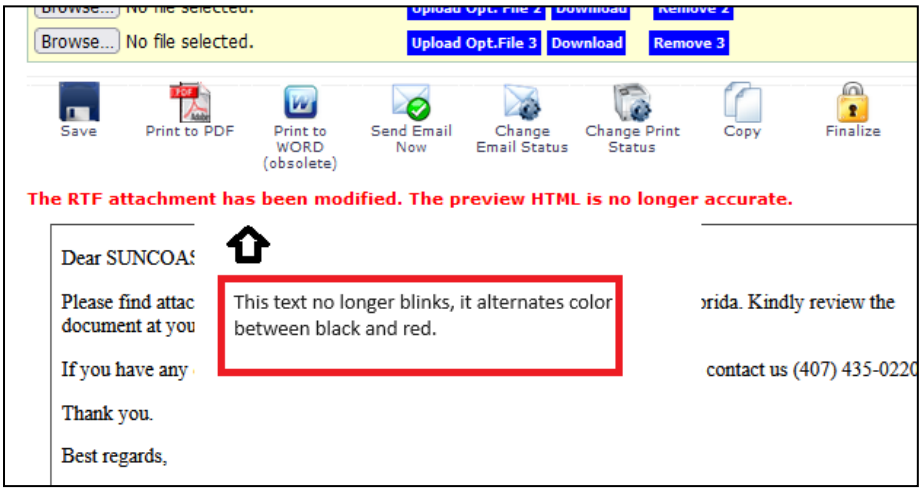
Note: This was tested by the Forms Development team.

Requires Admin Configuration

EX-881: Correspondence – File Name Format and Screen Changes

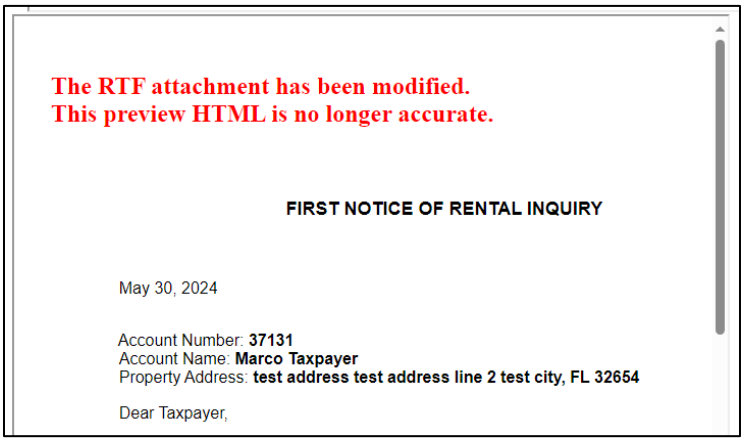
Request Details: Alternate color of the warning that indicates the RTF attachment has been modified. Inject warning text to the screen view to indicate when the RTF changes and the HTML are different. Update file naming format when using: (1) Print to PDF button, (2) Send Email Now button (3) ExciseBatch sending of attachments.

Resolution: Added setting **AllowCorrespondeceHTMLWarningToBlink**. This setting will alternate between black and red text when turned on:



This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

When the RTF changes and the HTML are different the text in red will be injected into the screen view. There are many different HTML formats generated by various letters, so this process may have to be revisited. Initially, the county is encouraged to leave setting **AllowCorrespondeceHTMLWarningToBlink** at the default value of true.



Updated file naming format when using: (1) Print to PDF button, (2) Send Email Now button (3) ExciseBatch sending of attachments. Now, the naming format is [Accountid][Letter Description][Date].pdf. Browser security does not allow full colons ":" in the name, so the hour and minutes are separated by and underscore. In the prior releases, the correspondence Id was part of the file name:

[Accountid][Letter Description][Date].pdf.



Note: This was tested by the Forms Development team.

Requires Admin Configuration

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.2023.2 Service Pack 0

Corrected Issues

EX-820: Schedule of Active/Inactive Hyperlink

Expected Result: In the Edit Account screen, the user should be able to open the Account Scheduler page by clicking the hyperlink ‘Schedule of Active/Inactive’.

Resolution: Fixed issue where the Account Scheduler page wasn't displayed. Now, after all required fields are entered, the user can open the Account Scheduler page when the 'Schedule of Active/Inactive' hyperlink is clicked.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.2023.1 Service Pack 8

Corrected Issues

EX-495: Failure Uploading Property List

Expected Result: In the Edit Account screen, users should be able to import properties without receiving an error.

Resolution: Fixed issue where uploading a property list file would result in a permissions error. Now, an administrator user can configure the setting **PropertyRentalImportColumnCount** to 28 and download the example format to upload properties to the account.

EX-812: Duplicate Default Accounts Created When Edit Checks Fail

Expected Result: When creating or editing an account the system should not duplicate the account after completing the form with an empty required field.

Resolution: Fixed issue where after creating an account with an empty required field the system was duplicating the account, now only one account is created, and if the user edits the account with an empty required field the system only updates the information, and no duplicates are created.

EX-813: Property Navigation Bar Displays Sub-Accounts Properties

***Expected Result*:** In the Edit Account screen, users should be able to see only the main account properties in the Rental Property Information navigation bar if they exist.

***Resolution*:** Added setting **PropertyNavSliderShowsAllManagedProperties**. If the setting is set to true, sub-account properties will appear in the main account property navigation bar. If the setting is set to false, only the main account properties will appear in the navigation bar.

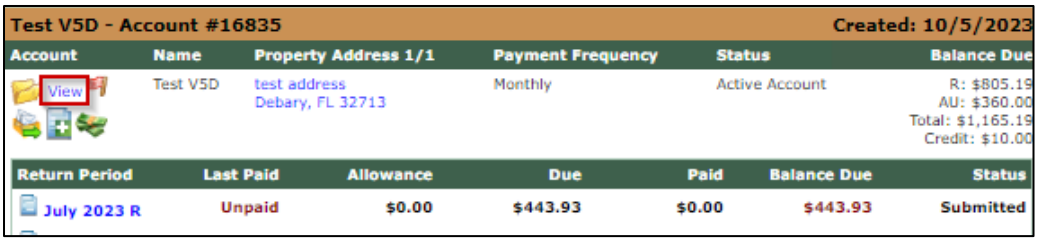
EX-814: Conditional Edit Checks (How to configure)

Expected Result: In the Edit Account screen, active accounts should receive conditional error messages according to how the Rental Conditional Edit entries are configured in the Edit Required Fields screen. Additional guidance should be displayed for the fields where edit checks can be turned on, are active or failed.

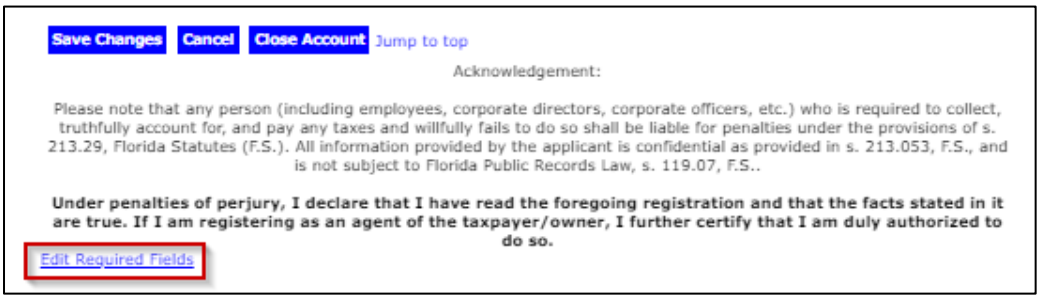
Resolution: Conditional error messages will be turned on/off, according to how the Rental Conditional Edit entries' "Is Required" flag is set in the Edit Required Fields screen. The fields where edit checks can be turned on will display their input box border in yellow, the ones that are active will display it in green and the ones that are failed will display it in red. Additionally, appropriate texts will be displayed when hovering over these fields. See the example below.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

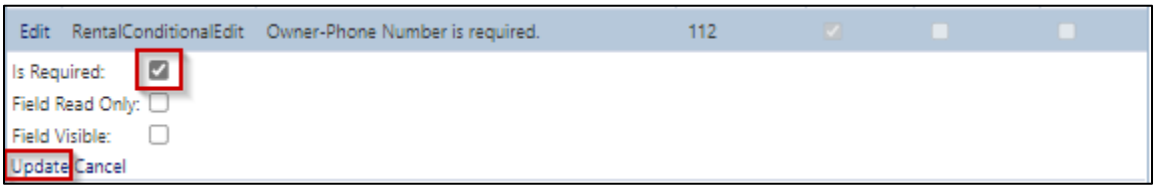
Open an active account and click on the View option to see the account details:



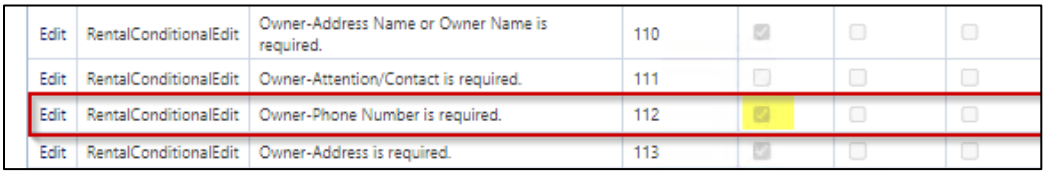
Select the Edit Required Fields link located on the bottom of the Editing Account screen:



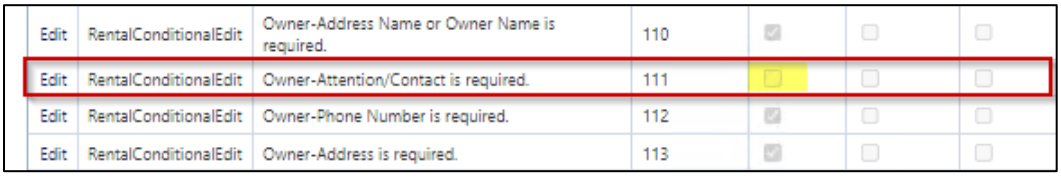
Click on the Edit option for the Rental Conditional Edit entry related to the Owner Phone Number and check its "Is Required" flag, then click on Update:



Notice now the "Is Required" flag for the Rental Conditional Edit entry related to the Owner Phone Number is checked:



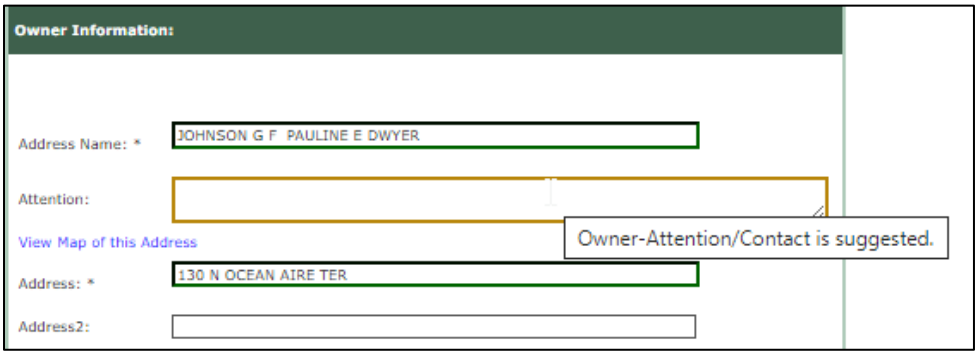
Also notice the "Is Required" flag for the Rental Conditional Edit entry related to the Owner Attention field is not checked:



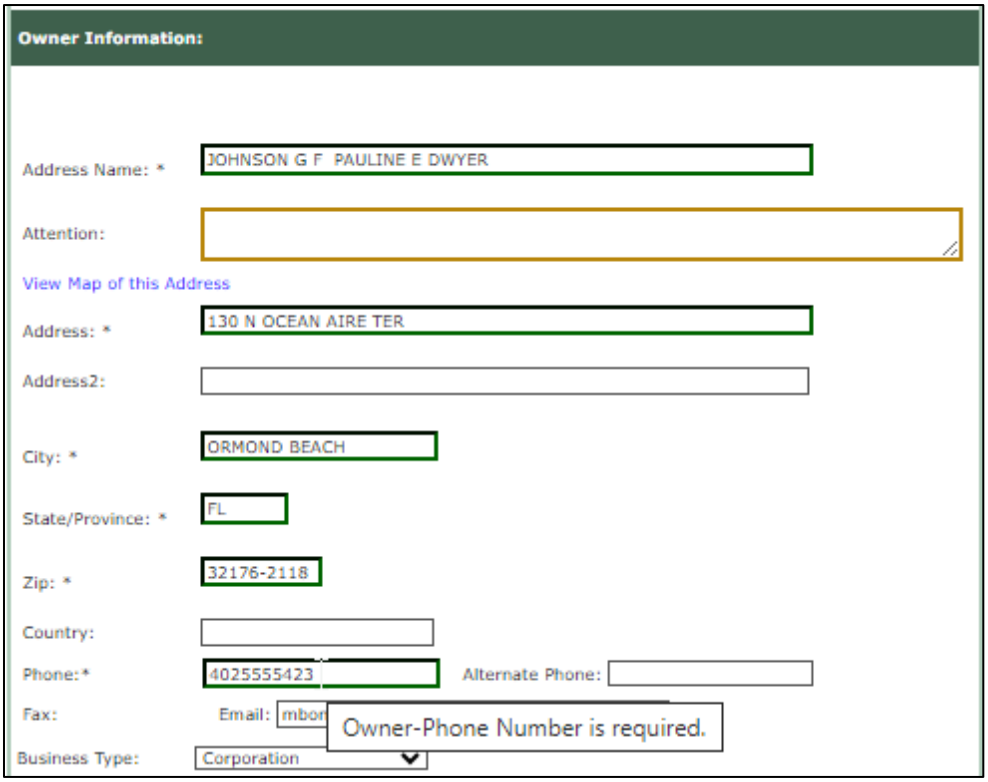
Open the active account again to see its details. In the Owner Information section, see the Attention field input box border is yellow, indicating the conditional error message for that field

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

is turned off and can be turned on. If the user hovers over the input field box, the text: “Owner-Attention/Contact is suggested” is displayed:

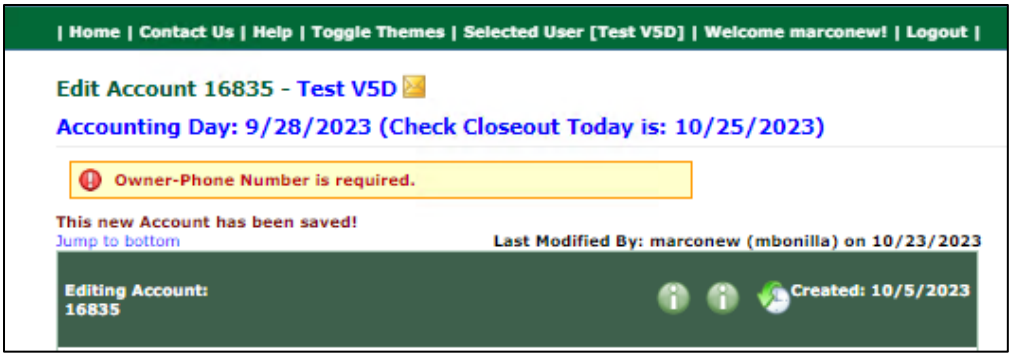


See the Phone field input box border is green, indicating the conditional error message for that field is active (turned on). If the user hovers over the input field box, the text: “Owner-Phone Number is required” is displayed:

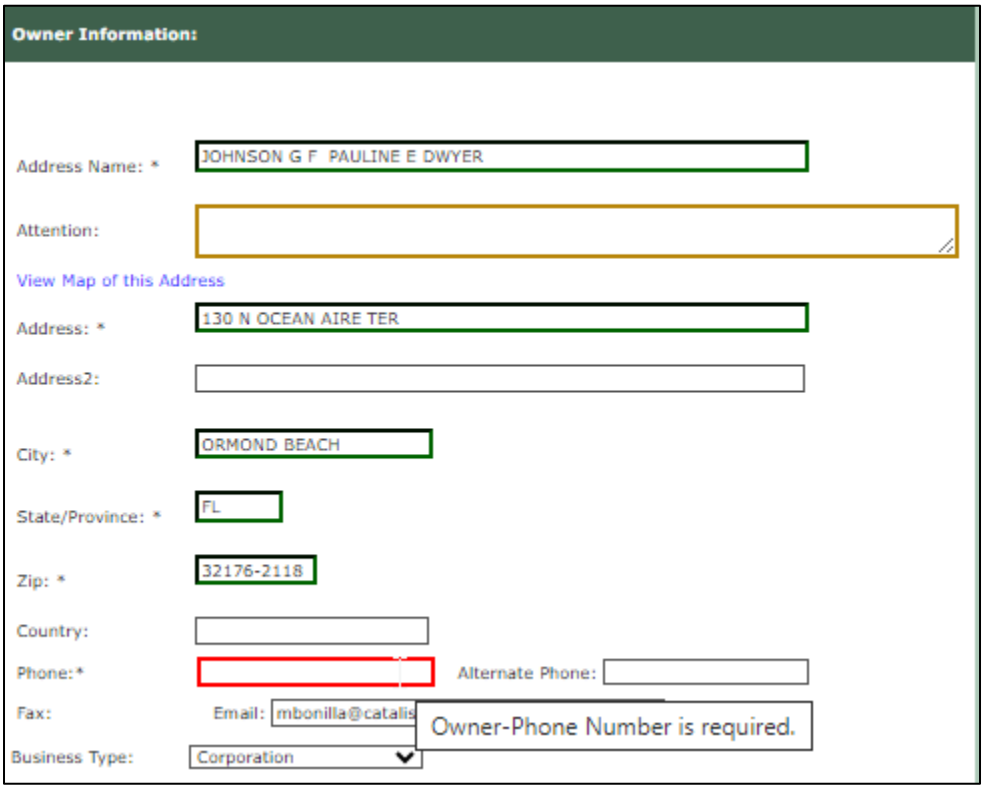


Remove the entered number from the Phone input field and click on Save Changes. The error message related to the field is displayed at the top of the screen:

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



Notice now, in the Owner Information section, the Phone field input box border is red, indicating the conditional error message for that field is failed (turned on but values were not entered). If the user hovers over the input field box, the text: “Owner-Phone Number is required” is displayed:



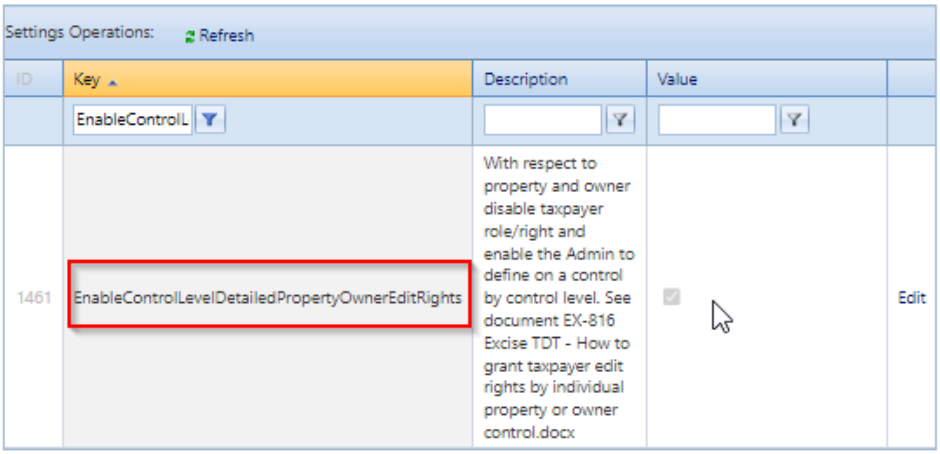
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

EX-816: Taxpayer Edit Rights by Individual Property or Owner Control

Request Details: Add the ability to edit required field by a Taxpayer user.

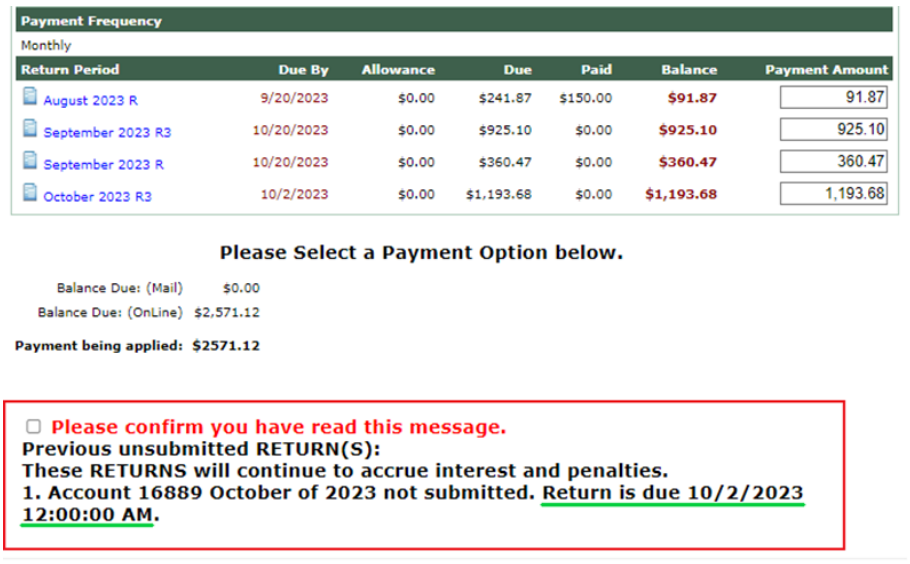
Resolution: Added a new setting **EnableControlLevelDetailedPropertyOwnerEditRights**. If the setting is set to true, an Administrator user can go to the Edit Required Fields screen and remove the read-only flag from those fields where editing rights are granted to Taxpayers**.**



EX-818: Enhance Partial Paid Warning Message

Request Details: Update partial paid warning message for a Taxpayer user in the Enter Payment screen to include the return due date.

***Resolution*:** Updated partial paid warning message. Original message: "1. Account 16889 October of 2023 not submitted". New message: "1. Account 16889 October of 2023 not submitted. **Return is due 10/2/2023 12:00:00 AM.**". E.g.



Return Due Date configuration was not changed.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

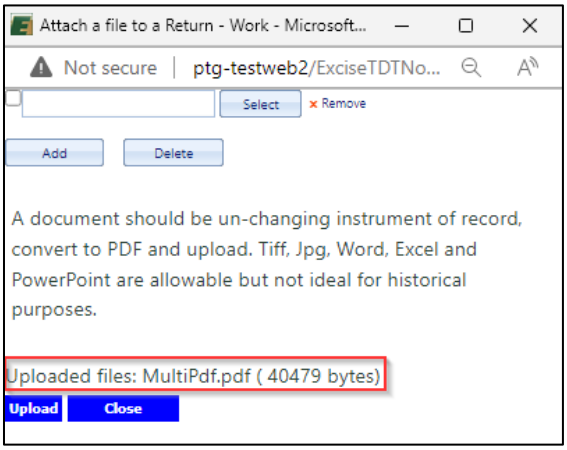
Release 3000.2023.1 Service Pack 5

Corrected Issues

EX-501: Uploading a PDF Extension File into a Return

Expected Result: Attempting to upload a PDF extension file into a Return should not prompt any error.

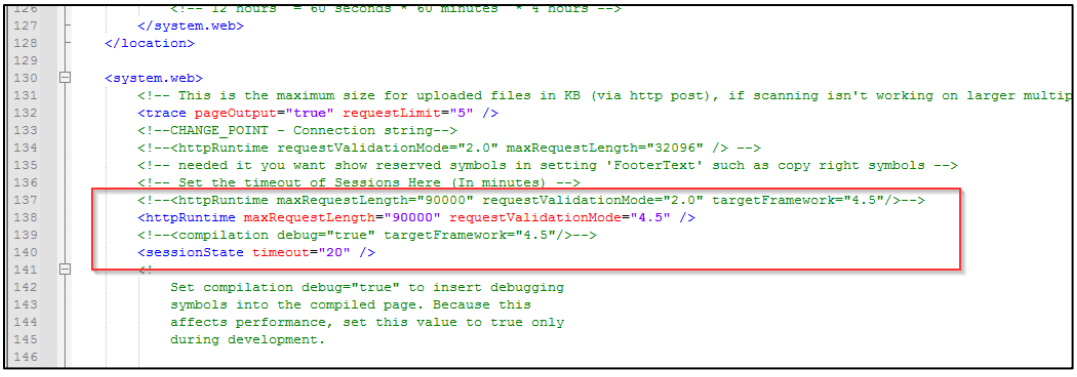
Resolution: Uploading a PDF extension file into a Return does not prompt any error.



EX-511: Postback Size Proper Configuration for Managed Accounts

Expected Result: Counties that use managed accounts should set the postback size to be at least 90000 with a timeout of 20 or more seconds to avoid postback size related issues.

Resolution: Implementing the proper configuration in the web.config file by setting the maxRequestLength variable from the httpRuntime tag to be at least 90000 and the timeout variable from the sessionState tag to be 20 or more seconds will avoid postback size related issues.



EX-519: All Penalties are Waived After a Late Zero Payment

Expected Result: After making a zero payment the system should not waive all penalties.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Fixed issue where after making a zero payment, the system was waiving all penalties. Now after making a zero payment, for a monthly payment frequency, the system waives the first two penalties and if the payment frequency is quarterly the system waives the first late return penalty.

EX-552: Custom Login Message Not Displaying in Mobile View

***Expected Result*:** The custom message should appear on the login screen in employee-only view and when the user makes a failed attempt. The custom message should not appear on the login screen when mobile view is enabled.

***Resolution*:** Setting **EnableMobileBrowserFeatureForceOn** set to the value 0 or 1 to enable/disable the mobile view, setting **LoginEmployeeOnly** set to the value true or false restricting login to only employees or non-employee logins, setting **LoginScreenMessage** set to the value of the personalized message text. The custom message appears when navigating to the login page with the **LoginEmployeeOnly** setting set to 1 and when attempting with an incorrect password from the employee only view. The custom message does not appear in the mobile view when browsing the login page since the mobile application does not contain all the features of the browser application.

EX-560: Page Counter in the Attachments Section

***Expected Result*:** The page counter should not appear in the attachments table when importing a document.

***Resolution*:** Now when a user imports a document the page counter column will not be displayed in the attachments table. It keeps the functionality of opening the document with the Attachment# hyperlink, the description and document type are displayed.

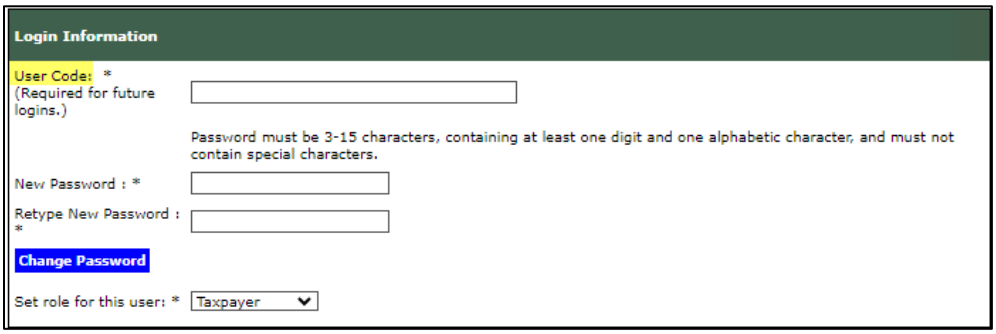


EX-732: User Profile – Change User Name to User Code in the Login Information Section

Expected Result: In the User Profile screen, the Login Information section should say User Code instead of User Name.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Changed the User Profile screen to say User Code instead of User Name.



EX-735: Fee Amount Included in the Form During the Payment Process of a Mail-In Return

***Expected Result*:** Fee amount should be included on the payment receipt when making a mail-in return payment for a certain period of an account.

Resolution: Fee amount is included in the payment process of a mail-in return and in the payment receipt when completing a mail-in return payment for a certain period of an account. Please refer to 'EX-769 - Documentation Update Implement Statute FS_213_755' if necessary.

EX-736: Allow Penalty Payments with no Balance Due

Expected Result: The system should allow users to pay a penalty payment with no balance due.

Resolution: Fixed issue where after trying to make a penalty payment the system was not allowing the user to pay, now with a taxpayer and admin role the system allows to make the payment without an error message.

EX-737: Edit Profile Screen Save Changes Button

Expected Result: Taxpayer users with proper rights should be able to see the "Save Changes" button in the Edit Profile screen.

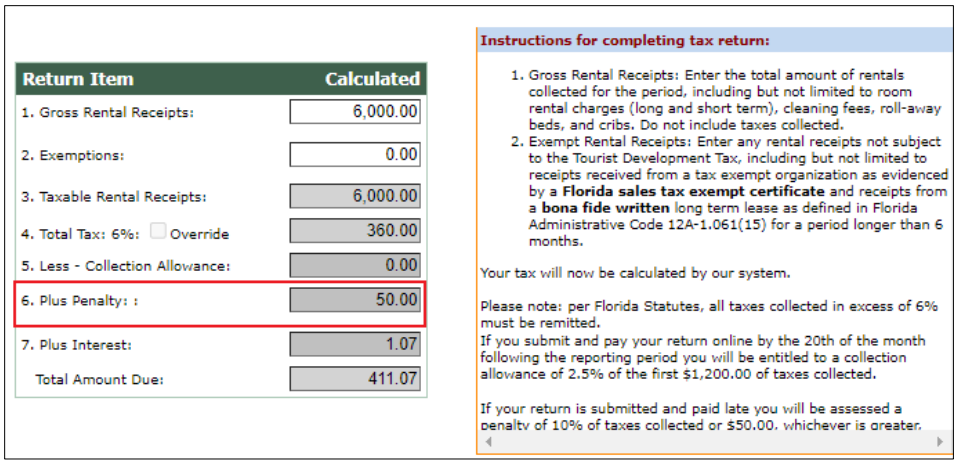
Resolution: A taxpayer role with these two rights turned on " EditRequiredFields" and "EditUserDetail" can edit the User Profile information, and changes can be saved with the "Save Changes" button.

EX-738: Reason Penalty Waived Box is Displayed when Penalty is Charged

Expected Result: When the penalty is not waived to the taxpayers after submitting a return, the Reason Penalty Waived box should not be displayed in the return details.

Resolution: Fixed issue where the Reason Penalty Waived box containing the penalty charged amount would be shown even though no penalty was waived. Now, if the penalty is charged the Reason Penalty Waived box will not be displayed.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

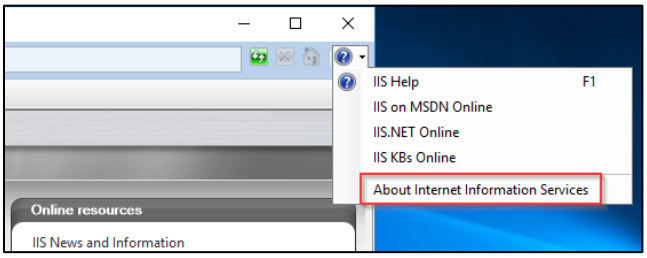


EX-745: Excise All IIS Versions for Using Anti Forgery Security Tokens

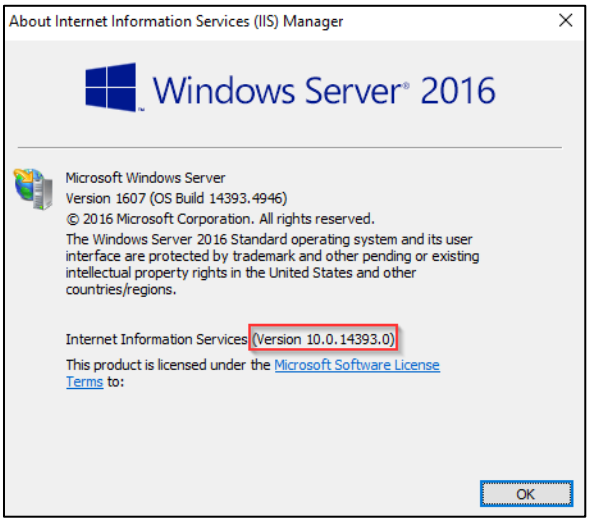
Expected Result: Counties should not be using less than the IIS version 8.0. Excise is using the method "Cross-Site Request Forgery Tokens" to prevent security vulnerabilities.

Resolution: Excise will use the method "Cross-Site Request Forgery Tokens" to prevent security vulnerabilities in Counties where they are not using less than the IIS version 8.0.

Verify the IIS version by selecting the About Internet Information option from the Help dropdown button in the IIS Manager window:



Then verify the version in the About Internet Information Services Manager window:

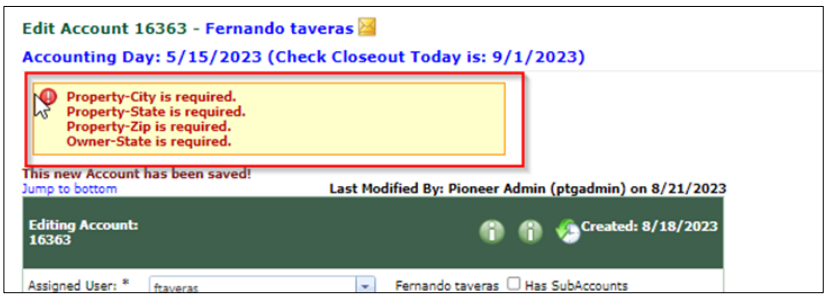


This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

EX-768: Issues Created by ADA Changes

Expected Result: After completing the account information, the system should validate if all the required fields were completed and display a warning message in case any fields were not completed. Also, the system should allow registering addresses not only from the U.S., in addition, users should be able to select an option via mouse in controls that are drop-down lists.

Resolution: Fixed issue where the system was not allowing to registry addresses from other countries, at the same time fixed problem where the system was not displaying the correct warning message when the form was trying to be submitted with empty required fields, the problem with drop-down lists was also fixed, now the user can select an option via mouse.



EX-769: Documentation Update Implement Statute FS_213_755

Expected Result: Document “Excise TDT Lee Mailin Payment Fee a per FS_213_755.docx” should be clear for users to implement this feature.

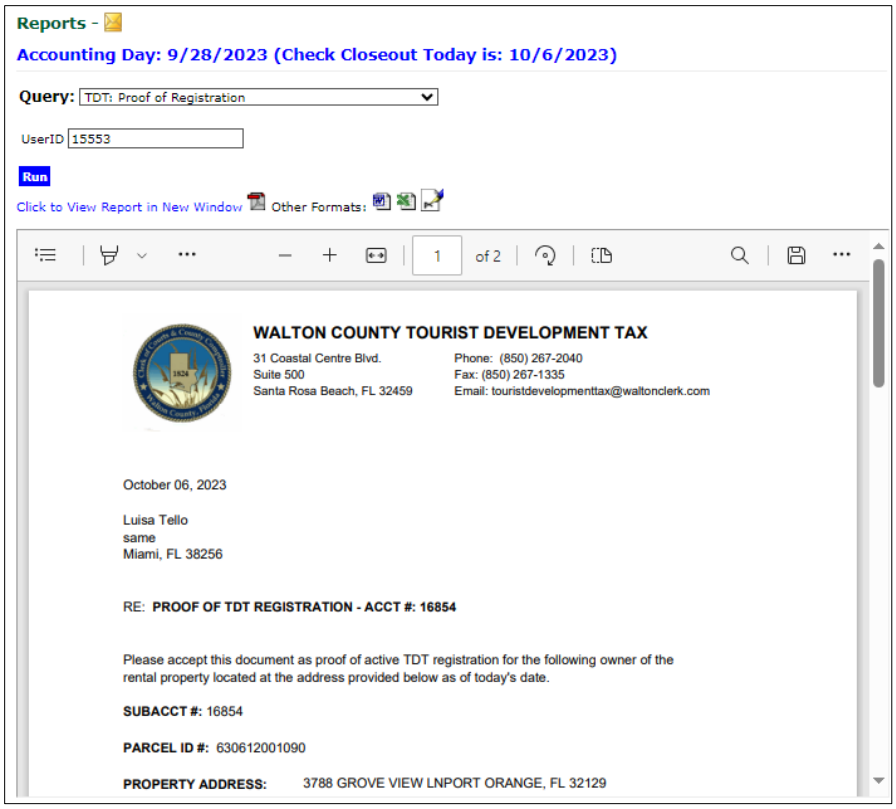
Resolution: Document has been updated in this release. The feature remains unchanged.

EX-775: Proof of Registration Report Generated Based on UserID

Expected Result: Proof of Registration report should be generated for each account associated with the UserID. The user should be able to generate a preview from the Reports page. Additionally, the report should be generated from a user's View Account(s) page.

Resolution: A new report "ProofOfTDTRegistration.rpt" was created. After proper configuration of this report, the user can find it on the Reports page. Setting **TaxPayerCertificateReport** can be set to the value "ProofOfTDTRegistration" to generate the Proof of Registration report from the View Account(s) page.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.





Requires Admin Configuration

E**X-776**: Download Outlook MSG Attachments

Expected Result: After clicking the Attachment# hyperlink the system should send an email with the email file attached.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Fixed issue where after clicking the Attachment# hyperlink the user was not allowed to download the email file attached. Now, if the user attached an email file and the setting **ClerksEmailAddressForOutlookAttachments** is configured, after clicking the Attachment# hyperlink the system sends an email with the file attached.

EX-778: Zero Payment Return Amended to Gross Dollars Greater than Zero Not Active Again

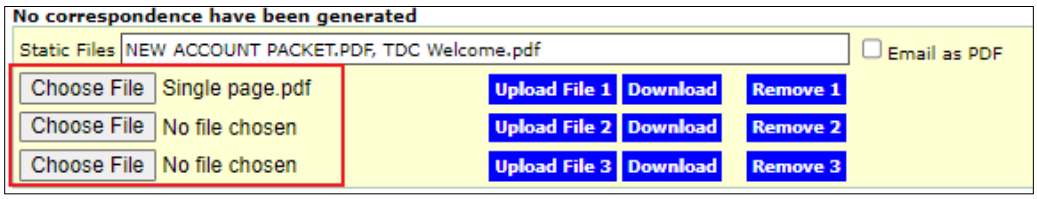
Expected Result: When a zero gross dollars payment return is amended to gross dollars greater than zero, the return should become active again.

Resolution: Fixed issue where amending a zero payment return to gross dollars greater than zero would not become active. Now, after the amendment the return becomes active again.

EX-781: Error Importing Documents into the Attachments Section on the Correspondence View Screen

Expected Result: Importing documents into the attachments section should work by dragging and dropping the document into the file area.

Resolution: Added **CorrespondenceUploadButtonsUseDragAndDrop** setting using the old document import functionality while fixing the document drag and drop functionality in the file area. Documents are now imported through the file browser when the user clicks the “Choose File” button.



EX-783: ADA – Issues Resulted from Style Modifications

Expected Result: Unwanted Correspondence link on the top of the screen should be removed. Update Status button on the property maintenance section reads “Upate Status”, it should be changed back to “Update Status”.

Resolution: Correspondence link was removed from the page header. Update Status button on property maintenance section changed back to “Update Status”.

EX-792: ADA - Tables Missing Row Headers and Sorting Status.

Expected Result: The header cells should each be wrapped in a <th> tag, instead of a <td> tag. Should also be given a scope attribute, which should be set to ‘row’ or ‘col’, depending on whether that cell heads a row or column.

Resolution: In the header cells a <th> tag was added, and the scope set to ‘col’; in the case of rows a <th> tag was added, and the scope set to ‘row’, in case of a <td> tag, no scope is needed.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

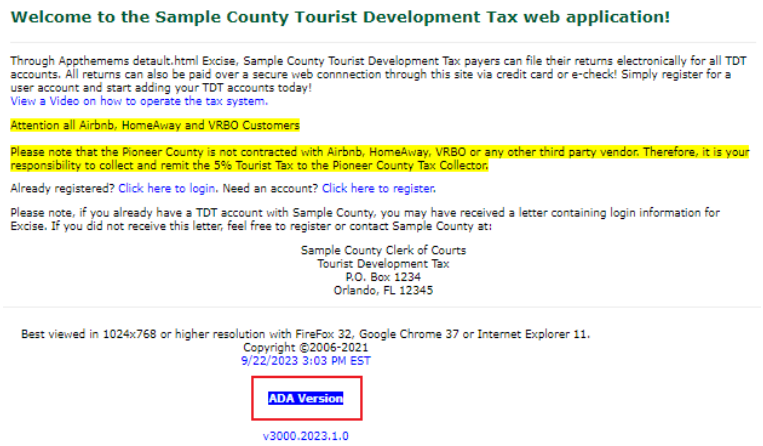
EX-793: Identify ADA System Version

Expected Result: Users should be able to identify whether the system is an ADA version or not.

Resolution: Added a new setting **AdditionalVersionIdentifier**. If the setting is blank, the 'ADA Version' label will not appear. If the setting is not empty, the user should be able to see the 'ADA Version' label at the bottom of the page.

Setting default value:

ADA Version



EX-797: Payment Frequency Resets to Default when Property Status is Updated

Expected Result: In the Editing Account screen, payment frequency should not be reset after updating the status of the property in the Rental Property Information section.

Resolution: Fixed issue where updating the status of the rental property would reset the payment frequency value of the related account.

EX-798: Navigation Order is Unusual When Using Screen Reader or Keyboard Commands

***Expected Result*:** Navigation order must be linear; the verbalization and the focus must be correct on the elements when using the screen reader or keyboard commands.

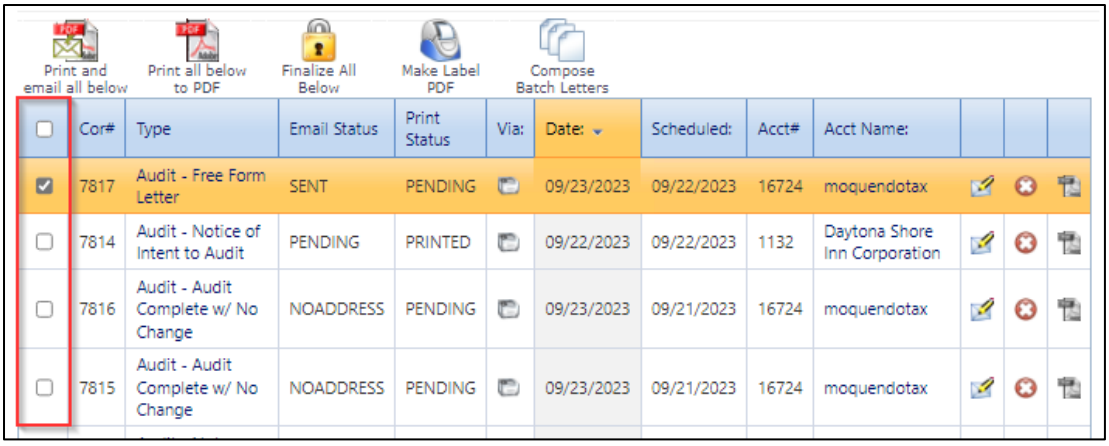
Resolution: The accessibility feature for navigation was fixed, now the navigation is linear using the screen reader or keyboard commands reading the correct verbalization of the elements and the reader's focus remains visible on the elements following the linear order.

EX-799: ADA – Add Ability to Multiselect Items for Keyboard Users in Correspondence Grid

Expected Result: Add ability to multiselect items for keyboard users in the Correspondence grid.

Resolution: Added a checkbox column to the Correspondence grid. Now keyboard users can multiselect items in the Correspondence grid by using the tab key and the space bar to check/uncheck the desired items.

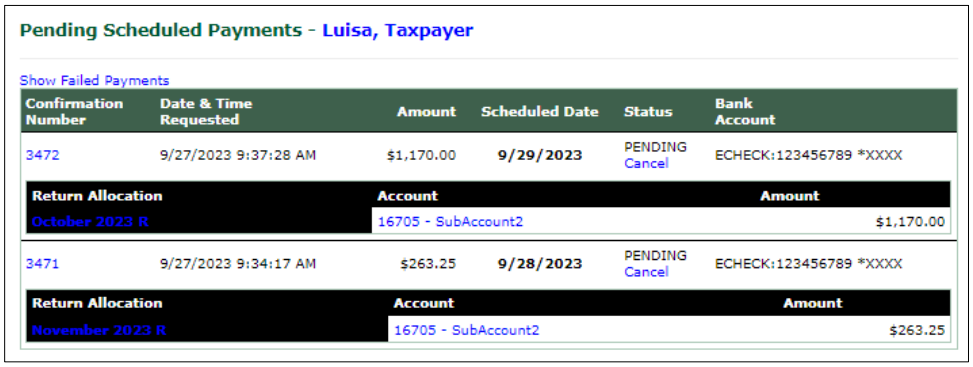
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



EX-800: Data Position in the Schedule Payments Table

Expected Result: In the Scheduled Payments screen, data in the table should be displayed under the correct column.

Resolution: The data in the rows is displayed in the correct position with the corresponding column.



EX-804: Lookup Property Button

Expected Result: In the Edit Account screen, the Lookup Property button in the case of an Administrator user should be enable and when the user adds data and save it, the next time, the button should be disabled to prevent accidental data overwriting.

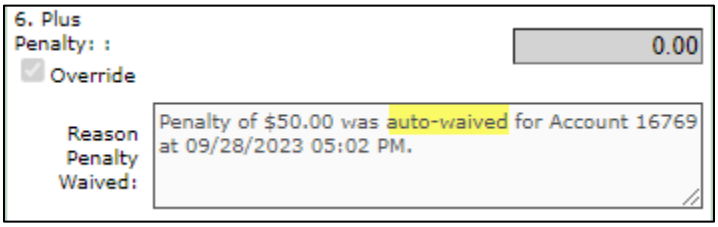
Resolution: The button is enabled for an Administrator user, when the Parcel ID is added, the button turns disabled to prevent accidental data overwriting. It is necessary to delete the information in the Parcel ID field, save the changes. and open the Edit Account screen again to see the button enabled. In the case of taxpayers, the button is hidden.

EX-807: Misspelling in Reason Penalty Waived Message

Expected Result: Reason Penalty Waived message displayed in returns where penalty was auto-waived should read without spelling errors.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Fixed issue where the word auto-waived was spelled incorrectly: auto-wavied. Now the auto-waived reason message reads: auto-waived.



EX-808: Edit Required Fields Link from Edit Account is Not Working

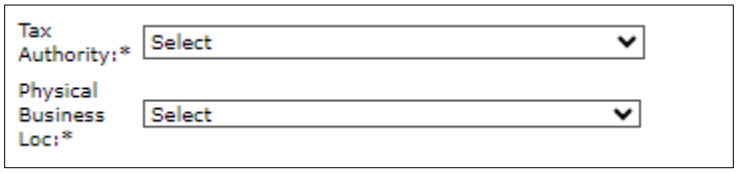
Expected Result: Edit Required Fields link from Edit Account screen should be removed.

Resolution: Removed the Edit Required Fields link from Edit Account screen.

EX-809: Required Fields 'Tax Authority' and 'Physical Business Location'

Expected Result: In Edit Account page, fields 'Tax Authority' and 'Physical Business Location' should be required. Fields should not be required when the list of 'Tax Authority' or 'Physical Business Location' is empty or there are no active records.

Resolution: For employees only, 'Tax Authority' and 'Physical Business Location' fields are now required if they are visible, and the lists are not empty.



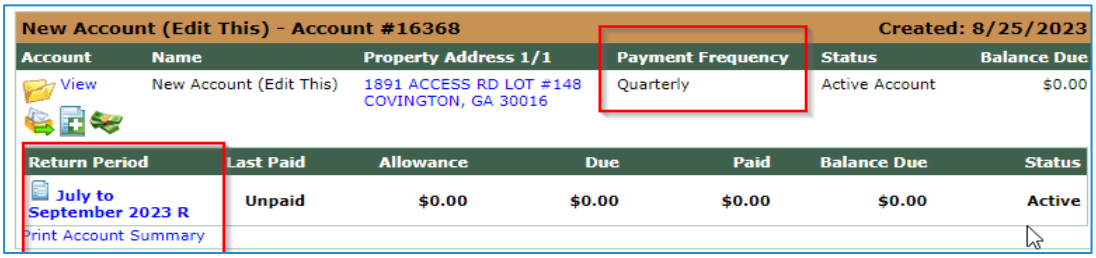
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

EX-435: Payment Frequency Quarterly Identifier Returns should Show Range

Request Details: Change the appearance of the Quarterly returns on the View Account(s) screen to help users identify that they are filing for 3 months when their account is set up to remit quarterly.

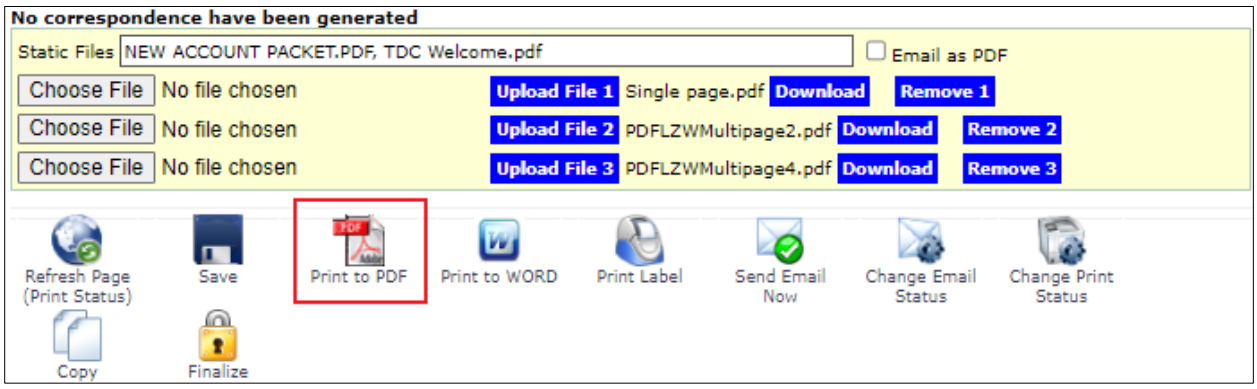
Resolution: Added the new appearance of the quarterly returns when the user selects the payment frequency Quarterly in the Edit Account screen, now the system displays the range between the 3 months according to the payment period.



EX-438: Print in a Single PDF Static and Dynamic Documents from the Attachments Section on the Correspondence View Screen

Request Details: Add the ability to print to PDF all the documents (Static/Dynamic) by concatenating the pages into a single downloadable PDF.

Resolution: Added 4 new optional fields "AttachedForms, ReportFileNameRTF, EmailRtfAsPdf, ReportFileNameRTFGreetingsFile" in tblLetterTemplate table. The static documents are saved in the _Attachments folder and the names are displayed in the "AttachedForms" field at the database level. Now a single PDF will be downloaded by concatenating the pages of the letter, static and imported documents when the user clicks the “Print to PDF” button.



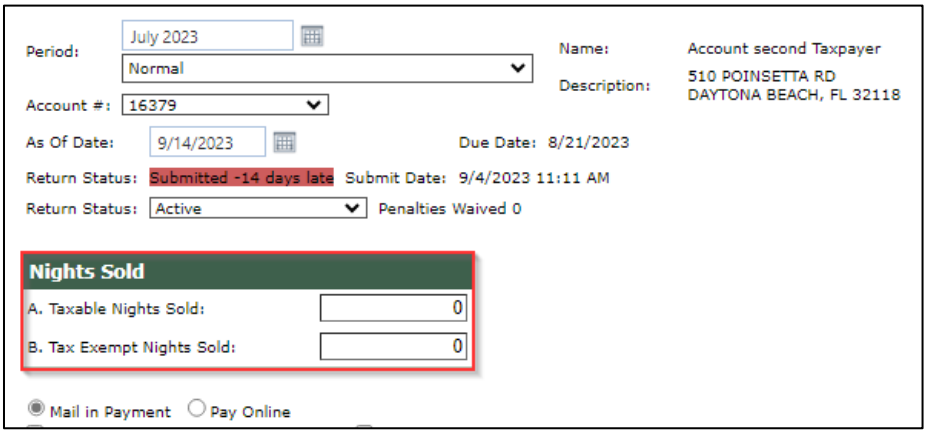
EX-644: Add Ability to Hide Nights Sold Section

Request Details: Add ability to hide the Nights Sold section.

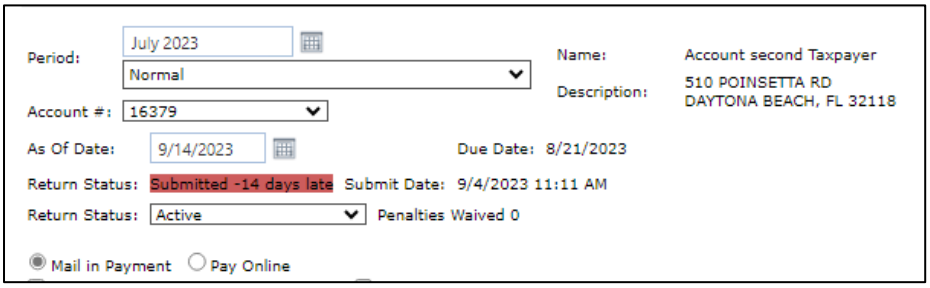
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Setting **ShowTaxableNightsRows** controls if a county collects nights sold. Counties can turn the setting to false to hide the Nights Sold Section.

Before turning the setting to false:



After turning the setting to false:

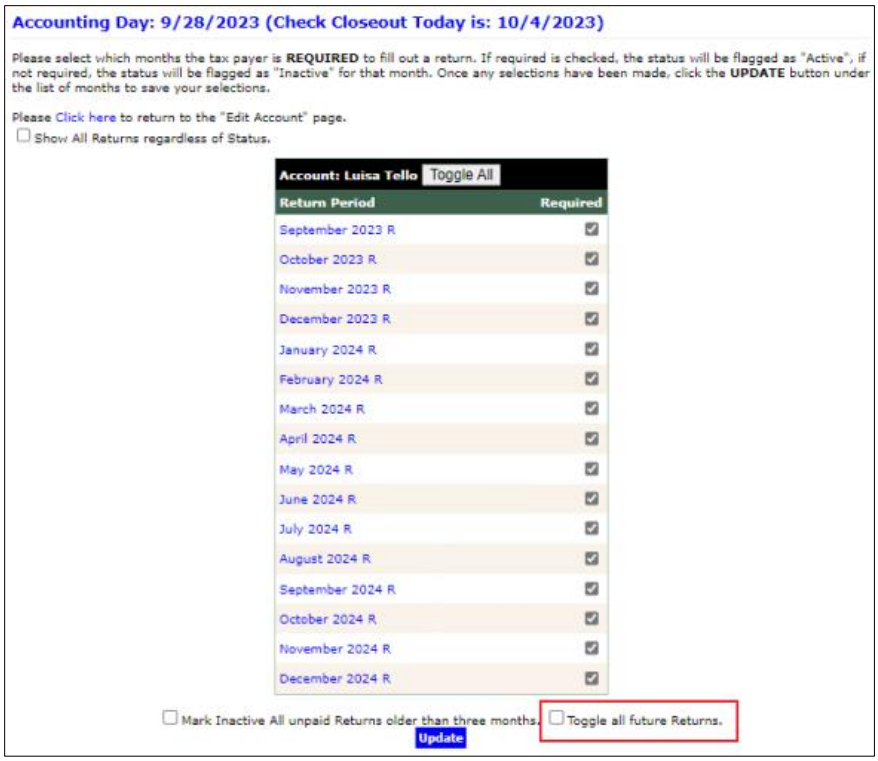


EX-664: Toggle Future Returns

***Request Details*:** Add the ability to toggle all future returns.

Resolution: Added the ability to toggle all future returns. Now if the user selects the "Toggle all future Returns" option the system inactivates all the active periods, in case the period was inactive the system updates the period to active. Edit Account page -> Schedule of Active/Inactive hyperlink.

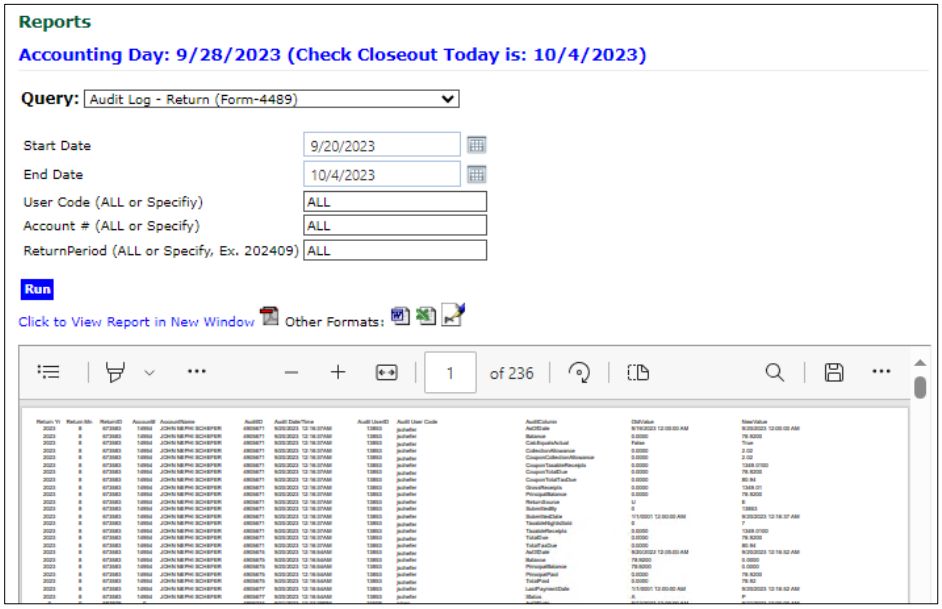
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



EX-784: Return Audit Log Report

Request Details: Add a new optional report for Audit Log records for tblReturn.

Resolution: Added report "Audit Log - Return (Form-4489)". The user can select the report in the Reports screen. All fields are mandatory, after selecting a date range, the user can enter “ALL” or add a specific User Code, Account # or Return Period.

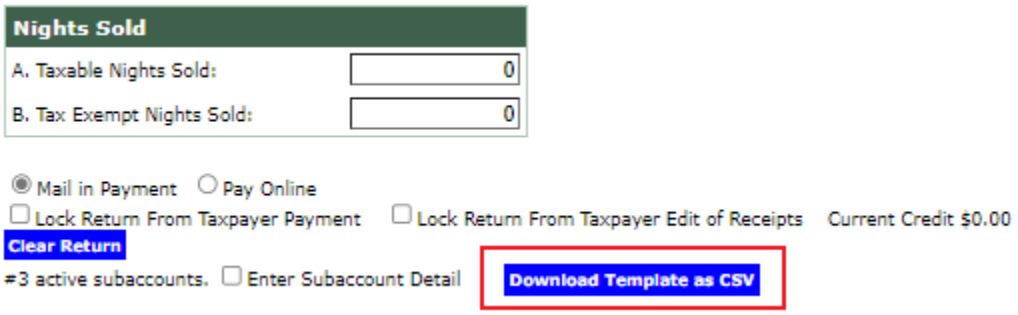


This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

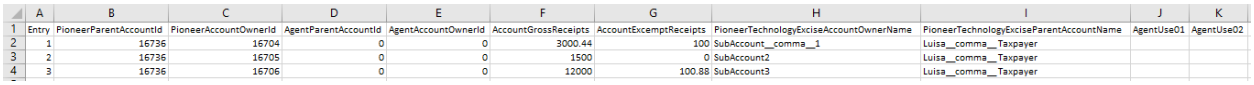
EX-796: CSV Template to Import Agent Payments

***Request Details*:** Add the ability to import agent payments in a friendly manner.

Resolution: Added the ability to import agent payments uploading gross receipts and exceptions amounts via CSV file. In the Return screen, a new button titled “Download Template as CSV” will appear for management accounts.



The user can click on this button and a CSV document will be downloaded where values can be updated in an easy way. Note that if the Account Owner Name and/or the Parent Account Name have an embedded comma it will be replaced with “__comma__”. Dollar values like “12,345.99” will become “12345.99”.



	A	B	C	D	E	F	G	H	I	J	K
1	Entry	PioneerParentAccountId	PioneerAccountOwnerId	AgentParentAccountId	AgentAccountOwnerId	AccountGrossReceipts	AccountExemptReceipts	PioneerTechnologyExciseAccountOwnerName	PioneerTechnologyExciseParentAccountName	AgentUse01	AgentUse02
2	1	16736	16704	0	0	3000.44	100	SubAccount__comma__1	Luisa__comma__Taxpayer		
3	2	16736	16705	0	0	1500	0	SubAccount2	Luisa__comma__Taxpayer		
4	3	16736	16706	0	0	12000	100.88	SubAccount3	Luisa__comma__Taxpayer		

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.2022.1 Service Pack 8

Corrected Issues

15121: Upgrade Scanner from v17 to v18

Request Details: Update the scanning function and license to the latest version.

Resolution: Updated the scanner methods to use the latest versions available.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.2022.1 Service Pack 7

Corrected Issues

103953: Orange – Allowance Included when a Balance Exists After Due Date

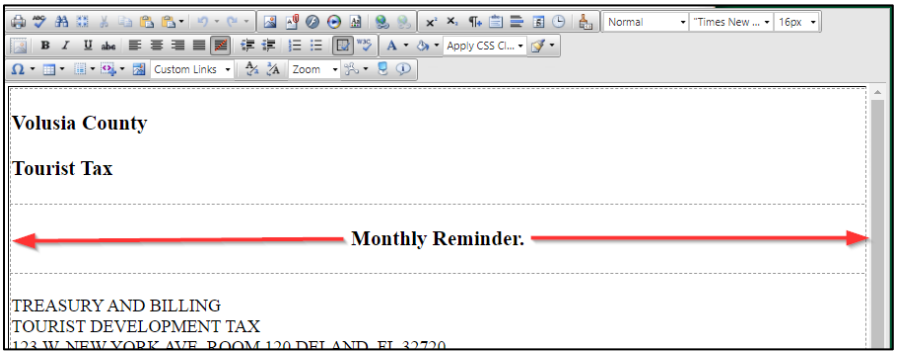
Expected Result: New balance should revoke allowance, include a penalty, and calculate interest from due date to present day when a balance exists after due date.

Resolution: Fixed issue where balance after due date was including the allowance, now the new balance revokes the allowance, includes a penalty, and calculates interest from due date to present day.

109655: Correspondence HTML Width Set to Zero

Expected Result: The letter content in the editor from the Edit Correspondence screen should remain displayed in full width after editing, saving and/or sending a preview email.

Resolution: Fixed issue where the letter content in the editor from the Edit Correspondence screen would not be displayed in full width after editing, saving and/or sending preview email.



110296: HtmlCheckBox Controls Not Working Properly

Expected Result: Checkbox controls should update properly, respecting the user's input.

Resolution: Fixed issue by replacing HtmlCheckBox Controls with HtmlInputCheckBox.

110321: Batch Not Running when User is not Logged On

Expected Result: The Excise Batch should run when the user is not logged on.

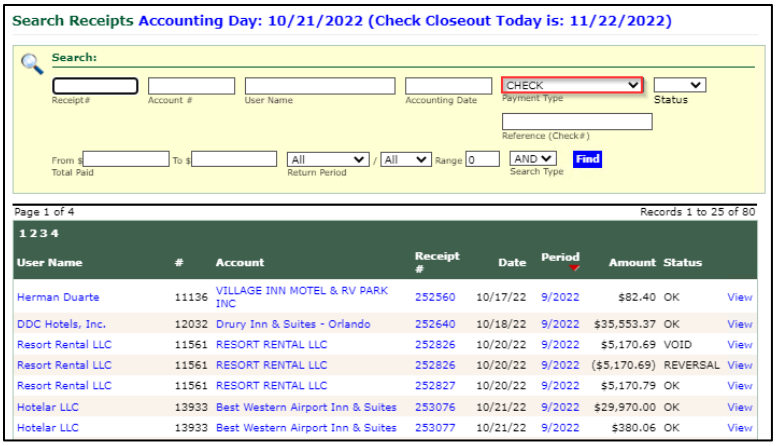
Resolution: An issue with Server 2022 was causing the batch to not run. A line of code that controlled the console window size was removed to resolve the issue.

110403: Error Prompted when Searching Receipts Filtered by Check Payment Type

Expected Result: The users should be able to search receipts filtered by check payment type without receiving an error.

Resolution: Fixed issue where a syntax error would be received when searching receipts filtered by check number.

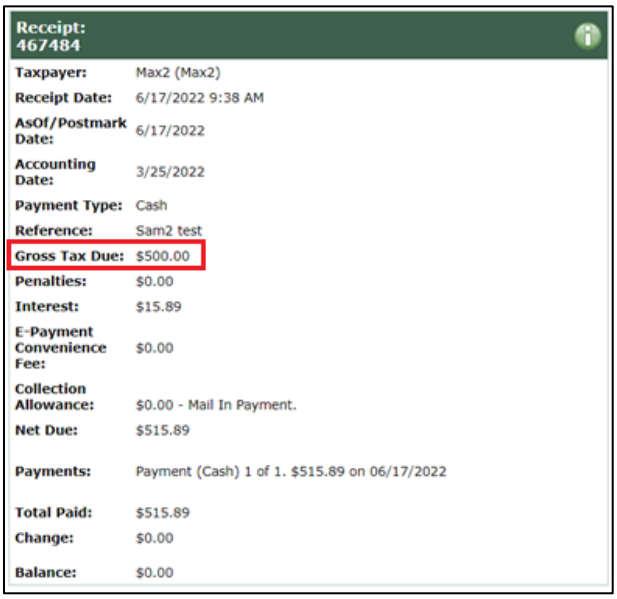
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



110435: TDT – Receipt Gross Tax Due Field Shows a Value of Zero Dollars

Expected Result: User should be able to see Gross Tax Due value in the receipt after submitting a return payment.

Resolution: Fixed issue where Gross Tax Due was not displayed in the receipt after a return payment.



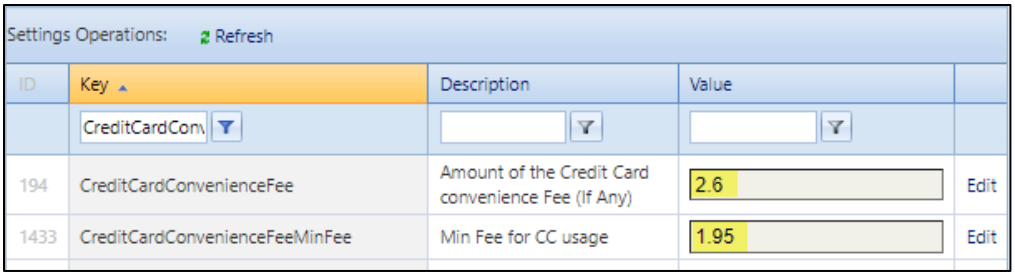
110438: Credit Card Convenience Fee Not Calculated Properly

Expected Result: The credit card convenience fee should be calculated based on the **CreditCardConvenienceFee** setting value treated as a percentage. Also, the mentioned fee shoul be added to the Audit Returns receipt total.

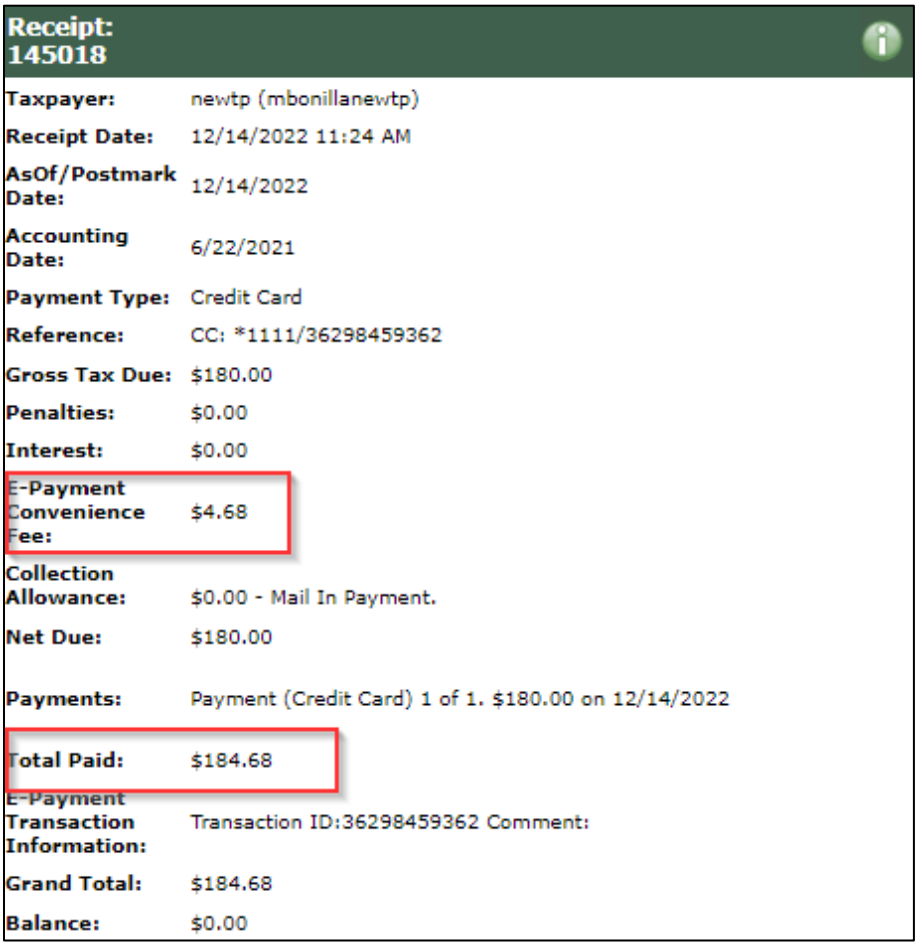
Resolution: Fixed issue where the credit card convenience fee was not calculated properly, the **CreditCardConvenienceFee** setting was not being treated as a percentage. In addition, fixed issue where the credit card convenience fee was not added to the Audit Returns receipt total. See the example below.

Credit Card Convenience Fee related settings values:

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



Payment applied to an Audit Return using Credit Card payment type. Notice the Credit Card Convenience Fee is applied based on the 2.6% of the payment (180 * 0.026 = 4.68), since the 2.6% of the payment is more than $1.95, which is the value set in the **CreditCardConvenienceFeeMinFee** setting. Now, the metioned fee is added to the total amount (180 + 4.68 = 184.68):



Requires Admin Configuration

110808: Other Security Enhancements

Expected Result: Resolve all security risks identified by SonarQube scan.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Resolved many potential security risks identified by SonarQube.

110862: Issues Related to DESCryptoServiceProvider

Expected Result: Customers using ACH file transfer to pay returns should use new encryption methods to store the batch file in the database.

Resolution: Updated the encryption method for data stored in the database. This included the ACH file.

110868: Replace TripleDESCryptoServiceProvider with AESCryptoServiceProvider

Expected Result: Update the encryption methods with the latest enhancements.

Resolution: AESCyptoServiceProvider is now used for HttpUtility.UrlEncode.

110900: TripleDESCryptoServiceProvider Update

Expected Result: The cipher algorithm should utilize the latest methods.

Resolution: Reviewed the TripleDESCryptoServiceProvider cryptographer references.

111017: Security Update – SQL Injection

Expected Result: Excise should clean all input data and block any SQL Injection attack methods.

Resolution: Resolved all areas identified as possibly susceptible to SQL Injection attacks.

111097: Update Weak Cryptography References

Expected Result: Remove all references to out of date libraries.

Resolution: Removed references to pdfSharp library. This library is not used by Excise.

111211: Encryption Enhancement

Expected Result: Update all encryption functions to more robust methods.

Resolution: Updated all encryption methods to the latest standards and removed any hard coded credentials.

111245: Top of Form is Displayed Cut Off on Low Resplution Monitors

Expected Result: Excise top of form should display complete on low resolution monitors.

Resolution: Fixed issue where Excise top of form would be displayed cutt off.

111269: Amending Down Penalty and Interest Issues Credit

Expected Result: Amending down penalty and interest on a late and partially paid return should reduce balance.

Resolution: Fixed issue where amending down penalty and interest on a late and partially paid return would issue credit instead of reducing the balance.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

111270: Amending Up Tax Paid in Full Shows Incorrect Interest

Expected Result: Amending up tax paid in full and on time then gross increased after due date should return the correct interest amount.

Resolution: Fixed issue where amending up tax was calculating an incorrect interest, now the interest is correct.

111271: Amending Down Tax on Late and Partial Paid Return

Expected Result: Amending down tax on late and partial paid return should issue the correct credit and show as paid in full.

Resolution: Fixed issue where amending down tax on late and partial paid return (enough to offset balance due) was showing incorrect credit issued, now credit is correct.

111272: Credit History is Blank Despite Credits Issued

Expected Result: Issued credits should be listed in the Credit History table.

Resolution: Fixed issue where Credit History table was empty, now credits are listed correctly.

111389: TIP – Interest Accrual for Partially Paid Returns

Expected Result: Interest on late partially paid returns should be calculated from the last payment date.

Resolution: Fixed issue where interest was miscalculated, now interest accrual is calculated from the last payment date on late partially paid returns.

111391: IPT – Interest Accrual for Partially Paid Returns

Expected Result: Interest balance on late partially paid Returns should be calculated based on the unpaid tax and considering the last payment date.

Resolution: Fixed issue where interest accrual was miscalculated on late partially paid Returns, now interest is calculated based on the unpaid tax and considering the last payment date.

111433: AU Return Status after Voiding a Payment

Expected Result: A fully paid AU return should be back to partially paid status after a payment has been voided.

Resolution: Fixed issue where voiding a payment was not correctly updating the return, the return status now shows as Partially Paid.

111495: Newly Created Users Not Able to Login

Expected Result: Newly created user should be able to access Excise successfully.

Resolution: Fixed issue where users recently registered users were not able to login successfully.

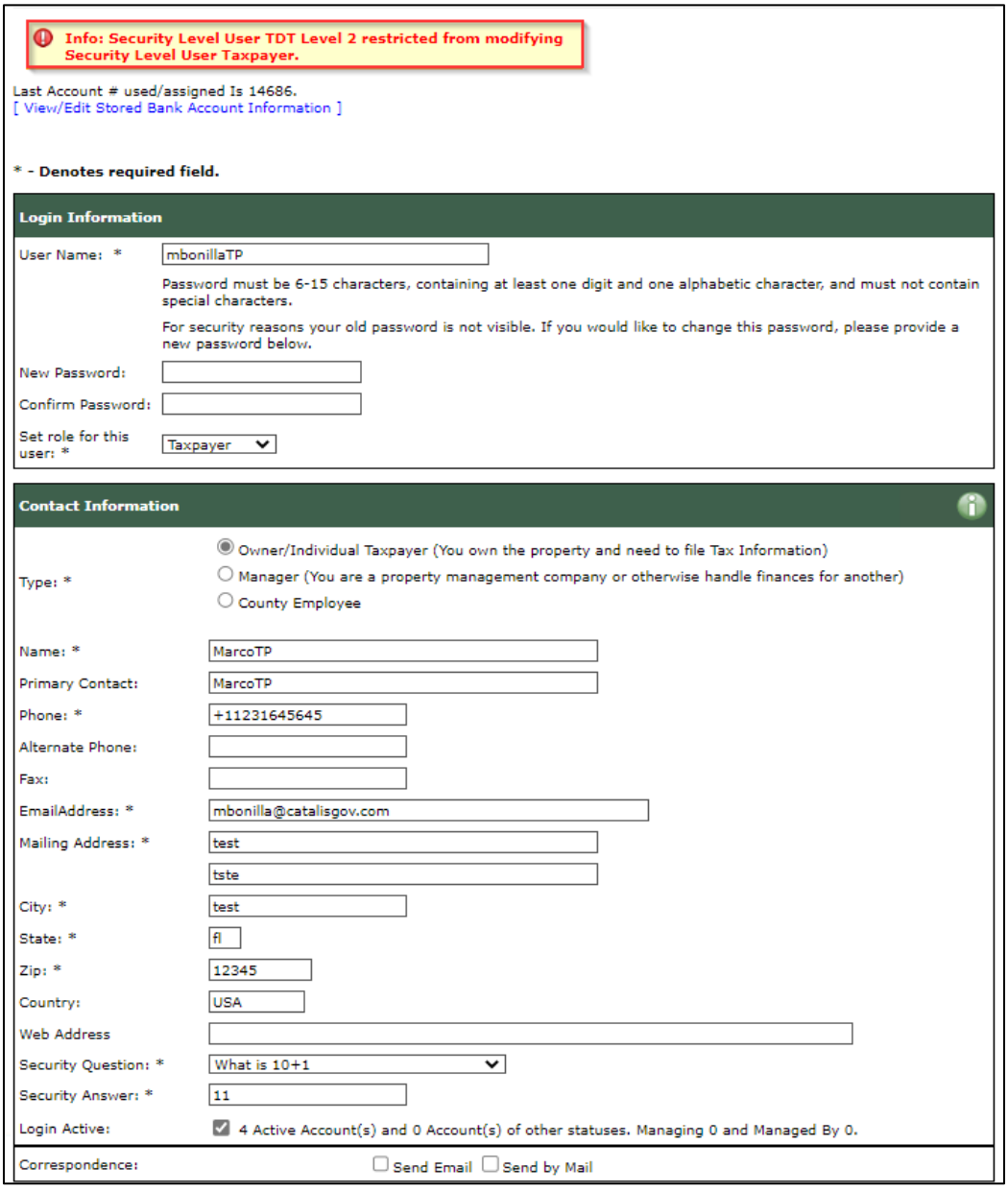
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

14974: Lee County: Remove the Audit Level 2 Ability to Uncheck Login Active Box on a Taxpayer

Request Details: Remove the Audit Level 2 role ability to uncheck Login Active box on taxpayer in the Edit Profile screen.

Resolution: Modified logic to remove the Audit Level 2 role ability to uncheck Login Active box on a taxpayer in the Edit Profile screen. See the information message related to the Audit Level 2 role inability to modify the taxpayer security level and notice there is no option to save any changes, including unchecking the Login Active checkbox:



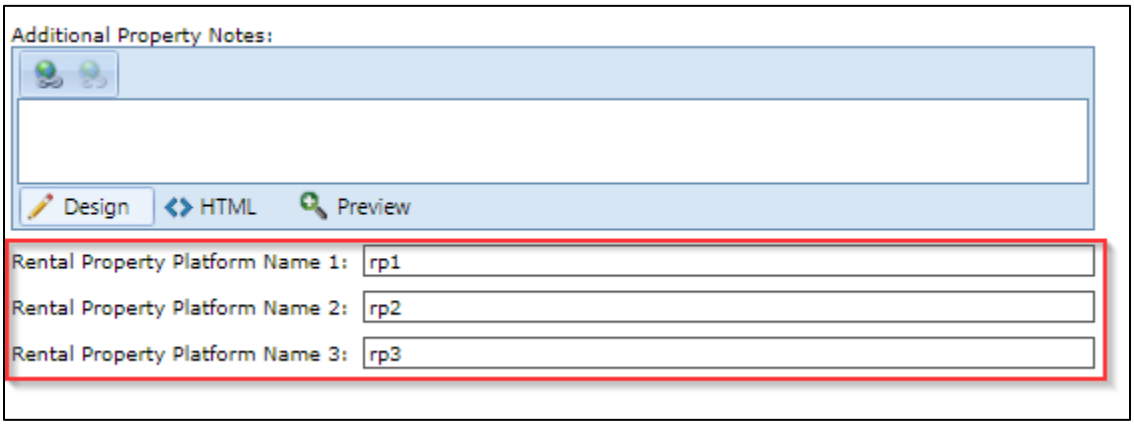
15106: Add New Rental Property and Owner Information Fields on the Account Screen

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

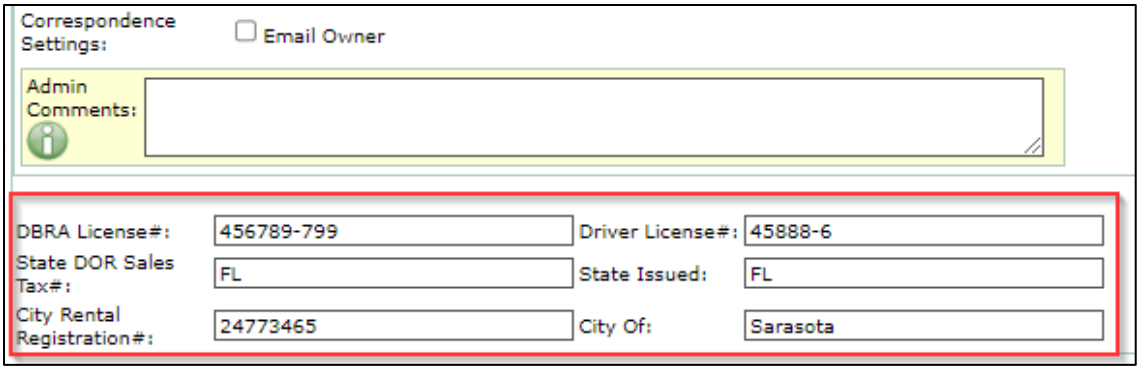
Request Details: New rental property and owner information fields should be displayed on the Account screen. These fields should be visible to all the users and only editable by the employees.

Resolution: Added new rental property and owner information fields to be displayed in the Account screen. See the added fields below.

Rental Property Information fields:



User Information fields:



15121: Upgrade Scanner from v10 to v17

Request Details: Update the scanning function and license to the latest version.

Resolution: Updated the scanner methods to use the latest versions available.

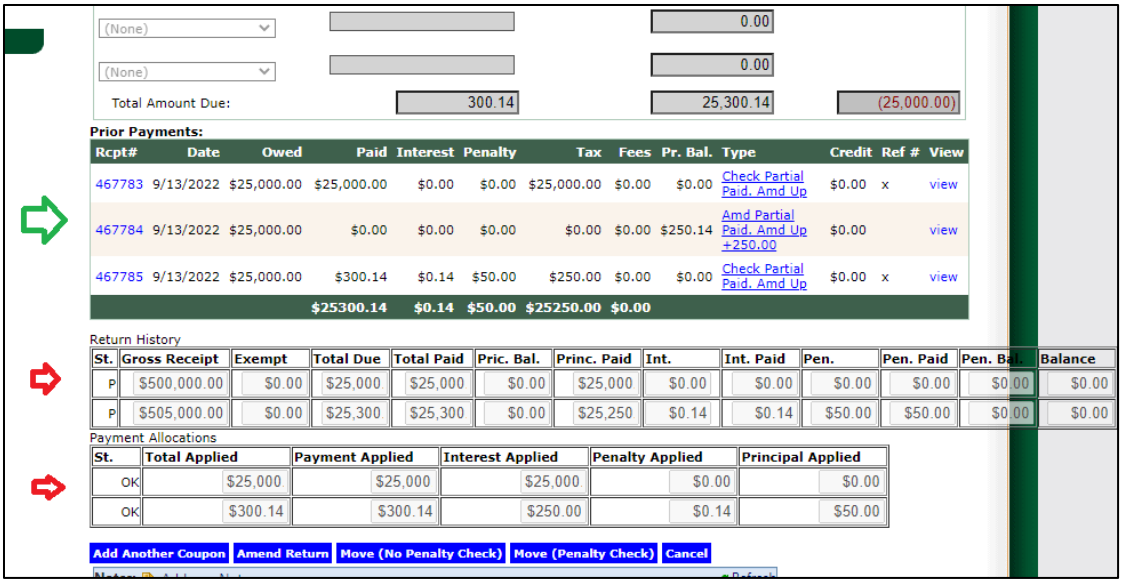
15490: Return History Details for Employees

Request Details: The users would like that employees have access to a detailed Return history that shows the amendment history since a Return can be amended more times than it is paid.

Resolution: Added the Return History and Payment Allocations grids in the Return screen. These grids are only visible to the employee when there exists a payment or an amendment on the Return.

The grids pointed to by the red arrows are the true Return history:

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



15531: Feature to Implement Statute FS.213.755 (Unmanaged Accounts)

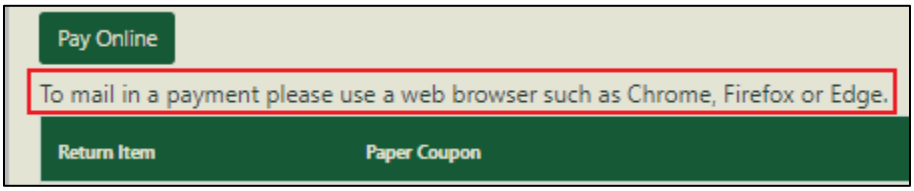
Request Details: Implement statute FS.213.755. This statue allows for the assignment of a "mail in payment" fee, for accounts with a prior fiscal year total tax bigger than a setting value

Resolution: New setting added "MailInPaymentFS_213_755", the value of this setting is the prior fiscal year total tax value that the system should compare to. If the value of the prior fiscal year balance is bigger than the setting, the system will apply the fee FS_213_755 to the new returns created, this fee must be added. Also new check box added "Check to NOT apply FS.213.755" into the account options, if the check box is unchecked the system will apply the fee FS_213_755.

15539: Mobile – New Message for Mail in Payment

Request Details: At this time, Mail in Payment new statute FS.213.755 can be applied only from the web application.

Resolution: Added message "To mail in a payment please use a web browser such as Chrome, Firefox or Edge.", with this message users will know that to use Mail in Payment in a Return they need to go to the web site.



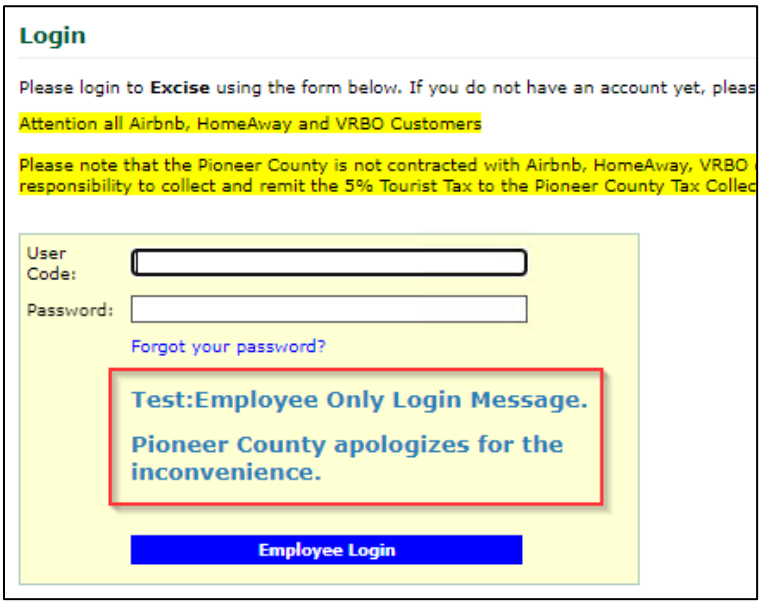
15543: Login Custom Message and Restrictions

Request Details: Users would like the ability to set a login custom message and restrict the login to employees only.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Resolution: Added settings: **LoginScreenMessage** and **LoginEmployeeOnly**.

The **LoginScreenMessage** setting uses html format and can be set for adding a message to the login screen, this setting could also be used to advertise statue changes or any other information:



Sample html:

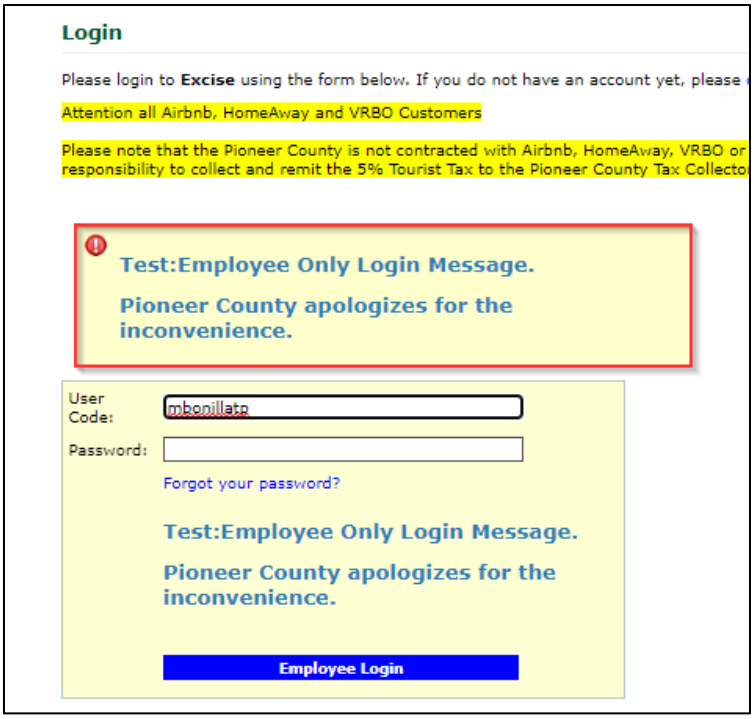
Test: Employee Only Login Message.

Pioneer County apologizes for the inconvenience.

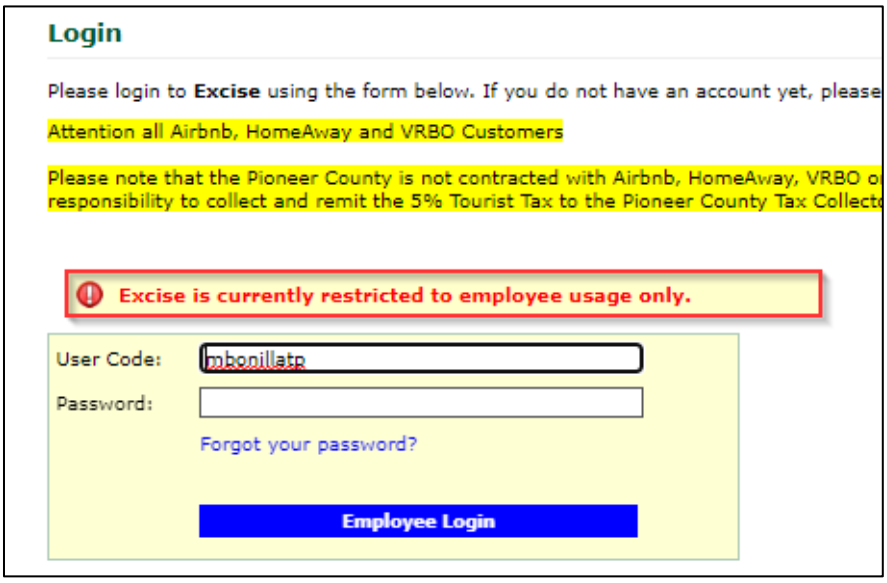
The **LoginEmployeeOnly** setting limits Excise access to employee users when it is set to true. See the examples below.

When the **LoginScreenMessage** setting value is not empty, the non-employee user is not allowed to login and the custom message is also displayed as an informational warning about the reason the user is not able to login:

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



When the **LoginScreenMessage** setting value is empty, the non-employee user is not allowed to login and a default resctriction message is displayed as an informational warning about the reason the user is not able to login:



Requires Admin Configuration

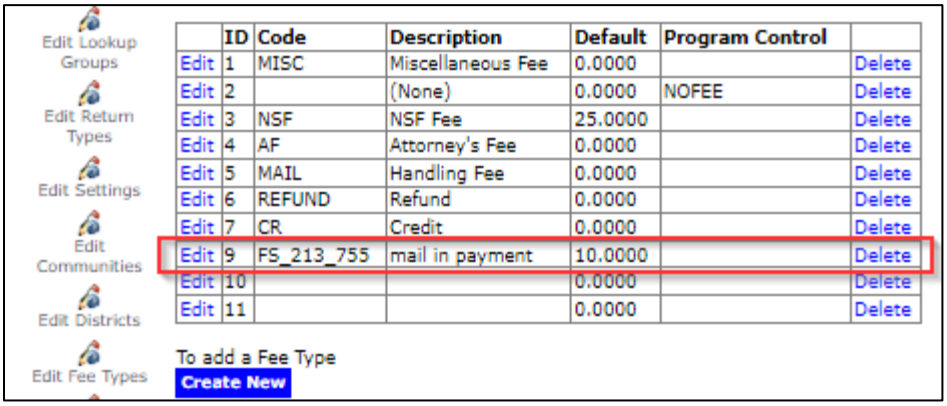
15546: Ability to Implement Statute FS.213.755 (Manager Accounts)

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Request Details: Add ability to implement statute FS.213.755. Users should be able to set the assignment of a "Mail in Payment" fee for manager accounts based on the prior fiscal year balance.

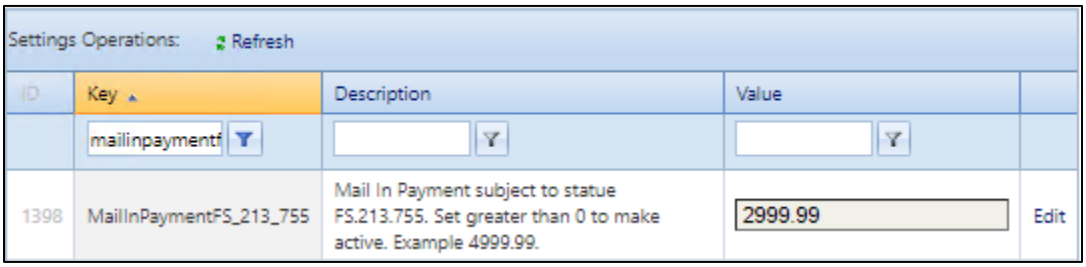
Resolution: Added setting: **MailInPaymentFS_213_755**. If the value of the prior fiscal year balance is greater than the value set in this setting, the system will automatically apply the fee FS_213_755 to new Returns, otherwise the taxpayer can pay by mail without fee. See related configurations needed to properly use this feature below.

- Set the "Mail In Payment Fee". The code must be ''FS_213_755'':

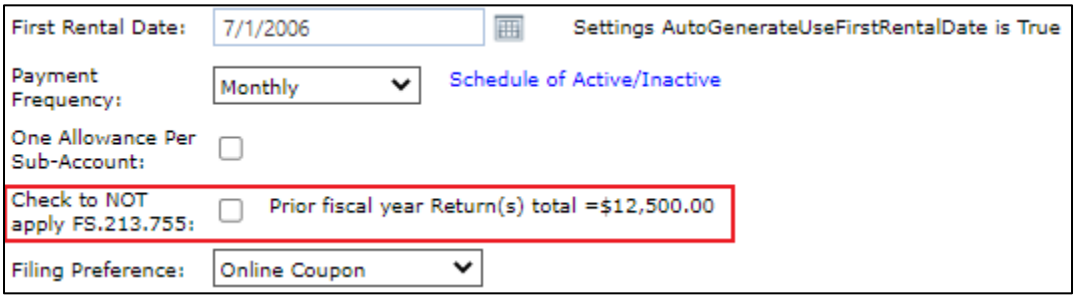


	ID	Code	Description	Default	Program Control	
Edit	1	MISC	Miscellaneous Fee	0.0000		Delete
Edit	2		(None)	0.0000	NOFEE	Delete
Edit	3	NSF	NSF Fee	25.0000		Delete
Edit	4	AF	Attorney's Fee	0.0000		Delete
Edit	5	MAIL	Handling Fee	0.0000		Delete
Edit	6	REFUND	Refund	0.0000		Delete
Edit	7	CR	Credit	0.0000		Delete
Edit	9	FS_213_755	mail in payment	10.0000		Delete
Edit	10			0.0000		Delete
Edit	11			0.0000		Delete

Set the **MailInPaymentFS_213_755** setting to the desired value (greater than zero to make it active):

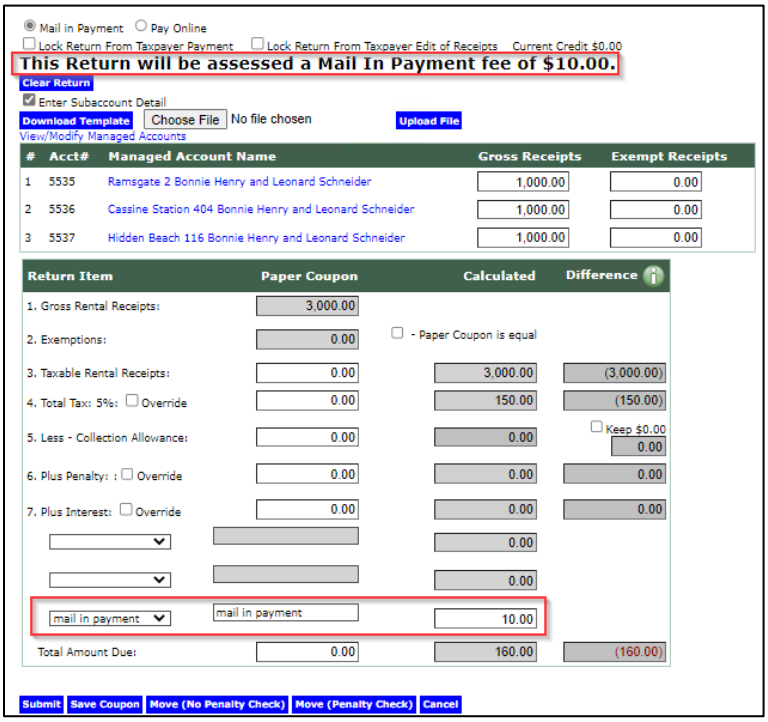


In the account details screen, there is a new checkbox titled "Check to NOT apply FS.213.755", the user can make an exception on a per account basis using this flag. If it is unchecked, the fee will be applied, if it is checked, the fee will not be applied:



This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Returns from accounts where the "Mail In Payment" fee should be applied, will display a warning message, and will add the related fee:



Requires Admin Configuration

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 3000.0.0 Service Pack 4

Corrected Issues

109472: Lookup Button Does Not Correctly Display

Expected Result: The Lookup button should not disappear after selecting 'Add'.

Resolution: The old **AllowPAODataInsert** setting is now obsolete. The Lookup button will now show for all employees and no other user role.

109516: Error Message on Amended Return

Expected Result: Users should be able to amend a return with an initial penalty waived.

Resolution: Fixed issue where an error message was displayed after the user tried to amend a return down and there was an initial penalty waived.

109763: Error when Creating a New User

Expected Result: Users should be able to register new users in the Add User screen without error.

Resolution: Fixed issue where an error message was displayed after the user clicks the Register button, the query got fixed to accommodate the Order By clause.

109969: Ability to Lock Returns from Taxpayer Edit of Receipts in the Enter Tax Return Screen

Expected Result: The users should be able to lock a return from a Taxpayer edit of receipts but allow payment from the Taxpayer.

Resolution: Added the 'Lock Return from Taxpayer Edit of Receipts' checkbox in the Enter Tax Return screen. When selected it will lock the return from Taxpayer edit of receipts but will allow payment from the Taxpayer. See the new option in the image below.



110029: Lee County – Auto Waive of Penalties not Working

Expected Result: The system should auto waive penalties if any of the auto waive penalties rules is applicable:

1. Only applies to R Returns.
2. 1 Auto waive for quarterlies.
3. 2 Auto waives for monthlies.

Resolution: Setting **AutoWaivePenalty** must be True, then the system will apply auto waive penalties rules if applicable as expected.

110074: First Property Record is not Displayed in The Rental Property Information

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Expected Result: When accessing an account with multi properties the users should be able to see the first property saved displayed, also the navigation control and dropdown should match the corresponding records when navigating through them.

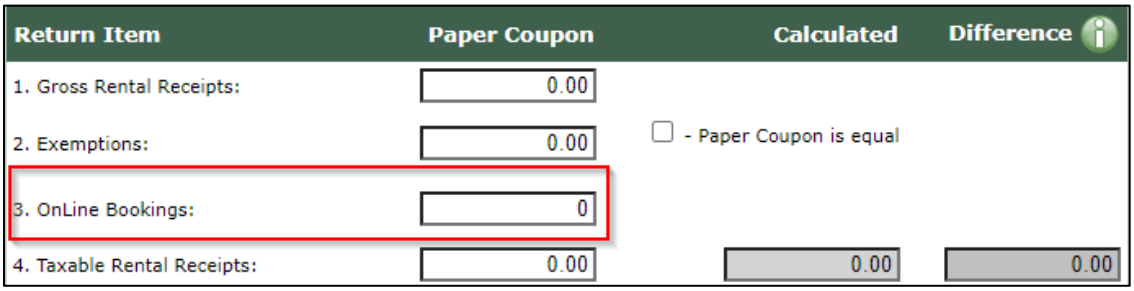
Resolution: Fixed issue where the last property was displayed when accessing an account with multiple properties instead of the first property, the navigate control and dropdown did not match the corresponding records when navigating through them.

110150: Extra Box is Displayed for Exemptions in the Return Screen

Expected Result: An extra box for exemptions in the Return Item section from the Return screen should not be displayed. When the setting **EnableOnLineBooks** is on, the Online Bookings section with its box should be displayed in the Return Item section, when it is off, it should not.

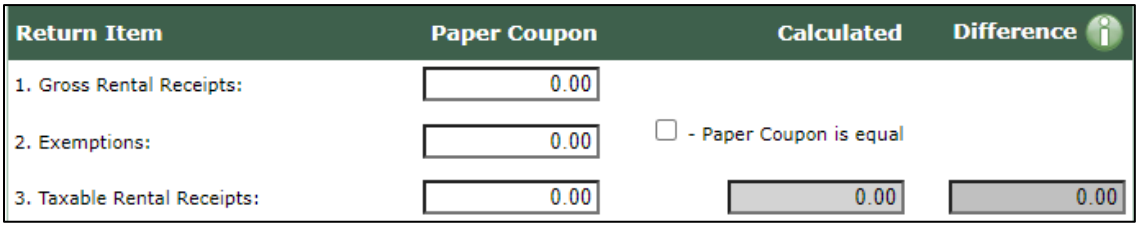
Resolution: Fixed issue where an extra box for exemptions in the Return Item section from the Return screen would be displayed. Modified logic so when the setting **EnableOnLineBooks** is on, the Online Bookings section will be displayed in the Return Item section, when it is off, it will not. See the example below.

Return Item section when the setting **EnableOnLineBooks** is on:



Return Item	Paper Coupon	Calculated	Difference
1. Gross Rental Receipts:	0.00		
2. Exemptions:	0.00	☐ - Paper Coupon is equal	
3. OnLine Bookings:	0		
4. Taxable Rental Receipts:	0.00	0.00	0.00

Return Item section when the setting **EnableOnLineBooks** is off:



Return Item	Paper Coupon	Calculated	Difference
1. Gross Rental Receipts:	0.00		
2. Exemptions:	0.00	☐ - Paper Coupon is equal	
3. Taxable Rental Receipts:	0.00	0.00	0.00

110205: Adding New Accounts to an Existing User Not Working Properly

Expected Result: Users should be able to add new accounts to an existing user.

Resolution: Fixed issue where an administrator user was not able to add new accounts to an existing user.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

14141: Penalty Waive Reason Not Display in Enter Payment Screen for Taxpayer

Request Details: The taxpayer should be able to view the penalty waive reason in the enter payment screen.

Resolution: Added **TaxPayerViewPenaltyWaiveReason** right, when the right is added to the taxpayer role, the penalty waive reason will be displayed in the enter payment screen.

14412: Volusia County – Modify Ability to Edit Profile and Accounts for Taxpayers

Request Details: Disable the controls in Active, Inactive and Closed accounts for the Taxpayer in the Edit Account screen and allow ability to make changes only in the password and security question in the Edit Profile section.

Resolution: Modified logic to disable the controls for the Taxpayer in the Edit Account screen and allow ability to make changes only in the password and security question in the Edit Profile section.

14702: Issue for Access Management

Request Details: The user with a higher role of authority can edit users with lower role but not the reverse.

Resolution: Added **EnableUserProfileSecurityLevels** setting, when the setting value is True, the system will use the security level configured in the tblRole to determine the level of authority of each role.

14849: Administrator Role does not Need Specific Rights

Request Details: Enable rights 'EditRequiredFields' and 'EditUserDetail' for an Administrator user.

Resolution: By default, Excise will give the rights 'EditRequiredFields' and 'EditUserDetail' to the Administrator Role. These rights are used on the "Edit User Profile" view. Future releases will grant more default rights to this role.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0.20 Service Pack 10

Corrected Issues

106921: Telerik Vulnerability Issue

Expected Result: Updated Telerik files should prevent any potential vulnerabilities.

Resolution: Replaced Telerik files with the latest version to address any previous potential vulnerabilities.

109230: Enter Key Performs Unwanted Actions

Expected Result: When users enter an amount in the Gross receipts field and press Enter key, enter key should not take the user to any other screen or perform unwanted actions.

Resolution: Fixed issue where a user tries the Enter key would result in unwanted actions in the application.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

10946: Prevent Taxpayer from Changing the Account Name

Request Details: User should be able to disable/enable the Taxpayer ability to modify the account name.

Resolution: Added new right **EditTaxPayerNoAccountName**, when the right is added to the taxpayer role it will prevent it from changing the account name.



Requires Admin Configuration

11607: Payment Express Integration

Request Details: Add Payment Express as a valid credit card provider.

Resolution: The following settings must be configured:

SourceKey – Provided by Payment Express
PIN - Provided by Payment Express
SandBox – Determines live or test environment.
If value =1 ➔ Test
If value=0 ➔ Live
ECheckPaymentProvider – ProcessPAYMENTEXPRESSTransaction
ECheckPaymentProviderCurrentUser – Provided by Payment Express
ECheckPaymentProviderLocation – Provided by Payment Express
ECheckPaymentProviderProduct – Provided by Payment Express
PaymentProviderDashBoardUrl – The URL for the Payment Provider Dashboard
PaymentWebServiceURL – Payment WebService URL (If required)



Requires Admin Configuration

11610: Mobile Interface

Request Details: User should be able to disable/enable a mobile interface to be used in any mobile device

Resolution: Added new setting **EnableMobileBrowserFeature**, when setting value is 1 and accessing the Excise website from a mobile device, the website will change to a mobile interface to display the content accordingly to the screen size, when setting values is 0 and accessing the Excise website it will display the same website interface as in a computer.



Requires Admin Configuration

14368: Unhold the Account Number in the 'Search for Account #' Field.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Request Details: Users would like that the 'Search for Account #' field gets cleared after searching for an account number.

Resolution: Disabled the cookie that caused to hold the account number in the 'Search for Account #' field.



14382: Option to Inactive All Returns Older than Three Months that Have No Fees

Request Details: Users would like to inactive all Returns older than three months that have no fees.

Resolution: Added ability to inactive all Returns older than three months that have no fees, when editing an account, by selecting the 'Mark Inactive All Unpaid Returns Older than Three Months' checkbox and then clicking the Update option in the Account Scheduler screen. Find this option by clicking on the 'Schedule of Active/Inactive' link in the Edit Account screen.



14425: Set a Default Rental Property Name

Request Details: User should be able to set a default value for a rental property name.

Resolution: Added new setting **RentalPropertyNameDefaultOverride**, the setting allows the user to set the value to the desired default property name. Properties will still be created with the default name "New Property (Edit This)", but when the property is saved the name will be changed to the value of the setting. If the setting value is left empty the system will use the default name "New Property (Edit This)".



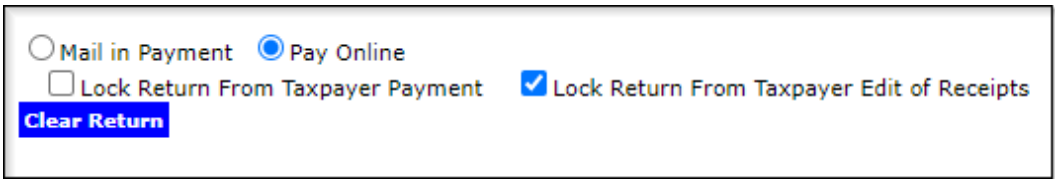
Requires Admin Configuration

14426: Lock Return from Taxpayer Editing of Receipts.

Request Details: Users would like to be able to lock a Return from taxpayer editing of Receipts.

Resolution: Added ability to lock a return from taxpayer editing of Receipts, by selecting the 'Lock Return from Taxpayer Edit of Receipts' checkbox in the Return screen.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.



14435: Scheduled Payments Email Confirmation to County

Request Details: User should be notified each scheduled payment status via email after the close of date payment.

Resolution: Added new setting **'ClerksEmailAddressForExcise'**, in the setting value we can define a list of emails separate by ; to send the Close of Day Payment status for each scheduled payment. The email subject line will indicate failed or success.



Requires Admin Configuration

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0.2 Service Pack 11

Corrected Issues

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

12177: Point and Pay Credit Card Integration

Request Details: Add Point and Pay as a valid credit card provider.

Resolution: The following settings must be configured:

PaymentWebServiceURL – Provided by P&P
ECheckConvenienceFee – ProcessPOINTNPAYTransaction
PointAndPayPartnerCD - Provided by P&P
PointAndPayProductID – 32443
SandBox – 0 (not used)
SourceKey – api.pioneertechgroup
PIN - Provided by P&P



Requires Admin Configuration. See Release 9.0.X in the Admin Release Notes.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0.2 Service Pack 10

Corrected Issues

106921: Telerik Vulnerability

Expected Result: Telerik should be updated to the latest version to patch potential vulnerabilities.

Resolution: Updated Telerik tools to the latest version.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0.2 Service Pack 6

Corrected Issues

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0.2 Service Pack 2

Corrected Issues

N/A

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

11600: Restricted Account Editing Permissions Removes Save Changes Button

Expected Result: User types that aren't allowed to edit their own accounts shouldn't have the Save Changes confirmation button in the profile edit menu.

Resolution: Users without these permissions will now find the Save Changes confirmation button missing from the profile edit menu, leaving only the option to change their password or clear any changes they made to the menu.

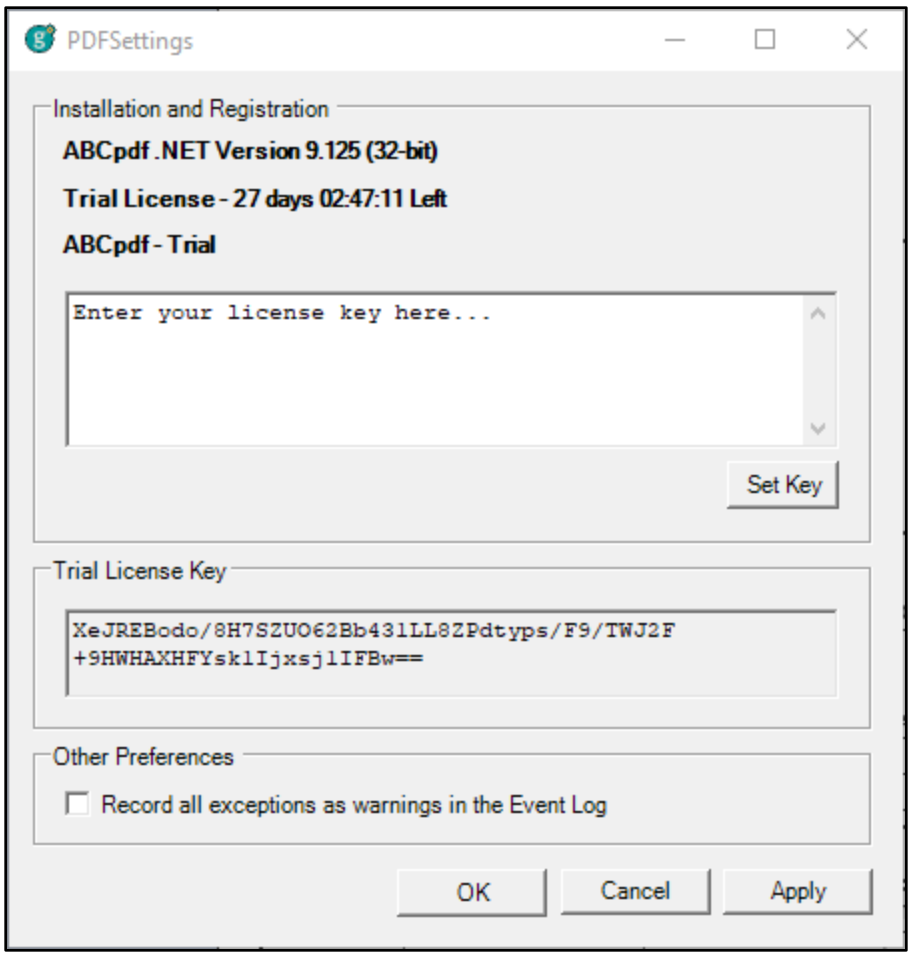


11606: ABCpdf Activation

Expected Result: Users should be able to use the ABCpdf component to interact with PDFs in Excise.

Resolution: The ABCpdf component can be activated with the use of a provided license key found in the whatsNew_Excise_9_0_0_x.docx file within the download package. The license must be applied to the existing abcPDF installation on the server hosting the Excise website using the following steps: Go to the Windows icon on the lower left of the screen. Search for "pdfSettings". Enter provided key. Select Set Key. Follow on-screen instructions (may ask user to restart computer).

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

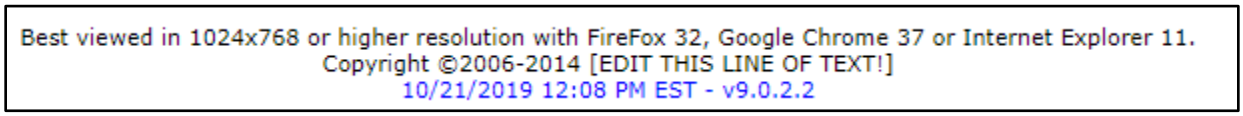


Requires Admin Configuration. See Release 9.0.X in the Admin Release Notes.

11608: Update Axia Footer Text

Expected Result: Administrators should be able to change the footer message of the website.

Resolution: New setting **FooterText** can be configured to change the lines of text running at the bottom of each page.



Requires Admin Configuration. See Release 9.0.X in the Admin Release Notes.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0 Service Pack 2

Corrected Issues

N/A

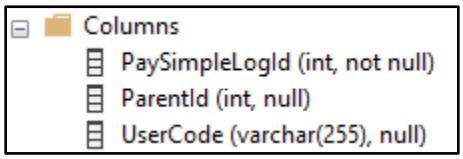
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

11605: Paysimple Log UserCode ID Update

Expected Result: Paysimple Log used by all payment providers should have a UserCode data length of 255.

Resolution: In the *PaySimpleLog* table within the Excise files, the UserCode column has had its data type length changed from 10 to 255.





Requires Admin Configuration. See Release 9.0.X in the Admin Release Notes.

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Release 9.0 Service Pack 1

Corrected Issues

N/A

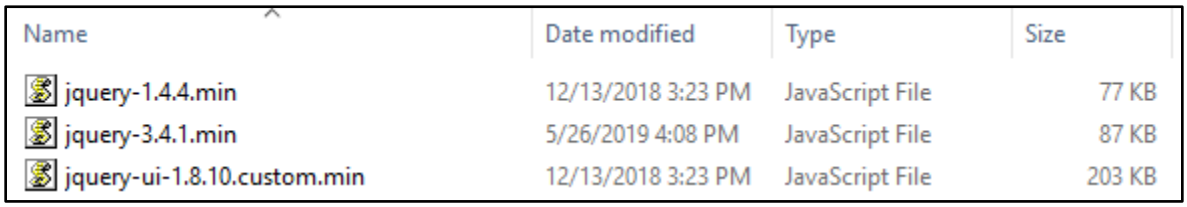
This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.

Added Features

11604: JQuery Updated

Expected Result: Excise should have the files to be compatible with both the Edge and Firefox browsers.

Resolution: JQuery has been updated in future releases from jquery-3.3.4.min.js to jquery-3.4.1.min.js.



Name	Date modified	Type	Size
jquery-1.4.4.min	12/13/2018 3:23 PM	JavaScript File	77 KB
jquery-3.4.1.min	5/26/2019 4:08 PM	JavaScript File	87 KB
jquery-ui-1.8.10.custom.min	12/13/2018 3:23 PM	JavaScript File	203 KB

This document may contain confidential and/or proprietary information and is intended to be used only by licensed Excise users.
Any use by others is strictly prohibited.