TaxSmart

General Release Notes

Version 1.1

Service Pack 59

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Revision History

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Kyle Wilson	03/07/2017	Finalized Release	1.0.0.77
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Kyle Wilson	9/27/2017	Finalized Release	1.0.0.81
Kyle Wilson	11/26/2018	Finalized Release	1.0.0.86
Kyle Wilson	8/6/2020	Finalized Release	1.1.29.0
Kyle Wilson	8/21/2020	Finalized Release	1.1.30.0
Kyle Wilson	8/27/2020	Finalized Release	1.1.32.0
Kyle Wilson	8/11/2021	Finalized Release	1.1.46.0
Kyle Wilson	10/11/2021	Finalized Release	1.1.47.0
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Kyle Wilson	4/8/2022	Finalized Release	1.1.52.0

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Ana Luisa Munoz	6/26/2024	Finalized Release	1.1.59.0

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Corrected Issues

TAX-479: Over/Short Closeout Record not Setting FeeGLId and PaymentGLId

Expected Result: Over/Short Closeout record should set FeeGLId and PaymentGLId fields in the database.

Resolution: Fixed issue where Closeout record was not setting FeeGLId and PaymentGLId fields. Now, both fields are populated after performing a Closeout.

TAX-500: Certificate Number Change Confirmation Message Typo

Expected Result: Certificate change confirmation message should read “Are you sure you want to change Tax Certificate Number from XXX to YYY?”.

Resolution: Fixed typo on word “Certificate”. Now, certificate change confirmation message reads correctly.

110151: Delay in Creating a New Case

Expected Result: Users should not experience a delay in creating a new case in TaxSmart.

Resolution: Increased performance when creating a new case.

110592: Online Auction Fee Total on DR-513 Tab Including Paid Out of Deposit Amount

Expected Result: DR-513 should not include paid out of deposit amount for online auction fee total.

Resolution: Fixed issue where DR-513 tab was including paid out of deposit amount for online auction fee total.

110991: Line Care of Payee Field not Populating

Expected Result: The Care of filed on the Check Approvals queue should be populated with the value entered in the Edit Peoplesoft Fields pop-up on the Check Request tab.

Resolution: Fixed issue where PeopleSoft value entered for Care of field was not getting passed to Check Approvals queue, party Care of field was passed instead.

110992: Setting or Clearing Bypass Date in Check Approvals Queue Overwrites User Who Did Approve

Expected Result: When clearing/setting Bypass Valid Date in Check Approvals queue, user who approved should not be overwritten.

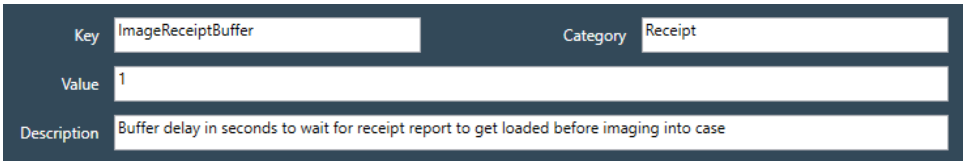
Resolution: Fixed issue where setting or clearing the Bypass Valid Date could override user on approval record.

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111006: TaxSmart will Crash Sometimes when Posting First Receipt

Expected Result: TaxSmart should not crash when posting the first receipt of the day when **AutoImageReceiptOnPost** is set to True.

Resolution: Added setting **ImageReceiptBuffer**. Buffer delay in seconds to wait for receipt report to get loaded before imaging into case.



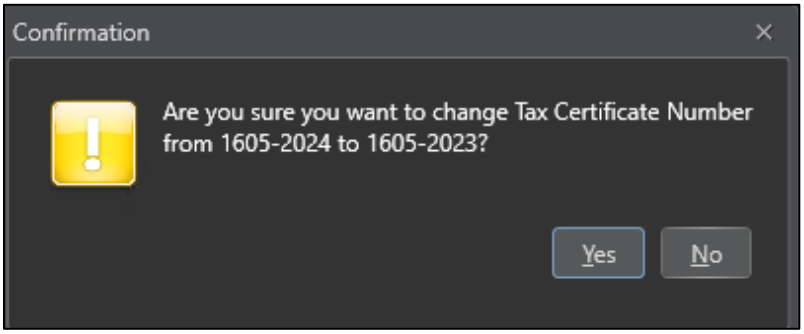
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Added Features

TAX-437: Certificate Number Change Prompt

Request Details: Add a prompt message when a Tax Certificate number change is being entered from the original number.

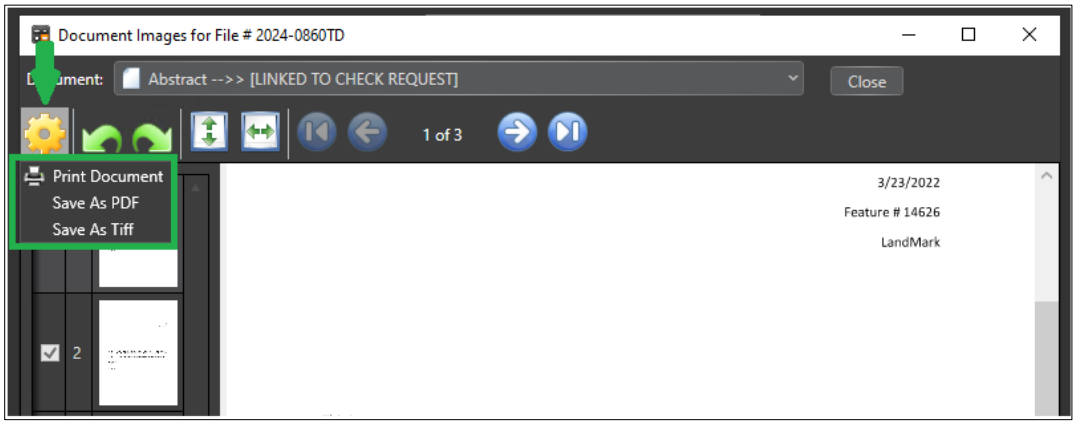
Resolution: Added a new confirmation message to inform the user that a change to the Tax Certificate number is about to be saved, the user can confirm whether the change should be saved.



TAX-492: Check Approvals Queue – View Case Documents Print and Export

Request Details: Add the ability to print or export the documents linked to a check request from the View Case Documents pop-up window.

Resolution: Added the ability to print or export the documents linked to a check request. In the Check Approvals screen, the user can select a check request from the list and click the View Case Documents button, in the pop-up window, a new button (yellow cog) will be available with three options, Print Document, Save As PDF, and Save As Tiff. The user can select the needed option and the document will be printed or saved accordingly.



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TAX-494: Update .NetFramework to 4.8

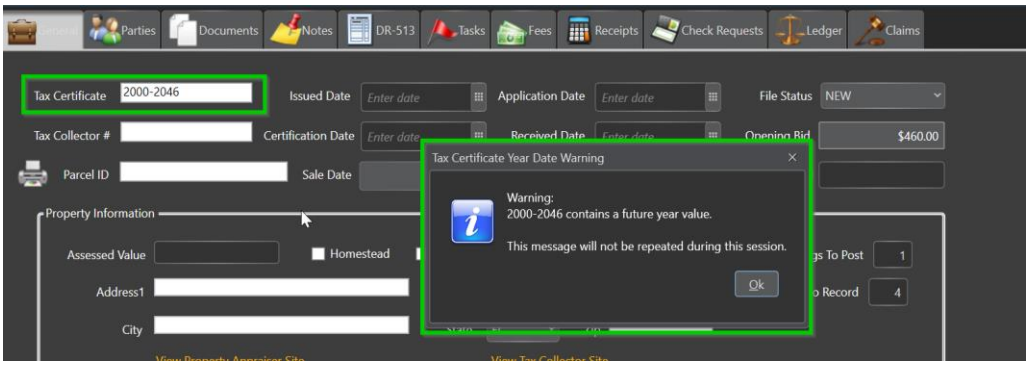
Request Details: Update TaxDeed.WPF to .NetFramework 4.8.

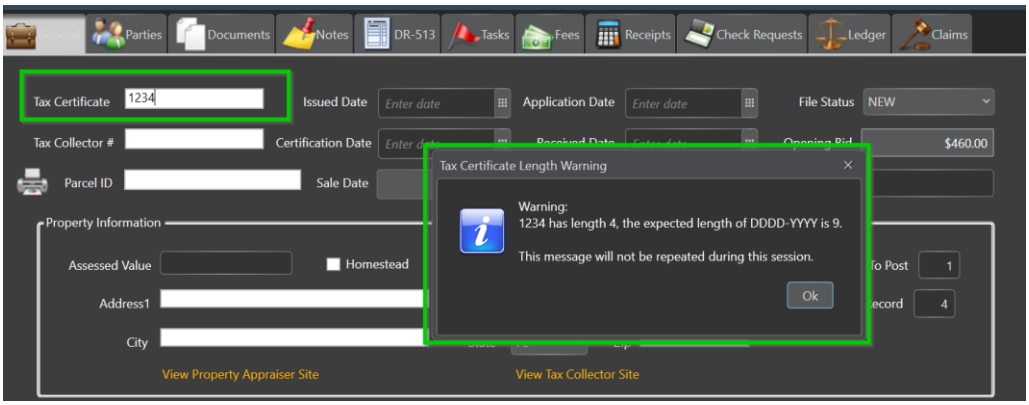
Resolution: TaxDeed.WPF updated to .NetFramework 4.8. A smoke testing was performed to validate basic functionality after the update.

TAX-498: Palm Beach Optional Format for Tax Certificate Number

***Request Details*:** Add the certificate number to the standard format [sequence number]-[four digit year]. The application should support a configurable format mask, such as ####-YYYY. The certificate number should not accept whitespace.

Resolution: The standard format [sequence number]-[four digit year] has been added to the certificate number field. The application now supports a configurable format mask, and the certificate number does not accept whitespace. If users introduce an out-of-range date, future date, or a length different from what is configured, the system displays a warning message while allowing users to complete the process.





Configuration:
Go to Main Menu -> Admin -> Settings
Find setting -> **TaxCertificateNumberFormat** and complete the setting value.

Default value: Blank.

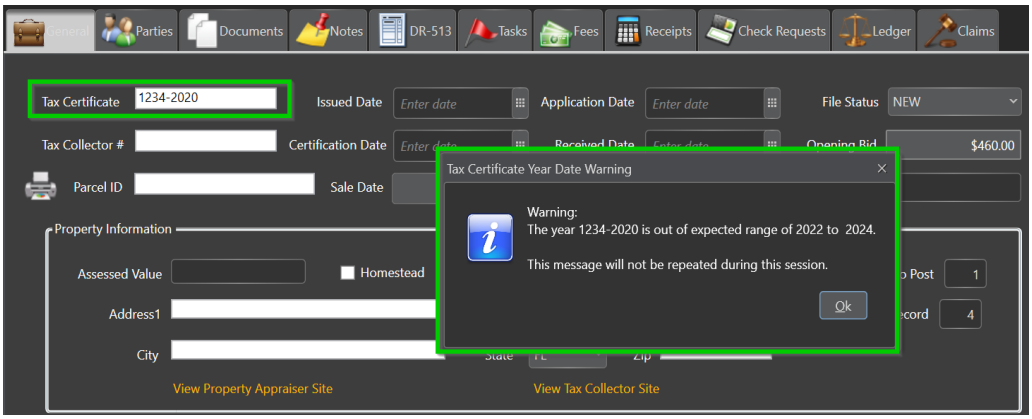
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The possible values for the setting are listed below:

- D = Digit (System should allow to introduce digits)
- L = Letter (System should allow to introduce letters)
- B = Digit or Letter (System should allow to introduce both options)
- YYYY = Year (System should allow to introduce a year).

Find setting -> **TaxCertificateNumberFormatRange** and complete the setting value.

Default value: Blank.
Possible values:
A number indicating the expected range. In the example below, the setting value is 3, given that the current year is 2024, the system should warn the user if a date of 2021 or earlier is entered.



Requires Admin Configuration

14903: ORIS 049 – New Right – UnReconcile/Closeout

Request Details: Users would like a new right Unreconcile added to TaxSmart.

Resolution: Added new right **UnReconcile**, users need this right now to unreconcile, any users that had access to the accounting screen have been granted this new right.

Id	Right	Description
30	ReviseCheckRequest	Ability to Revise Check Request
26	ReviseReceipt	Ability to Revise Receipt
20	SearchWorkspace	Search Workspace
72	UnNSF	Un-NSF Checks
86	UnReconcile	UnReconcile

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Corrected Issues

109937: Check Endorsement not Showing Receipt Fields

Expected Result: User should be able to print the check endorsement stamp and the receipt fields (Location, Receipt # and Username) must appear on it.

Resolution: Fixed issue where receipt fields were not showing on check endorsement stamp, the variables associated with the receipt fields can be added in any order and they will show in the check endorsement stamp. Below an example of how to apply the variables in the endorsement stamp.
Location: [, receipt.Location]
Receipt# [, receipt.ReceiptNumber]
OPR [, misc.loggedinuserid,User:UserName]

110017: Second Approval Level Overriding First UserID

Expected Result: When a check request is approved by different users the system should keep the record of each user that has approved the check request.

Resolution: Fixed issue where approving a check request with different users override the previous user record who approved it.

110078: Surplus Fields are not Calculating Properly when a Surplus Check Request has been Voided

Expected Result: At the top of Ledger and Claims tabs (File screen), user should see adjusted amounts on Surplus Disbursed and Surplus Remaining columns, after a posted surplus check request is voided.

Resolution: Fixed issue where surplus fields were not properly recalculated after a surplus check request was voided.

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Added Features

N/A

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Corrected Issues

109431: Ledger Balance not Restoring from Denied Check Request

Expected Result: Ledger balance should restore denied Surplus Check requests.

Resolution: Voiding items in approval queue will now void the underlying check request on the case.

109505: Inability to void Check Request in Case

Expected Result: Users should be able to void the check request in the case.

Resolution: Fixed issue where checks in the approval queue could not be voided in the case or check request screens when they were already voided or denied on the approval queue.

109526: Payment Type and Amounts on the Receipt Payment Table Clearing from Posted Receipts

Expected Result: Users should be able to see the payment type and amount values from posted receipts on the receipt payment table.

Resolution: Added logic when opening a case or receipt to fix issue where the payment type and the amount on the receipt payment table would show blank.

109539: Login Errors When Connecting to Older Database

Expected Result: Users should be able to login into older databases successfully.

Resolution: Fixed issue where errors would occur when logging into older databases.

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Added Features

13801: ORIS 91 & 945 – Relating Directly to a Void and Revision Report

Request Details: Users would like Override records displayed.

Resolution: Added indexes on LogInfo table to speed up searching for override records.

14411: Add CloseoutId Field to the ReceiptGL Table

Request Details: Users would like to have a direct link from ReceiptGL to the original Closeout, because if a transaction is revised and posted after the original closeout has been reconciled, the Receipt Payment will link to the new Closeout record.

Resolution: Added CloseoutId field to the ReceiptGL table.

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Corrected Issues

109182: Slow Performance When Loginfo has Many Records

Expected Result: When the loginfo table has many records, the performance should not slow down. The system should clean up tables or check fewer to speed up load times.

Resolution: Increased performance when checking for online auction results (the green flag that shows in upper right-hand corner).

Added Settings:

NumRecordsToCheckForAuctionResults – Determines how many loginfo records to look at for auction results. More records will decrease performance.
CheckForOverdueTasks – Determines whether overduetasks check is done in the background (red flag that shows in the upper right-hand corner).
CheckForAuctionAlerts – Determines whether auction alerts are checked for in the background (green flag). If false, a new 'check for online auction results' button will appear on auction screen and the green flags will not show.

SQL Query *CreateIndex_IX_Loginfo_LogCategory.sql* must be run for this to function as expected. The query can be found in the SQLScripts folder of the download package.



Requires Admin Rights to Configure.

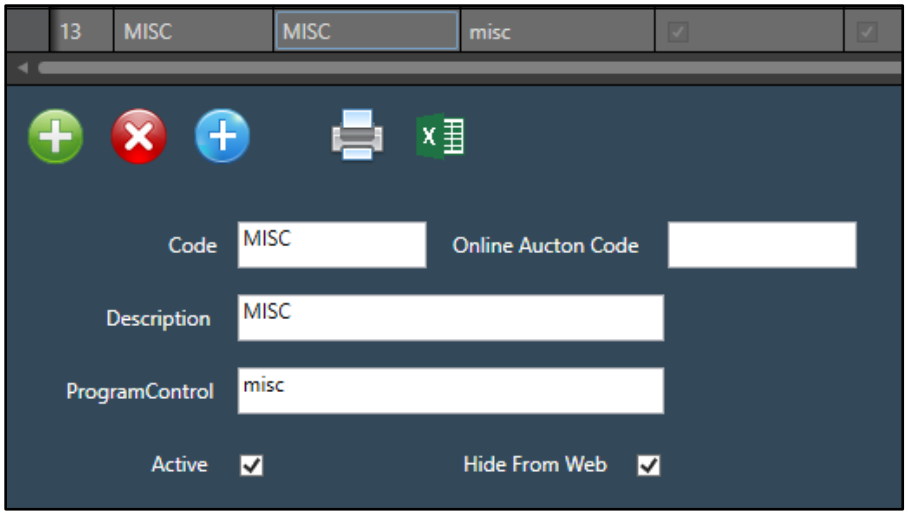
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Added Features

13328: New Case Type (Miscellaneous)

Request Details: Add a new case type for miscellaneous transactions.

Resolution: Added the ability to create Miscellaneous Cases. To turn this option on, set the new MISC Case Status to active.

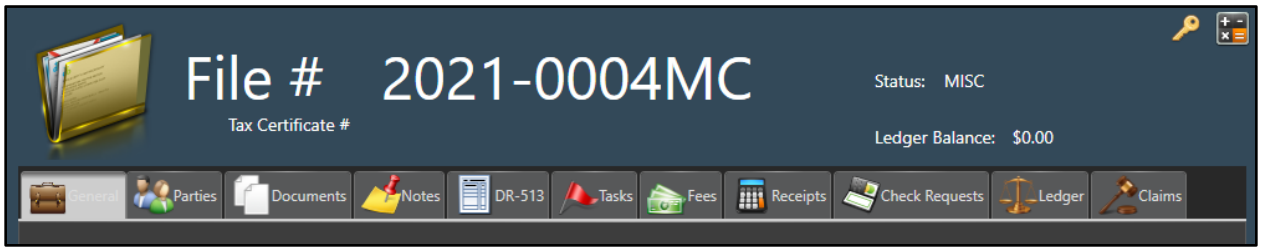


New Settings Added:

MiscCaseNumberFormat – Case number format for miscellaneous cases
MiscCaseNumber – Used by misc case types
EnterNewMiscCaseNumbers – If true, system does not generate miscellaneous case numbers
MiscCaseUpdatesLedgerBalance – Determines if misc case types update ledger balance

Settings that control the tabs shown on a Misc Case Type:

MiscGeneralTabVisible, MiscPartiesTabVisible, MiscDocumentsTabVisible, MiscNotesTabVisible, MiscDR513TabVisible, MiscTasksTabVisible, MiscFeesTabVisible, MiscReceiptsTabVisible, MiscCheckRequestsTabVisible, MiscLedgerTabVisible, MiscClaimsTabVisible



Requires Admin Rights to Configure.

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Corrected Issues

108249: Importing PDF Documents

Expected Result: Add the ability to import PDFs into the system. PDFs should be converted to tiff and not lose quality.

Resolution: Added setting **UseABCPDFToConvertPDFsToTiffs** with the following configuration options:

0 – Use Aspose Library for conversion
1 – Use ABCPDF for conversion

108728: Voiding/Revising Check Request is Not Using Todays Date in GL Records

Expected Result: Voiding or Revising check request should use today's date in the GL Records.

Resolution: Fixed issue where revising/voiding check requests when setting **PostingRule** is 0 would not use today's date in the receipt date for the GL Records that are created.

108785: Selecting the Same Auction Date More Than Once Could Cause Duplicate Entries in Case Auction Date Table

Expected Result: Selecting the same auction date more than once should not cause duplicate entries in the case auction date table.

Resolution: Fixed an issue where selecting the same auction date more than once could cause duplicate entries in the case auction date table. Also fixed an issue where deleting unused auction dates in the history window (F3) could delete active auction record.

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Added Features

11849: Increase Size of Name from 255 to 900 Characters

Request Details: Increase the size of Name from 255 to 900 characters.

Resolution: Increased the size of Name on receipt and check request from 255 to 900 characters. It now matches party name size.

13229: Change Task Due Date

Request Details: Users should be able to change the due date of tasks more conveniently from the Search function.

Resolution: A new Change Due Date for Selected Cases button has been added to the "Tasks by Sale Date" search category. Selecting a search result's attached cases and using this button allows users to change the selected case's task(s) to a different date.



13253: Approval Queue Rejection Reasons

Request Details: Place the Approve/Reject reason for checks into the case details on the Claim tab.

Resolution: Added Deny reason to queue status information in the check request grid on the case screen. Also added Queue Status information on the multi-case check request screen at the top (you can double-click on this to get full info in a pop-up).

13320: Ability to Hide Case Statuses that are not Sale or Re-Sale

Request Details: Add the ability to adjust the Search functionality. Removed and Redeemed cases do not need to be shown in Searches by Sale Date and Task By Sale Date.

Resolution: Added Status drop down to Searches: Sale Date, Sale Date Range, and Tasks By Sale Date. Added setting **DefaultSearchStatusToSale** that, when 'true', status will default to Sale in searches that show the additional status column.

13697: Add ApprovedDate and DeniedDate to CheckRequestQueue Table

Request Details: Peoplesoft interface needs to keep track of specific Check Request Rejections and Approvals.

Resolution: Added ApprovedDate and DeniedDate to CheckRequestQueue table.

13700: Disable Ability to Reject Items in the CheckApprovalQueue Table Once Finally Approved

Request Details: Prevent check status from differing once sent to the Disbursement View for Peoplesoft.

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Resolution: Added setting **PreventApprovedCheckRequestsFromBeingDeniedVoided** that, when 'true', check request that are fully approved cannot be denied or voided.

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Release 1.1 Service Pack 40

Corrected Issues

107323: Interest Calculations for Re-certification Process

Expected Result: Taxsmart needs to allow for multiple sets of tax collector fees to be added and tracked with different dates to handle interest calculations properly for re-certification processes.

Resolution: Added new setting **AdjustmentsAffectCertifiedAmount**. Only set to true if interest should be calculated by amount per date assessed for tax collector certified amounts using adjustment fees.

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Added Features

12992: Renaming “Cases” to “Files”

Request Details: Users in certain regions need to have the ability to change TaxSmart naming conventions to locally-used terms.

Resolution: The setting **UseFileLabel** in TaxSmart now causes TaxSmart to replace all references to “Cases” with that of “Files”.

12999: Approval Queue Location Column

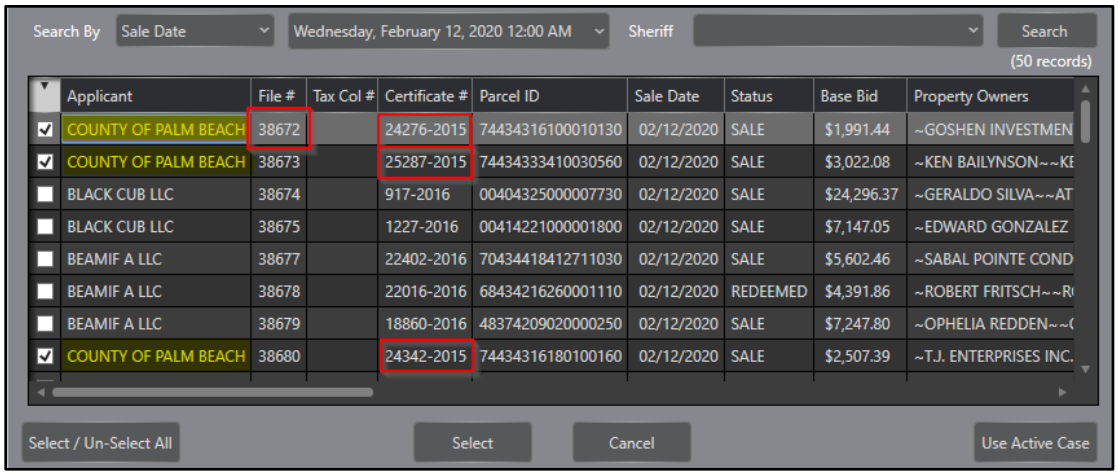
Request Details: Add a way for users to filter for location in the Check Approval Queue.

Resolution: Added filterable Location column to the Approval Queue.

13052: Apply Combined Reports to Multiple Cases with Same Applicant

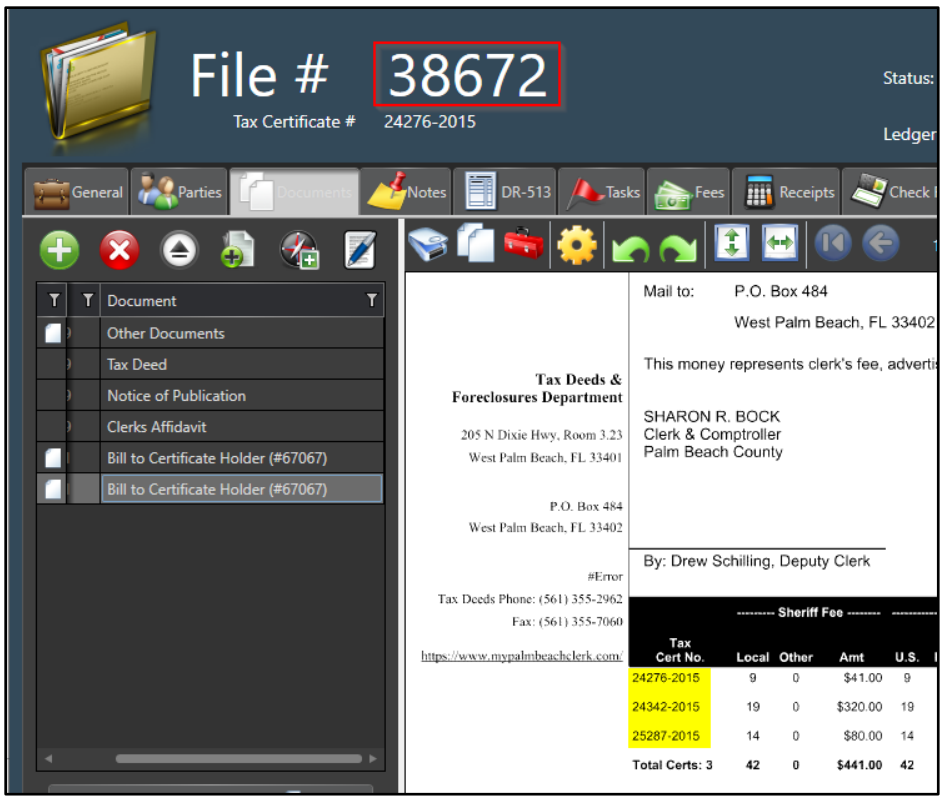
Request Details: When adding bill reports to cases with multiple case certificates filed under the same applicant, each bill report attached to each case should have all of the applicant’s certificates.

Resolution: On the Reports screen when clicking the 'Add to Case(s)' button, if a report has a value in the report group like: (combinepartytype:applicant) then instead of splitting up the data for one case at a time to image into each case, it will combine cases sharing the same partylook for the party type referenced after the colon.





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13103: SSRS Enable External Images

Request Details: Enable the option in the SSRS ReportViewer to allow external images.

Resolution: SSRS Reports now support External Images.

13169: Tasks by Sale Date Search Certificate Number Column

Request Details: Add a column to display certificate numbers in the Tasks by Sale Date search.

Resolution: Added the CertificateNumber column to the results grd when searching for Tasks by Sale Date.

13226: DR513 Line 5 Label

Request Details: Add Setting to control naming for line 5 of the DR513 tab.

Resolution: Added new setting **DR513Line5Label**. The value of this setting controls the label shown on line 5 of the DR513 tab.

13227: DR513 Line 16 Label

Request Details: Add Setting to control naming for line 16 of the DR513 tab.

Resolution: Added new setting **DR513Line16Label**. The value of this setting controls the label shown on line 16 of the DR513 tab.

13228: Task Type Dropdown Order

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Request Details: Change the sorting of the task list drop down in search workspace to be in sequence order.

Resolution: Updated the task list dropdown in Search to be in sequence order.

13230: Case Create Date in Search

Request Details: Add case creation date to the search results grid.

Resolution: Added case creation date to the search results grid.

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Corrected Issues

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Added Features

12744: Vacant Lot and Sheriff Posting Checkbox Exclusivity

Request Details: Users should have the ability to make the TaxSmart case checkmarks for Vacant Lot and Sheriff Posting exclusive to each other.

Resolution: New setting **ClearSheriffWhenVacantChecked** causes the Vacant Lot checkmark and the Sheriff Posting checkmark to be exclusive with each other; selecting one will automatically deselect the other.



12838: Ownership and Encumbrance Report Renamed

Request Details: The Ownership and Encumbrance Report in the DR-15 tab of the Case menu needs to be renamed in accordance with changes to DR-15 standards.

Resolution: The Ownership and Encumbrance Report has been permanently renamed to Property Information Report.

12851: GL Numbers for Sheriffs and Party Lookups

Request Details: Users should be able to work with GL Numbers from within TaxSmart's Admin menu.

Resolution: The GLNumbers field and a GL Numbers dropdown have been added to the Sheriff and Party Lookup tables in the Admin menu. Selecting any entry in the table allows users to assign a GL Number using a dropdown menu, and assigned GL Numbers can be viewed for all entries through its corresponding column in the table.



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Corrected Issues

107336: Max Search Results

Expected Result: Users are expecting to be able to see more results from searches than they're currently seeing.

Resolution: New setting **MaxSearchResults** allows users to set the maximum amount of search results in the result table. TaxSmart will display the most relevant results up to the configured cap.

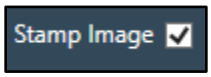
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Added Features

12736: Document and Report Auto-Stamping

Request Details: Documents or reports uploaded to a given case should be able to be automatically stamped with case and date information.

Resolution: A new Stamp Image checkbox has been added to every report and document type in the Admin menu. Selecting this checkbox will cause images to automatically be given a stamp when either uploaded directly to a case or added to a case from the Reports screen.



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Corrected Issues

N/A

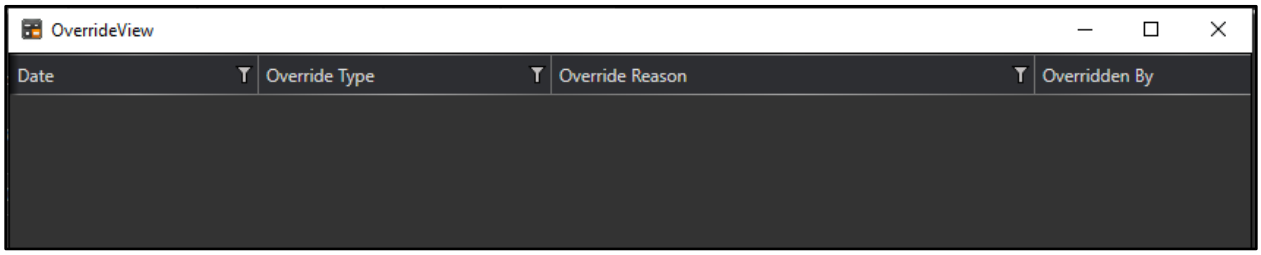
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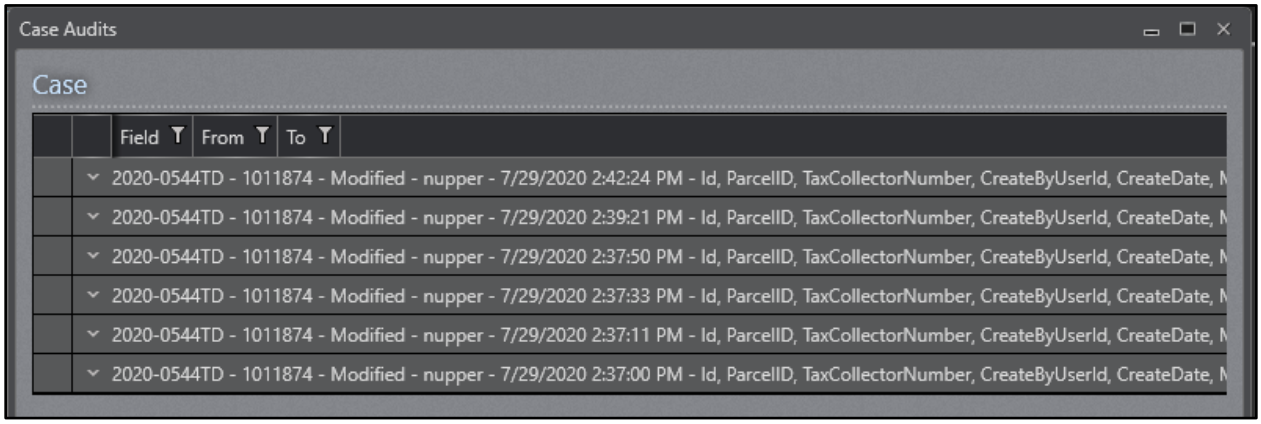
Added Features

12639: Audit and Override Windows

Request Details: Users would like to view the audit and override windows from the case workspace.

Resolution: Added new audit and override windows to the case workspace. Use new hotkeys **Ctrl + Alt + A** and **Ctrl + Alt + O** respectively to open these windows.





12692: Check Approval Queue Certificate Numbers

Request Details: Users need more relevant check information added to the check request queue.

Resolution: Check certificate numbers can now be viewed in the Check Request Queue under the new Cert Number column.

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Release 1.1 Service Pack 30

Corrected Issues

106785: Receipt-generated Check Request Error

Expected Result: Posting a receipt that generates a Check Request should not cause an error.

Resolution: Fixed an issue where an error would occur when posting a receipt that would generate a check request setup to auto-disburse if that check request is also setup to be added to check request queue and get auto-approved.

107143: Reports Menu

Expected Result: Viewing a report after opening the admin reports menu should not throw an error

Resolution: Fixed issue where opening a report after leaving the admin reports menu was throwing an error. Now, users will be able to view the correct report after leaving the admin menu.

107232: TaxSmart Version Update Issues

Expected Result: TaxSmart should properly update to newer versions without issues.

Resolution: Fixed issue where an older version of TaxSmart had an issue updating to the latest version.

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Added Features

11481: Grant Street Interface Abstract Fees

Request Details: The Grant Street Interface needs to include all recording-related fees.

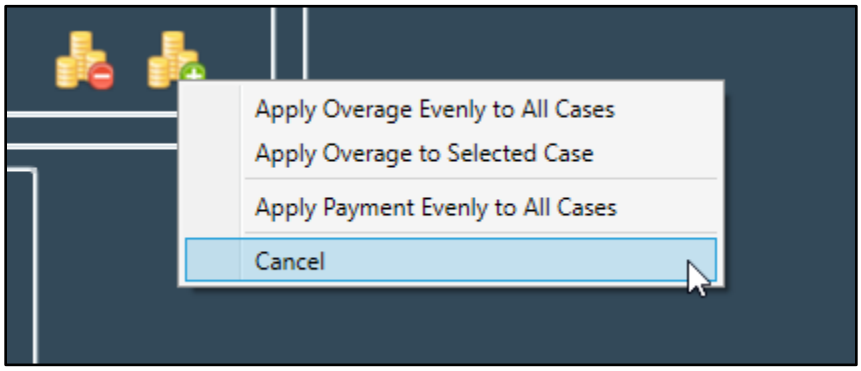
Resolution: Updated the Grant Street Interface to include all three recording fees and abstract fees.

11596: Multi-Case Overage Options

Request Details: Add support to deal with overages on multi-case receipts in multiple ways.

Resolution: Added options for multi-case overage scenarios:

Apply Overage Evenly to All Cases: Splits overage amount between all cases with fees less than the evenly-split payment amount.
Apply Overage to Selected Case: Applies the total overage to the currently-selected case.
Apply Payment Evenly to All Cases: Sets the total for each case to the same amount. Cases with fees greater than even-split payment amount will get adjusted for shortages.



11620: Redemption Fee Calculations

Request Details: Redemption fees based on more than one set of fees should be calculated correctly.

Resolution: When redemption fees are added based on the completion of a task, the total fee amount will now be correctly calculated.

11996: Auto-Update Deposit Receipt on Sale Date Change

Request Details: Add support for auto-updating deposit receipts when an auction sale date is changed.

Resolution: Fixed an issue where logic to auto-update a deposit receipt when changing an auction sale date could get stuck in the revision state if the logged-in user did not have post rights.

12628: Encrypted Connection Password

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Request Details: Add the ability to encrypt the database connection password in the TaxSmart connection file.

Resolution: Added the ability to encrypt the database connection password in the TaxSmart connection file. Add the following XML tag to an existing connection file:

<UseEncryptedPassword>true</UseEncryptedPassword>

Once saved, a pop-up text file will appear upon the next client login to the database containing the encrypted password and connection file update instructions.



Requires Admin Rights to Configure.

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Release 1.1 Service Pack 28

Corrected Issues

107116: escrow cases - ledger balance not correct

Expected Result: The main issue is that the ledger balance shows the deposits made on the case open.

Resolution: Added Setting: **PartyTypesToShowEscrowBalance** -Comma delimited list of party type program controls (ex: bidder,buyer) if populated will show Escrow Balance column on Case Parties Grid Button will also show to view Party Escrow Detail Report.

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Added Features

N/A

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Release 1.1 Service Pack 27

Corrected Issues

104237: Approval Queue Typo

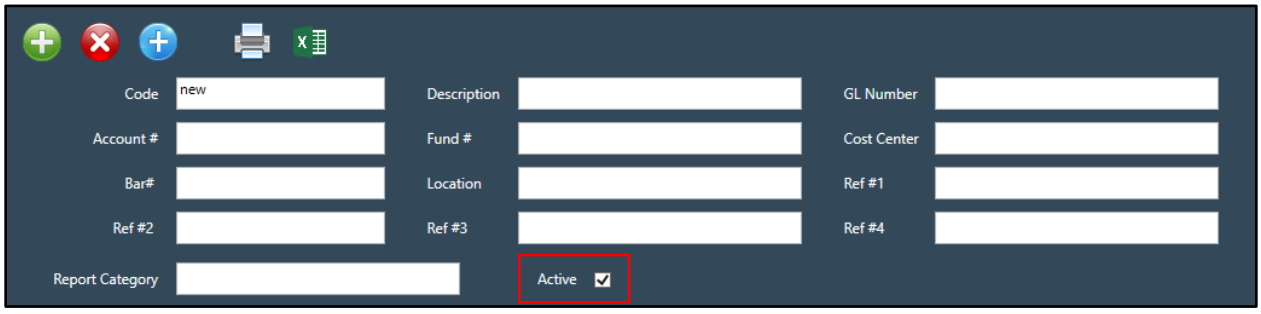
Expected Result: There should be no spelling errors in the approval queue.

Resolution: Fixed spelling error in approval queue's custom search.

106494: GLNumber Active Field

Expected Result: There should be a way to make GLNumbers active or inactive.

Resolution: Added a new Active field to the GLNumbers admin table.



106935: New Values in Audit

Expected Result: Audit records for modifications should display the new value.

Resolution: Fixed issue where audit records for modifications were not displaying the new value.

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Added Features

12026: Update Interest Calculation

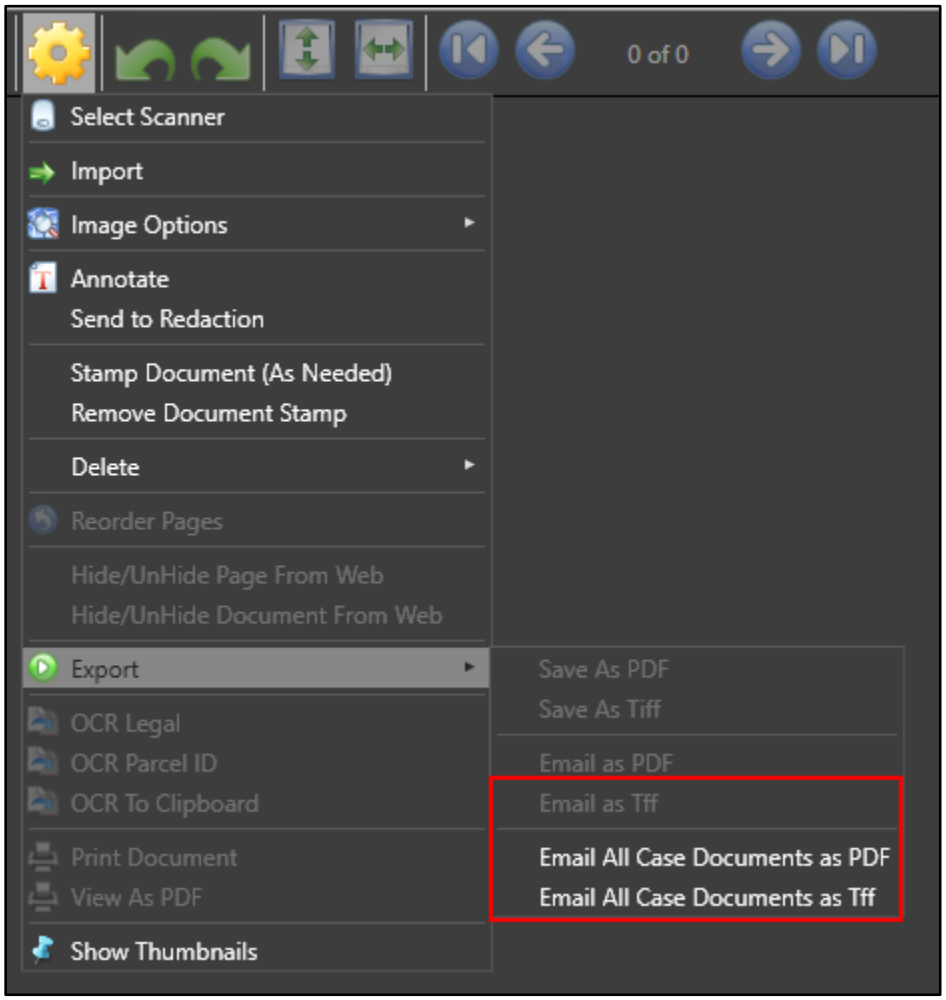
Request Details: Interest calculations should not only be completed on the first set of fees on a case.

Resolution: Fixed an issue where interest would only calculate on the first set of case fees.

12125: Email All Case Documents

Request Details: Users would like to be able to email all case documents

Resolution: Added new menu options to the yellow cog wheel on the documents tab of a case. Users will now be able to email all case documents as either PDFs or TIFFs.



12283: Check Request Config and Approval Queue Update

Request Details: Users would like the ability to configure check requests made on cases to be automatically accepted, rejected, unmodifiable for a certain amount of time, or excluded from the Approval Queue.

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Resolution: Made numerous changes to Check Requests, the Approval Queue, and Admin.

Added columns to CheckRequestQueue Table: ValidDate, ByPassValidDate
For any given record in CheckRequestQueue, this should be logic for reporting these statuses:

Status Approved: CheckRequestQueue.Approved=1 and (ByPassValidate=1 OR ValidDate >= Today's Date)

Status Denied: CheckRequestQueue.Denied=1 and (ByPassValidate=1 OR ValidDate >= Today's Date)

Added columns to CheckRequestType Table:
MinAmountForApprovalQueue - Minimum amount needed to get into Check Approval Queue
AutoDenyWhenAmountLessThanAutoApprove - if true, amount is less than AutoApproveMinAmount, queue item will get marked auto denied
AutoApproveMinAmount - if greater than 0, items added to queue greater than AutoApproveMinAmount and less than AutoApproveMaxAmount will get marked auto approved
AutoApproveMaxAmount - if greater than 0, items added to queue greater than AutoApproveMinAmount and less then AutoApproveMaxAmount will get marked auto approved
ApprovalDays - Number of days after an item is added to Check Approval Queue before it becomes valid to approve or deny.

Added Right: *ApproveChecksBeforeApprovalDate* – Allows user to approve/deny checks before the approval date.



Requires Admin Rights to Configure.

12305: HTTPS Image Service

Request Details: All TaxSmart components should have the ability to access the Image Service through HTTPS.

Resolution: Added the ability for the Image Service to use HTTPS.

12483: User Guide

Request Details: Users would like the user guide to appear in the client.

Resolution: Added a new question mark icon that will appear when the user has TaxSmartUserGuide.pdf in their TaxSmart folder. When clicked, the pdf will open.



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Release 1.1 Service Pack 25

Corrected Issues

106843: Saving Denied Check Requests

Expected Result: Denied Check Requests need to be saved even when changes are made to the approval queue before leaving the menu.

Resolution: Check Requests that get denied will now always be saved. Refreshing the approval queue, leaving the approval queue, or closing TaxSmart will still save the denial.

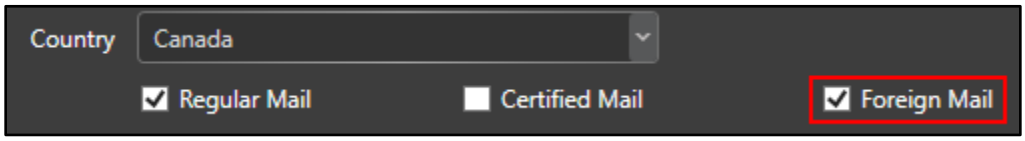
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Added Features

12435: Foreign Mail Auto Selection

Request Details: Setting a party's country outside the U.S. should automatically flag said party as a foreign mail recipient.

Resolution: New setting **AutoSelectForeignMail** will cause the Foreign Mail checkbox to be automatically selected when the user chooses a country that is not the United States.



12453: Original Cashier Date

Request Details: TaxSmart records should keep track of the time a receipt was first created, separate from the dates of any revisions.

Resolution: TaxSmart will now record a receipt's creation date in the OriginalCashierDate column of the Receipts database. This record will not change with revisions or updates to the receipt in question.

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Release 1.1 Service Pack 20

Corrected Issues

N/A

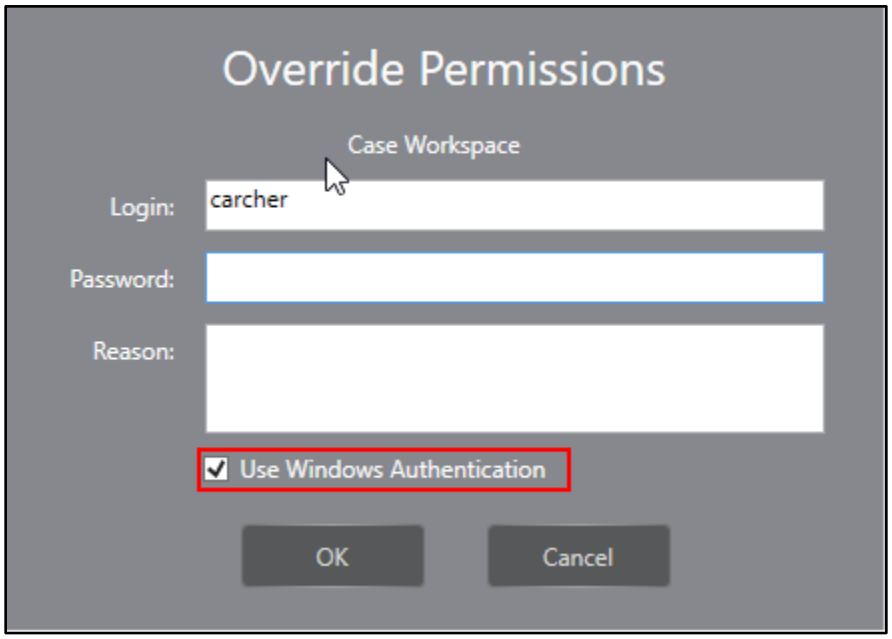
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Added Features

12205: Security Model Should Authenticate Through AD

Request Details: override permission window should have Windows Authentication checkbox.

Resolution: New window includes the Use Windows Authentication checkbox.



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Release 1.1 Service Pack 19

Corrected Issues

106503: Clearing Login Name

Request Details: Users need to be able to clear login information from previous TaxSmart logins.

Resolution: Users, once logged out of an active TaxSmart session, can now correctly clear old usernames from the login screen.

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Added Features

11997: Case "REDEEMED" Status Fee Variable

Request Details: Users would like the ability to configure case fees based on case redemption status.

Resolution: Added Fee Variable **{RedeemedWashOut}**. Returns 0 if the fee's associated case status is REDEEMED and returns 1 for all other case statuses.



Requires Admin Rights to Configure.

11998: Truncate Check Request Address Fields

Request Details: Users should be able to automatically append Address 1 fields with the Address 2 input, as PeopleSoft only has an Address 1 field.

Resolution: Setting **EnforcePeopleSoftFieldLengths** allows users to cause party preset address fields to both appear in the Address 1 text box to match PeopleSoft's formatting.



Requires Admin Rights to Configure.

12000: Auction Re-Sale Status

Request Details: Cases with a changed sale date shouldn't carry case status over to the new date.

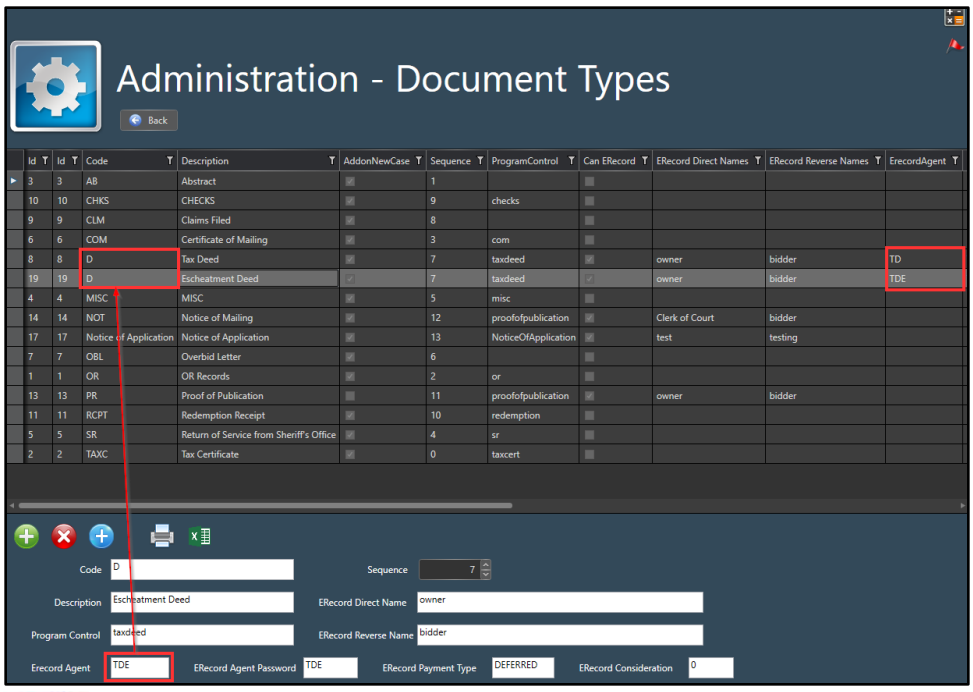
Resolution: When a case receives a new sale date, the new log entry in the Auction History window will have a blank Status rather than taking the status of the previous sale date.

12091: ERecording Multi-Agent Document Mapping

Request Details: Users would like the ability to ERecord the same document type with more than one agent/identifier from Landmark.

Resolution: Added the ability to set up more than one document type for ERecording using the same Landmark document type code.

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Release 1.1 Service Pack 15

Corrected Issues

N/A

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Added Features

11901: Surplus Search Shows Surplus Fields

Request Details: Users should be able to see a variety of fields regarding ledger surpluses in the Surplus Funds search category.

Resolution: When setting **ShowSurplusFields** is active, Surplus Funds search will now show all Surplus Fields as search results. These include 'Surplus to Disburse', 'Surplus Fees', 'Surplus Disbursed', and 'Surplus Remaining'. In addition, Surplus search will no longer return zero balance for surplus amounts.

SurplusFundsToDisburse	SurplusFees	SurplusDisbursed	SurplusRemaining
$440.53	$26.58	$2.00	$411.95
$140.53	$13.90	$0.00	$126.63



Requires Admin Rights to Configure.

11905: Fee Date Syncing

Request Details: Users would like a way to have additional fees' fee dates synch with case dates.

Resolution: Added setting **SynchFeeDatesForNewFees.** If true, newly added fees will have their fee date set to the value determined by existing setting **UpdateApplicantBillFeeDatesTrigger.**

UpdateApplicantBillFeeDatesTrigger values:

0: Don't update

1: Application Date changed

2: Certification Date changed

3. Received Date changed



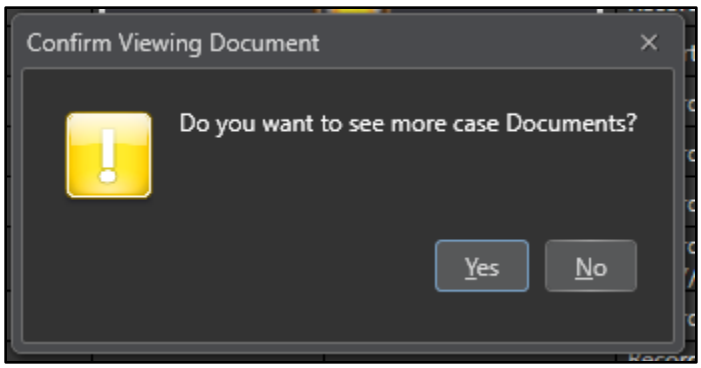
Requires Admin Rights to Configure.

11999: Multi-Case Check Request Document Links

Request Details: Users should be able to see the documents linked to a multi-case check request from every case on the request.

Resolution: Multi-case check requests can now be linked to documents on more than one case. When viewing documents linked to a check request in the approval queue, if more than one case of documents is linked, then the user will be prompted to view documents from the next case once the current case's Document Viewer is closed.

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Release 1.1 Service Pack 14

Corrected Issues

N/A

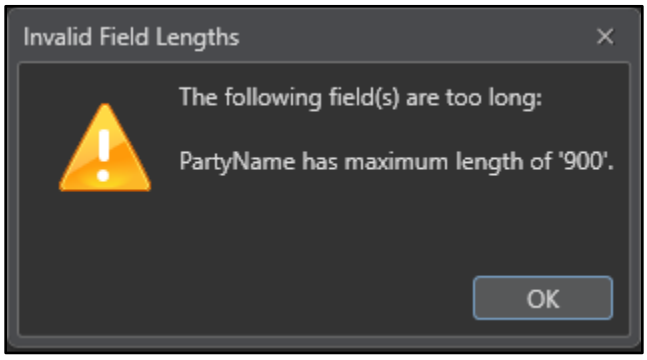
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Added Features

11849: Increased Name Field Size

Request Details: Users should be able to set name fields to longer values.

Resolution: Fields Party.PartyName, PartyLookup.PartyName, CaseAuctionDate.BidderName, and CaseAuctionDate.NewOwnerName have had their character limits extended from 255 to 900.



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Release 1.1 Service Pack 12

Corrected Issues

N/A

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Added Features

10826: Pay by Applicant Disbursement

Request Details: Add the ability to give a certificate holder credit for amounts due to that party towards purchasing a property where they are the certificate holder.

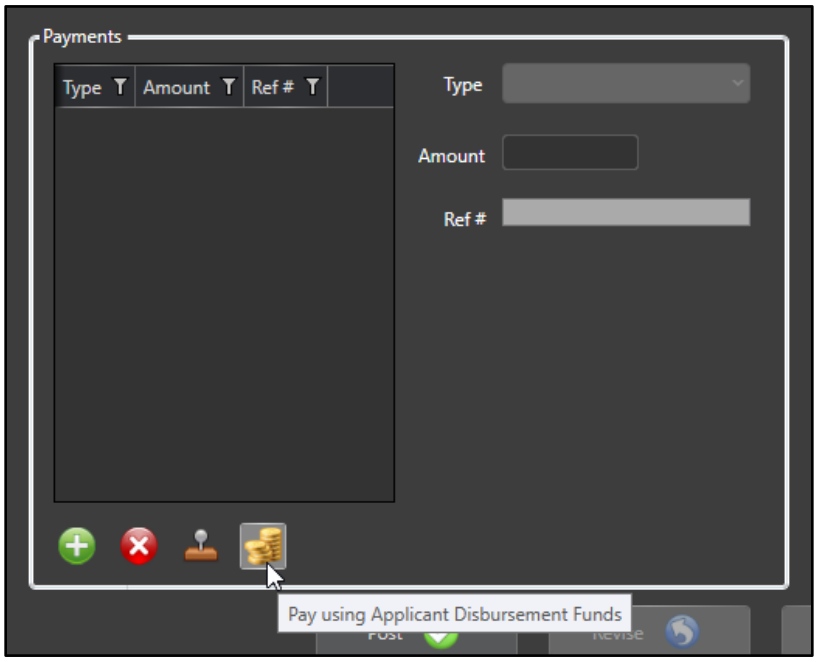
Resolution: Added several settings to enable the ability to pay auction receipts from applicant payouts. Also added the Appliant Disbursement Payment Type, Accounting Party Type, DISBURSEMENT USED FOR PURCHASE Party Lookup, and Disbursement Used for Purchase Check Request Type to accommodate for new settings.

ApplicantPayAuctionFromFundsCheckRequestType: Program control for check request used in disbursement.

ApplicantPayAuctionFromFundsPartyLookupID: Party lookup ID to pay check request funds to.

ApplicantPayAuctionFromFundsPaymentType: Sets the payment type of payments made with applicant payout.

ApplicantPayAuctionFromFundsEnabled: If true, enables the Pay using Applicant Disbursement Funds button on the Receipts tab. Automatically adds a payment for the auction receipt from the applicant's payout. If false, button is hidden.



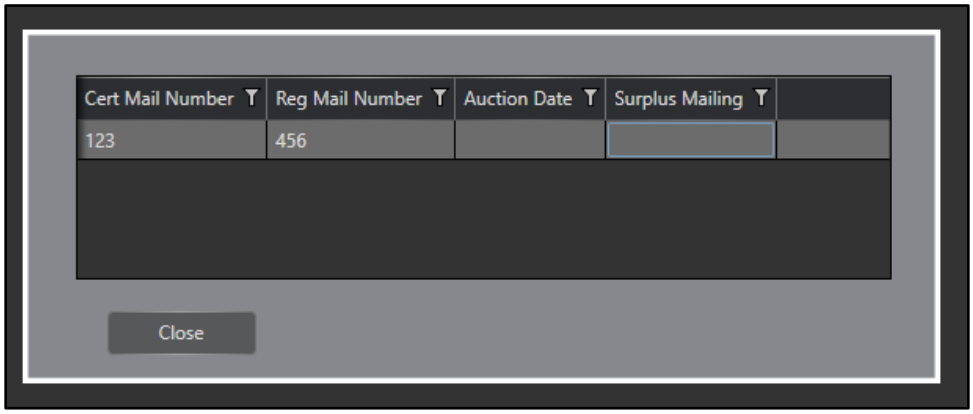
Requires Admin Rights to Configure.

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10837: Display Cert and Reg Mail Numbers

Request Details: Users would like to see both the cert mail number and reg mail number on the mail number pop-up window.

Resolution: Both cert and reg mail numbers are now shown on the mail number pop-up window.



11454: HTML Check Endorsements

Request Details: Users would like check endorsements to support HTML formatting.

Resolution: Added HTML support for the Check endorsement type under the Endorsements screen of the Admin menu. This will be printed to the preferred printer when Endorse Checks is selected on a receipt. The Check endorsement type still supports the previous endorsement formatting.



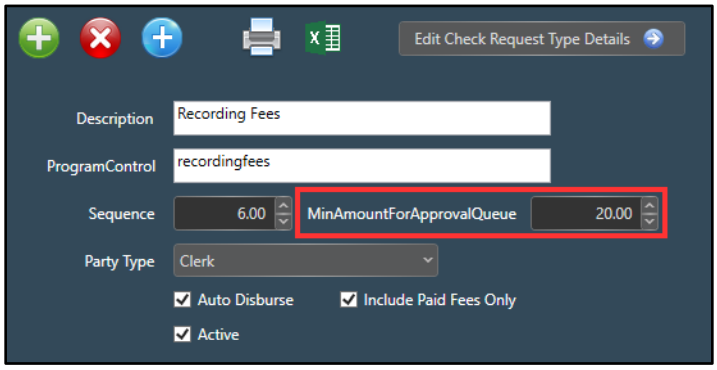
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11614: Minimum Check Request Amount for Approval

Request Details: Check requests should be able to have a minimum refund value where check requests of amounts below the value do not need to be approved.

Resolution: Added check request setting **MinAmountForApprovalQueue** to control the minimum check request amount of the approval queue. Can be set per check request type to skip approval queue if the amount on the posted request is less than the set value. The setting will only appear in the Admin area if the approval queue is being used.



Requires Admin Rights to Configure.

11615: Payment Type and Amount Retention

Request Details: Users would like the payment types and amounts entered to retain once a user leaves and returns to a case.

Resolution: If a user enters a payment type or amount on a receipt or check request, the values entered will still appear once a user leaves and returns to that case.

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Release 1.1 Service Pack 11

Corrected Issues

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Added Features

11616: Applying Overage to Selected Case Functionality

Request Details: The Apply Overage to Selected Case button on the Receipts screen should correctly add an overpayment fee to the currently selected case.

Resolution: The Apply Overage to Selected Case button will now add an overpayment fee to the currently selected case if there is an overage.

11655: Receipt/Check Request Note Defaults

Request Details: Users would like the default notes on check requests and receipts to be configurable.

Resolution: Added settings **ReceiptNote** and **CheckRequestNote** to control the default receipt and check request notes.

CheckRequestNote controls the default note on check requests and supports variables: [,crt.Description] [for Sale Date:,SaleDateFormatted] [Adv Dates:,AdvertisingDatesComma]

ReceiptNote controls the default note on receipts and supports variables: [,rt.Description] [for Sale Date:,SaleDateFormatted] [Adv Dates:,AdvertisingDatesComma]



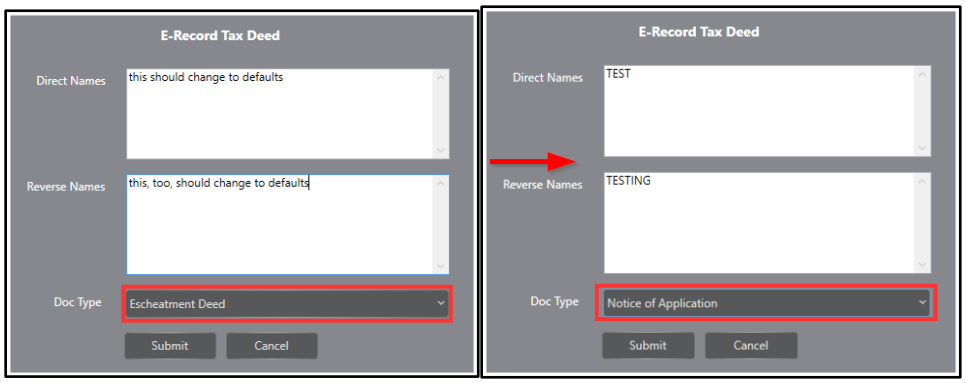
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11656: E-Record Auto-Fill Default Names on Document Type Change

Request Details: In the E-Record window, changing the doc type should update whatever is already in the Direct and Reverse Name fields to the new doc type defaults.

Resolution: Direct and Reverse Names will be updated to the default values when the doc type is changed in the E-Record window. The default name values are defined in Admin->Document Types.



Requires Admin Rights to Configure.

11675: Client-side Online Auction Flag Updates

Request Details: If the auction service resets while a case is open, the Send to Auction flag should be updated to its original value.

Resolution: Fixed an issue where the client would not reset the Send to Auction flag on a case if the flag was reset by the auction service while the case is open.

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Release 1.1 Service Pack 10

Corrected Issues

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Added Features

11618: Multi-case Shortage on Receipt

Request Details: The Adjust Fees for Shortage button should work on shorted receipts with multiple attached cases

Resolution: Using the Adjust Fees for Shortage button now works for multi-case receipts. The button will only adjust fees on the currently selected case if there is a shortage.

11619: Applicant Disbursement Funds on Struck to Applicant Receipts

Request Details: Struck to Applicant receipts should not be able to be paid with applicant disbursement funds.

Resolution: The Pay using Applicant Disbursement Funds coin stack button has been removed from the Struck to Applicant receipt type.

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Release 1.1 Service Pack 6

Corrected Issues

N/A

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Added Features

11280: Search Tasks by Sale Date

Requested Functionality: Add the ability to search all tasks by sale date.

Resolution: Added new Search option Tasks by Sale Date. Searches tasks on all cases within specified sale date range and groups them by due date categories: no date, today, tomorrow, this week, next week, next month, and later. Tasks returned by the search can be completed and uncompleted from the results grid.

11374: Ability to Add New Owner on Auction Screen

Requested Functionality: Add the ability to record the new owner's name on an auction.

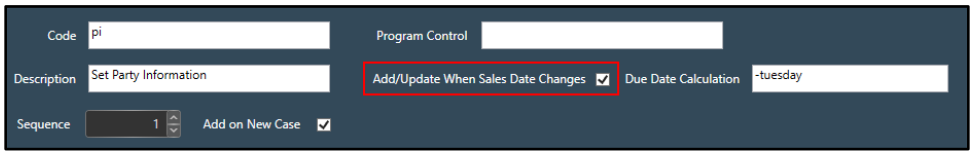
Resolution: Added new owner field to Auction screen. If it is filled out, a new owner party type will be created in addition to the bidder.

Requires Admin Rights to Configure.

11451: Add New Tasks When Sales Date Change

Request Details: Users would like tasks to be added to a case when the sale date changes

Resolution: Tasks will now be automatically added or updated when the sale date of that case changes. Added new field **Add/Update When Sales Date Changes** to task types. Task types with this field enabled will add or update when the sales date changes.



Requires Admin Rights to Configure.

11459: Update Tasks When Sales Date Change

Request Details: Users would like tasks to be updated on a case when the sale date changes

Resolution: Tasks will now be automatically added or updated when the sale date of that case changes. Added new field **Add/Update When Sales Date Changes** to task types. Task types with this field enabled will add or update when the sales date changes.

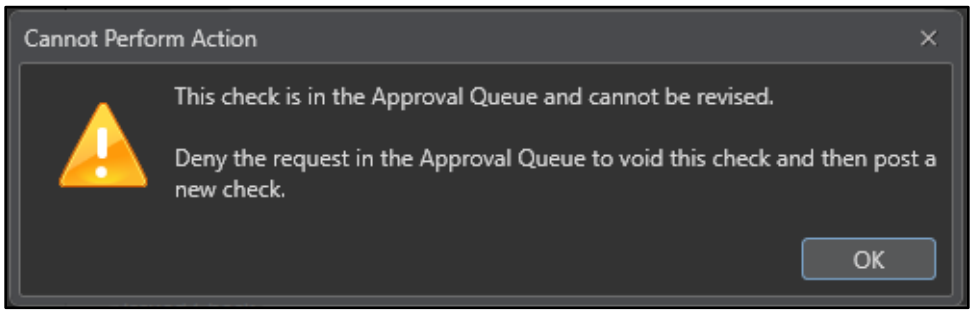
Requires Admin Rights to Configure.

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11461: Void Checks before Approval

Request Details: Users should not be able to void or revise checks that are still in the approval queue.

Resolution: Users are no longer able to void or revise checks that are still in the approval queue. A message will throw telling the user to remove the check from the approval queue. Added new setting **AllowReviseAndVoidingItemsInApprovalQueue.** When true, users will be able to revise and void receipts that are in queue. When false, the warning message will throw if the item is still in queue.





Requires Admin Rights to Configure.

11462: Move Images Image Splitter

Request Details: The image splitter window that appears when moving images between documents should not crash TaxSmart.

Resolution: Moving, opening, or using the "Move Images from one Document to Another" image splitter will no longer cause errors.

11463: Adding Receipt Image to Case

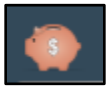
Request Details: Adding a receipt image to a case should not cause errors.

Resolution: Adding a receipt report image to a case will no longer cause memory errors.

11498: PeopleSoft Accounting Interface Records

Request Details: Users would like a way to see the PeopleSoft record in TaxSmart.

Resolution: Added new piggy bank icon to the check request screen. This new button will display the history of interface data.



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13254: New Setting to Control when Cases are Pushed to Auction

Request Details: Allows users to decide when cases are sent to Auction Vendor.

Resolution: Added setting **WaitForApplicantBillReceiptToSendToOnlineAuction**. When 'true', system will wait until applicant bill is receipt before sending cases to online auction provider.

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Release 1.1.0 Service Pack 10

Corrected Issues

N/A

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Added Features

10340: Ability to Send E-Mails Using Windows Service

Request Details: Add the ability to send e-mail notifications from a separate server using Windows service.

Resolution: Added ability to send SMTP e-mail and text notifications using Jury Windows Service instead of client. Added Setting: **SendEmailsUsingService** - if true, SMTP e-mails and texts will get sent using windows service instead of from individual client PCs. Added Setting: **RunServiceNotifications** - if true, Notifications Service will run; requires Existing Setting: **JuryWindowsServiceActive** set to true. Added Setting: **NotificationsLastRunDate –** will show date last Notifications Service was run. Added Setting: **NotificationsCheckInterval** - number of minutes to wait between Notifications Service runs.



Requires Admin Rights to Configure.

10819: Image Manipulation Logging

Request Details: User attempts to append, delete, or otherwise manipulate images uploaded to a case should be logged.

Resolution: Attempting to append, replace, delete, join, or split documents will now leave a record in the LogInfo table, even if the action is cancelled.

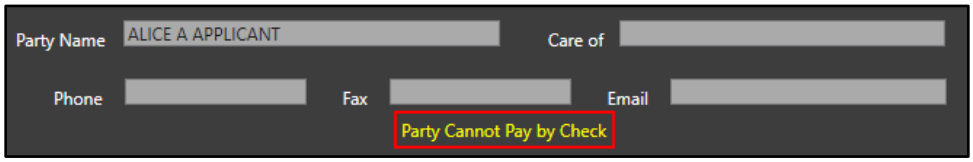
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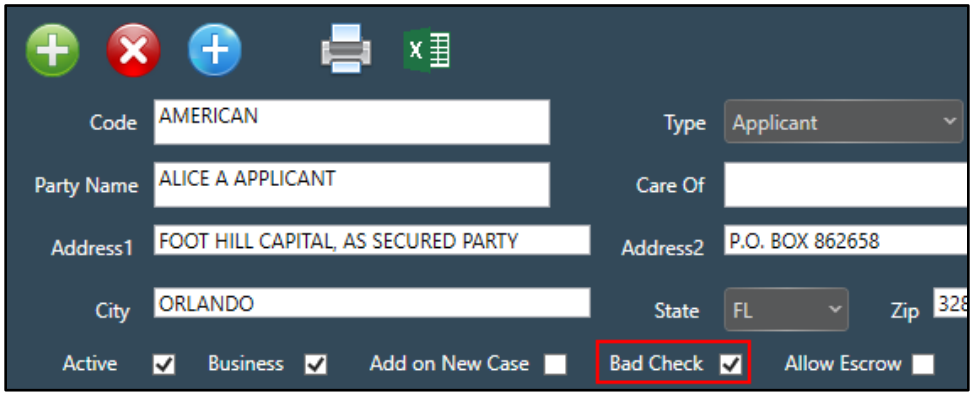
10820: Bad Check Flag

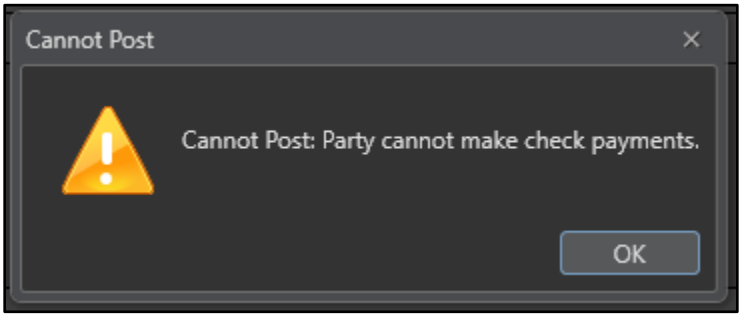
Requested Functionality: Add the ability to flag a party for bad checks.

Resolution: Added a Bad Check flag to the Party Lookup table. The flag displays a message on the Party screen and disables that party's ability to pay by check.

Admin -> Party Lookups







Requires Admin Rights to Configure.

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10824: Allow Configurable Security Based on Active Directory Groups

Requested Functionality: Add a way to create new users, disable users, and add to groups with the same Active Directory name.

Resolution: Added SQL Stored Procedures: **ModifyUserRole** and **DisableUser** that can be used as a way of syncing Active Directory Users and Roles.

ModifyUserRole - Add user if they do not already exist:

If @AddRole = 1, it will add them to clerk role; if @AddRole = 2, it will remove them from clerk role

```
EXEC    [dbo].[ModifyUserRole]
        @username = N'Username',
        @fullname = N'Full Name',
        @password = N'Password',
        @Role = N'Clerk',
        @AddRole = 1
```

DisableUser - Set user Active to false:

```
EXEC     [dbo].[DisableUser]
        @username = N'Username'
```



Requires Admin Rights to Configure.

10841: Ability to Designate the Surplus

Requested Functionality: Create a new workspace tab in the case screen. User should be able to see the available surplus here. Claims can be added and tied back to a party on the case. Include date fields for received date and approved/rejected date. Add a claim status and ability to create a check request for a claim if it is approved.

Resolution: Added a Claims tab to the Case screen. When a claim status is changed to approved, a 'Create Check Request' button appears next to status. Claims have been added as a search type and column in the Search screen. Claim Statuses can be created and edited from the **Admin>Claim Statuses** screen.





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10848: Ability to Check Image Integrity

Requested Functionality: Provide image integrity checks through hashes/checksums.

Resolution: Added new setting: **CheckImageIntegrity** which, if true, checks images against hash on Document Image record.



Requires Admin Rights to Configure.

10852: Display Surplus Amounts

Requested Functionality: Add the ability to check surplus amounts on a case.

Resolution: Added setting **ShowSurplusFields.** If true, surplus fields will appear at the top of the Ledger and Claims case tabs:

Surplus To Disburse: Total amount of surplus including fees.
Surplus Fees: Surplus clerk, mail, and disbursement fees.
Surplus Disbursed: Amount of non-fees disbursed.
Surplus Remaining: Total of non-fees remaining to disburse.

Also added setting **ShowSurplusFieldsUseOldSurplusSearch.** If true, the Surplus Funds search will use the older surplus search to allow old cases to be opened and populate the new surplus fields. This can be turned off once all old cases have been opened.

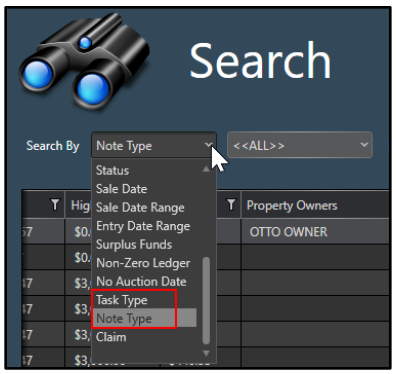


Requires Admin Rights to Configure.

10853: Add Notes and Tasks to Search Grid

Requested Functionality: Add custom case lists of all tasks due today. Add a task workspace to see all tasks due on or between dates.

Resolution: Added Memo fields to Tasks and Notes. Added ability to search by ALL for Notes and Tasks in the search screen. Added Notes and Tasks columns to the search grid.



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11103: Rename Instances of 'Checkmark' to 'TaxSmart'

Requested Functionality: TaxSmart installer should not have references to the name Checkmark

Resolution: All references to Checkmark have been removed from the TaxSmart installation package and related shortcuts.

11108: Trademarked Logos and Copyright Year

Requested Functionality: Update all logos in the application for the product and pioneer with TM included. Update copyrights to current year. Add a About screen in Preferences workspace.

Resolution: Added About screen in Preferences workspace and added copyright info to login screen.

11283: Manual Auction Deposit Receipts Update Case Auction Records

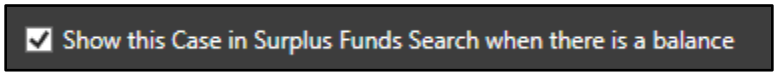
Requested Functionality: Manually entered auction deposits should update the case auction records.

Resolution: Auction deposit receipts entered manually in Case will now update case auction records automatically.

11286: Surplus Funds Search Not Returning Case with Surplu**s**

Requested Functionality: Add ability to stop certain cases with a surplus from appearing in the Surplus Funds search.

Resolution: Added new setting: **ShowInSurplusVisible** which, if true, enables a check option on the Ledger tab to show or hide the case from Surplus Funds search. If false, all cases with surplus funds will be shown in the search.





Requires Admin Rights to Configure.

11445: Allow Modification of Applicant Party Type

Requested Functionality: Applicant party types on a case should be able to have their party type changed or be deleted.

Resolution: Applicant party type selection box is now enabled and changeable until an applicant lookup is assigned.

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11446: Allow Check Payments by Default

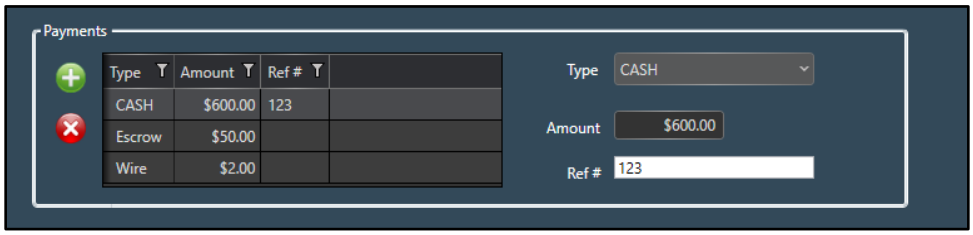
Requested Functionality: Parties on a case should be able to pay with checks by default.

Resolution: Case parties are no longer required to be in the party lookup table to be able to pay by check.

11447: Allow Multiple Auction Deposit Payment Types

Requested Functionality: Parties should have the ability to pay auction deposits with multiple different payment types.

Resolution: Added setting **AllowMultipleDepositPayments.** If true, auction deposits can be fulfilled from several different payment methods. Adds a payment grid to the Auction screen to support multiple payment types.

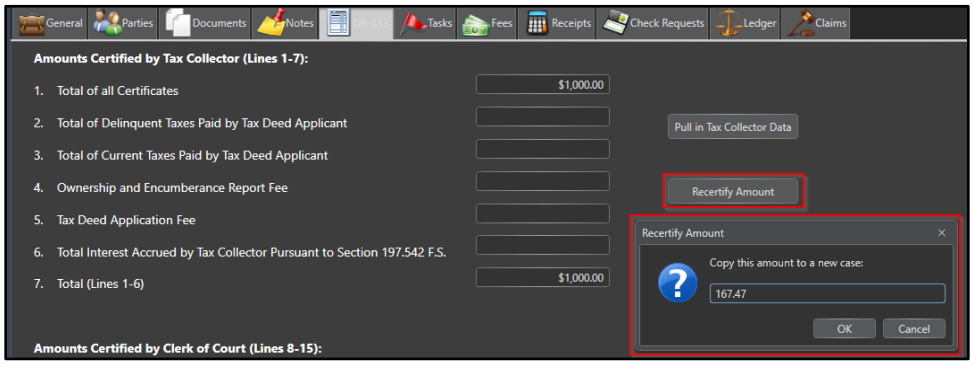


Requires Admin Rights to Configure.

11449: Case Recertification

Requested Functionality: Users should be able to recertify case by date and obtain recertify amount.

Resolution: Added setting **ShowRecertifyButton.** If true, shows Recertify Amount button on DR-513 Case tab. After selecting a recertification date, the button will give the appropriate recertify amount to copy into a new case.



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11456: Show Certificate Number on Image Stamp

Requested Functionality: Stamps applied to document images should show the case's Certificate Number.

Resolution: Added Certificate Number to applied endorsement stamps.

11460: Recent Case Certificate Number

Requested Functionality: Add a case's Certificate Number to the case entry in Recent Cases.

Resolution: Added Tax Certificate Number to case information on the recent case list.

11613: Accounting Closeout Error

Requested Functionality: Closing out a cashier, leaving, then attempting to navigate back to the Accounting screen should not throw an error.

Resolution: Fixed issue where backing out of the Accounting screen after closing out would cause a null reference error when trying to reopen the workspace.

11622: Multiple Payments for Deposit

Requested Functionality: Using the Apply Results button when checking out multiple deposit payments should not tell the user that the deposit is not entered when it is.

Resolution: Fixed issue where auction deposit checking was not working with setting **AllowMultipleDepositPayments.**

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Release 1.1.0 Service Pack 5

Corrected Issues

N/A

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Added Features

10780: Prevent Errors when Setting Scanner Capabilities

Requested Functionality: Prevent errors when trying to set scanner capabilities.

Resolution: Added checks and logging when scanner driver does not support setting capabilities.

10818: Void a Check Individually

Requested Functionality: If there is more than one check on a receipt, allow ability to void one check and then void a different check without having to manipulate the first.

Resolution: Added NSF button to individually void a check without voiding the entire receipt.

10821: System Security: System Database Protection

Requested Functionality: Add system database protection with password that allows read-only capability (read only account).

Resolution: Added ReadOnly flag in Admin>User Accounts. If a User is flagged as ReadOnly then no changes made on the screen will be saved to the database.

10827: Show Create Date of Documents

Requested Functionality: Maintain separate folders for scanned items: tax deed, DR-513, publication, affidavit, other documents, sheriff notices/returns, envelopes and claims.

Resolution: Added Create Date to the documents grid as a sortable column. Added a resizable splitter between the grid and the images.

10829: Move Images from Document

Requested Functionality: Add the ability to move images from one document to another or on the same document.

Resolution: Added ability to move images from one document to another using new move images button. Added right to *MoveImage*s.

10833: Electronically Time Stamp Documents

Requested Functionality: Add the ability to electronically time stamp documents when received.

Resolution: Added ability to stamp document images when they are added. Added setting **StampDocumentImagesOnAdd**, when set to true endorsements will be setup to stamp on documents.



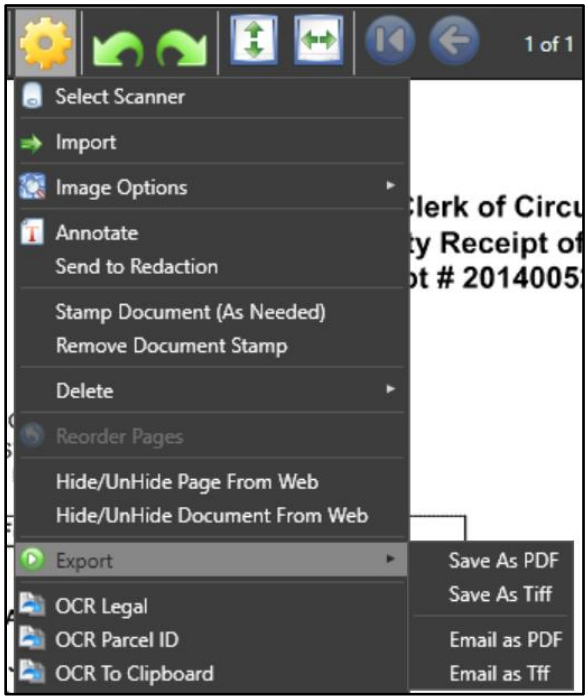
Requires Admin Rights to Configure.

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10834: Electronic Transmission

Requested Functionality: Add a way for the system to interface with the Tax collector's Office, Sheriff's Office, Online Auction Site, and Advertiser of Publications.

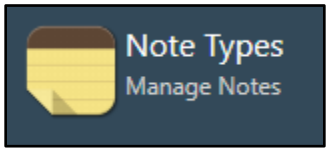
Resolution: Added ability to email images from the document tab. Emailing option will be available in the yellow gear icon menu under Export. The document description and case number in the file name will be attached to the email.



10840: Provide Option to Flag Certificates

Requested Functionality: Add to the Notes section of the application.

Resolution: Added new table: Note Types where notes can be configured. Added search functionality for note and case types. Notes can be setup to auto-add on new case. Notes can be setup to show an alert when opening a case. Case notes and tasks can now be linked to party. Added Note Type and Task Type to Searches.





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10843: Retain Receipt Number When Revisions are Made

Requested Functionality: To make it known when revisions are made to a receipt, add a letter to the end of the receipt number corresponding to the number of revisions

Resolution: A/B/C… will be added to the end of a receipt number when a revision is made

10844: Ability to Search by Check Number/Check Amount within Date Ranges

Request Details: Add the ability to search for checks by number or amount within certain date ranges.

Resolution: Added the ability to filter reports by type on reports screen. Added link to Reports from the Search screen that jumps to search-type reports. Added search-type report for check search.

10845: Automatically Create an Image of Receipts

Request Details: Make the system automatically create an image of receipts that are posted.

Resolution: Added the setting **AutoImageReceiptOnPost** which determine if receipt images will be generated when a receipt is posted. When set to 'true' receipt images will be posted to that tax deed file.



Requires Admin Rights to Configure.

10849: Ability to Change System Application Screen

Requested Functionality: Ability to change system application screen colors, resolution and save settings per workstation. Ability to change color of title bar.

Resolution: Added tags to connection file to allow showing of a bottom title bar. Added ability to change color of title bar via a setting. Following are the added tags:

<BottomBarColor>Color**</BottomBarcolor>**

<BottomBarTextColor>Color **</BottomBarTextColor>**

<BottomBarText>Text **</BottomBarText>**



Requires Admin Rights to Configure.

10850: Save And Edit Redaction Annotations

Requested Functionality: Add ability to save and edit all annotations.

Resolution: Added ability to save and edit all annotations after they have been burned into the image. Annotations can be moved around and resized when the Annotate option is selected. Dynamic image annotations can be added from tool in annotation toolbar.

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10854: Approval Queues for Different Types of Disbursements

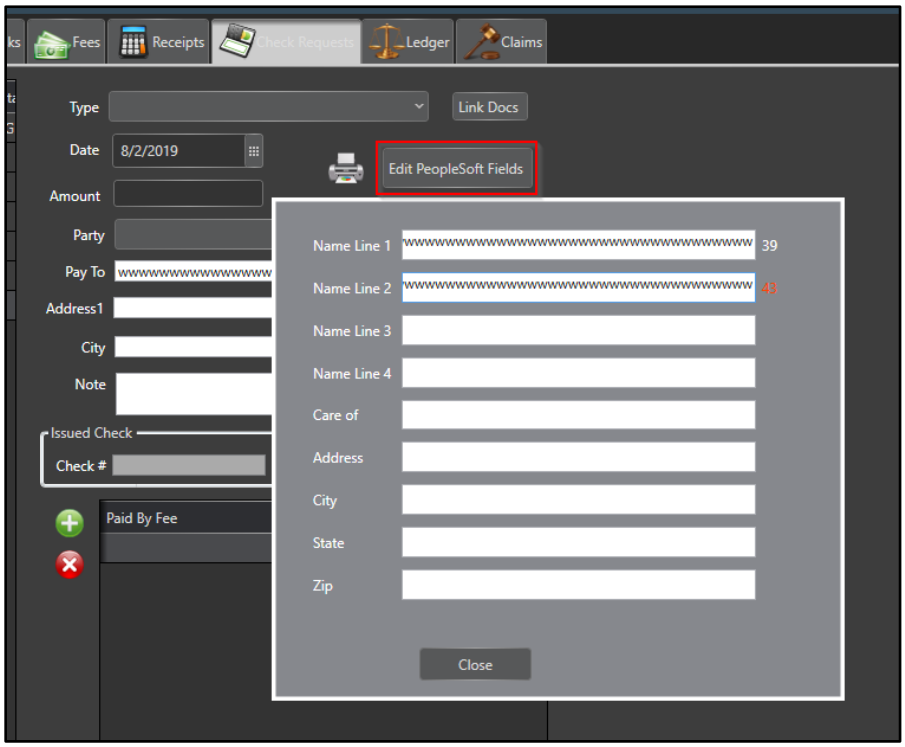
Request Details: Provide approval queues for the different types of disbursements, and allow them to be system controlled.

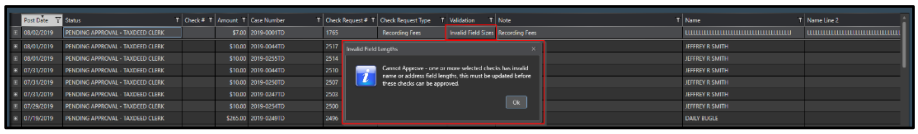
Resolution: Added approval queues for check requests. Added Approval Levels to Admin workspace to control approval queue levels per check request type. Added a button to Multi-Case Check Request Screen to show the Approval Queue.

10855: PeopleSoft Check Fields

Requested Functionality: Add ability to enforce PeopleSoft-defined field lengths on check requests

Resolution: Added new setting: **EnforcePeopleSoftFieldLengths** which, if true, adds a PeopleSoft field input box to check requests and enforces PeopleSoft field lengths for checks in the Approval Queue. If a check request with improper field lengths is posted to the approval queue, that check cannot be approved until the field lengths are revised.





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10856: Check Requests Cannot Be Modified Once Put in Approval Queue

Requested Functionality: Do not allow changes to made on check requests that are in the approval queue.

Resolution: Check requests can only be modified from within the approval queue. If a user tries to modify a check elsewhere, a message will display indicating what steps they must perform in the queue.

10857: Void Check Requests When They Are Rejected

Requested Functionality: If a disbursement request is rejected in the approval queue then that disbursement is automatically voided.

Resolution: Denying a disbursement request within the approval queue now voids the disbursement, and an appropriate entry is made in the financial ledger.

10859: Require Admin Override When Marking Checks for Insufficient Funds

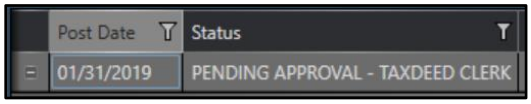
Requested Functionality: Require an admin override that includes a reason when marking a check for insufficient funds.

Resolution: NSF/Un-NSF (insufficient funds) now require an override reason, and that reason will be linked to the receipt.

10860: Miscellaneous Approval Queue for Over Payment

Expected Result: The approval queue for over payment refunds must include the receipt date so the aging of the refund may be visually monitored.

Resolution: Approval Queue now included the Post Date of the check request.



10861: Add Bank Deposit Requirement for Closeout Reconciliation

Requested Functionality: Make End of Day Balance include reconciliation of all payment types, including the bank deposit.

Resolution: Added the setting **ShowDepositID** to toggle whether or not deposit ID is shown and required to reconcile. True = shown and required; false = not shown or required.

11273: Access a Case from Approval Queue

Requested Functionality: Add ability to double click a case from the check request queue.

Resolution: Double-clicking the row on an approval grid will open a case for that check request.

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11274: Add Comments for both Approvals and Denials

Requested Functionality: Add ability to add comments whether check requests are approved or denied.

Resolution: Approving check requests now prompts user to enter comments.

11275: Show Check Requests Notes from Approval Queue Grids

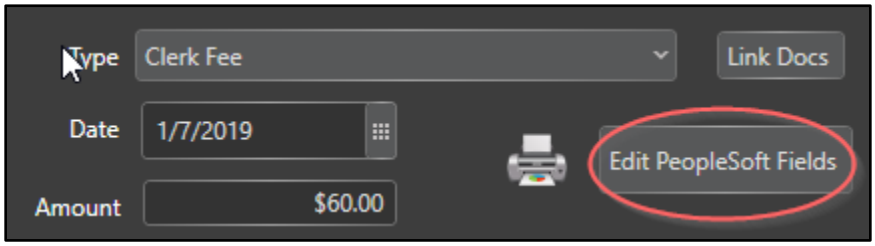
Requested Functionality: Add ability to check notes on check requests from the approval queue.

Resolution: Column added in the approval queue to view check requests notes.

11276: Allow Address to be Edited from Check Request

Requested Functionality: Do not allow address to be modified from the approval queue.

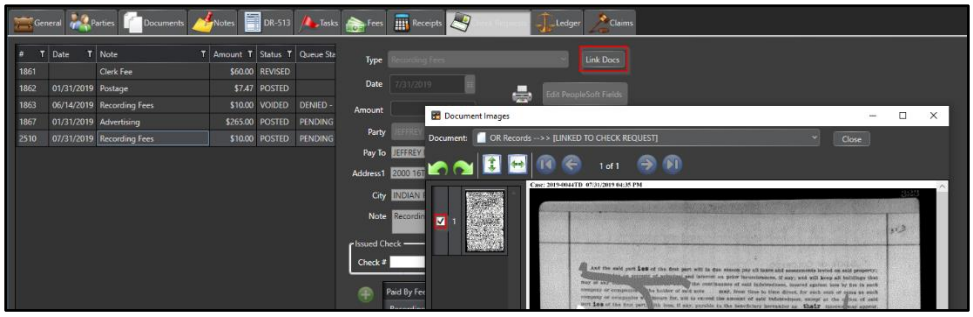
Resolution: Address fields can only be edited from check request screen from the PeopleSoft field.

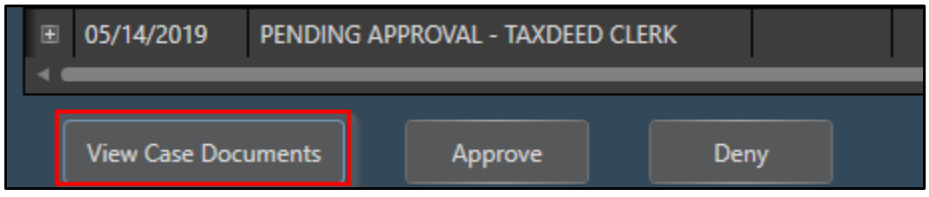


11278: Link Document Pages to Check Request

Requested Functionality: Add ability to link document images from a case to a check request.

Resolution: Added Link Docs button to Check Requests, when clicked will show popup with uploaded document images. Checked pages will be linked to the check request after a save prompt upon closing the window. Documents linked to check requests can be viewed with the View Case Documents button in the check request Approval Queue.





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11279: Expand Column Sizes from Search Screen

Requested Functionality: Expand columns to see all claims without information getting cut off.

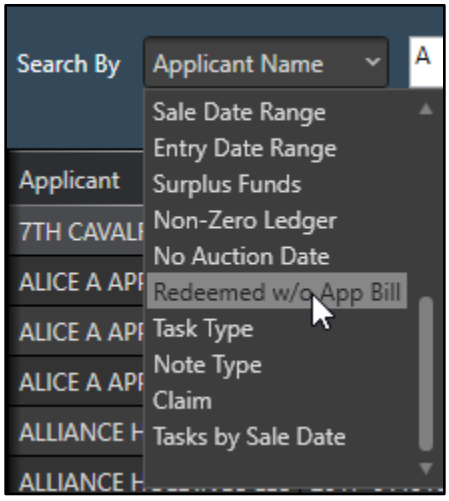
Resolution: Top right of search screen has an option to expand rows.



11282: Search Redeemed Cases

Requested Functionality: Add ability to search a case that has been redeemed and doesn't have an applicant bill receipt

Resolution: New Search Type added called 'Redeemed w/o App Bill'



11304: Expand Notes from Check Request Tab

Requested Functionality: Allow notes field to scroll so they are not cut off.

Resolution: Vertical scroll bars are available when text field is being edited. The full note will also show in grid.

11412: Changing Real Auction to Online Auction

Requested Functionality: Under the DR513 tab, Real Auction should say Online Auction

Resolution: Under DR513 tab, below the Sherriff's Fee, it now says 'Online Auction Fee'

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Release 1.0.0 Service Pack 86

Corrected Issues

19753: Check Request Number Field is not Saving Information

Expected Functionality: The check number and date should save upon leaving the case or quitting the application.

Resolution: Fixed the database commit for check numbers and dates.

20705: Auto Save

Expected Result: When text is entered in a case, it should automatically be saved when you leave the case.

Resolution: Fixed an issue where data might not save on the case workspace.

20924: Report Export Adding '?' in SQL Text

Expected Result: Exporting SQL should not replace "FOR XML" with question mark characters.

Resolution: Fixed issue where exporting reports to XML could add extra question marks in the SQL Text.

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Added Features

9476: CSV Files as Attachments in Emails

Request Details: Non-Crystal Reports and search results should be able to be attached onto emails as .csv files.

Resolution: Search results and non-Crystal Reports can now be exported and attached as spreadsheets on emails.



10012: Ability to User SSRS Reports

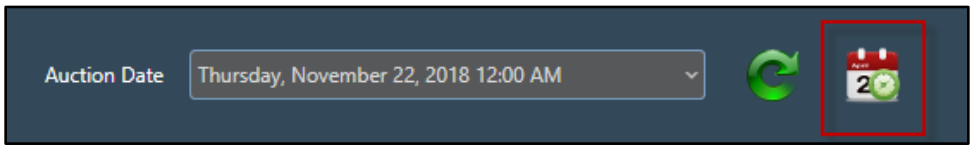
Request Details: Add the ability to use SSRS report types.

Resolution: Added the ability to use SSRS reports.

10355: Change Auction Dates

Request Details: Users would like to be able to update Auction Dates.

Resolution: Added a button that allows users to update the Sales Date for a given Auction Date from the Auction Workspace.





Requires Admin Rights to Configure.

10356: Multi-Assign Sales Date

Request Details: Users would like the ability to add cases to a sales date from the search screen

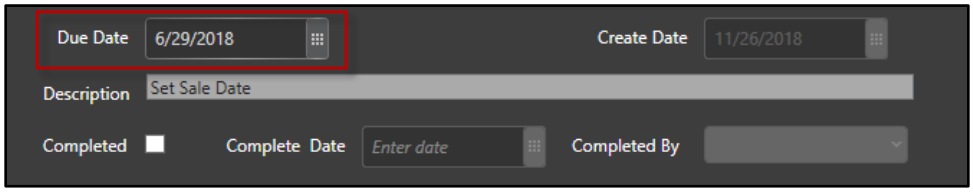
Resolution: Added ability to multi-select and multi-add cases without a sales date to a sales date from within the search workspace.

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10357: Sale and Due Date Calculations

Request Details: Users would like to be able auto calculate sales dates through tasks.

Resolution: Due dates can now automatically be calculated with a task.



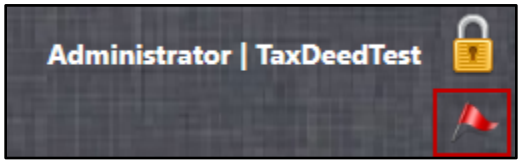


Requires Admin Rights to Configure.

10454: Overdue Tasks

Request Details: Users would like to be able to view overdue tasks from the home screen.

Resolution: Added flag to the home screen. When clicked, the Overdue Task report will run showing users all the cases with overdue tasks.



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Corrected Issues

18871: Case Logic may Cause Changes to not Save

Expected Results: Case information should not fail to save properly.

Resolution: Adjusted performance logic to better handle all case saving scenarios.

19191: Reports Always Print in Portrait

Expected Result: If a report is selected to print in landscape, it should not print in the incorrect orientation.

Resolution: Landscape reports now print appropriately.

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Added Features

8155: Clear Grid Filters

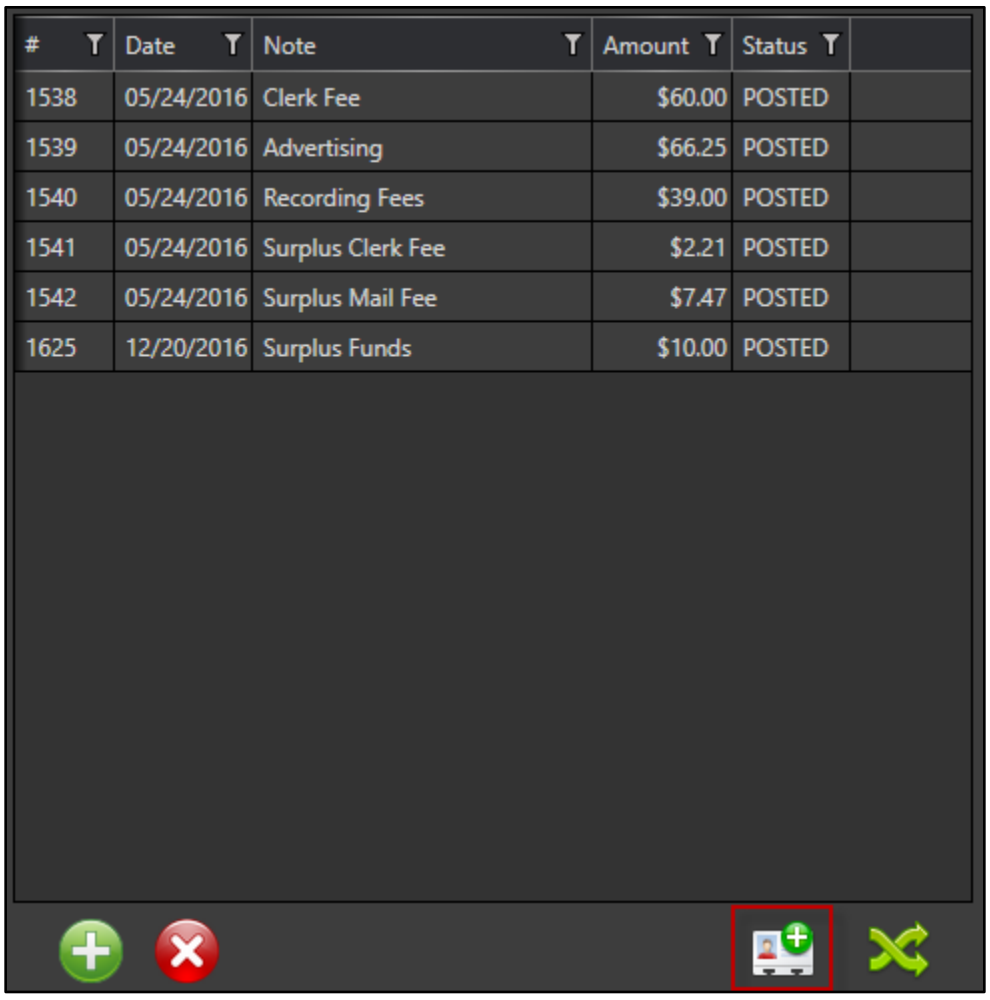
Request Details: Need a quick way to clear any filters that may have been set through any grid based menu.

Resolution: Right clicking in a row of the grid will clear any set sorting filters.

8156: Auto Disburse Fee Button

Request Details: A way for auto disbursing $10 clerk fee for writing surplus checks is needed.

Resolution: Button for this has been added at the bottom of the Check Requests screen.

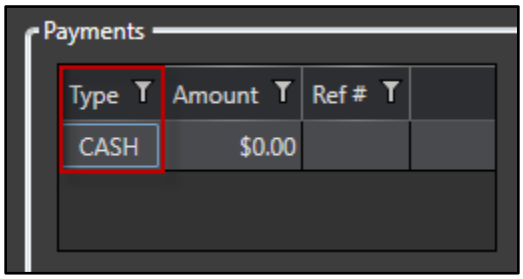


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8157: Default Payment Selection

Request Details: Ability to change the default payment when making a new payment from the Receipts menu.

Resolution: Setting **DefaultPaymentCode** added. Whatever the value is set to will be the default value for payments. In the image below, the setting is set to Cash.



DefaultPaymentCode can be set to any active *PaymentType* code.

Requires Admin Rights to Configure.

8158: City and State AutoPopulate

Request Details: City and State information should autofill when a zip code is entered.

Resolution: City and state are now populated from the zip code.

8648: Rounding Rule

Request Details: Users would like a way to control how fees are rounded.

Resolution: Added setting **RoundingRule** to control whether fees round towards or away from zero.

Requires Admin Rights to Configure.

8774: Double Click on Receipt/Check Request Grids

Request Details: From within a case, double clicking on a receipt or check entry should take you to their respective screens directly.

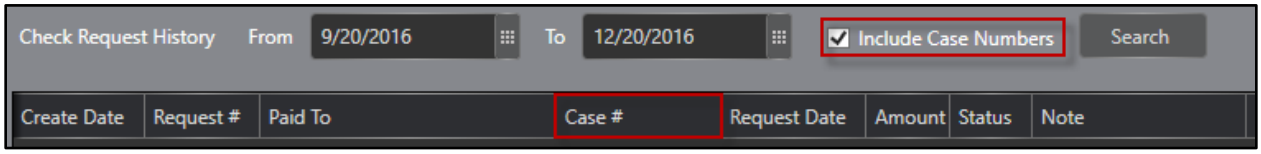
Resolution: Double clicking on a receipt from within a case takes you to the Multi-Case Receipt screen. Double clicking on a check from within a case takes you to the Check Request screen.

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8778: Option to Display Case Numbers on Searches

Request Details: Displaying case numbers on searches should be a toggleable option.

Resolution: Checkbox for displaying case number on searches has been added to relevant windows.



8856: Performance Optimizations

Request Details: Increase Overall Performance When Saving Cases/Receipts/Check Requests.

Resolution: Increased Overall Performance When Saving Cases/Receipts/Check Requests.

8906: Add Duplicate Button to each Admin Screen

Request Details: Add the ability to duplicate any entry in any admin table.

Resolution: A duplicate button was added to all of the admin screens

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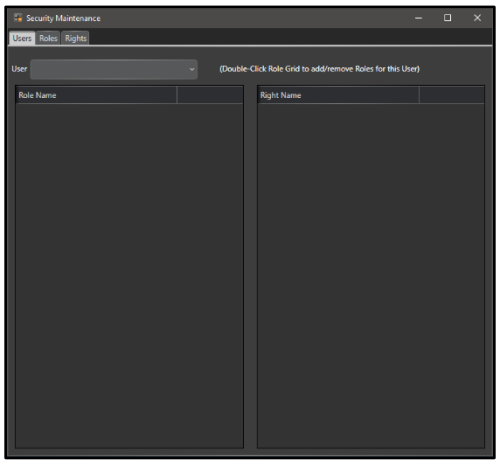
8907: Easier Way to Maintain User/Role/Right Security

Request Details: There should be an easier way to maintain users, roles, and right security.

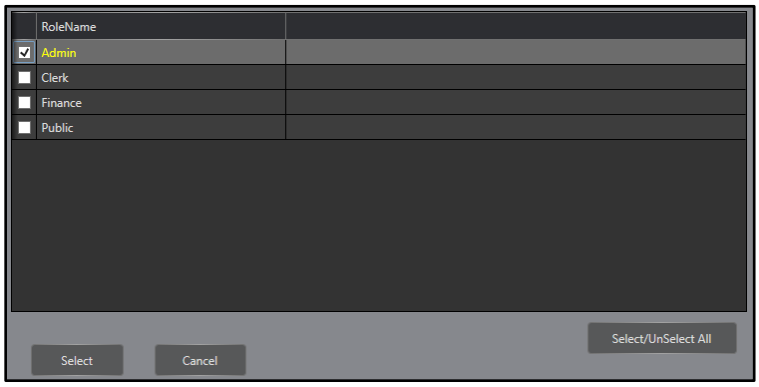
Resolution: A new Security button has been added to the Admin screen.



When clicked on, this window will appear:

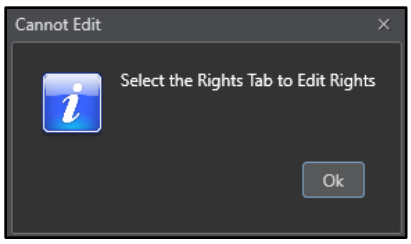


To add, remove, or edit security settings, users will need to double click on a row for the edit window to appear.

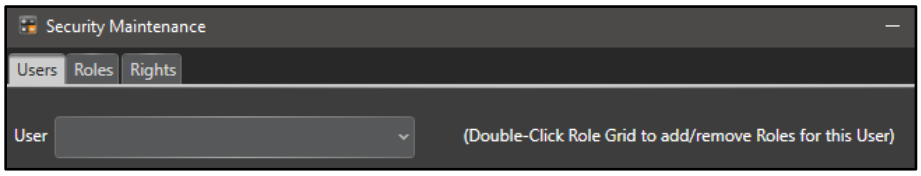


If users attempt to edit rights from the Users tab, they will receive this error message.

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Same goes for attempting to edit users from the Rights tab. When viewing the Roles tab, users can edit either rights or users. If the Security Maintenance window appears blank, it will be because a user is not selected in the "User" field.



Requires Admin Rights to Configure.

8922: Default Report Timeout

Request Details: Extend the amount of time allowed for a report to run before reporting an error.

Resolution: Reports timeout has been increased to six minutes from thirty seconds in order to allow for longer running reports.

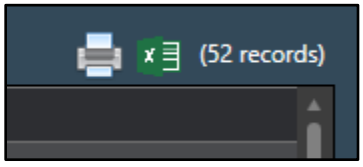
9021: Add Option for Print Preview and Export to Excel for Search Grid Reports

Request Details: Add option for print preview and export to excel for search grid reports.

Resolution: Added new setting **ReportGridPrintPreview**.

0 – No print preview or Excel export buttons show on the search grid.

1 – Print preview and Excel export buttons show on the search grid.



Requires Admin Rights to Configure.

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