FH Standard and Enterprise 7.9.14 Release Notes

A xerox Company

Introduction

These Release Notes are for **FIREHOUSE** Software® release 7.9.14 and provide a listing of the issues resolved and enhancements implemented during this release. The changes listed in the Release Notes apply to both FH® Standard and Enterprise editions.

Issues resolved

The following issues were successfully resolved this release.

Error message when designing a query

Issue When a user chose **Tools** → **Queries**, selected a query and clicked **Properties**, and then in the **Query Designer** dialog box clicked the **Having** tab, clicked **Add**, selected **Join** in the **Type** column, and then selected **INCI_NO** in the **Source** column, the following error appeared.

```
Error 12: Variable FUNCTION not found
```

Resolution The issue has been resolved.

Error appeared when accessing Lookup dialog box for zip codes

Issue If a user created groups in their city, state, and zip code lookup entries, and also selected the **Do not require Zip Code** option (located in the **Administrative Options** dialog box, on the **Incident**→ **All Incidents** → **General** tab, in the Rules section), an `Error 11` message appeared whenever the **Lookup** dialog box for zip codes was accessed.

Resolution The issue has been resolved.

Enhancements

The following enhancements were implemented this release.

Last location now saves in the FH Web browser

When you open a file from or save a file to a specific location, FH remembers the path to the location, and the next time you open or save a file, the file browser automatically opens to that location. The FH Web file browser now also remembers the path to the location, and automatically opens to that location.

Refund payment overages

You can now refund overpayments or unapplied amounts to a client, instead of being restricted to using an overpayment or unapplied amount as a credit for future use. Refunds can be issued as a check, cash, or credit card, and accounts can still use unapplied amounts as credit for future use. Credit adjustments cannot be processed on refunds.

Information on refunding payment overage is available in the ***FIREHOUSE*** *Software Accounts Receivable User's Guide*, under:

- **Work with payments, credits, and refunds → Apply a refund**, **Open an existing refund record**, and **Edit a refund**

Add late fees to unpaid invoices

You can now define an invoice item lookup code that is used exclusively for late fee invoice processing. Active accounts can calculate and create invoices with unpaid balances (not including late fee balances).

Once the invoice item lookup code for late fee invoice processing is set up, you can:

- Manually generate invoices with late fees for a specific active account.
- Specify parameters and batch-generate invoices with late fees for active accounts.
- View the generated late fee invoice.
- View the individual late-fee invoice item details.
- Generate a late fee invoice report.

Information on adding late fees to unpaid invoices is available in the ***FIREHOUSE*** *Software Accounts Receivable User's Guide*, under:

- **Configure FH Accounts Receivable → Add general account and invoice lookup codes → Add remaining account and invoice lookup codes**
- **Work with invoices → Batch-generate invoices → Batch-generate invoices with late fees**
- **Work with invoices → Generate late fee invoices for a single account**, **View a late-fee invoice**, and **View a late-fee invoice item**

Prompt to apply overage to new invoice

In previous releases, if you created a new invoice on an account and the account had an overage balance on it, FH automatically applied the overage to the new invoice. Now you can set an administrative option that controls this behavior.

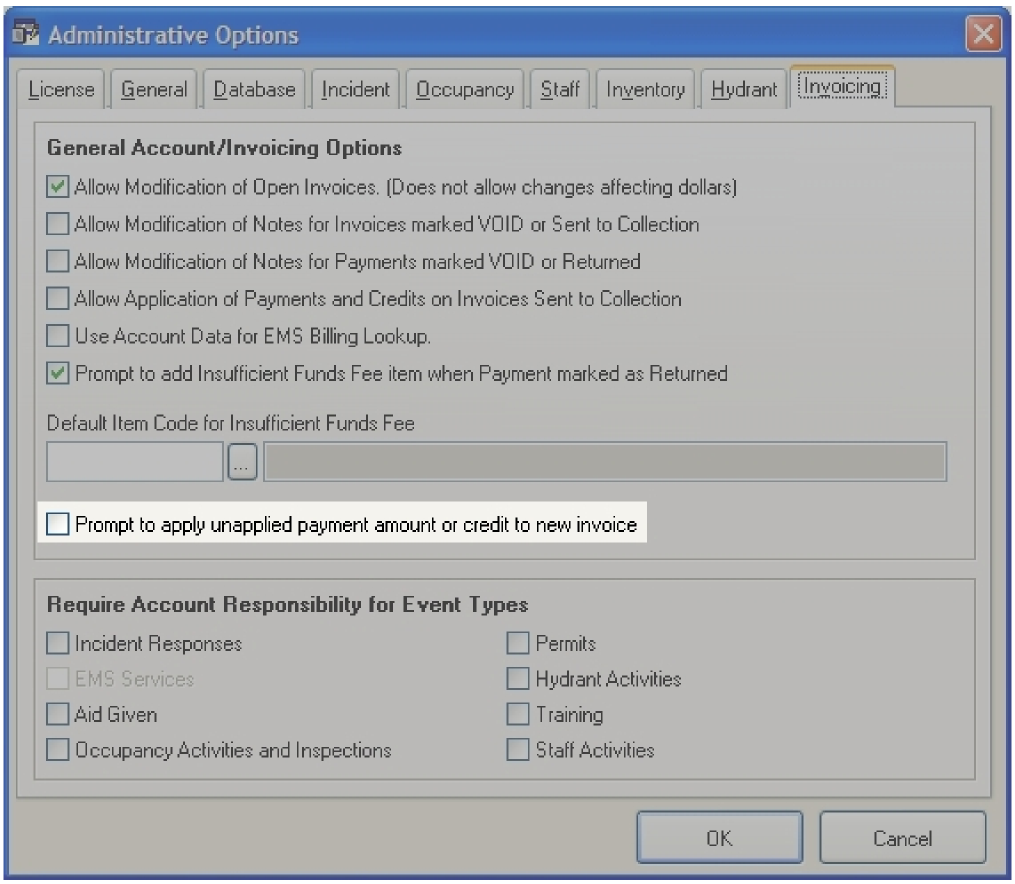
To find the new option, do the following:

1. Choose **Administration → Administrative Options**

   The **Administrative Options** dialog box appears.

2. Click the **Invoicing** tab.

   Under **General Account/Invoicing Options**, the **Prompt to apply unapplied payment amount or credit to new invoice** appears.

   If you select this option, whenever you create a new invoice, you are prompted as to whether the overage should be applied to the new invoice.

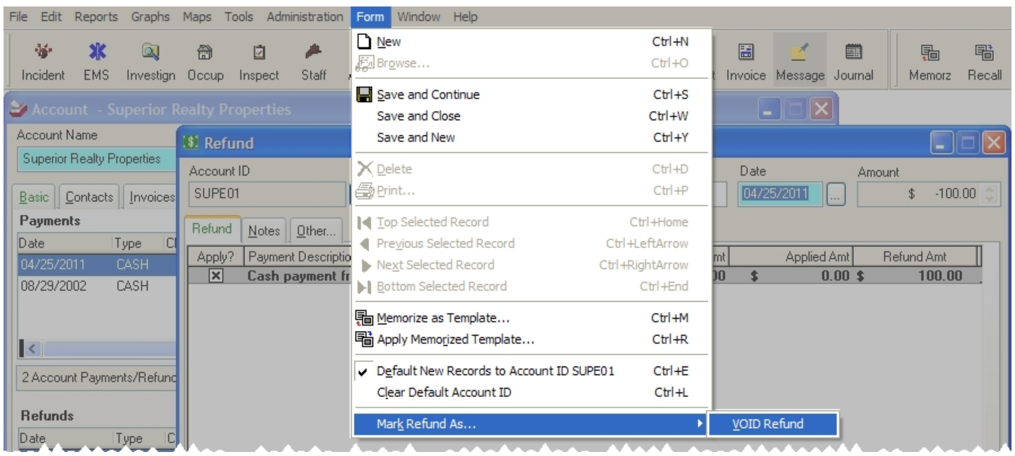
Refunds can now be voided in Accounts Receivables

You can now void a refund the same way a payment can be voided, and the payment is returned to a pending status.

> **Note:** If the payment that the refund is applied to is set to VOID, the refund is also set to VOID because there is no longer a payment to apply it to.

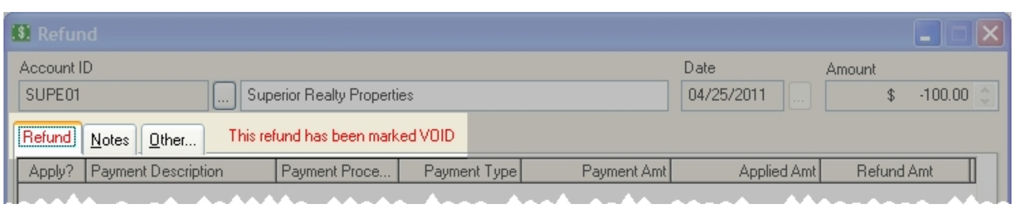
1. Open the **Account** dialog box, and then open the account record with the refund you want to void.
2. Click the **Payments/Refunds** tab.
3. Under **Refunds**, select the refund you want to void, and then click **Open**.

   The **Refund** dialog box appears.
4. Choose **Form** → **Mark Payment As** → **VOID Payment**.

   A warning dialog box that the refund is about to be voided appears.
5. Click **Yes**.

   The statement **This refund has been marked VOID** appears in red text, near the top and center of the **Refund** dialog box.

6. In the **Refund** dialog box, click **Close**.
7. In the **Account** dialog box, click **Save**, and then click **Close**.

User-defined fields available in custom calculations for invoice item lookup codes

The Accounts Receivables module now supports the use of user-defined fields in custom cost formulas. If you add user-defined fields to a billable event type, such as occupancies, then add an invoice item lookup code to the lookup tables, you can use the fields you added when you create a custom formula.

Information on adding user-defined fields is available in the ***FIREHOUSE*** *Software Advanced Feature Reference*, in "Chapter 6: User-Defined Fields."

To find your user fields for custom cost calculations, do the following:

1. Choose **Tools → Lookup Tables**.

   The **Lookup Tables** dialog box appears.

2. Expand **Invoicing and Accounts Receivable Codes**.
3. Select **Invoice Items**, and then click **Setup**.

   The **Lookup - Invoice Items** dialog box appears.

4. Click **New**.

   The **Code for Invoice Items** dialog box appears.

5. In **Code**, enter a code for the new invoice item you are creating.
6. In **Description**, enter text describing the new invoice item.
7. From **Group**, select **OCCUP**.
8. Select **Links to Event Type**, and then select a billable event type from the menu below **Links to Event Type**.
9. Click the **Cost and Class** tab.
10. From **Item Cost Calculation**, select **Calculate Unit Cost from Custom Formula**.

    The **Cost Formula** button appears on the **Cost and Class** tab.

11. Click **Cost Formula**.

    The **Invoice Item Cost Calculation Formula** dialog box appears.

12. From **Show Fields From**, select **Masterrecordtemp** or **Invoiceitemtemp**.
13. Scroll to the bottom of the list and locate the user-defined fields you created earlier.

    Example: If you created a user-defined field called **SHOESIZE** in the occupancy module, `SHOESIZE` appears at the bottom of the list in the **Invoice Item Cost Calculation Formula** dialog box, on the **Fields** tab.

    You can select the user-defined fields you created and include their values in any custom expressions you create for the invoice item code.