

How to read the Release Notes

System Requirements: This section details all of the modules that Essentials can pair with, along with the appropriate version.

New features, new functionality, and bug fixes: The feature enhancements, known issues, and bug fixes on this page are broken down in following way, respectively:

- A description of the issue or feature
- Internal tracking code
- Salesforce case number, if applicable
- Additional information (for features)

1 System Requirements

TeamConnect Essentials 6.3.1 is designed to pair with the following modules:

- Base Module - Essentials 6.3.1
- Platform - TeamConnect Enterprise 6.3.1
- TCBI 6.3.1 / Sisense 8.2
- Elasticsearch 7.10 with optional Xpack Security
- AP Export Link 5.1
- Office Suite Integration 3.2+
- TAP Integration (latest version)
- Collaborati Integration (latest)
- CSM 6.2.5
- SAML 2.1

2 Feature Enhancements

Enhancement: Display of Accruals Data in Matter Budget Insight (MBI) block - UI

Description: To make an Informed decision regarding the approval of a Standard Invoice and to view **Unreversed Accruals** data on the Matter Budget Insight widget, implemented the following changes in MBI block:

Accruals data is applicable in the following scenarios:

- No Reversal
- Full Reversal

No Reversal:

By default, a user is provided with **No Reversal**, the accrual amount is added to the Standard Invoice amount.

Full Reversal:

When **Full Reversal** is configured, the accrual amount becomes "0" after approving the Standard Invoice.

The following are implemented in the MBI block:

- Display of Unreversed Accruals with dollar amount and % in brackets inside the MBI bar.
- Introduced toggle button and Show accrual data with info icon.

The Accruals column is displayed on the budgets tab for a selected Matter is populated based on the setting enabled.

To enable the **Full Reversal** functionality, activate the rule **Reversal Accrual in Invoice Rule** in Setup Tool.

- Go to Setup > Invoice > Rule.
- Select Activate Reverse Accruals Invoice Rule checkbox.
- Once the rule is Active, the accruals column is present on the budget tab for a Matter.
- In EAB, the Full Reversal option is hidden. Once the rule is activated, this option becomes default to "Reverse total accrued amount" and sets the total accrual amount back to zero.

Tracking Code: TC-36779

Enhancement: Update the Accruals & credit notes text in MBI info section

Description: Following are the changes implemented in MBI Info Section

- Removed the Info section in MBI widget
"Accruals and Credit Notes are not reflected in the budget or pending invoice data."
- Added the below disclaimer message for (Standard/ Credit Notes/ Accruals) as,
"The amounts in the Matter Budget Insight chart are inclusive of taxes, credit notes, internal expenses, exclusive of shadow invoices, and are always displayed in the system currency."
- The disclaimer message for shadow invoices has been modified and updated as, **"The amounts in the Matter Budget Insight chart are inclusive of taxes and are always displayed in the system currency."**

Tracking Code: TC-36781

Enhancement: Display MBI block for Non Standard Invoices types

Description: In the workflow process, the Non-Standard Invoices are displayed in the MBI block for the following:

- Accruals
- Credit Notes (Available from 6.3 Version)
- Shadow Invoices (to view Shadow Invoices in MBI, user need to create an account)

Tracking Code: TC-36782

Enhancement: Credit Notes Test Story

Description: Credit Notes are tested for the following scenarios:

- Display of MBI widget for Credit notes in a workflow.
- Display of credit notes amounts in the MBI Block

NOTE: The behaviour of Credit notes should resemble standard invoices.

Tracking Code: TC-37022

Enhancement: Toggle Functionality in MBI Block

Description: To make an Informed decision regarding the approval of a Standard Invoice and to view unreversed accruals data on the Matter Budget Insight widget, implemented the following changes in the MBI block:

- Display of Unreversed Accruals with dollar amount and % in brackets inside the MBI bar.
- Introduced toggle button and Show accrual data with info icon.

The Toggle Functionality is applicable in the following scenarios:

- No Reversal
- Full Reversal

No Reversal: When the Toggle button is in ON position, the added accrual amount displays in the following bar in the MBI block:

- Total Matter Budget Spend (6.3 Version) is renamed as **Spend Against Selected Budget** (from 6.3.1 version)

Full Reversal: When the Toggle button is ON, the added accrual amount displays in the following bars in the MBI block:

- Total Matter Budget Spend (6.3) is renamed as **Spend Against Selected Budget** (from 6.3.1 version)

Tracking Code: TC-37024

Enhancement: Display Shadow Invoices Count & Total to the Right side block of MBI

Description: Introduced the Shadow Invoices on the right side block of the MBI widget, which displays the total count and total amount of the Vendor-specific invoices.

Tracking Code: TC-37026

Enhancement: MBI Legend Change - UI enhancement

Description: Following are the changes implemented on the MBI widget:

- Removed the legends from the widget
- Removed the interactivity of the bars
- Added two pins for **Spend Against Selected Budget** and **With this Invoice Approved** (displaying the amount and percentage on the percentage meter bar on the right).

Tracking Code: TC-37492

3 Known Issues

The following items are known issues in the TeamConnect Enterprise® 6.3.1 release. Each issue is documented in the following format:

A description of the issue:

Internal tracking code:

Issue: Getting (NaN %) & (Infinity %) in MBI block when "Selected Budget Amount" is 0.

Description: When the budget is not allocated, the values from one of the bars (With This Invoice Approved & With all Pending Invoices) is being divided by Zero.

Tracking Code: TC-37948