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TeamConnect® Financial Management 6.3.3 Patch 1
Release Notes

TeamConnect® Financial Management 6.3.3 Patch 1 (PFM6303001) resolves the following issue:

Issue: Matter Budget Insight (MBI) block does not appear for accrual invoices.
Tracking Code: SUPPORTPRI-68231
Case Number: None
Reported Version: None

Workaround
None

Pre-Requisites
- An Enterprise on Version 7.1 and FM version should be in 6.3.3
- An active and existing user with All Right access.
- Create a matter with the monthly budget.
- From setup Matter Budget Insight (MBI) block should be selected to view in line items.

Steps to Reproduce
1. Login Teamconnect.
2. Create a matter and vendor.
3. Go to Account and Create New Account for Shadow with above matter and vendor and allow Posting.
4. Activate the Account.
5. Create 1 Standard Invoice and post the same.
6. Create 2 Shadow Invoice and link above standard Invoice as reference and post the same.

Expected Results of Steps
MBI should be displayed.

Actual Results of Steps
MBI is not displaying and getting "This invoice must be in workflow in order to view this block." whereas Invoice already is in workflow.

Root Cause Analysis
FMR 6.3.3 made it so that appeal invoices are included in the invoice types that should display the MBI block. These same changes also made it so that shadow and accrual invoices were excluded. It was then determined that accrual invoices should continue to be included in the invoice types that display the MBI block, but shadow invoices are to remain excluded.

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The fixes in this patch will be merged into FMR 6.3.4

INSTALLATION

The following list is a summary of the procedures necessary to install this patch.

1. Log into TeamConnect® as an administrator.
2. Click the **Admin** tab.
3. Click **Admin Settings** under the tab bar if it is not already selected.
4. In the left pane, click the **About** link.
5. In the **Available Updates** section, follow the instructions below to install the patch.
   a. Click on the **Show updates available for installed products** button.
   b. Locate FM 6.3.3 Patch 1.
   c. Click **Install Now** and follow the installation instructions.
6. After successfully installing this patch, stop and start your TeamConnect® instance.

UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

LEVEL OF RISK TO UPDATE WITH PATCH

LOW