# Release Notes

## XEPPO

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| Release Date: | 21 July 2018 |
| Issues: | 20 (3 new features, 8 improvements, 9 fixes) |

## Xeppo Portal

### New Features

#### Ignore Data Discrepancies (XEP-1358)

We've added the ability to ignore data discrepancies at a connector or client level, giving you flexibility in how this is managed and packaged into change requests. This prepares us for when data will be synced back to connectors in future releases, allowing you to choose the data that is pushed or ignored.

- From the Admin > Settings page, you can uncheck fields that you no longer wish to be included in discrepancy processing.
- From the Client Details page > Admin tab > Client page, you can hover the cell containing the data discrepancy and choose to ignore this where appropriate.
- A bulk action to Ignore Discrepancies has been added to the Admin > Client Data Discrepancies page. An "Is Ignored" field has also been added for filtering and display, with default views updated to only show included discrepancies by default.

#### Map Key Firm Contacts To Users (XEP-1448)

Key firm contacts can now be mapped to Xeppo users from the Admin > Settings page.

- This helps clean up where sources display names differently and also paves the way for tighter integration throughout Xeppo.
- From a search, the Key Firm Contact - Contact Name will then show a cleaner list of contacts.
- Note that when mapping, this may require some existing search views to be manually updated to match the selected user's name.
- Further integration will be included within the Projects feature, Opex Consulting's FDS App and other relevant areas in future releases.

### Related Client Creation (XEP-1442)

When creating a new client in Xeppo it is now possible to also create a related client at the same time.

- You can select from the existing Relationship types within your data, or add a customised label. Further management of these types will be reviewed in a future release.
- Note that once a relationship is created, this can't yet be modified within Xeppo. We've created the framework for this behind the scenes and will be available in a later release.

# Improvements

### XEP-313

We've reorganised Xeppo's Admin menu to make settings easier to find, while fitting on the page with lower resolutions.

- Some items have been slightly renamed for consistency and clarity e.g. you'll no longer see the word "manage" and the old manual client matching page is now "Manual Matching Advanced".
- Pages that were previously just for managing settings for a feature have been moved to the "Settings" page. This includes Change Request Assignments and some of the new features detailed above.

### XEP-529

User Audits have been added for further actions within the portal. The action parameters are no longer displayed within the portal. We are aware that the parameters aren't very helpful to you as admins, so we will work in the future to provide a friendlier version.

For the benefit of resolving your helpdesk queries though, auditing of these parameters has been improved. When those can be translated to something that makes sense to practice admins, we'll again make the column visible.

### XEP-1401

Activity-related views will now exclude activities which are attached to Project templates.

# Fixes

### Opex Consulting's Auto FDS App (XEP-1392, XEP-1460)

- An issue has been fixed where deactivated FDS clients imported from XPLAN were being incorrectly reactivated during overnight processing.
- Addressed a bug where the Preview tab on the Auto FDS app's Group page would throw an error when trying to refresh.

## Activities App (XEP-1457, XEP-1483, XEP-1473)

- We've resolved an issue where activities with Due Dates, but no Start Date were not set back to Pending when they should have been.
- An issue has been resolved where some activities were being created in a pending state rather than open state under specific conditions.
- An issue where the link to view documents attached to projects was incorrectly redirecting to the home page has been resolved.

## 3rd Party APIs - Private alpha release (XEP-1497, XEP-1412)

Work has continued on Xeppo's APIs with testing occurring with an internal partner. Our aim is to provide access in a public beta in Q4, but we want to keep you up to date on the features that will be available to your practice and 3rd party vendors.

- DATA API - The URL property was missing from the Document entity. It has been made available again.
- PowerBI API – More entities have been made available for access.

## XEP-1306
An issue affecting the Income Sums Insured calculation has been fixed.

## XEP-1413
The security management pages for Users and Groups are now loading much quicker.

# Xeppo Connectors

## Improvements

### Centralised Connector Mappings (XEP-1039, XEP-1489, XEP-1488)

To better manage and maintain connectors, we have made some improvements. This will be rolled out to your on-premise connectors within the coming weeks and will allow us to make certain changes without always requiring access to your server.

- All connector mappings are now centralised on the Xeppo side.
- Connector mappings are now set at the time the connector is created if a mapping template is available.
- All connector mapping *templates* have been centralised on the Xeppo side.

### XEP-1265
Cancelled invoices are no longer being synced from WorkflowMax to Xeppo.

### XEP-1418
The Xeppo Moneysoft app now pulls data from both Moneysoft Lite and Moneysoft Pro versions simultaneously after Moneysoft have provided an additional integration option.