jBilling Release Notes

Community - Version 4.1.1

Highlights

- Asset Management
- Company Hierarchy
- Account Types
- Agents and Commission Enhancements
- Meta Field enhancements
- API Security and Web Application Security

Known issues

- There's a known issue with User Codes

Backwards incompatible changes

- None

Bug fixes and various smaller improvements

Check out the notes below for more details

New Features

- **Asset Management**
  - Individual asset can be identified as unique with a status. Assets belong to a type. Assets can transition from an available to an unavailable state when saved to an order
  - Transition the asset status to configurable states. Statuses ultimately define if the asset can be assigned to a customer or not.
  - Use Meta Fields and core attributes to describe Assets
  - Ability to search assets by pre-configured asset meta fields (other than unique ID). E.g. to search for phone numbers tagged by City or State.
  - The assets can be organized in a resource group/bundle that has it's own status. Those bundles can then be used as an asset as well
  - View a particular asset's transition history
  - Asset Reservation as a feature to enable blocking of assets during order creation, such that the same asset is not used on another order before the current one is saved
  - The root company can determine the availability of products and assets respectively to other companies
- **Company Hierarchy**
  - If a company is marked as a reseller, send an invoice to it for the products that

have been invoice to customers on behalf of the reseller
- **Account Types**
  - Template of attributes that are assigned to a new customer
  - Instead of one CC and one ACH, have as many as wanted. Create a basic one with just an amount and date. Also add meta-fields to them
  - Incorporate to the account type a list of accepted payment methods
- **Account Information Types**
  - Customizable meta-fields group as a template that is assigned to a customer type
  - A product will be available to all, or some account types. Not everybody can buy everything
- **Product Commissions**
  - Establish a commission value (percentage or flat) for each product. Allow overrides at the Agent level
- **Commissions Hierarchies (Agent Hierarchy)**
  - An Agent can 'own' other partners and get commissions for the other Agent sales
- **Agent Referrals**
  - Agents refer other Agents, and get a small additional commision on their sales
- **Invoice/Payment as Base for Commissions**
  - Allow agents to be paid their commissions based either on payments or invoices
- **Meta Field Validations**
  - Enhance Meta Field validations with ranges, regular expressions and Groovy scripts
- **Java based Meta Field validation**
  - Enhance Meta Field validations with custom Java validators including different gsp templates (The Java validation objects written for Limitless would be just for them but the core support to use objects for validation should be generic.)
- **Custom Template Meta Fields**
  - Ability to configure custom templates with complex logic.
- **Product Dependencies**
  - Establish dependencies between products that need to be satisfied when added to an order.
- **Minimum Quantities for Dependencies**
  - Establish that when for a dependency to be met, a minimum quantity is required. Example: order a PBX, but at least 2 phone lines.
- **Customer Notes history**
  - History of notes (instead of just one).
- **User Codes**
  - A User Code is a unique alphanumeric string associated with a user, that can be linked to an Orders and Customers to create a relationship between the User and the Object.
- **Order Hierarchies**
  - Arrange orders in hierarchies to group them and facilitate management.
- **Order Changes as Entities**
  - An Order Change represents a modification of an order line: creating, changing quantity or price, deleting.
- **Order Change List**
  - A new list that deals only with order changes. It would include typical filters.

(Done as part of OCH.)
- **Order Change Editable Status**
  - Provide a configurable workflow for statuses, indicating which of them are available for editing (now, order changes are not editable).
- **Customizable Order Statuses**
  - Make the order status customizable, rather than fixed.
- **Order Cancellation Fees**
  - Determine fees if a contract is terminated before the minimum time.
- **Product Specific Meta Fields**
  - Define meta-fields on products that are assigned to orders when the product is included in an order.
- **jQGrid List Views**
  - Filter on all fields, swifty; Will be removed in a future version (not sure when).
- **API and Data Access Security**
  - Secure access to entities from the session bean layer, code improvements.
- **Changing Application Defaults for Security Preferences**
  - Preferences on security to have low threshold, cannot be reduced beyond a level
- **PCI Enhancement**
  - Modified passwords to not to be entered manually, except by the user themself
  - User accounts will not be created with login accounts by defaults except for Admin accounts created for Signup (Granting User Credentials, Default Accounts)
  - Salt based password encryption support, support multiple encryption algorithms, support switching between algorithms.
  - Enable password lockout after configurable number of unsuccessful attempts
  - Allow admin to lock/unlock/reset password without knowing the existing password to an account.
  - Configurable expiry after a number of days
  - Allow user/customer to reset their own password
  - Prevent use of one of the last 6 passwords
- **French and German Languages**
  - Translation to French and German languages added
- **Meta Field Usage enhancements**
  - Meta Field Usage Types on Account Information Types.

Improvements

- Upgraded Liquibase Version to 3.2.3
- Improved signup message for password
- Agent Commission Type should only be allowed to enter PAYMENT or INVOICE
- Use '@Transactional(readOnly = true)' attribute to improve service call performance
- French and German Translation Texts
- Fixed Error message name, removed blank dropdown for error message for validation error message
- Scripts-cleanup
- Replace licensing (Community Edition only!)

- Agents are now using the credentials system
- Product category type meta fields are not visible at Add Category screen
- File name emails_sent.log changed to emails_sent.txt
- Upgraded jquery-validate plugin to latest version to fix JS errors in IE. Added 'dependsOn' attribute to Config.groovy
- Updated new Logo
- API tests were disabled in CE
- Fake API was added to CE only for tests compilation
- Tests not relevant to CE were removed

Bugs

- Triggered Billing process and Collections successfully.
- Child entity created successfully.
- Dependency Products saved.
- View History button should not be on Community.
- Discount ui on order page fixed & Assets product added in order.
- Fixed issues with Plugin UI.
- Removed security annotations.
- [**10992**] - Updates functionality to filter out the unavailable companies while creating company specific assets
- [**10448**] - Updates functionality to filter out the companies based on the categories selected while creating a product.
- [**10931**] - "Order expiry token" and "Collection" token are not available under tokens section at "Edit Notification" page.
- [**10734**] - No action is performed when user click on any "Tokens" present under the "Edit Notification " page.
- [**14010**] - CommissionType name changed from 1 letter to more descriptive.
- [**14306**] - After the Auto Recharge Monthly Limit is Reached, the system continues to process auto payments.
- [**13867**] - Wrong validation message is displayed when user try to upload asset.
- [**14013**] - 'Reservation duration' field don't require at 'Add product page', if the product doesn't belongs to any asset category.
- [**14308**] - User was being redirected to login page,while entering last used password at 'Reset password' page.
- [**14351**] - Fixed categories dependencies at order creation time.
- [**13892**] - No Validation message is displayed when user try to impersonate into child company which is locked.
- [**14177**] - Validation message is not displayed,while creating a asset without any values.
- [**13779**] - Error message is displayed for non mandatory fields at "New Discount" page.
- [**14013**] - Added preference for reserve duration and also refactored UI for reservation duration input field.
- [**12586**] - A proper validation needed when discount exceed the order total.

- [**13813**] - Fixed alignment of textarea in add notes.
- [**14207**] - Fixed overlapping buttons on asset product detail page.
- [**14267**] - Password change unsuccessful error message is displayed, while setting new password.
- [**14012**] - Reset Password email body should contain the name of the company it is requested for.
- [**14194**] - Delete button is not working at asset details page,Only refreshing spinner keeps revolving.
- [**14243**] - Unnecessary characters are displayed with Total of order.
- [**14242**] - Error message is displayed,while removing created shortcut.
- [**14234**] - Card number should not be masked until saved.
- [**13895**] - Fixed asset status list at order builder update screen.
- Fix forgot password issue.
- [**12405**] - List of all the available companies populate at 'Reset' password page. For any company selected, the 'Reset Password' page remains intact and the password resets as well.
- [**13985**] - Fixed changes for showing assets while editing order.
- [**14237**] - Exception has occurred,While Importing Meta Field Group at product category page.
- [**13860**] - User may set password more than once in a day.
- [**14205**] - Internal server error occurred,when user switches from Cheque payment method to Debit card payment method at New Payment page.
- [**14179**] - Error message is displayed,while clicking on "Add shortcut" link at 'Home page'.
- [**14180**] - Product page is distorted, when user click on the breadcrumb of deleted asset product.
- [**13814**] - Filter by functionality is not working at blacklist page.
- [**14145**] - Creating Agent: Preference 75 must be turned on to receive email link to password reset page.
- [**13651**] - Date format is not valid for cheque payment method.
- [**14060**] - ApplyNegativeInvoicetoPaymentTask plug-in does not generate credit payment from negative invoice.
- [**13994**] - Fixed showing blank page on clicking breadcrumb link for plugin.
- [**14132**] - Super User able to see Agent Password and Verify Password Fields.
- [**13673**] - 404 error message is displayed when user try to Impersonate into child company.
- [**14134**] - Validation message is displayed when product start and end date is same.
- [**14091**] - Parent icon is displayed under Agent status section.
- [**13814**] - Filter by functionality is not working at blacklist page.
- [**14093**] - Password field disappear,after any invalid inputs on 'Edit User" page.
- [**14125**] -Incorrect label on order cancellation on create order.
- [**14039**] - Meta-field type' is not required at add/edit meta-field page.
- [**14037**] - Fixed unhandled exception while creating meta field with validation rule.

- [**13992**] - Customer's billing Cycle in details section should be displayed as it is displayed at customer creation/edit page.
- [**13981**] - On Agent Referral Commissions pane, date can not be manually entered into the field, only datepicker works.
- [**14022**] - At Forgot Password page,& is displayed as amp; if company name contains & symbol.
- [**13786**] - Child company name is displayed twice at home page.
- [**13993**] - Fixed random breadcrumb for plugin.
- [**14014**] - Fixed recaptcha distorted UI.
- [**13975**] - Removed validation error messages after click on cancel button.
- [**13705**] - Throw exception after click on "Send as email" button if invoice is in review status.
- [**13974**] - Save unsuccessful error message is displayed when user try to save customer without any next invoice date.
- [**13805**] - Wrong validation message is displayed when user try to set forget password.
- [**14011**] - Password change is always unsuccessful for a company, at first attempt.
- [**13787**] - Wrong validation message on incorrect enumeration name.
- Special characters should not be allowed as user names.
- [**13677**] - Exception occurred when user copy any product.
- [**13807**] - Fixed color of input text while displaying validation message.
- Validation should really be done across current and child entities.
- [**13895**] - Order Status not listed.
- [**13711**] - New Company SIgnup - Email message appears badly formatted.
- [**13811**] - Blacklisted credit card is not listing.
- [**13996**] - Exception occurred when user try to save 'Agent Commission Process'.
- [**13892**] - Populate list of all assets if user select "Is user group" checkbox.
- [**13861**] - User is able to reuse the previous password to reset the password fix.
- [**13968**] - Removed error message when clicked on cancel button at language page.
- [**13795**] - Changed message for order report if item id is null.
- [**13736**] - Fixed prorate checkbox related issue.
- [**13797**] - 'Forgot Password Expiration' time does not expire the token for Password reset fix.
- Changes done to create a payment method and to add product in a order.
- [**13783**] - Password fields disappear if Customer saves changes when passwords don't match (logged as customer) fix.
- [**13757**] - Page distort when user click on 'Delete' button to delete created enumeration.
- [**13748**] - Exception occurred when user try to create meta-fields for product with default values.
- [**13752**] - Error message is displayed for non mandatory fields at new meta field page.
- [**13755**] - Exception occurred when user click on "Order Change Status".
- [**13653**] - Payment method is not displayed under payment page.
- [**13635**] - Credit card can be updated as expected.
- [**13608**] - Removed restore button from payment history page.

- [**13627**] - Fixed error on create order.
- [**12686**] - Splitted changesets by feature.
- [**12636**] - Reset password - adding 24 hs as default to reset password url.
- [**8813**] - Expected value and saved value both are greater than 0 then it's assumed to be jqgrid.
- [**11565**] - Invoice Notification #18 should have a descriptive title.
- [**12611**] - Fixed asset filter screen.
- [**12730**] - Mark all required fields as required in GUI.
- [**12699**] - Removed filterAction and filter Id params from template call.
- [**12628**] - Show Main Subscription on Customer Show/ Screen.
- [**12648**] - Fix. visibility of broken for semi-monthly periods.
- [**9787**] - List to Array conversion for all API methods.
- [**12542**] - Confirmation Request Needed for AIT as Notification Options.
- [**12589**] - Fixed i8n validation message for choosing wrong asset in group.
- [**12608**] - -Hide Payment Method Template and Payment Method Type meta field categories from Meta Fields and Meta Fields groups.
- [**11008**] - Fixed update order for discount.
- [**12690**] - Add missing index.
- [**12660**] - Fixes for save unsuccessful while making payment.
- [**11012**] - Deleted user should not populate in 'Company' drop-down at Login screen.
- [**11539**] - Global check box don't disappear completely (faintly visible) at product page that belongs to a non-global category.
- [**12631**] - Date and Time format is inconsistent between the time of asset creation and under the asset transition section.
- [**12597**] - Successful payment notification is not triggered.
- [**12679**] - Implemented validation for incorrect plugin ID.
- [**12420**] -No validation message is displayed when user try to upload asset with invalid file extension
- Gui fixes for asset status configuration available checkbox.
- [**11179**] - Fix for back-dated order change billing.
- [**12538**] - User should not be able to Configure both 'Available' and 'Order' Saved with one asset status.
- [**12343**] - Null Pointer Exception on update Customer
- [**12610**] - Validate true if no user/creator is provided to release asset.
- [**12596**] - Unwanted Text in Product Description on an Order LIne.
- [**12595**] - Show User ID on Asset Assignment History List.
- [**12540**] - Validation that restricts effective date to be earlier to Active since is checked while creating order but not on editing the order, that had never been invoiced.
- [**11683**] -No validation message is displayed when user edit the order line of an order for which invoice is generated.
- [**11831**] - Assignment History Start and End Date Times are Incorrect.
- [**12484**] -Sorting is not working on account type.

- [**12426**] - A cross icon increases every time when user add/remove asset consecutively, under the 'Group Asset' section.
- [**12488**] - Incorrect payment method is displayed in payment list when user make payment using payment method that the customer did not define at customer page.
- Create checkboxes with a clickable label.
- [**12483**] - Exception occurred on viewing payment report with period breakdown as week/month.
- [**12592**] - Customer Not found message.
- [**12396**] - 'Filters' section for asset disappear in JQGrid view.
- [**12556**] - Asset name is not displayed when user try to create asset with HTML tags has been fixed.
- [**11548**] - There is no successful confirmation when User clicks the 'Update' button from the Orders screen right panel under 'Changes'
- [**12404**] - Customer AIT Filters.
- [**10881**] - Unable to save order with product with multiple dependency.
- [**12506**] - 'Pre-paid' type is displayed available for One-time Orders. It do not work though.
- [**10915**] - Able to Create a Group Asset for the Root company with Assets that are Company Specific.
- [**12390**] - "Edit AIT - Type information does not show" has been fixed.
- Download Invoice fails for account type not having AIT preferred.
- [**12482**] - Exception occurred when user try to save order change type with empty field.
- [**11663**] - In JQGrid view agent id is missing and agent name is undefined.
- [**12479**] - Fix for order.total getter, if null then return zero.
- [**12423**] - Two validations are displayed for blank currency name field.
- [**12475**] - Fixes for Unhandled exception after creating order with discount.
- [**12429**] - Unnecessary validation message is displayed at choose assets page.
- [**12385**] - Unhandled exception is displayed when creating a Discount with empty fields.
- [**12339**] - Removed dependency on Billing Process Simple Scheduled Task.
- [**12421**] - "Global" is displayed twice at the order creation page has been fixed.
- [**12191**] - Fixes for unbind account type if no account type is selected in edit payment method.
- [**10625**] - Discount with amount greater than the order discount should not be applicable.
- [**12355**] - Order should be successfully saved, when the product end date is same as order active since, irrespective of Active until (can be any, greater than Active Since) of the order has been fixed.
- Company name displayed on top.
- [**12268**] - "User is able to delete used asset." has been fixed.
- [**12397**] - 'Reserved' status being optional, user should be able to un-check "Reserved" status for category. has been fixed.
- [**11664**] - Details of selected agent is not displayed.
- Changes in OrderBuilderController.groovy to add product in order.
- [**11836**] - Tokens are not displayed properly at "Edit Notification" page.

- [**11346**] - $url should be available as a token and param.
- [**11194**] - Is the word "Subscriptions" still applicable in the Inspect Customer screen header "Subscriptions and recurring orders"?
- [**12382**] - Password change - notification content??
- [**11391**] - Only child's id is displayed on the invoice line of parent. No first/last name is displayed.
- [**12267**] - Order is not found error appears when user cancel the purchase order.
- [**12317**] - Validation message should be displayed when user try to search with invalid data.
- [**10978**] - An unhandled exception has occurred while removing threshold amount from edit customer screen.
- [**12883**] - Re-Adding Asset Triggers Order Message: Save Unsuccessful.
- [**10442**] - Fixes for if delete account type,associated payment method is deleted.
- [**11631**] - Column header reads 'Product Name' but its search works with product id has been fixed.
- [**11553**] - Typo: "Order Line Charges" should be "Order line Changes".
- [**8845**] - No result is displayed on searching global products.
- [**10846**] - Possible to Add Root Product to Child Company Category - Validation Message?
- [**11330**] - 'Card Number', 'Expiry Date' and 'Card holder name' field should not be mandatory at create payment method page.
- [**11656**] - Exception occurred on clicking 'Cancel' on plugin page.
- [**11788**] - Entering the wrong user name at expiry password reset page throws unhandled exception instead of error notification.
- [**9457**] - Fixed asset status assignment at release reservation time.
- [**9458**] - Fixed asset reservation release method, the reservation released by the user will be deleted, the reservation released by the cron task (i.e. reservation expired) will be set as completed==true.
- [**11712**] - Global checkbox should be available at edit product page.
- [**11633**] - Fixes the validation for reservation-duration field.
- [**11369**] - Develop ability to identify inactive accounts.
- [**11809**] - Fixes wrong error message for order-period value field.
- [**11653**] - Payment amount is missing in payment JQGrid table.
- [**11738**] - Save Plug-In and Cancel button is missing at Add New Plug-In page.
- [**11680**] - Create a checkbox 'Use for Notification' to Account Information Type Edit/Create page.
- [**11731**] - Changes Tab - Right Side Section: Order Field Change.
- Assets section added in customer UI. PhoneNumber filter added in customer's list UI.
- [**8846**] - No result is displayed on searching global products.
- [**10808**] - Proper validation message is not displayed when user upload an invalid file format.
- [**8875**] - 'Report Name' table should not open unless any 'Report Type' is selected.
- [**8877**] - Column labels (Login & Name) for user should be corrected to avoid confusion.

- [**11465**] - Customer Notes expandable panel displayed twice. has been fixed.
- [**11280**] - Assets assignment in an order creation.
- [**11534**] - Forward and backward pagination arrows to change pages in not displayed in JQGrid.
- [**11390**] - Use entity id instead of CustomerDTO to check about the enumeration usage, within the company.
- [**11559**] - Fixes for naming convention for register AssetDTOMarshaller, additional parameters in map and gui issue in case of delete assets in normal view.
- [**11596**] - In Orders, suggesting name changes for left and right 'Changes' tab for clarity.
- [**11137**] - Removed extra intend.
- [**11587**] - Email value not preserved when password validation failed due to password rules.
- [**11536**] - Account Information Type Meta Field Enhancement not working.
- Fixed password validation for day.
- [**10815**] - User is not able to add email filter.
- [**8227**] - Filters based on metafield for customers not working.
- [**11389**] - 404 error occurred when user try to delete used Enumerations.
- [**10919**] - Parts of the Invoice Notification Email attached PDF reads "null"
- [**11185**] - Password enhancements for PCI Compliance.
- [**11462**] - Forgotten Password Feature Results in Unhandled Exception.
- [**10617**] - Global checkbox should only appear where/when appropriate.
- [**11243**] - Development/Coding - Account Information Type Meta Field - Enhancements.
- [**10893**] - Cannot update customer.
- [**5982**] - Fixing order creation after removal of child dependency.
- [**11472**] - Payment views Fixes.
- [**11453**] - Exception occurred when user click on "Add Product" button has been fixed.
- [**11372**] - Remove Asset Product PopUp Bug.
- [**11315**] - Year is not considered while comparing Start & End date for report.
- [**10700**] - Exception occurred on viewing invoice report with period breakdown week / month.
- [**11260**] - If 'Reserve' button is clicked without selecting any asset, one of them is reserved anyway.
- [**10631**] - Mandatory & Disabled Meta Fields behaviour inconsistent for workflows.
- [**11188**] - Max Periods to invoice requires new default value to allow Order Line Adjustments to also include current period charges.
- [**11258**] - 'Reservation Duration' field takes decimal values as integer when creating a Product.
- [**10256**] - Asset Reservation - asset reservation/asset release fixes.
- [**11282**] - Exception occurred while saving a purchase order has been fixed.
- [**11028**] - Implementation regarding constant "NOTIFICATION_TYPE_PARTNER_PAYOUT" removed.
- [**10344**] - Implementation: Asset Assignment History.
- [**10932**] - Word-wrap issue fixed in notification and plugin.

- [**11321**] - Fixed customer notes in sorted order at list page.
- [**10963**] - Call isCCUpdated only when both payment instruments are credit cards.
- [**10595**] - Implement password lock after not more than 6 failed login attempts.
- [**11011**] - Asset with long characters should be displayed properly at order creation page.
- [**11226**] - Proper validation message should be displayed while user delete parent order without deleting child order.
- [**11013**] - Added ? mark in user delete confirmation box.
- [**11217**] - Custom reports ignore year in date parameters.
- [**10920**] - Wrong notification fires for Entered payments.
- [**11201**] - Error when click to Payment tab.
- [**11177**] - Alphabetize agency drop-down on login screen following password expiry.
- [**10355**] - Minor change related to HTTPS.
- [**10590**] - Fixes of column issue in previous fixes of showing selected agent commissions.
- [**10458**] - Payment method selection is lost after validation displayed on the page.
- [**10933**] - Payment refund notification is not sent.
- [**10963**] - Save unsuccessful error message is displayed when user change the payment method at customer details page.
- [**10914**] - Product can be saved as 'Global' when saved under Child Specific Category, and becomes Available to all Companies within Hierarchy.
- [**10584**] - User is not able to relocate the add note window at edit user page.
- [**10922**] - Company selection field should not be available at assets creation page for Company specific products