



RELEASE NOTES

R23.4

NOVEMBER 17, 2023

TABLE OF CONTENTS

Overview.....	2
What's New	3
Consumer Price Index (CPI)	3
Asset-as-a-Service	4
Billing Management	4
Partner Settlement.....	6
Revenue Management	7
Others	7
What's Changed	9
Order Management	9
Reports and Analytics	9
Partner Settlement.....	9
What's Fixed	11
Billing Management	11
Order Management	11
Reports and Analytics	12
Others	12
Support.....	13
Copyright.....	14

Release Notes

Overview

This document provides information in a nutshell on new features, changes, and fixes of the RecVue product component-wise. Each section contains a brief description of the feature to be utilized. For any specific configurations/setup requests, please contact our support team.

In this release, most of the updates are related to modules of Order, Billing, Revenue, modules, and so on.

The key features covered in this release are:

- Order Management
- Billing Management
- Revenue Management
- Cost Management

This document contains the following sections.

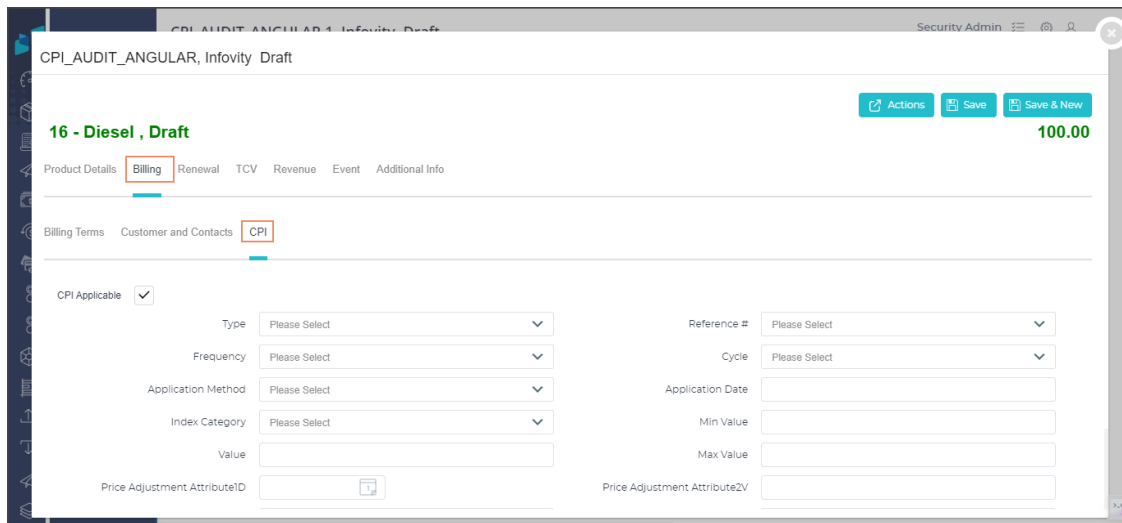
- *[What's New](#)*
- *[What's Changed](#)*
- *[What's Fixed](#)*

What's New

The following are enhancements/new features in the product organized into the different modules of RecVue.

Consumer Price Index (CPI)

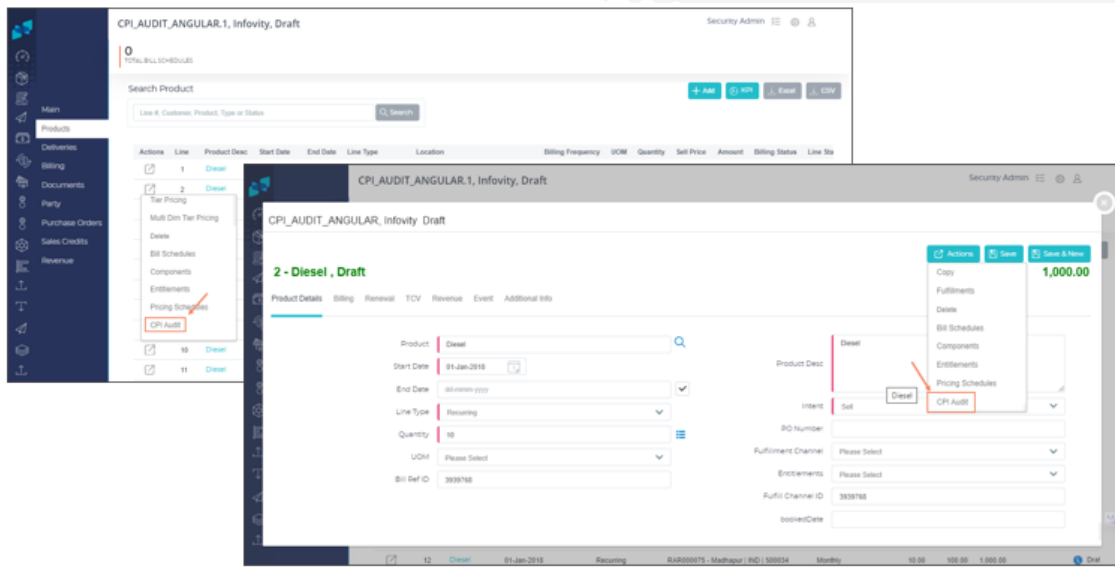
- **CPI for MLM:** CPI compatibility has now been extended to Multi Line Minimum product lines, just like it has for recurring and usage products. As a result, the application has been enhanced as follows.
 - Provided the CPI tab in the sub-tab menu of the billing tab in the MLM Product Line UI.
 - Supports the price uplift of MLM lines.



The screenshot displays the RecVue application interface for a product line named "16 - Diesel, Draft". The "Billing" tab is selected, and the "CPI" sub-tab is active. The "CPI" sub-tab contains a form with the following fields:

- CPI Applicable:** A checkbox that is checked.
- Type:** A dropdown menu with "Please Select" as the current selection.
- Frequency:** A dropdown menu with "Please Select" as the current selection.
- Application Method:** A dropdown menu with "Please Select" as the current selection.
- Index Category:** A dropdown menu with "Please Select" as the current selection.
- Value:** A text input field.
- Price Adjustment AttributeID:** A text input field with a file upload icon.
- Reference #:** A dropdown menu with "Please Select" as the current selection.
- Cycle:** A dropdown menu with "Please Select" as the current selection.
- Application Date:** A date input field.
- Min Value:** A text input field.
- Max Value:** A text input field.
- Price Adjustment Attribute2V:** A text input field.

- **CPI Audit Report:** Provided a separate report called 'CPI Audit Report' to view all previous CPI transactions' details. The CPI Audit Details report option has been added to the Actions button in the Product Line UI.
 - It will be displayed in a separate window.
 - It contains columns such as the action, audit date, order number, adjustment type, line number, column name, and product name.
 - Provides an Excel file download option in your local system explorer.



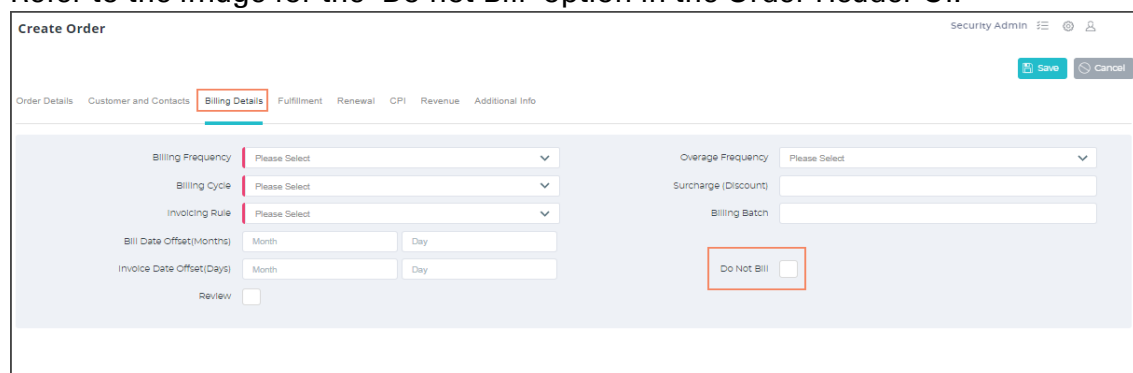
Asset-as-a-Service

- RecVue enhanced with the Asset-as-a-Service (AaaS) feature. 'With this, an asset rule may be defined against an asset (such as equipment, machinery, containers, vehicles, etc.). Charges will be generated for movement depending on the specification of the asset rule. For more details, please contact the RecVue support team.

Billing Management

- Exclude from Billing:** Provided an option that users can skip specific orders or product lines from the billing. The 'Do not Bill' checkbox has been added to the Billing Details tab screen in both the Product Line UI and Order Header UI. To exclude a specific order or line, the user must select this option.

Refer to the image for the 'Do not Bill' option in the Order Header UI:



Create Order Security Admin

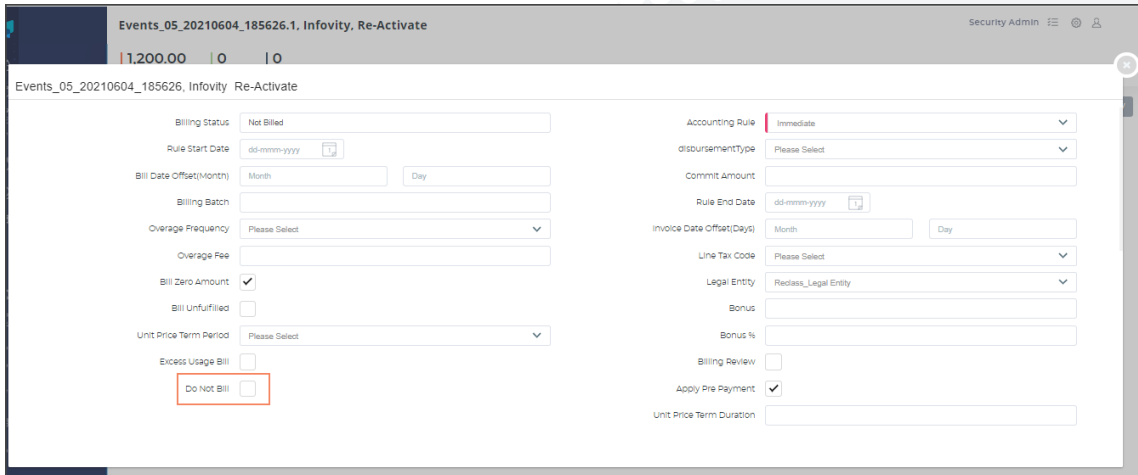
Order Details Customer and Contacts **Billing Details** Fulfillment Renewal CPI Revenue Additional Info

Billing Frequency: Please Select
Billing Cycle: Please Select
Invoicing Rule: Please Select
Bill Date Offset(Months): Month Day
Invoice Date Offset(Days): Month Day
Review: ☐

Coverage Frequency: Please Select
Surcharge (Discount):
Billing Batch:
Do Not Bill ☐

Save Cancel

Refer to the image below for the 'Do not Bill' option in the Product Line UI:



Events_05_20210604_185626.1, Infovity, Re-Activate

1,200.00 | 0 | 0

Events_05_20210604_185626, Infovity Re-Activate

Billing Status: Not Billed

Rule Start Date: dd-mm-yyyy

Bill Date Offset(Month): Month Day

Billing Batch:

Overage Frequency: Please Select

Overage Fee:

Bill Zero Amount: ☒

Bill Unfulfilled: ☐

Unit Price Term Period: Please Select

Excess Usage Bill: ☐

Do Not Bill: ☐

Accounting Rule: Immediate

disbursementType: Please Select

Commit Amount:

Rule End Date: dd-mm-yyyy

Invoice Date Offset(Days): Month Day

Line Tax Code: Please Select

Legal Entity: Redclass_Legal Entity

Bonus:

Bonus %:

Billing Review: ☐

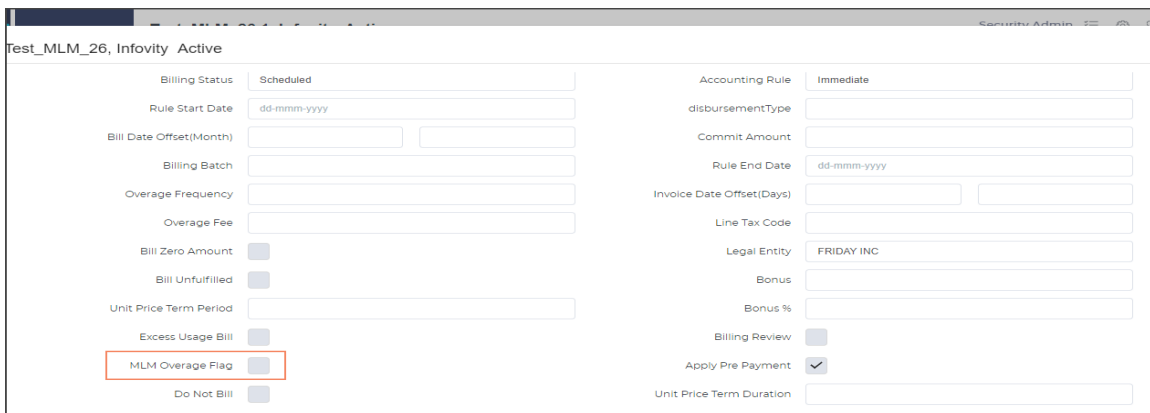
Apply Pre Payment: ☒

Unit Price Term Duration:

- MLM - Event Hold:** Previously, the parent line of Multi-Line Minimum [MLM] could not create billing schedules if one of its associated lines was applied to an event hold until the hold was lifted.

Now the MLM parent line can still create billing schedules even if one of its associated lines is applied to an event hold. It skips the specific child line that is on event hold and creates billing schedules for the remaining lines. Provided a profile option to use this option. For more information, please contact the RecVue support team.

- MLM Overage:** In the Product Line UI, provided a MLM Overage checkbox. If the user selects the checkbox, the MLM will be considered as maximum threshold amount. Each month the billing amount of child lines is less than the MLM threshold nothing will be billed, or else, the delta amount will be billed.



Test_MLM_26, Infovity Active

Billing Status: Scheduled

Rule Start Date: dd-mm-yyyy

Bill Date Offset(Month): Month Day

Billing Batch:

Overage Frequency:

Overage Fee:

Bill Zero Amount: ☐

Bill Unfulfilled: ☐

Unit Price Term Period:

Excess Usage Bill: ☐

MLM Overage Flag: ☐

Do Not Bill: ☐

Accounting Rule: Immediate

disbursementType:

Commit Amount:

Rule End Date: dd-mm-yyyy

Invoice Date Offset(Days): Month Day

Line Tax Code:

Legal Entity: FRIDAY INC

Bonus:

Bonus %:

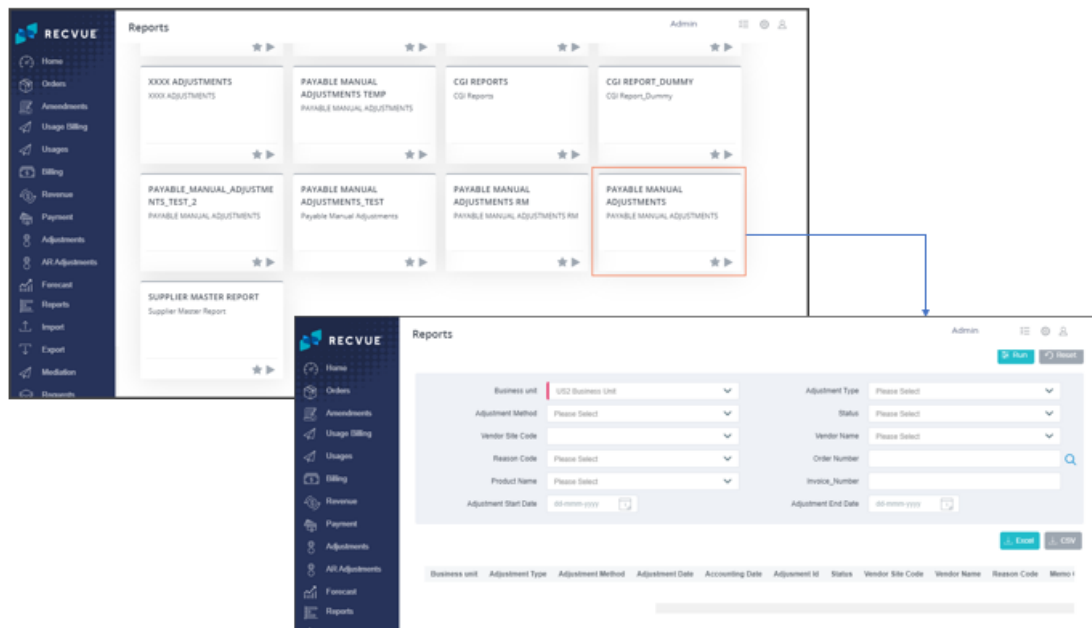
Billing Review: ☐

Apply Pre Payment: ☒

Unit Price Term Duration:

Partner Settlement

- **Payable Manual Adjustments Report:** Recent releases introduced the payment adjustments function to create manual debit and credit memos. In this release, we added the 'Payable Manual Adjustments' report, which provides data on credit and debit memos based on business units. To generate the report, the "Payable Manual Adjustments" report tile was added to the Reports UI.



- **Payment Adjustments:** In the Adjustments UI, the following two buttons are added:
 - **Submit:** It is useful to pick several adjustments and submit them all at once.
 - **Delete:** It is useful to delete bulk adjustments that are in draft status with a single click.
- **Asset Re-Numbering:** The asset module now supports renumbering the asset and making payments accordingly. Renumbering means the unique identifier for the asset, which is EQPD (equipment ID and external field), and API-KEY (internal field), are changed to another set of values. This is tracked via asset versioning.

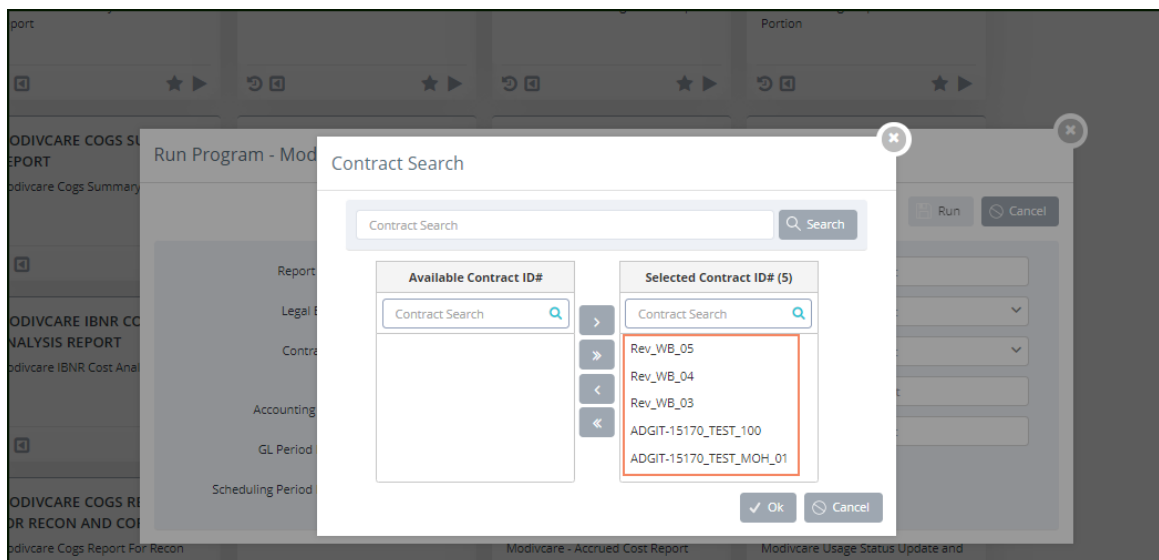
A few changes occurred in the following UIs. For more details, please contact the RecVue support team.

- Fulfilments
- Payments Schedules
- Payment Lines

- Provided sorting icons for date columns (Period From and Period To) in the Order Payment Lines window of the Parter Payment Lines UI. A button is added with an Excel icon that allows users to download the information about order payment lines into an Excel file.
- The Key Performance Indicator [KPI] in the Pay Run UI has been enhanced with additional information.
 - Vendors
 - Orders
 - Total Amount
 - Paid Amount
 - Invoices' Amount

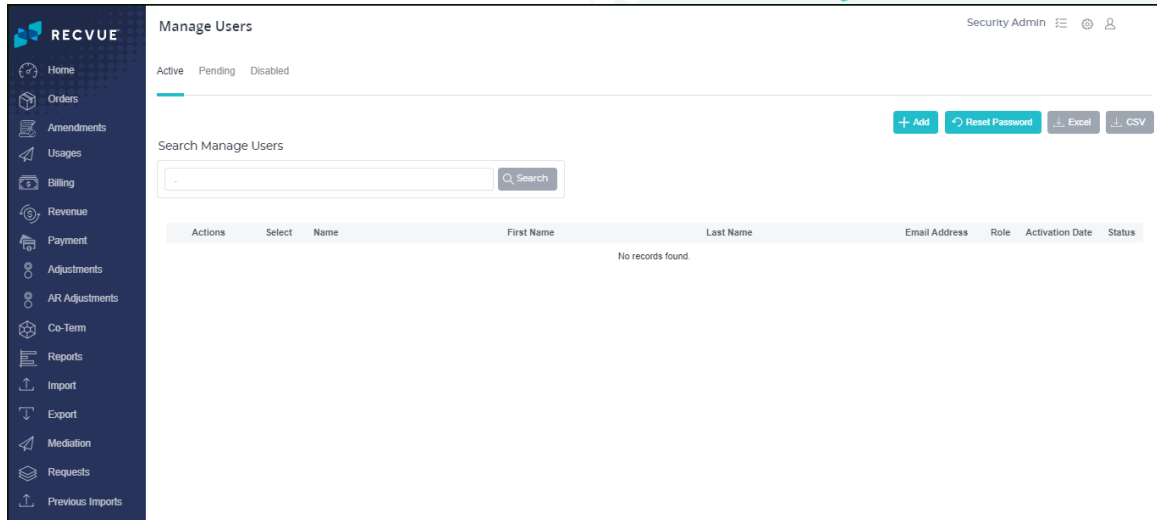
Revenue Management

- Reports are generating currently based on order ID, users have the option to provide a single order number. We have now provided a multi-select option in the order ID field to generate a report for multiple orders.



Others

- The search function in the Manage Users UI now returns results based on the search criteria of Email ID, User First Name, and User Last Name.



- The user-specific field 'Event Type' (Line Tax Code) available in the Billing tab (Billing Term screen) of the Product Line UI now also appears as one of the list options values in the advanced search of the Order Search UI on the line level. It shows the LOV values of the event type field in a separate column where the user can use the filter option and download the details in an Excel or CSV file.

What's Changed

The following features are modified in the product organized by different modules of RecVue.

Order Management

- **Current Functionality:** The scope of mass updating product lines is limited to 10.
Change: The scope of mass updating product lines extended up to 100 product lines at a time.
- **Current Functionality:** The log file will be created after the Process Amendments program runs successfully from the Requests UI. A log file is created with the order ID and amendment details.
Change: To provide more clarity to consumers, the generated log file now includes order numbers instead of order IDs.

Reports and Analytics

- **Current Functionality:** The user-specific monthly billing MRC NRC report is generated based on the legal entity.
Change: The monthly billing MRC NRC report is now generated based on the business unit.
- **Current Functionality:** Currently, only the last run date is defaulted when users run incremental reports through the UI.
Change: Change: The incremental reports now run based on the last run date and the last run time as well.

Partner Settlement

- **Current Functionality:** When the pay run is in the review state, users can view the Order# and Pay Amount columns in the Paying UI. If users want more details about a specific order or payment amount, they must open them in separate UIs.

Change: A hyperlink is provided for each value in the columns of Order# and Pay Amount. When the user clicks the link, a new window opens with relevant information.

What's Fixed

The following are fixes and corrections in the product organized by the different modules of RecVue.

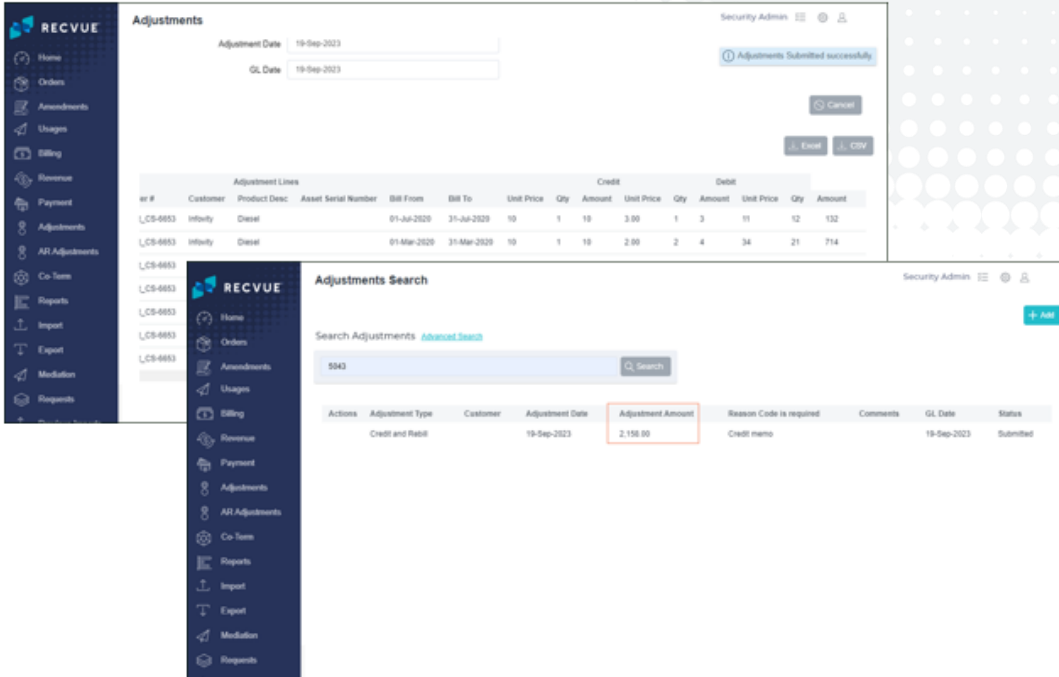
Billing Management

- **Issue:** After upgrading to the most recent release, the prebill functionality was not working as expected.
Fix: The issue has been fixed, and the prebill capability is now operational.
- **Issue:** There was an issue with creating an order using the Create Order API call.
Fix: The issue has been fixed, and the post API is now creating an order as intended.
- **Issue:** Line start and end dates, event hold dates, and event release dates were all out of sync. The original start and end dates of the term still apply when an event is released, and price terms are enabled on the line.
Fix: The issue has been resolved. According to the event release date, the term start and end dates are updated and modified.

Order Management

- **Issue:** The Usages Workbench's export feature was not functioning correctly. The data fails to appear when the user tries to export data using the export button to deliver import.
Fix: The issue has been fixed, and now the export functionality in the Workbench is functioning correctly.
- **Issue:** Duplicate records were produced when importing customer data using the imports capability. The same thing occurred even after upgrading the existing data.
Fix: The issue has been resolved, and the importing feature is now operational.
- **Issue:** An order should show up with a 'reactivate' status after being copied, but this didn't occur until the order was refreshed.
Fix: The issue has been resolved and copy order functionality is working properly.
- **Issue:** The adjustment amount in the Adjustment UI displayed improperly due to an error in calculating the sum of debit and credit memos.

Fix: The issue has been fixed. Now, the adjustment amount is displayed correctly. The total of the debit memos is shown as the adjustment amount since the credit memos are negative.



The image shows two screenshots of the RECVUE application interface. The top screenshot displays the 'Adjustments' page with a table of adjustment lines. The bottom screenshot shows the 'Adjustments Search' page with a search result for adjustment 1043.

Order #	Customer	Product Desc	Asset Serial Number	Bill From	Bill To	Credit			Debit			Amount	
						Unit Price	Qty	Amount	Unit Price	Qty	Amount		
LC8-6653	Infiniti	Diesel		01-Jun-2020	31-Jul-2020	10	1	10	3.90	1	3	11	132
LC8-6653	Infiniti	Diesel		01-Mar-2020	31-Mar-2020	10	1	10	2.00	2	4	34	714

Actions	Adjustment Type	Customer	Adjustment Date	Adjustment Amount	Reason Code is required	Comments	GL Date	Status
	Credit and Refill		19-Sep-2023	2,158.00	Credit memo		19-Sep-2023	Submitted

- **Issue:** There was an issue in the amendment process. The amendment order will be created with a new number. If it is again amended, then the old account details will appear in the error log files.

Fix: The issue has been resolved. The amendment process is now working properly.

Reports and Analytics

- **Issue:** When the customer's name in the order line and order header level are different, there was a search issue in the Order Details Report.

Fix: The issue has been resolved.

Others

- **Issue:** It shows unexpected **errors** in the application if the user repeatedly opens specific user information in the **User Management** Settings UI.

Fix: The issue has been resolved.

Support

For further information or any technical support, please contact:

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