

# 5.5.4.3000 Release Notes

The purpose of this document is to list the features and bug fixes that are included in the Aptify 5.5.4.3000 release.

## Contents

Contents .....	1
Important Notes.....	2
Aptify Code Base .NET Framework Migration From .NET 3.5 to .NET 4.5 .....	2
Support for Microsoft SQL Server 2016 .....	2
Generic Import Wizard: Imports from Access 2013/2016 64-Bit Fail.....	2
Feature Requests .....	2
Accounting .....	3
Aptify SOA Framework.....	4
Aptify Web Framework.....	5
Customer and Member Management .....	10
Framework .....	11
Messaging .....	13
Orders .....	13
Setup Program .....	14
Subscription and Membership Dues.....	14
Viewing System .....	15
Bugs.....	18
Accounting Management.....	18
Aptify SOA Framework.....	18
Aptify Web Framework.....	22
Campaigns.....	31
Committee Management.....	32
Configuration Management Tool.....	33
Customer and Member Management .....	33
e-Business .....	34
Education Management System .....	34
Expos .....	34

Form Template Administration.....	35
Framework .....	35
Meeting and Housing Management .....	38
Messaging .....	39
Orders .....	40
Products .....	46
Setup Program .....	46
Survey Management.....	47
Viewing System.....	47
ACH Procedures .....	52
Adding ACH Payment Type to Merchant Account.....	52
Workflow for Processing an ACH Payment.....	54
Cancelling an Order with an ACH Payment.....	58

## Important Notes

### **Aptify Code Base .NET Framework Migration From .NET 3.5 to .NET 4.5**

In Aptify 5.5.4.3000, all of the assemblies within the Aptify code are updated to migrate from .NET 3.5 to .NET 4.5. (*Issue 24573*)

### **Support for Microsoft SQL Server 2016**

With the release of Aptify 5.5.4.3000, Aptify has conducted testing using SQL Server 2016 as a platform and no compatibility issues have been identified. Please contact the Aptify Technical Support team if you run into any problems or have questions about using Aptify with this version of SQL Server. (*Issue 22986*)

### **Generic Import Wizard: Imports from Access 2013/2016 64-Bit Fail**

When using the Generic Import wizard with the Aptify 5.5.4 Desktop interface to import a Microsoft Access 2013 or 2016 file, the import may fail if running the 64-bit version of Microsoft Office 2013 or 2016. The error that is generated is: The '*Microsoft.ACE.OLEDB.12.0*' provider is not registered on the local machine. The import fails because the user's computer has the 64-bit version of Access 2013 or 2016 installed, while the Aptify shell requires the 32-bit version.

To resolve this issue, install the 32-bit version of the Access Database Engine Redistributable on the user's computer. The installation file, **AccessDatabaseEngine.exe**, can be found in the Access Database Update sub-folder of the 5.5.4\_3000. Once the Access Database Engine Redistributable is installed, the user's computer must be restarted. (*Issue 24890*)

## Feature Requests

This section lists the features that are added in Aptify 5.5.4.3000

## **Accounting**

---

The following new features are added to the Accounting system as part of Aptify 5.5.4.3000.

### **Aptify Web: Support for the AP Export Wizard**

Aptify 5.5.4.3000 adds support for the Accounts Payable (AP) Export wizard in the web interface. Support for this wizard is added by updating a JavaScript file, updating metadata, and adding a component, APPProcessComponent. (*Issue 19219*)

### **Aptify Web: Support for the AP Import Wizard**

Aptify 5.5.4.3000 adds support for the AP Import wizard in the web interface. Support for this wizard is added by updating a JavaScript file, updating metadata, and adding a component, APPProcessComponent. (*Issue 19220*)

### **AP Vendors File Pulls County Instead of Country**

In Aptify 5.5.3 and up, there is an issue where when the AP Vendors file is generated, it is pulling the city, state, and county information, but the country information is not pulled. This is due to an error in the code that calls the address data, where the line that should call the country information is calling the county information. Aptify 5.5.4.3000 updates an object to ensure that when the AP Vendors file is generated, country information is included as expected. (*Issue 23937*)

---

## Aptify SOA Framework

---

The following new features are added to the Aptify Service-Oriented Architecture (SOA) framework as part of Aptify 5.5.4.3000.

### Improvements to GetRecord Endpoint: Record Names and Eliminating Sub-Type Record Version Number

Aptify 5.5.4.3000 includes updates to the GetRecord SOA endpoint that eliminates the retrieval of unnecessary information, which should improve the overall performance of the endpoint. (*Issue 23230*)

### SOA Improvements

Aptify 5.5.4.3000 makes the following improvements to SOA for the Aptify web interface:

- **Support of greedy path parts:** Developers can now identify greedy path parts to define an arbitrary route for their controllers and parse it themselves. This issue adds a new `IsGreedy` field in the Controller Routes sub-type entity. Note that a path cannot be both literal and greedy. Also, for a given controller, only the last route specified in the sub-type can be marked as greedy. (*Issue 23358*)
- **Update the ImageField controller to support update and delete operations:** The controller now supports the following http methods: DELETE, POST, PUT, PATCH. DELETE will null out the requested field. POST, PUT and PATCH all update the existing field. Data can be specified in two ways, and both ways require the content-type header to be specified. If the content-type header is plain/text, the body of the HTTP message should be URL that is resolvable from Aptify Services. Services will retrieve the content from that location and set the field with the data. If the content-type header starts with 'image/', Services will use the body of the request as the binary value for the field. (*Issue 23364*)
- **Ability to enable and disable signal hub plug-ins:** Updated the Services Framework object and added a new section to `web.config` for defining hubs configuration. (*Issue 23638*)
- **Support for server-side output caching:** A new Caching Policy record, *year caching with server cache*, enables server side caching. The output cache is keyed via URL and query parameters. A plug-in supports the standard Time Based caching attributes to control client side cache headers. It also supports:
  - `EnableServerCaching`: Enables and disables (*true* or *false*) the cache.
  - `ServerCachingRequiredParameters`: query parameters that must be present on the request for server caching to be considered
  - `ServerDays`: how long the server cache is kept
  - `xAptifyIgnoreServerCaching`: Optional query parameter used to bypass server cache entirely

**Note:** Only controllers with GET routes are candidates for server caching.

There is no way at this time to easily determine whether a response is served from server cache or goes to the database without looking at the SQL Profile. (*Issue 23468*)

- **Support for configurable options for Remember Me and Account Lockout on web user authentication:** Current web user authentication provider does not provide the option to enable or disable the Remember Me and Account Lockout logic, so by default they are disabled. Aptify 5.5.4.3000 updates the web user authentication provider to execute the Remember Me or Account Lockout logic if it is explicitly enabled. (*Issue 23651*)
- **Support for rate and review of products for web stores:** Updates the services layer to support this functionality. (*Issue 23910*)

(*Issue 23131*)

## SOA: Update JavaScript Files

Aptify 5.5.4.3000 updates the following JavaScript files for the Aptify Services Oriented Architecture (SOA):

- Aptify.Framework.Utility.js (*Issue 23590*)
- Aptify.Framework.Utility.Cache.js (*Issue 23588*)
- Aptify.Framework.Utility.Inheritance.js (*Issue 23591*)

## Aptify Web Framework

---

The following new features are added to the Aptify Web framework as part of Aptify 5.5.4.3000.

### Add Capability To Display or Hide Images to Message Box

Aptify 5.5.4.3000 adds the capability to the web interface to display or hide images that can be used on different kind of message boxes. For example, warning type messages will have a warning icon. This implementation allows developers to pass in a value of *false* for the **showImage** parameter for the Aptify.Framework.Utility.UI.MessageBox.js file, so that those images can be hidden if needed. | (*Issue 23650*)

### AptifyJS: Add Helper Method to Get Current Person ID

Aptify 5.5.4.3000 updates a JavaScript file to add a helper method that gets the current Person ID. (*Issue 23969*)

### Aptify Web: Ability to Open a Specified URL in a New Browser Tab from a Dashboard

Aptify 5.5.4.3000 adds a new button type, **Open URL**, to the Aptify web interface. Specify a URL in the button properties to open any URL, including a view or record in the Aptify web interface. (*Issue 22310*)

## **Aptify Web: Add Switch Dashboard Button**

Aptify 5.5.4.3000 introduces in the web interface a Switch Dashboard button that enables users to change from one dashboard to another dashboard, including dashboards that are tied to an application not currently in the user's applications list. An error message is issued when a user selects a dashboard for an application that they do not have permission to access. This feature updates four JavaScript files in the Aptify Web framework to provide the ability to switch between dashboards. (*Issues 28860, 15106, 23207, and 23211*)

## **Aptify Web: Attachment Count Does Not Display**

In previous releases, the web interface did not display a count of the attachments in a record. Aptify 5.5.4.3000 updates a JavaScript file to add the attachment count to the web interface. (*Issue 15533*)

## **Aptify Web: Enable Filtering of Input Properties on Input Maps**

Aptify 5.5.4.3000 updates the web interface to filter the list of input properties that are displayed for input maps. (*Issue 24224*)

## **Aptify Web: Enhancements To Spaces Framework**

Aptify 5.5.4.3000 modifies the framework for the Spaces feature to provide the capability to scroll posts to load the next set of posts. (*Issue 23649*)

## **Aptify Web: Implement Zip Code/Postal Code Look-up Functionality**

Aptify 5.5.4.3000 adds support for postal code auto-population in the Aptify web interface to match the existing feature in the Aptify Desktop client. This feature includes support for ZIP+4 codes. (*Issues 16517 and 23798*)

## **Aptify Web: Improve Cross Browser Support**

Aptify 5.5.4.3000 updates the Aptify web framework to ensure that the following browsers can be used to run the Aptify web interface:

- Microsoft Internet Explorer 10 and Edge (*Issues 17774, 17779, 17781, 17782, and 17786*)
- Latest version of Mozilla Firefox (*Issues 17780, 23215, 23216, and 23915*)

(*Issue 23279*)

## **Aptify Web: Improve Favorites Option**

Aptify 5.5.4.3000 updates the Favorites option in the web interface, adding the ability to delete and rename Favorites Groups. (*Issues 21719 and 22341*)

## Aptify Web: Provide the User with the Option to Decide Which Form Is Opened for an Entity, Either the Summary Form or the Standard Form

Aptify 5.5.3 introduces Summary forms for Persons and Companies to the web interface, and this feature adds the ability for users to determine whether the default form that is loaded is the Summary or the standard data entry form. The Summary form is a read-only form, and the data entry form can be edited. A top-level form template that is a summary form has the new `IsSummaryTemplate` bit field set. To disable the display of summary forms, an administrator can set the `SupportSummaryTemplate` attribute to 0 in the Persons or Companies entity. (*Issue 18408*)

## Aptify Web: Search Improvements

Aptify 5.5.4.3000 updates the Search functionality in the Aptify web interface as follows:

- **Link Box Search:** Implement full text search approach used in the Quick and Universal Search and highlighting of search term in the results. (*Issue 19823*)
- **Spaces Search:** Implement full text search approach used in the Quick and Universal Search and highlighting of search term in the results. (*Issue 21046*)
- **Search enhancements:** Search control is enhanced to align with other Aptify products. (*Issue 23644*)

(*Issue 22826*)

## Aptify Web: Support Record History Restore

Currently in the web interface, users do not have the ability to restore a previous version of a record history. Aptify 5.5.4.3000 updates four JavaScript files, the Services Framework Endpoints Record History Restore and Application objects, and metadata to make a button available in a record to restore a previous version of a record history. (*Issue 15959*)

## Aptify Web: Support View Duplicates Upon Duplicate Detection

Currently in the Aptify web interface, when a duplicate is detected when a record is saved, such as Persons or Companies and the entity supports Aptify's duplicate check feature, the dialog presented to the user includes a non-functional **View Duplicates** button. Aptify 5.5.4.3000 updates a JavaScript file to enable the **View Duplicates** button and support its intended functionality. If there are more than one duplicate records, a grid listing the duplicate records is displayed. If there is only one duplicate record, it is opened in a new browser tab. (*Issue 24300*)

## Bootloader Should Allow for Override of Default File Lists

Aptify 5.5.4.3000 updates a JavaScript file to ensure that bootloader allows applications to change the list of default files that are loaded and allows for injection into the front of the line when queuing up files to load. (*Issue 23968*)

## Displaying Alerts On Summary Forms

Leveraging Aptify's stock Alert functionality, Aptify 5.5.4.3000 updates the HTML5 Web Metadata Generators object, updates JavaScript and CSS files, and adds component and form template parts to add record alert information to the Company and Persons Summary forms in the web interface. (*Issue 24513*)

## Improved Support for iPad

Aptify 5.5.4.3000 updates the Aptify web interface framework to improve support for using the Apple Safari web browser on the iPad running iOS 9. To do this, the following improvements have been made:

- More intuitive scrollbars in grid views (*Issue 22281*)
- Improved system behavior while working with HTML fields (*Issue 22848*)
- Resolved button clicking problems (*Issue 23067*)
- Enabled scrolling within view hierarchies (*Issue 23325*)
- Ability to connect to shared folders (*Issue 23732*)
- Photos can be added to Persons records (*Issue 23733*)
- Display of the Timeline data in the Persons Summary form (*Issue 23735*)
- Proper alignment of buttons on Prompt wizard (*Issue 23685*)
- Saving a new view with a filter does not create an error (*Issue 23620*)
- Increased Field Size on Login Page (*Issue 23734*)

## Reduce Calls to Server by Packaging UI Parts

Aptify 5.5.4.3000 improves the performance of the web interface by adding two attributes to control the bundling of data requested for User Interface (UI) Parts, so that a single request results in receiving data for multiple UI Parts. The **Aptify.Services.EntityUIParts.LettersPerPackage** attribute controls bundling for the UI Parts for entities, where the bundle contains all of the entity UI parts for a letter sent in the request. The **Aptify.Services.UIParts.PartsPerPackage** attribute controls the bundling of UI Parts, where the bundle contains the specified number of UI Parts records, that start from a UI Part ID number sent in the request. (*Issues 23371 and 23528*)

## Regenerate UI Part Metadata Item When a Form Component Changes

Aptify 5.5.4.3000 adds a new event handler to run the UI Part Metadata Item regeneration Process Flow for the Form Components UI Part Metadata Item after Form Components are created or changed. (*Issue 24110*)

## Support the Ability to Specify Entities to be Loaded Into the Entity Metadata Cache

Currently, the Aptify Entity Metadata Cache loads all of the Entities in the system. This works well for long-running applications which access many of the Entities over time, because a single request to the database to get the information results in the application having that information for the duration of the process. For applications like AptifyCreateProcessFlowRun.exe, which require a small set of Entity information, and do not run for a long time, the cost of retrieving all the Entity information outweighs the benefits of retrieving a lot of unnecessary information. Aptify 5.5.4.3000 adds a new configuration file



attribute, `Aptify.Framework.Metadata.FilteredEntitiesPipeSeparated`. The value for this attribute is a list of the top-level entities, separated by the pipe (|) character, to allow a developer to specify which top-level Entities should be loaded into the cache. The Entity Metadata Cache also includes sub-types of the listed Entities and any Embedded Linked Entities. If the application requests an Entity that isn't in the cache, it will be loaded on demand. If this attribute is not present in the configuration file, all of the Entities are loaded. As an additional optimization, the default value for the Update Check Interval attribute, `Aptify.Framework.Metadata.UpdateCheckInterval`, is changed from 60 seconds (1 minute) to 300 seconds (5 minutes). (*Issue 24033*)

---

## Customer and Member Management

---

The following new features are added to Customer and Member Management as part of Aptify 5.5.4.3000.

### Add Preferred Phone Concept to Persons Form on Desktop Client

Currently in Aptify, there is no way to specify a preferred phone number from the set of phone numbers that are listed in a Persons record. This hotfix updates two objects and updates Persons metadata to enable Aptify Desktop client users to specify a preferred phone number from the available phone number types.

**Note:** If the Persons form in your environment is modified, the preferred phone number function may not work. Perform the following procedure to validate the form template part settings for the preferred phone number function:

1. Open the Form Template Parts service in the Framework application.
2. Find and open the Persons Phone Control record.
3. In the **Layout Key** field, ensure that the value is set to **Persons Phone Control**.
4. Save and close the Persons Phone Control record.
5. Find and open the Persons Preferred Phone record.
6. In the **Layout Key** field, ensure that the value is set to **Persons.PreferredPhone**.
7. Save and close the Persons Preferred Phone record.

**Note:** The preferred phone number function is only available when using the Aptify Desktop client.

*(Issue 24197)*

### Aptify Web: Ability to Open a Record to a Specific Tab

Aptify 5.5.4.3000 adds the ability in the web interface to open a record from a summary form to a specific tab in the related record. For example, it is now possible from a Persons Summary record to click a button that opens the Persons record with a specific sub-type tab displayed, instead of the default tab. *(Issue 24419)*

### Aptify Web: Preferred Mailing Address as Default Address

Currently in Aptify, when a record with a specified Preferred Mailing Address is opened, the first address entered is displayed as the address. Aptify 5.5.4.3000 updates the web interface so that when a record with a specified Preferred Mailing Address is opened, the address displayed is the preferred address. *(Issue 24321)*

---

## Framework

---

The following new features are added to the Framework application as part of Aptify 5.5.4.3000.

### Add RecordTemplateID Input Property to Link Box Form Component

Currently in Aptify, record templates for Link Box form components are defined using new record parameters. This method is not an intuitive process and is not supported in the Aptify web interface. Aptify 5.5.4.3000 simplifies the record template definitions process by adding a RecordTemplateID input property to the Link Box form component. This input property is supported in Aptify Desktop client and the Aptify web interface. (*Issue 23980*)

### Add Support for Derived Entities

Aptify 5.5.4.3000 adds support derived entities. Derived entities are an extension of virtual entities in that there are no data structures created for the entity, but unlike virtual entities, the derived entity does support persisting data. The persistence is provided from the Embedded Entity linked field (DerivedEntityField). Derived entities provide a view of the data from another entity. For example, a simplified view of the Persons entity can be created to expose a subset of the Persons fields. This is useful when using a Web Services API for integrations. (*Issue 23653*)

### Error Message in Message Run Record Should List the Persons for Whom the Message Failed

Currently in Aptify, if a message run cannot send one or more messages, it reports how many messages that it failed to send, but it does not provide specific information about which records failed. Aptify 5.5.4.3000 updates the Aptify Messaging Engine so it now reports for which records from the recipient list it could not send a message. (*Issue 23438*)

### Improve Aptify Attribute Manager Support for Boolean Attribute Values

The Aptify Attribute Manager is used to retrieve configuration file values from the appSettings section. Typically, the attribute values are strings. Occasionally, the value is a number or boolean value. Developers typically get the Attribute's value and convert it to a boolean value. The conversion to a boolean value using VB.NET's CBool can be restrictive, especially when working with attribute values. Aptify 5.5.4.3000 improve the Attribute Manager by adding a method, ToBoolean, on the AttributeValue class. This method should be used when retrieving a boolean value from Attribute Manager.

The ToBoolean method uses the following rules to determine the value returned:

- If the attribute value is null or an empty string, the method returns *false*.
- If the attribute value is numeric, the method returns *false* if the Value is 0, and returns *true* for all non-zero values.
- If the attribute value is *True*, *On*, or *Yes*, the method returns *true*.
- If the attribute value is *False*, *Off*, or *No*, the method return *false*.

For string matches, case does not matter, so the values *true* and *True* are equivalent. If the Value does not match any of the above criteria, an `InvalidCastException` is issued stating that the Value could not be converted to Boolean. (*Issues 24378 and 24542*)

## Launching Aptify CM Tool from Aptify Framework

Currently in Aptify, the Aptify Configuration Management (CM) Tool is a separate install and has to be run from outside of Aptify. Aptify 5.5.4.3000 adds the Aptify CM Tool to the setup program, and adds a button in the Aptify Desktop client start ribbon. The button is only visible when the logged-in user has a Developer license.

**Note:** If the Aptify CM Tool is not installed on the computer where the Aptify Desktop client is installed, a developer starting an Aptify session receives a message requesting that they install the tool. See [Using the Aptify Configuration Migration Tool](#) in the Aptify Product Knowledge site for more details about this tool.

(*Issue 23560*)

## Support Record Template and New Record Parameters Simultaneously

Currently, the Record Template and New Record Parameters features are tied together, where making changes in one overwrites the settings in the other. Specifying a Record Template overwrites other New Record Parameters, and when specifying a Record Template, the New Record Parameters generated by a View's filters overwrite the Record Template settings. Aptify 5.5.4.3000 updates the framework to ensure that in both the Desktop client and the web interface, New Record Parameters should be applied on top of the specified Record Template if both are provided. (*Issue 23981*)

## Update Melissa Data Web Service to Support International Address Verification

Aptify 5.5.4.3000 updates the Melissa Data Web Service Verification object to add the ability to configure the Melissa Data web service to support the verification of international addresses. (*Issue 14235*)

## Update ZipCode Utility with Latest Files From July 2016

Aptify 5.5.4.3000 updates the Zip Code Update utility with the latest U.S. ZIP Code and congressional district information, as of July 2016. See this topic <https://kb.apptify.com/display/PK55/Running+the+Update+Utility+for+U.S.+ZIP+Codes> in the Aptify 5.5 Product Knowledge space for the procedure to update the ZIP codes in your environment. Note that the Welcome screen will indicate **July 2016** for this release.

**Note:** You must have an Aptify User Community account to access the Product Knowledge site.

**Note:** If you are currently logged in to the Product Knowledge site, clicking the link above will take you directly to the topic. Otherwise, clicking the link will lead you to a login page. Once you are logged in, clicking the link above will take you directly to the topic. (*Issue 24851*)

## User Values Does Not Handle Values Larger Than 255 Characters

Currently in Aptify, User Values, which store Name Value pairs for Aptify users, do not handle values that are larger than 255 characters when using the GetUserValue and SetUserValue methods in the AptifyApplication object. The User Values Entity contains a TextValue field that is set to nvarchar(max), which can hold larger values, but the AptifyApplication object methods are not using that TextValue field. Aptify 5.5.4.3000 updates an object so that the GetUserValue and SetUserValue methods are able store larger values in TextValue and return the correct value. (*Issue 23652*)

## Messaging

---

The following new features are added to the Messaging System as part of Aptify 5.5.4.

### Aptify Web Bulk Messaging: Implement Support for Message Actions

Aptify 5.5.4.3000 implements support for performing message actions in the Bulk Messaging dialog for the Aptify web interface. Aptify 5.5.4.3000 adds a new object, adds a new object repository object, and updates a process component to add message actions support to the Aptify web interface. The most common implementation of this feature is the ability to generate contact logs for messages sent from the system. (*Issues 17947 and 22056*)

### Aptify Web: Support Global and Entity Level Aptify Messaging with UseAptifyMessaging Attribute

Aptify 5.5.4.3000 adds support for opening the Aptify Messaging dialog from a field's email icon and supports the standard UseAptifyMessaging entity attributes already in use by the Desktop client. (*Issue 17843*)

### Aptify Web: Support Schedule Message Wizard

Aptify 5.5.4.3000 adds support for using the Schedule Message wizard in the web interface.

**Note:** The Preview feature for message templates that is available in the desktop version of this wizard is not currently supported in web. (*Issues 19225 and 24549*)

## Orders

---

The following new features are added to the Orders system as part of Aptify 5.5.4.3000.

### Add Support for Additional Orders Wizards in Aptify Web

Aptify 5.5.4.3000 adds support for the following Orders system wizards in the Aptify web interface:

- Invoice Consolidation wizard (*Issue 19198*)
- Bulk Write Off wizard (*Issue 16069*)
- Bulk Order wizard (*Issue 16173*)

## ePayment Capture Solution

Leveraging the ePayment Capture process component already included in stock Aptify, 5.5.4.3000 delivers a process flow and a scheduled task to automate the ePayment capture process for Aptify.5.5.4.3000 includes a new Process Flows record called **ePayment Capture Process Flow** and new Scheduled Tasks record called **ePayment Capture Solution**. The process flow is run against a specified view.

**Note:** This solution assumes that your organization is running at least application server.

To implement this functionality so that credit card and ACH payments are capture automation, do the following:

1. Determine the Payments view and the frequency in which you want to run the ePayment capture process.
2. Navigate to the Process Flows service and open the **ePayment Capture Process Flow** record.
3. Specify the View ID in which you want to run the ePayment Capture wizard against.
4. Navigate to the Scheduled Tasks server and open the **ePayment Capture Solution** task.
5. Specify the Job Account Name and password of your application server.
6. Specify the time and frequency, based on your organization's needs.

## Support Automated Clearinghouse Payment Type (ACH) Update with PayPal

Aptify 5.5.4.3000 updates the Payments object to ensure that the ACH payment type can use PayPal.

See [ACH Procedures](#) for more information about the related procedures. (*Issue 22599*)

## Support Order Button on Payments Form

In previous releases, searching for Orders from the Payments form is done using three buttons, **Order Search**, **Order #**, and **Invoice #**. In addition, these searching buttons are disabled in the Aptify web interface in previous releases. Aptify 5.5.4.3000 updates the Payments functionality to simplify the Order searching process on the Payments form. A single button, **Order Search**, is now used to search for Orders, and this functionality is available for use in the Desktop client and the web interface. (*Issues 18432, 18215, and 18144*)

## Setup Program

---

The following new features are added to the Setup Program as part of Aptify 5.5.4.3000.

### Update Setup with New Configuration Migration Tool

Aptify 5.5.4.3000 updates the Setup Program with the latest version of the Aptify Configuration Migration (CM) Tool. See [Using the Aptify Configuration Migration Tool](#) in the Aptify Product Knowledge site for more details about this tool. (*Issues 23066, 23503, and 24381*)

## Subscription and Membership Dues

---

The following new feature is added to the Subscription and Membership Dues system as part of Aptify 5.5.4.3000.

### **Aptify Web: Support of Subscription Fulfillments**

Aptify 5.5.4.3000 adds support for Subscription Fulfillments in the web interface. (*Issues 15974*)

### **Viewing System**

---

The following new features are added to the Viewing System as part of Aptify 5.5.4.3000.

#### **Aptify Web: Ability to Copy and Paste Views**

Aptify 5.5.4.3000 introduces the ability to copy and paste views within the same service using the Aptify web interface. Users are able to copy a view from a service or a folder (the user's or a shared folder) and paste it to the folder list or one of the user's folders directly. This feature does not allow a user to copy a view to another user's shared folder. Aptify 5.5.4.3000 updates five files (CSS, JavaScript, and VB) and updates database objects and metadata to implement this feature. This feature also provides the option for the user to include or exclude the content of the **Schedule** tab in the copied view. This option is provided to the user through a prompt when the copy request is made.

**Note:** The ability to specify whether the **Schedule** tab content is copied with the view is only available in the Aptify web interface.

(*Issues 17290 and 22089*)

#### **Aptify Web: Ability to Delete Views**

Aptify 5.5.4.3000 introduces the ability to delete views using the Aptify web interface. Aptify 5.5.4.3000 updates a CSS file and a JavaScript file to implement this feature. This feature also includes the ability to search by view name and sort the views by name. (*Issues 22304 and 24163*)

#### **Aptify Web: Add Support for Proximity Wizard Implementation**

Aptify 5.5.4.3000 adds the Proximity Search wizard to the View Properties dialog to match the desktop client feature. (*Issue 18181*)

#### **Aptify Web: Deleting Records From ELVs**

You can now delete records from a view using the delete button on the View toolbar. Note that this is applicable for records with and without dependencies to other records. Aptify 5.5.4.3000 updates two JavaScript files to enable this functionality. (*Issues 18927 and 23243*)

## Aptify Web: Add Support to Sort Records Within Sub-Type Grid

Aptify 5.5.4.3000 updates the web interface to provide users with the ability to sort records within sub-type grids. This ability is controlled using the form template part *AllowSort* input property. When this property is set to *1*, users are able to sort any columns in the sub type grid by clicking on the column header in either ascending or descending order. The sort applies to the full set of records in the grid. An administrator will need to set this value for each form template part where re-sorting is allowed. The default value of this property is *0*, which disables the sorting logic.

**Note:** Record movement does not work properly within a sub-type grid once it is sorted. This is a known issue and will be resolved in an upcoming release.

(Issues 23312 and 23867)

## Aptify Web: View Filters Performance Delay: Support ViewFiltersSuggestedValueLists Entity Attribute For View Filters

Currently in the Aptify web interface, there is an issue in environments with large entities, where loading the values list for these entities can be subject to a significant delay, and a second delay can occur after loading the values list, when two or more characters are added to the Value area. Aptify 5.5.4.3000 updates the Viewing System to introduce two attributes (*GlobalViewFiltersSuggestedValueList* and *ViewFiltersSuggestedValueList*) that work together to control the values list, and a new stored procedure and service data object, *spGetEntityFieldValuesConditional*.

The *GlobalViewFiltersSuggestedValueList* attribute is a system-wide setting to control whether or not the **Filter Control Value** drop-down lists will be filled with up to 100 values pulled from the database. The possible values for the *GlobalViewFiltersSuggestedValueLists* attribute are *Off* (do not retrieve suggested values), *Per Entity* (only retrieve suggested values when a particular Entity has the *ViewFiltersSuggestedValueLists* attribute defined with a value of *On.*), and *On* (always attempt to retrieve suggested values). The default value is *On*.

The *ViewFiltersSuggestedValueList* attribute is an entity-specific attribute you can add to any Entities record's **Configuration > Attributes** tab to turn on the **Filter Control Value** drop-down list for views of that particular entity. When adding this attribute to an entity, set the value to *On*. Note that using this attribute assumes that *GlobalViewFiltersSuggestedValueLists* attribute is set to *Per Entity*.

The following table shows how the setting of these attributes affects what is displayed in the values list:

<b>GlobalViewFiltersSuggestedValueLists</b>	<b>ViewFiltersSuggestedValueLists</b>	<b>Values List Result</b>
On	On	100 records are displayed as suggested values
Off	On	No suggested values are displayed
Per Entity	On	100 records are displayed as suggested values



On	Off	100 records are displayed as suggested values
Per Entity	Off	The value list shows for static value fields (that have a defined Values list in the entity field record) and for fields with a SQL defined list (Values list entry that calls a stored procedure like State).

(Issue 18269)

## Bugs

This section contains the bug fixes resolved in Aptify 5.5.4.3000.

### Accounting Management

---

The following issues are resolved in the Accounting Management application as part of Aptify 5.5.4.3000.

#### AP Export Engine Assumes File Creation

In Aptify, there is an issue where the design of the Accounts Payable (AP) export engine always assumes that it will create vendor and transaction files and it does not support export methods that do not generate files. For example, the current AP export engine does not support exporting directly to SQL tables. Aptify 5.5.4.3000 updates the AP Export Engine object to ensure support for export methods that do not generate files, checks for a vendor file, and adds a condition to determine whether a vendor file is empty to resolve an exception. (*Issue 22602*)

#### Aptify Web: Error Logged in Exception Log When Updating the PayPal Record

Currently in the Aptify web interface, there is an issue where when a user saves updates to the PayPal record, an error is logged in the Exception Log, but the updates are saved correctly. Aptify 5.5.4.3000 updates the Accounting Management application to ensure that in this scenario, errors are not logged in the Exception Log. (*Issue 17868*)

#### Date Issue with Batch Wizard

Currently in Aptify, there is an issue where when a user runs the Batch Wizard for records that use a date format other than the U.S. format, an error is logged into the exception log, and the accounting period functionality cannot be used. The error is due to the date format being used in the SQL query not being compatible with the regional settings (for example, British English or en-AU). This issue occurs when batching Orders, Payments and Scheduled Transaction records. Aptify 5.5.4.3000 updates the Batch Wizard object to ensure that in this scenario, the Batch wizard works as expected and accounting periods can be set up. (*Issue 23240*)

### Aptify SOA Framework

---

The following issues are resolved in the Aptify Service Oriented Architecture (SOA) framework as part of Aptify 5.5.4.3000.

#### Add XML Documents to Aptify.services.framework.endpoints.dll

Currently in Aptify, documentation for the SOA endpoints can only be found on the Aptify Online Community Product Knowledge site. Aptify 5.5.4.3000 updates the Aptify.services.framework.endpoints.dll file with comments to enable developers to be able extract documentation on the endpoints from the object. (*Issue 22840*)

## **After SOA Restart, Valid Tokens in the Database Cannot be Used**

Currently in Aptify, there is an issue where when Services loses its in memory cache for token information, it cannot be reconstructed. Aptify 5.5.4.3000 updates two objects to change the AptifySession cookie to use the same value as the AptifyAuthorization header. This enables the system to go to the database when the in memory cache is missing. If a header and cookie are both supplied in a request, the cookie is ignored. (*Issue 23048*)

## **Aptify Services Cookie is not Distinct Across Different Instances of Services in Same Site**

In the Aptify web interface, there is an issue where the Aptify Cookie is not distinct across different instances of Aptify Services within the same Microsoft Internet Information Service (IIS) site. Aptify 5.5.4.3000 updates the SOA framework to resolve this issue. (*Issue 22839*)

## **Authentication Error When Multiple Instances of Aptify Web are Open in Browser**

Currently there is an issue in the Aptify web interface where if more than one browser tab or window is open (or an app that shares that same SOA, and the user has to re-authenticate (i.e., the session expires), the user cannot authenticate without closing all windows or tabs, except for one. Aptify 5.5.4.3000 updates the SOA tokens to ensure that in this scenario, the user is able to re-authenticate without closing windows or tabs. (*Issue 23397*)

## **Authentication is not Forced When System Detects User is Already Authenticated**

In the Aptify web interface, there is an issue where when a caller to Aptify.framework.utility.authenticateUser specifies they want to force authentication and the system detects that the user is already authenticated, a logout call does not happen, so actual authentication is bypassed. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, authentication is forced. (*Issue 22876*)

## **Controller Routes do not Respect RCF 3986**

In the Aptify web interface, the regular expression for controller path parts that are non literal and of type string do not respect all valid characters in RCF 3986. Aptify 5.5.4.3000 updates the set of characters supported by Aptify SOA controllers. (*Issue 23047*)

## **Domain Authentication Provider is not Caching Stored Procedure**

In the Aptify web interface, there is an issue where when services are authenticated using domain authentication and a service request is issued, each service request calling the spGetRelatedAuthenticationProviderAttribute stored procedure are seen. This data should be cached. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the data is cached as expected. (*Issue 23881*)

## **Employee Linked to SOA User Used In Business Logic Instead of Logged In User's Employee**

In the Aptify web interface, there is an issue where when a new Person record is created through the SOA SaveData EndPoint, the employee linked to SOA user account is used to populate the **Account Manager** field, so that the SOA user's employee data may be used in place of the logged in user's. Aptify 5.5.4.3000 resolves that behavior so that the correct information is used for the logged in user. (*Issue 22775*)

## **Field Level Restrictions are not Enforced During Updates from JavaScript API**

In the Aptify web interface, there is an issue where field-level restrictions are not enforced during updates from the JavaScript API, due to a problem with the EntityBatchCreateUpdate SOA controller. Aptify 5.5.4.3000 resolves this issue by updating an object. (*Issue 23051*)

## **Improve the Object Repository Image Handler Processing Logic**

Aptify 5.5.4.3000 updates an object to improve the Object Repository Image processing logic where a specific image size is requested so that the system looks for a previously created image of the appropriate size and use it. If that does not exist, Object Repository image is processed into a file of the appropriate size using a different method. (*Issue 23586*)

## Logout From Aptify Web not Working for Domain Users

Currently in the Aptify web interface, there is an issue where the logout does not function properly for domain users. Aptify 5.5.4.3000 updates two object files so that in this scenario, the logout works as expected. (*Issue 23880*)

## Problem with Default Transaction Management in Create/Update Records

Currently in the Aptify web interface, there is an error that is logged when a user saves changes to an Entity record with Topic Codes updates and nothing else. This error states that the transaction is no longer active. This is due to a situation where there are multiple instances of the UserCredentials object involved in the Create/Update logic. Each UserCredentials object has its own DefaultTransactionID, and when the Generic Entity commits a transaction, it clears its instance of the UserCredentials DefaultTransactionID, but the other UserCredentials object(s) contain a reference to the TransactionID that is no longer active. Aptify 5.5.4.3000 updates the Services.Framework.Utilities object to update DoCreateUpdate to ensure that DefaultTransactionID is cleared for all UserCredentials objects (GE and oApp) when the transaction is completed. (*Issue 24442*)

## Service Application Entity Field Lookups are Case Sensitive

In the Aptify web interface, there is an issue where field lookups for service application entities are case-sensitive, when they should be case insensitive. Aptify 5.5.4.3000 updates the services framework so that field lookups are case insensitive. (*Issue 23050*)

## Services: Authentication Errors Occur When Given a Valid User Name, Wrong Password, and an Anonymous Token

In the Aptify web interface, there is an issue where authentication errors occur when a valid username, an wrong password, and an anonymous token is provided. Aptify 5.5.4.3000 updates the aptify.security.provider to ensure that in this scenario, SOA behaves as expected. (*Issue 24126*)

## Services Error When Authentication Provider Does Not Provide a Status Code

With Aptify 5.5.4, in some cases Aptify services may throw an *object reference not set to an instance of an object* error if an authentication provider does not provide a status code. Aptify 5.5.4.3000 updates the services framework to properly handle those situations. (*Issue 23049*)

## Services Repository Image Size Processing Issue With Cache

Currently in Aptify SOA, it is possible to request an image from the Object Repository and, in that request, specify the Height and Width of image. The Repository library attempts to process the file, transforming it to the requested size. Before the image is processed, the Repository library checks for a cached version of the image in the requested size. If it does, the cached file is used and no further processing is required. If not, the image is resized and saved as a file to the cache. The location of the cache is based on an Images folder, if defined, or the Repository folder. There is a bug in the Images folder lookup that provides false positives to the Repository. Aptify 5.5.4.3000 updates the Repository to bypass the Images folder if a cached file has not been defined. (*Issue 24160*)

## SignalR Could Report as Offline Even Though a Valid Token is Passed

In Aptify 5.5.4, there is an issue where an application could receive an offline status from the Javascript API even though services are up and running and a valid token is being passed. Aptify 5.5.4.3000 improves the system's behavior when switching between online and offline modes. (*Issue 23304*)

## SignalR Sends Errors During Connection and Reconnection Events When Anonymous Access is Enabled

In Aptify 5.5.4, there is an issue where when SignalR connection or reconnection events are performed using an anonymous token, an error is written to the event log. Aptify 5.5.4.3000 updates Aptify.Security.Provider to ensure that in this scenario, errors are not generated. (*Issue 23859*)

## SOA Aptify.Services.Framework.Utility Fixes

Aptify 5.5.4.3000 updates the Aptify.Services.Framework.Utility object to address several fixes. (*Issue 23646*)

## SOA: Improve Some Error Messages

Aptify 5.5.4.3000 updates an object to improve the error messaging within the services framework. (*Issue 23363*)

## SQL Injection Possibility Via Topic Codes

Currently in the Aptify SOA, an unparameterized value for topic codes is used, which is a vector for a SQL injection attack. Aptify 5.5.4.3000 updates an object to use a parameterized query for topic codes. (*Issue 23905*)

## Web User Authentication does not Abort Request When Error Encountered

Currently in the Aptify web interface, there is an issue where if any of a web user's authentication methods encounters an error, the request is not aborted. The exception should be re-thrown to ensure that a token is not returned to the caller. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the authentication request is aborted. (*Issue 23860*)

## Aptify Web Framework

---

The following issues are resolved in the Aptify Web framework as part of Aptify 5.5.4.3000.

## Aptify May Shift Upwards That Causes the Quick Search Bar To Disappear

With Aptify 5.5.4, the web interface may shift upwards after loading a view from the Favorites list and selecting a row in that view. Aptify 5.5.4.3000 resolves that behavior. (*Issue 23234*)

## **Aptify Web: Buttons on the Customer Tab are not Consistent with Other Button Style**

in the Aptify web interface, there is an issue where the buttons on the Bulk Orders record's **Customers** tab do not match the style used by other buttons on the form. Aptify 5.5.4.3000 updates a Javascript file ensure that these buttons match other button styles. (*Issue 23422*)

## **Aptify Web: Changes Made in the Record Using In Place Edit Should Save on Stop In Place Button**

Currently in the Aptify web interface, there is an issue where the changes made in a record using In Place edit are not saved when the **Stop In Place** button is clicked. Aptify 5.5.4.3000 updates a JavaScript file so that in this scenario, the **Stop in Place** button works as expected. (*Issue 24103*)

## **Aptify Web: Cannot Add Attachments To a Sub-Type Record**

Currently in the Aptify web interface, there is an issue where when a user adds an attachment to a Sub-Type record, and the record is saved and closed, the attachment is not in the record. Aptify 5.5.4.3000 adds the attachment functionality to Sub-Types and additional Generic Entity (GE) object and updates a stored procedure to ensure that attachments can be added as expected. (*Issues 21942*)

## **Aptify Web: Check Boxes Removed When Switching to New Tab**

Currently in the Aptify web interface, there is an issue where when a user selects a check box for a row in a sub-type grid or list view, clicks on another tab in the record, and returns to the grid or view, the selected check box is now cleared. Aptify 5.5.4.3000 updates two JavaScript files to ensure that in this scenario, the selected rows are not cleared. (*Issue 23242*)

## **Aptify Web: Drill Down ELV Toolbar Should Follow The UI Standard For Toolbars**

In Aptify 5.5.4, there is an issue in the web interface, there is an issue where if a user drills down to a list view from a chart view, the toolbar icons are not correct in the list view drill down. Aptify 5.5.4.3000 updates a JavaScript file to address this issue. (*Issue 17067*)

## **Aptify Web: Drop Down for Group By on Chart View Populates as a Text Box**

Currently in the Aptify web interface, there is an issue where when a user creates a Chart view, in the **Grouping > Primary Grouping** tab, the **Group By** field displays as a text field the first time the tab is opened. This field should be a drop-down list. The field displays correctly in subsequent viewings. This issue updates a JavaScript file to ensure that the **Group By** field always displays as a drop-down list. (*Issue 22937*)

## **Aptify Web: Favorite Groups are not Sorted Correctly Based on Rank**

Currently in the Aptify web interface, there is an issue where when a user displays a list of client-created ranked favorite groups, the groups are not displayed in rank order. Aptify 5.5.4.3000 updates a JavaScript file to ensure that the favorite groups are displayed in rank order. (*Issue 22948*)

## **Aptify Web: Fields are Updated Only When Cache is Cleared**

In the Aptify web interface, once a form is opened, all the data related to that form is cached. This cache is then used to display data for a form reload until it is determined that the data has changed in the database. However, when a field is updated as listed below, the cached information is displayed until the browser cache is cleared.

- Through a backend update (for example, trigger updates) that does not generate any record history, This problem affects the Persons, Person Relationship, Companies, Orders, and Products records. (*Issues 18928, 19671, 23350, and 22629*)
- Adding membership to a Company through the Membership wizard. (*Issue 21410*)
- Member Type and Company Member Type in a Persons form when updated in Companies form (*Issue 17120*)

Aptify 5.5.4.3000 updates five JavaScript file to ensure that in this scenario, the information is displayed as expected.

## **Aptify Web: Filter Rule UI Should Support Date Keywords**

Currently in Aptify web, the ability to create filters that use date keywords is not supported. Aptify 5.5.4.3000 supports the ability to type in date keywords such as NOW, GETDATE(), and TODAY in filter rules to create filter rules that are based on the current date. (*Issue 19688*)



## Aptify Web: getUrlParameter Does Not Work With Hashtags in URLs

Currently in Aptify web, there is an issue where `Aptify.framework.utility.getUrlParameter` does not work when the input URL contains a hashtag. Aptify 5.5.4.3000 updates a JavaScript file to ensure that URLs containing hashtags can be processed as expected. (*Issue 23970*)

## Aptify Web: Generic Import Wizard Not Working When AptifyServicesAPI Is In Non-Default Path

Currently in Aptify web, there is an issue where when Aptify web is installed outside the default path (`C:\inetpub\wwwroot\AptifyServicesAPI`), the Generic Import wizard does not work. Aptify 5.5.4.3000 updates the installer to ensure that in this scenario, the Generic Import wizard works as expected. (*Issue 23820*)

## Aptify Web: Hierarchical Sub-View Records Not Shown on Dashboard

Currently in the Aptify web interface, there is an issue where dashboards do not display sub-view records created from a view's **Hierarchy** tab. Aptify 5.5.4.3000 updates a JavaScript file to ensure that the sub-view records display as expected. (*Issue 23259*)

## Aptify Web: Image is Cropped on New Person Record

Currently in the Aptify web interface, there is an issue where photos added to a Persons record may be cropped incorrectly and leave white space at the bottom of the photo area. Aptify 5.5.4.3000 updates a JavaScript file to resolve this issue. (*Issue 23164*)

## Aptify Web: Improve UI Part Versions Query

This issue updates the logic used to retrieve UI Part Version information for the web interface. (*Issue 23250*)

## Aptify Web: List Record Errors

Currently in the Aptify web interface, there are issues in displaying List records. The first issue occurs when opening a List record for the first time, the grid does not display, but the grid does display when the record is saved, closed, and re-opened. The second issue occurs when adding a list item to a List record, the list item has an ID of 0 when it is opened. The third issue is that a Persons record cannot be opened from a List record. Aptify 5.5.4.3000 updates the code in the Lists form template to ensure that List records display as expected. (*Issues 16938 and 23494*)

## Aptify Web: Long File Type Fields are not Rendered Correctly

Currently in the Aptify web interface, there is an issue where a record with a field that has an **Extended Type** of **File**, the record does not display correctly. In some instances, the **Upload** or **Browse** buttons are not displayed, and in others, icons are not displayed correctly. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the records displays as expected. (*Issue 23445*)

## **Aptify Web: Need Mechanism to Know Precise File Upload Path for File Type Fields**

When a user uploads a file in the web interface, the file is added to the web server's Uploads folder (identified in the AptifyServicesAPI application's Web.config), and a GUID is added to the beginning of the file name. While this prevents duplicates, it makes it difficult to identify the uploaded file. This issue updates the File field type to display the full path and file name for the uploaded file. (*Issue 23410*)

## **Aptify Web: No Loading Indicator When Initiating a Search**

In the Aptify 5.5.4 web interface, the search indicator is removed from the Search functionality. This is an issue when a user searches a data set that takes several seconds to process, as there is no indication that the system is performing the search. Aptify 5.5.4.3000 updates three CSS files to ensure that in this scenario, an indicator appears while the search results are processed. (*Issue 23059*)

## **Aptify Web: Online/Offline Functionality Not Working When Session Left Idle Over 1 Hour**

Currently in the Aptify web interface, there is an issue where the online and offline functionality stops working when a session is idle for over an hour. Aptify 5.5.4.3000 updates an object to ensure that the online and offline functionality works as expected. (*Issues 23021 and 23141*)

## **Aptify Web Orders and Payment Information Control Does Not Refresh When Requested via UIPart**

Currently in the Aptify web interface, there is an issue in environments where different payment types are specified for multiple organizations. In this environment, when the organization ID is changed on an order, the payment type is not refreshed to the value specified for the organization. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the payment type refreshes as expected. (*Issue 23909*)

## **Aptify Web: Payment Type Data Overlapping on the Details Tab of the Payment Record**

Currently in the Aptify web interface, there is an issue where when a user attempts to view a payment record, the Payments Information controls are overlapping. Aptify 5.5.4.3000 updates a JavaScript file and object to ensure that in this scenario, the Payments Information controls are displayed as expected. (*Issue 23138*)

## **Aptify Web: Record Forms Do Not Open for New Entities**

Currently in the Aptify web interface, there is an issue where when a new entity is created from the Aptify Desktop client, a user cannot open a new record or an existing record (that has been created from the Desktop client) in the web interface. Once user resets the application (an option available from the Gear menu), the records can be opened as expected. Aptify 5.5.4.3000 updates two stored procedures to ensure that in this scenario, the web interface works as expected. (*Issue 24157*)

## **Aptify Web: Reload Fails When SQL User and Server Date Formats Do Not Match**

Currently in the Aptify web interface, there is an issue where reloading Aptify fails when the date format set for the SQL user does not match the date format used for the SQL server. If your Aptify environment is in a country that uses the Day Month Year (DMY) or Year Month Day (YMD) formats, you should perform the procedure in the *Configuring to Support DMY and YMD Date Formats* step in the **Aptify 5.5.4.3000 Hotfix Installation Instructions** document included with this hotfix to ensure that reloading Aptify does not fail. (*Issue 23044*)

## **Aptify Web: Remove Scroll Bar From Delete Confirmation Message Box**

In Aptify 5.5.4, a delete confirmation message in the web interface may have an unnecessary scrollbar. Aptify 5.5.4.3000 updates a JavaScript file removes that scrollbar. (*Issue 23237*)

## **Aptify Web: Scroll Bar May Not Appear on a Calendar View**

In Aptify 5.5.4, there is an issue where a scrollbar may not appear when working with a Calendar view. Aptify 5.5.4.3000 updates a JavaScript file to fix this issue. (*Issue 16133*)

## **Aptify Web: Selecting Topic Codes Creates New Topic Code Record Links Instead of Updating Existing Links**

Currently in the Aptify web interface, there is an issue where when a user selects and clears a topic code, new topic code record links are created, instead of the existing links being updated. Aptify 5.5.4.3000 updates the Aptify web framework to ensure that in this scenario, the existing record links are updated as expected. (*Issue 22517*)

## **Aptify Web: Site Freezes After Saving Payment Record**

Currently in the Aptify web interface, there is an issue where when a user updates a Payment record and saves the changes, the site freezes and the user is unable to select any tabs. Aptify 5.5.4.3000 updates the web interface to ensure that in this scenario, the site works as expected. (*Issue 23137*)

## **Aptify Web: Sub-Types are not Saved When Cloning Records**

Currently in the Aptify web interface, there is an issue where when a user clones a record with sub-types, the sub-types appear in the cloned record initially, but when the cloned record is refreshed, the sub-types are missing. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, sub-types are found in the cloned record. (*Issue 23710*)

## **Aptify Web: Sub-Type Data Record Added Does Not Persist In Cloned Record**

Currently in the Aptify web interface, there is an issue where when a user clones a record, and adds sub-types to the clone, the sub-types do not persist when the clone is saved and re-opened. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, sub-types are found in the cloned record. (*Issue 23852*)

## Aptify Web: View Data is not Displayed on Dashboard

Currently in the Aptify web interface, when an entity list view on a Dashboard is sorted, the results may not be displayed. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, view data is displayed as expected. (*Issue 24244*)

## Aptify Web: Web User Button Not Working on Persons Record

Currently in the Aptify web interface, there is an issue where the **Web User** button in a Persons record does not open a new or existing Web User form. Aptify 5.5.4.3000 updates the metadata for the Persons entity, Aptify.Persons form template, and Persons Form Template Layout Sub-Class to ensure that the **Web User** button works as expected. (*Issue 23428*)

## Aptify Web: Wizards Do Not Function For Prompt View Until Records Are Selected

Currently in the Aptify web interface, there is an issue where view-based wizards (e.g., Subscription Renewal, Add Persons to Campaign, Add Persons to Committee as Members) can only be run within a Prompt view when records in the view are selected. Aptify 5.5.4.3000 updates three CS files and one JavaScript file to ensure that in this scenario, the wizards can be run as expected. (*Issue 18960*)

## Aptify Web: Wizards Do Not Function From Form View Tab Until Records Are Selected

Currently in the Aptify web interface, there is an issue where can only be run from a tab that contains a view of data (such as the **Subscriptions** tab in an Orders form) when a row in the tab is selected. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the wizards can be run as expected.

**Note:** The following wizards cannot be opened from a tab that contains a view of data when a row is selected:

- Bulk Order wizard: cannot be run from the **Person** tab in a Companies record
- GL Batch Export wizard: cannot be run from the **All Linked Orders** tab in a Persons or Companies record

(*Issue 18961*)

## Auth Required Is Not Working When User Moves from Online to Offline State

Currently in the Aptify web interface, there is an issue where when a user moves from an online state to an offline state, they are unable to return to an online state. In some instances, the user returns to an online state automatically, but they are unable to take any actions. In other instances, the user is able to return to an online state manually, but after about 30 seconds the web interface returns to an offline state. Aptify 5.5.4.3000 updates three JavaScript files to ensure that in this scenario, users are able to return to an online state as expected. (*Issue 22819*)

## Cannot Clear a Person's Address by Setting the AddressID to -1 in JavaScript

With Aptify 5.5.4, when a developer sets an embedded AddressID to -1 on a Persons record, the system does not clear the address as expected. This issue updates the Javascript code so setting an AddressID to -1 clears the address. (*Issue 23096*)

## Chart View Toolbar UI Distorted for Prompted Chart Views

In Aptify 5.5.4, the chart view toolbar in the web interface may not render properly for prompt views. Aptify 5.5.4.3000 resolves that problem with the interface. (*Issue 23398*)

## Check Box is Not Working Properly in Sub-Type View

Currently in the Aptify web interface, there is an issue where when there are multiple check boxes in a Sub-Type view, and a user selects a check box without clicking on the row, it will work as expected, but if the user clicks slightly outside of the check box, that row is selected and all other selected check boxes are cleared. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the selection of check boxes works as expected. (*Issue 23219*)

## Creating an Order Through Person Admission Wizard Causes Null Reference Exception

Currently in the Aptify web interface, there is an issue where when a user attempts to create a purchase order or quotation order using the Person Admission wizard (which is a CPA Manitoba configuration), a Null Reference exception is logged. This issue appears to be a side-effect of the solution to another issue 22843 (Multiple Pending Changes For Sub-Types Not Working). Aptify 5.5.4.3000 updates the Service.Framework.Utilities object to ensure that in this scenario, the orders are created as expected. (*Issue 23424*)

## Default Address Form Template Does Not Load

Currently in the Aptify web interface, there is an issue where when the default Address Form Template has been modified to use the address format for a country other than the United States, the United States address format is still used when a new Persons or Companies record is opened. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the correct address format is displayed. (*Issue 23952*)

## Display Default Icon Within View Filters When Service Specific Icon Is Not Defined

Currently in the Aptify web interface, there is an issue where no service icon appears in the filter dialog for services that use the default blue square icon. Aptify 5.5.4.3000 updates a JavaScript file to resolve this issue. (*Issue 23208*)

## **Find Dialog Does Not Return Results in Entity Base View Field on Views Dialog Advanced > Configuration Sub-Tab**

With Aptify 5.5.4, the Find dialog that opens from the view properties dialog's Base View field does not return any information the first time you click on it. Aptify 5.5.4.3000 resolves this behavior so the appropriate information appears as expected. (*Issue 22000*)

## **getEntityObjects() Does Not Call Callback When Passed Zero Records**

Currently in the Aptify web interface, the `Aptify.framework.genericEntity.getEntityObjects()` function takes entity name or record ID pairs and a callback function to call when all of the identified records have been loaded. However, if no entity name or record ID pairs are passed, the callback function is not called. Aptify 5.5.4.3000 updates a JavaScript file to ensure that if there are no entity name or record ID pairs to pass, the callback function is called. (*Issue 24420*)

## **In Place Editing Can Be Used Without Clicking Button After Reloading a Page**

Currently in the Aptify web interface, there is an issue where when a user reloads a page, sub-type in place editing is used for editing a record, without having clicked the **In Place Editing** button. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in sub-type place editing can only be used when the **In Place Editing** button is clicked. (*Issue 23073*)

## **Issues with the Favorites Option**

Currently in the Aptify web interface, there are issues with the Favorites option: 1. The search box for the Select Group function to move favorites does not work. The search box does work once the browser is refreshed, 2. If a record or view is added to Favorites, it cannot be moved to a different group during the same session it is added to Favorites. The browser has to be refreshed to be able to move it to a different group, and 3. Distinguishing Favorite groups from Favorite records is difficult. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in these scenarios, the Favorites option works as expected. (*Issues 22218*)

## **Multiple Pending Changes Folder List Is Moved Out of Box for Large Lists**

Currently in the Aptify web interface, there is an issue in environments with large lists where a multiple pending changes folder list is moved out of the box. Aptify 5.5.4.3000 updates a CSS file to ensure that in this scenario, the multiple pending changes folder list stays in the box, as expected. (*Issue 23145*)

## **Multiple Pending Changes for Sub-Types Not Working**

Currently in the Aptify web interface, there is an issue where if there are multiple changes pending for a sub-type record, the pending changes are not saved when the web interface returns to an online state. Aptify 5.5.4.3000 updates a JavaScript file and an object to ensure that in this scenario, the pending changes to a sub-type are saved as expected. (*Issue 22849*)

## Multiple Pending Changes in Offline Mode Is Not Working as Expected

Currently in the Aptify web interface, there is an issue where offline functionality is not working in the following scenarios: 1) Persons form address updates to both lines entered off-line are only partially reflected in the record after the updates are saved when the user is online. 2) Updates to two records from the same entity made in offline mode are not being saved. Aptify 5.5.4.3000 updates the Aptify.Framework.GenericEntity.RecordChanges JavaScript file to ensure that in this scenario, offline functionality works as expected. (*Issue 23241*)

## Pending Changes are not Synchronizing Properly When Browser Closes or Crashes

Currently in the Aptify web interface, there is an issue where Aptify stops working when a user is disconnected from the internet while in the process of creating a new record and the user tries to save the record before the interface indicates that the user is offline. When the user is able to log back into the system, the record does not exist and the pending changes functionality does not create the record. If this scenario is attempted for an existing record, the pending changes are saved, but the pending change record is not cleared and the interface shows that changes are still pending. These scenarios do not occur when the attempt to save the record is done after the interface indicates that the user is offline. Aptify 5.5.4.3000 updates two JavaScript files to ensure that in these scenarios, the pending changes functionality works as expected. (*Issue 23019*)

## Some FTPBinding Code Uses Wrong Entity Instance Names

Currently in the Aptify web interface, the documented names for form template related Entity Instances for Filter Rule Items on Form Template Part Binding Filter Rules are *Form Template GE*, *Form Template GE Parent*, *Form Template GE GrandParent*, and *Form Template GE Great GrandParent*. However, some places in the code, uses different names (such as *Form Template Parent GE* and *Form Template GrandParent GE*). Aptify 5.5.4.3000 updates a JavaScript file and metadata to ensure that the correct names are used throughout the code. (*Issue 24418*)

## Prompt View Drop Down Should Be Wider

In Aptify 5.5.4, there is an issue in the web interface where the field size for for the **Prompt View** field is too narrow. Aptify 5.5.4.3000 updates a JavaScript file to widen the **Prompt View** field. (*Issue 21856*)

## Campaigns

---

The following issues are resolved in the Campaigns system as part of Aptify 5.5.4.3000.

### Add to Campaign Wizard: Person Not Added to Prospect List

Currently in Aptify, there is an issue where when a user adds a person using the Add to Campaign wizard, and the person is not added to the prospect list. Aptify 5.5.4.3000 updates the setup program to ensure that the wizard updates the prospect list as expected. (*Issue 24687*)

## **GetCampaignPricing Method Not Returning Expected Result**

Currently in Aptify, the system may be unable to correctly calculate an order's total discount if the order and its lines include multiple campaigns with different types of discounts. This is due to the GetCampaignPricing method not returning the expected result when multiple types of discounts are present in one order. Aptify 5.5.4.3000 updates two objects to ensure that in this scenario, the expected result is returned. (*Issue 23426*)

## **Initial Payment Amount Cannot be the Price of the Product when Campaign is Used on an Order**

Currently in Aptify, there is an issue where when there is a campaign with products that have a 50 percent discount, a user places an order with a campaign, and enters an initial payment amount that is the standard price of the product, two errors are created. The first error is *GL Entries for this payment are not correctly generated* and the second is *Attempted to divide by zero*. Aptify 5.5.4.3000 updates the Payment Generate GL object to ensure that in this scenario, the payment can be set to the standard price of the product. (*Issue 22865*)

## **Committee Management**

---

The following issues are resolved in the Committee Management application as part of Aptify 5.5.4.3000.

### **Aptify Web: Cannot Save CommitteeTermMember Edits from Persons Form**

Currently in the Aptify web interface, there is an issue where when a user attempts to modify the Committee Term Member information from a Persons record, the changes are not saved in the Committee Term Member record and an exception is thrown. Aptify 5.5.4.3000 updates a JavaScript file and object to ensure that in this scenario, the edits can be saved as expected. (*Issue 18354*)

### **Aptify Web: Incorrect Record Selected When a Committee Term Record is Selected From a Page Other Than Page 1**

Currently in the Aptify web interface, there is an issue when a user attempts add a Committee Term from the **Committee** tab in a Persons record. If the user selects a record from any page in the grid other than the first page, an incorrect Committee Term record is added. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the correct Committee Term record is selected. (*Issue 23714*)

### **Aptify Web: Validation Messages do not Display Properly for Committees Terms**

Currently in the Aptify web interface, there is an issue where when a user fails to enter required information for committee terms, the validation messages that are displayed in the Desktop client are not displayed. Aptify 5.5.4.3000 updates the associated process flow to ensure that in this scenario, the validation messages appear as expected. (*Issue 23190*)



---

## Configuration Management Tool

---

The following issue is resolved in the Aptify Configuration Management tool as part of Aptify 5.5.4.3000.

### **Process Flow Actions and Input Properties Duplicate After Unpacking Existing Process Flows**

Aptify 5.5.4.3000 resolves a problem where duplicate metadata may be added to the system when unpacking process flows using the Aptify Configuration Migration tool. (*Issue 23420*)

---

## Customer and Member Management

---

The following issues are resolved in the Customer and Member Management application as part of Aptify 5.5.4.3000.

### **Aptify Web: Companies Duplicate Check Does Not Work**

Currently in the Aptify web interface, using the duplicate checking functionality with the Companies entity cause errors and does not work. Aptify 5.5.4.3000 updates the Company Object object to ensure that in the above scenario, the duplicate check functionality works as expected in the web interface. (*Issue 24520*)

### **Aptify Web: Correct Contact Log Link is not Deleted**

Currently in the Aptify web interface, there is an issue where when a user is deleting a link that is not the first link from a Contact Log with several links configured, the first link is deleted. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the correct Contact Log link is deleted. (*Issue 23436*)

### **Aptify Web: Security can be Changed on a List Record Without Permission**

Currently in the Aptify web interface, there is an issue where the security setting for a List record can be changed by unauthorized users. Aptify 5.5.4.3000 updates the web interface to ensure that the security setting for the List record is respected. (*Issue 22734*)

### **Merging Two Companies Incorrectly Updates Quotation Order**

In Aptify 5.5.2 and up, there is an issue where when a user merges two company records, the quotation orders that existed for the non surviving company are not updated correctly. When an existing membership subscription has a quotation order associated with it and the Bill To company is changed on that subscription, the quotation order is updated incorrectly by the system. The effect of the update to the quotation order is the removal of the Bill To company and the **Bill To Same As Ship To** option is selected. This occurs only when merging two companies. Aptify 5.5.4.3000 updates an object to ensure in this scenario, the quotation orders are updated correctly. (*Issue 22615*)

---

## e-Business

---

The following issue that supports Aptify e-Business is resolved in Aptify 5.5.4.3000:

### **Password Not Hashed on View Object Record**

In Aptify e-Business 5.5.2 with Aptify 5.5.2 and up, there is an issue where the password for a web user is sometimes shown in the Record History's Object Viewer as an unencrypted value. Aptify updates the Object Viewer and Generic Entity objects to ensure that the password for a web user is hashed as expected. (*Issue 23439*)

---

## Education Management System

---

The following issue is resolved in the Education Management System add-on application as part of Aptify 5.5.4.3000.

The issues resolved in this section are only applicable for organizations that have the Education Management System add-on application for Aptify 5.5.4.3000.

### **Class Registration Date Completed Not Auto-Populated When Close Meeting Wizard is Run**

In Aptify 5.5.1 and up, there is an issue where when a user runs the Close Meeting wizard, class registration dates completed cannot be automatically populated with the end date of the meeting. The date completed should be populated once the Close Meeting wizard Status for Attendees is changed to *Attended/Attended (no credit)* or *Passed* for the class registration record. Aptify 5.5.4.3000 updates an object file to ensure that in this scenario, the data completed automatically populates as expected. (*Issue 23846*)

---

## Expos

---

The following issues are resolved in the Expo Management application as part of Aptify 5.5.4.3000.

### **Company with No Product Codes Clears ExpoCAD's Product Description Field**

In Aptify, there is a scenario related to the Aptify ExpoCAD integration. Aptify's ExpoCAD includes the ability to take a company's assigned Product Codes and push them to the ExpoCAD booth's Product Description field. However, some clients may be populating this description with some other data. If a company has no product codes, Aptify blanks out the Product Description field when the data is synced. Aptify 5.5.4.3000 adds a new field to Companies so a user can specify the appropriate description in Aptify and have that pushed to the corresponding field in ExpoCAD.

The system uses the following logic to set the Company Profile/Booth Description in the ExpoInfo section of ExpoCAD:

- If ExpoCADCompanyDescription is filled in on the exhibitor's Companies record in Aptify, that description is pushed to the Company Profile/Booth Description in ExpoCAD.

- If ExpoCADCompanyDescription is blank for the exhibitor's Companies record in Aptify, Aptify pushes a Company's Product Codes to the Company Profile/Booth Description in ExpoCAD. For example, if Danube Partners has two product codes (e.g., Consulting and Quality Assurance), the ExpoCAD description would read:
  - *Product Codes:*
  - *Consulting*
  - *Quality Assurance*
- If ExpoCADCompanyDescription is blank and the company has no Product Codes, the Company Profile/Booth Description is blank in ExpoCAD.

(Issue 23151)

---

## Form Template Administration

---

The following issue is resolved in the Form Template Administration area as part of Aptify 5.5.4.3000.

### Context-Based Filtering of Form Templates Not Working for Summary Forms

Currently in the Aptify web interface, there is an issue where in environments where an administrator has created different Persons or Companies Summary form templates to be used by different users or personas, the filter rules created to specify which users see a particular form template do not work. Aptify 5.5.4.3000 updates a JavaScript file to ensure that the different Persons or Companies Summary form templates are seen by their respective users. (Issue 21898)

---

## Framework

---

The following issues are resolved in the Framework application as part of Aptify 5.5.4.3000.

### Caching Issue for British English Culture

Currently in Aptify there is an issue in environments that use the BritishEnglish date format, such as Australia, where an Aptify web interface session cannot be started after refreshing due to caching problems that occur when the date is greater than the 12<sup>th</sup> of any month. This hotfix updates an object to ensure that in the above scenario, Aptify web sessions can be started as expected. (Issue 23975)

### Cannot Change Security Key When Password has Apostrophe

In Aptify, there is an issue when in an environment where a user has a password that contains an apostrophe ( ' ), and the **Encrypt Data** option is disabled for the **PWD** field of the Web Users entity, saving the entity fails. Aptify 5.5.4.3000 updates an object to handle apostrophes in SQL statements before executing the statement to ensure that in this scenario, the changes to the Web Users entity can be saved as expected. (Issue 23441)

## Conflict Wizard Can Cause Duplicate Sub-Types (Including Duplicate Order Lines)

Currently in Aptify, there is an issue where when an order line contains sub-type records, using the Conflict wizard to resolve data conflicts can cause duplicate sub-type records to be created. This is due to the Conflict wizard logic clearing the sub-types and re-adding all records instead of comparing the current sub-type records against the generic entity in memory to identify the record changes and resolving the data conflicts. Aptify 5.5.4.3000 updates the Aptify Generic Entity object to change how sub-type records are handled by the Conflict wizard logic to ensure that data conflicts are resolved as expected and users are able to create entities as expected. (*Issue 21716*)

## Default Error Logging To Event Viewer When No Database Connection Available

In Aptify 5.5.4, a feature is added where a client can choose to save the errors that are raised in the Aptify application to a new table in Aptify (ErrorLog). This feature relies on valid connection to the Aptify database. There is an issue where when a connection is not available, the error log file can be lost. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the system attempts to write to the Event Log. If that attempt fails, the system writes the error log file as *AptifyExceptionLog.txt* in the Temp directory, which could be the User's Temp folder or C:\Windows\Temp\. (*Issue 23153*)

## Deleted Data Not Recorded in Record History

In Aptify, there is an issue where when a user deletes all of the text in a field, the record history shows it as *Changed from Blank to Blank*, which is not correct. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the record history contain the correct information. (*Issue 24270*)

## Exception Manager: Clean Up Exception Text

In Aptify, there is an issue where the Exception Text that is generated for a published exception contains information in the Properties section that does not add value, such as TargetSite, HelpLink, and Source properties when the property's value is null/Nothing. Aptify 5.5.4.3000 updates an object and a configuration file to clean up the Exception Text. (*Issue 23046*)

## Exception Manager: Large Number of Error Log Records Impacts View Performance

In Aptify 5.5.4, there is an issue in environments where the Exception Publisher is enabled. The Exception Publisher publishes exceptions to the Error Log entity in the Aptify database, but the time required to open Views increases as the Error Log reaches hundreds of thousands of records. Aptify 5.5.4.3000 adds a stored procedure database object, **spDeleteERRORLOGRecordBefore**, to the Error Log entity to enable the deletion of all Error Log records created before a date specified in a parameter, **@BeforeDate**. (*Issue 23493*)

## Improve Thread Safety in the Script Engine

Currently in Aptify, there is an issue in multi-threaded environments where multiple threads can execute scripts simultaneously, where when Aptify scripts are executed, there are often problems where exceptions occur or data from one script instance can appear in another script instance. There are

resources that are being shared between Script Engine instances that should not be shared. Aptify 5.5.4.3000 updates the way the script is compiled into code and then executed. This includes changes to make properties and methods not static and to have the Run method instantiate a new instance of the Class that is generated by the compiled script to ensure that there is no sharing between the same instances. (*Issue 23052*)

## **IConvertibles Do Not Correctly Convert in AptifyLogin Code**

Currently in Aptify there is an issue where sometimes users are unable to log in because the values that use the private internal class that run IConvertible are not converted correctly in the Aptify Login code. Aptify 5.5.4.3000 updates the AptifyLogin.vb file to ensure that in this scenario, the Aptify Login objects compiled in .NET 4.5 work as expected. (*Issue 24551*)

## **Increase Entity Save Related Timeouts for Setup Programs**

In Aptify, there is an issue where setup-related problems are occurring in environments with a large client database that attempt to update a newer version of Aptify. Aptify 5.5.4.3000 updates three objects, Entities Entity, DB Object, and Full Text Entity, to ensure that in this scenario, the software update can be completed as expected.

In the AptifyEntitiesEntity object, the SQL timeout value is updated to use the value set in the QueryTimeOut attribute instead of 1200. Users can add the QueryTimeOut attribute to a config file to modify the timeout value as follows:

```
<add key="Aptify.Framework.DataServices.Constants.QueryTimeOut" value="[desired timeout value greater than 1200 seconds]"/>
```

In the AptifyFullTextEntities and AptifyDBObject objects, a default SQLTimeOut of 3600 (i.e., one hour) is added. The value of this timer can be modified by adding a SQLTimeOut attribute in the Full Text Indexes and Database Objects entities and specifying the value as appropriate. (*Issue 23460*)

## **Melissa Data Interface Removing Address Information**

In Aptify, there is an issue where when using the Melissa Data interface for address verification, and the first line in the address is a private mailbox number, such as # 315, the resulting address does not contain the private mailbox number and the second line of the address becomes the first line. For example, if Line 1 is #315, Line 2 is 5214F Diamond Heights Blvd, the resulting address would have Line 1 as 5214F Diamond Heights Blvd, and Line 2 would be blank. Aptify 5.5.4.3000 includes a new object to ensure that in this scenario, the correct address is verified. The Aptify Melissa Data Web Service Verification object is also updated to address an issue where more of the address information is being removed as a result of address verification. (*Issue 22558*)

## **Records Can Be Edited After Reloading Page Without Clicking In Place Edit Button**

Currently in the Aptify web interface, there is an issue where when a user reloads a page, in place editing is used for editing a record, without having clicked the **In Place Editing** button. Aptify 5.5.4.3000 updates

a JavaScript file to ensure that in place editing can only be used when the **In Place Editing** button is clicked. (*Issue 23073*)

### **Text for Inner Exception Messages are Incorrect**

Currently in Aptify, there is an issue where when an Exception has an Inner Exception, the message for the Inner Exception is not included in the Exception text. Instead, the top level Exception message is duplicated for the Inner Exception. Aptify 5.5.4.3000 updates an object to ensure that the Inner Exception message is included in the Exception text. (*Issue 22949*)

### **Updated UI Part is not Downloaded to the Client Without Also Changing a Core UI Part**

Currently in Aptify, there is an issue where after updating a User Interface (UI) Part, the updated UI Part is sometimes not automatically downloaded to the client. Aptify 5.5.4.3000 updates an object to ensure that the updated UI Part is automatically downloaded as expected. (*Issue 24173*)

### **User Administration Wizard Fails**

Currently in Aptify, there is an issue where when an environment has a large number of users (more than 90,000) and a user attempts to run the User Administration wizard, the wizard fails. This occurs in two scenarios: 1) A user logs in to Windows using a non-domain account, opens the User Administration wizard, and the wizard fails when the user selects a domain user to add, and 2) A user logs in to Windows using a domain account, attempts to open the User Administration wizard, the wizard does not load, and it crashes after a few minutes. Aptify 5.5.4.3000 updates the Users Viewer object by updating Step 2 of the wizard, adding a **Search** button to the **Account** drop-down list, and adding a **Search** button to the **User Name** drop-down list that appears for SQL Server Security users. These changes ensure that in this scenario, the User Administration wizard works as expected.

**Note:** The User Name search matches the entered text to the beginning of the user names in the database (Begins With). A minimum of two characters must be entered in this search before results are returned. Wildcards are not supported for this search

(*Issue 22933*)

### **Meeting and Housing Management**

---

The following issues are resolved in the Meeting and Housing Management application as part of Aptify 5.5.4.3000.

#### **Aptify Web: Exception is Issued for Meeting Conflict Instead of Warning Message**

Currently in the Aptify web interface, there is an issue in environments where meeting conflicts are not allowed, meeting conflicts are resulting in exceptions, when the expected behavior is the issuing of a Warning message. Aptify 5.5.4.3000 updates two JavaScripts and the Orders Entity object to ensure that in this scenario, Warning messages are generated as expected. (*Issue 15828*)

## **Badge Name, Badge Company Name, and Badge Title Not Respected When Different Registrant is Selected**

In Aptify 5.5.4, there is an issue in an environment with an order that has a Ship To person defined, where a user adds a Meeting product with sessions, and attempts to change the registrant to a person other than the Ship To person, after saving the order, the Badge Name, Badge Company Name, and Badge Title fields do not reflect the information for the new registrant. Instead these fields contain values for the Ship To person. Aptify 5.5.4.3000 updates an object file to ensure that in this scenario, these fields contain information related to the new registrant, as expected. (*Issue 24088*)

## **New Meeting Wizard: New Meeting Does Not Open After the Wizard Finishes When Option Is Selected**

Currently in Aptify, there is an issue where when the New Meeting wizard is run and the **Open the new Meeting after it has been created** option is selected, the new Meeting record is not opening. Aptiy 5.5.4.3000 updates an object and two JavaScript files to ensure that in this scenario, the new Meeting record opens as expected. (*Issue 20522*)

## **TotalRegistrants Field in a View Does Not Update When Meeting Registrants are Removed from an Order**

In Aptify, there is an issue where in a list view of meetings, the TotalRegistrants field is not being updated in the view when a registrant is deleted from an order. Aptify 5.5.4.3000 updates an object and a stored procedure to ensure that in this scenario, the TotalRegistrants field updates as expected. (*Issue 23239*)

## **Messaging**

---

The following issues are resolved in the Messaging system as part of Aptify 5.5.4.3000.

### **Aptify Web: Attachment Functionality not Supported for Messaging**

Currently in the Aptify web interface, there is an issue where when a user creates a message using the Aptify Messaging tool, files cannot be added to the **Attachments** tab. Aptify 5.5.4.3000 updates a CS and a JavaScript file to ensure that in this scenario, attachments can be added to a message as expected. (*Issue 18254*)

### **Aptify Web Preview Pane Shows Incorrect Email Address after Selecting Secondary Email**

Currently in the Aptify web interface, there is an issue in environments where the Persons Entity is configure to use the Aptify messaging tool (*UseAptifyMessaging* attribute is set to 1) and the user opens a Messaging session from the secondary email address from a Persons record, the Aptify Preview pane opens listing the Persons primary email address. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the correct email address is listed. (*Issue 24730*)

## Email Confirmation Message Not Sent For Bulk Messaging

Currently in the Aptify web interface, there is an issue where when a user sends a Bulk Messaging email and the DisplaySendConfirmationMessage attribute is enabled, a confirmation message asking the user whether the message should be sent is not shown. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the confirmation message is always displayed, no matter the value of the DisplaySendConfirmationMessage attribute. (*Issue 24417*)

## Previously Running Message Executes When Calling addMessage on Exiting a Message

Currently in the Aptify web interface, there is an issue where when an operation triggered by a message can cause a previously running message to be processed again. In this instance, the message at the top of the message queue is being processed, and another addMessage call begins to process the same message at the top of the queue. Aptify 5.5.4.3000 updates a JavaScript file to ensure that the message at the top of the message queue is removed at the start of processing to eliminate the possibility that the message is processed again. (*Issue 24543*)

## Orders

---

The following issues are resolved in the Order Entry system as part of Aptify 5.5.4.3000.

### Allow Description Override on Order Lines Record is not Respected When Order is Saved

In Aptify Desktop client, there is an issue where when a user adds Subscription product to an order, has the **Allow Description Override** option selected, and edits the **Description** field, the order line description reverts to the original default description after the order is saved. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the order line description does not revert in the Desktop client. (*Issue 22562*)

### Aptify Desktop: Cancellation Wizard Error When Generating Credit Memo if Currency Symbol Is Not a Dollar Sign

Currently in the Aptify Desktop client, there is an issue when in an environment where the Currency Symbol has been changed from **\$** to another value, like **US\$** or the Euro symbol, and the **Keep on Account** option is selected in the Order Cancellation wizard, an error occurs. Aptify 5.5.4.3000 updates the Cancellation Wizard object to ensure this error is not generated in this scenario. (*Issue 24446*)



## Aptify Desktop: Payment Types Filter Logic Is Not Respected On Some Forms Using Payment Info Control

Currently in Aptify 5.5.4, when an Aptify Desktop client user specifies an Organization on the **Filters** tab of a Payment Types record, that payment type should only be available for the employees of that organization for making payments, but this filtering logic is not respected on the following forms:

- Standing Orders
- Company Saved Payment Methods (SPMs)
- Person Saved Payment Methods (SPMs)
- Bulk Order Customer Payment sub type

Aptify 5.5.4.3000 updates the Payment Information Control and Standing Orders Layout Controls objects to ensure that in these scenarios, the expected result is returned.

**Note:** This issue applies only to the Aptify Desktop client.

The solution to this issue does not resolve payments made against Marketplace Listing in the scenario above. In this case, organizational filters may not be respected. This is a known issue set to be resolved in a future release of Aptify. Contact Aptify Technical Support for updates. (*Issue 24557*)

## Aptify Web: Balance and Order Total Fields Show Incorrect Amounts When Meeting Product and Session with Price is Added

Currently in the Aptify web interface, there is an issue where when a user adds a Meeting product and a Session with Prices are added to a Meeting product, the **Balance** and **Order Total** fields show incorrect amounts. Aptify 5.5.4.3000 updates the Order Entry system to ensure that in this scenario, the correct amounts are displayed. (*Issue 18895*)

## Aptify Web: Invoice Consolidation Wizard Validation, Multicurrency, and Display Errors

Currently in the Aptify web interface, there are issues with the Invoice Consolidation wizard, described below:

- Validation error message is not issued when a user attempts to allocate an amount that is more than the credit amount available. In addition, the wizard allows the process to move to the next step.

**Note:** In the Desktop client, the wizard does not allow the process to move to the next step.

- Wizard allows the process to proceed to the next step when a user attempts to try to allocate an amount greater than the order balance. However, a validation error message is issued.

**Note:** In the Desktop client, the wizard does not allow the process to move to the next step.

- When a Person or Company has an order with two different currencies and a credit memo is available for only the one of the currencies, an incorrect validation message is issued. In addition,

the wizard does not allow the process to move to the next step when a credit memo becomes available for the other currency. Also, the wizard is not processing in instances where there is a Person with an order with a balance in US currency, and for the same Person there is another order in another currency with a credit memo available for that currency.

**Note:** The user is able to move to the next step once a new credit memo is created for that currency.

- Wizard permits the user to go back a step after the payment is created. The wizard should disable the back button.
- No orders are displayed on the Credit Order page when a user enters more orders for a Person or Company such that a second page of orders appears, selects the second page on the Select Credit page, returns to the first page of the wizard without making any changes, a new Person is entered with one page of orders, and the user resumes running the wizard.

Aptify 5.5.4.3000 updates the Invoice Consolidation Process Component object to ensure that the wizard works as expected. (*Issue 24031*)

### **Aptify Web: Order Data Not Shown in Correct Columns in Exported Excel File**

Currently in the Aptify web interface, there is an issue where when a user exports a view of orders to Excel, any blank fields in the view do not appear in the correct column in the exported Excel file. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the fields in Excel exports of order data appear as expected. (*Issue 23369*)

### **Aptify Web: Orderline Record Should Retain Badge Company Name and Badge Title**

Currently in the Aptify web interface, there is an issue where when a user is placing a Meeting order for a member that does not have a company linked to their record, and when they enter a Badge Company Name or Badge Title and ship the order and reopen the order again, the Badge details are no longer in the Order. This issue can also be replicated with a person that has a company link. Aptify 5.5.4.3000 updates a JavaScript file to ensure that the Order record saves the Badge details as expected. This is supported for both taken and shipped orders. (*Issue 23605*)

### **Aptify Web: Related Products Not Displayed in the Orderline After Adding Associated Product**

Currently in the Aptify web interface, there is an issue where when a user working on an orderline adds an associated product, a dialog box listing the related products does not display. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the dialog box listing the related products displays as expected. (*Issue 16254*)

## Aptify Web: Unable to Set Quantity to 0 in Order

Currently in the Aptify web interface, there is an issue that occurs in environments in which an organization does not have any specific members, the quantity of the product cannot be set to 0. When a user attempts to modify the quantity of the product to 0, it changes back to 1. Aptify 5.5.4.3000 updates an object to ensure that the quantity can be set to 0. (*Issue 23147*)

## Autoship on Bulk Order Record Hangs Application After Saving

Currently in the Aptify web interface, when a user selects the **Autoship** option in a Bulk Orders record and attempts to save the record in Ready and Approved status, the record may not get saved and may cause the application to become unresponsive. Aptify 5.5.4.3000 updates the Aptify.Services.Framework.Utilities object to ensure that the record is saved as expected. (*Issue 23655*)

## Batching Orders Locks Down the Tax Details on an Order

In Aptify 5.5.2, there is an issue where when a user opens a batched order, the tax details cannot be seen because the order is locked down. This issue occurs in the Aptify Desktop client and Aptify web interface. Aptify 5.5.4.3000 updates Orders Entity object to ensure that in this scenario, the tax details for a batched order can be viewed as expected. (*Issue 23444*)

## Cannot Cancel Multiple Meetings that have Meeting Conflict as Conflict Prohibited

In Aptify 5.5.1 and up, there is an issue where in an environment where an order with multiple meetings that all have the **Meeting Conflict** field set to *Conflict Prohibited*, and a user attempts to cancel some of the orderliness, the *Object reference not set to an instance of an object (Order ID=9895)* error is displayed and is unable to with the cancellation. When the Aptify web interface is used in this scenario, the user can proceed through the Cancellation wizard and finish the wizard, but a Cancellation order is not created, nor is an error is thrown. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, cancelling multiple meetings works as expected. (*Issue 22612*)

## Cannot Use Shipment Type Plugin to Calculate Shipping Charge in Aptify Web

In Aptify 5.5.3 and up, there is an issue in the Aptify web interface for environments that use a shipment type plugin to calculate shipping charges, where shipping charges cannot be calculated when a user changes the shipping type for an order to a shipping type that uses the plugin. Aptify 5.5.4.3000 updates the Shipping Calculator object to ensure that in this scenario, the shipping charges can be calculated as expected. (*Issue 23134*)

## Custom Plugin for Orders Entity Does Not Work

Currently in Aptify there is an issue in environments that use an Orders entity plugin to generate custom payment schedules, where the generated schedule subtype records are being cleared. This is due to some code that clears subtypes regardless of whether there are custom schedules. Aptify 5.5.4.3000

updates an object to ensure that in this scenario, the Orders entity plugin generates custom payment schedule records as expected. (*Issue 23245*)

### **For Prompt View Bulk Order Wizard Not Working When Record not Selected**

Currently in Aptify, when a user opens the Bulk Order wizard from a prompt view and does not select a record, the wizard does not add all the records to the bulk order as expected. Aptify 5.5.4.3000 updates an object to ensure that all of the records in the prompt view are included in the Bulk Order, as expected. (*Issue 24115*)

### **Include All and Include From Prompt View not Working on Bulk Order Wizard**

Currently in the Aptify web interface, when running the Bulk Order wizard, users are unable to include records from a prompt view. Aptify 5.5.4.3000 updates two JavaScript files to ensure that running the Bulk Order wizard from a prompt view works as expected. (*Issue 24155*)

### **Incorrect Price Name Shown in Order Line Description**

In Aptify, there is an issue where incorrect price names may appear in order line descriptions. For example, if there is a product that has different pricing for members and non-members, an order for this product where the Bill To person is a member will use the member's price, but the price name may incorrectly appear in the description as the non-member price name. Aptify 5.5.4.3000 updates the Orders Entity object to ensure that in this scenario, price names reflect the correct price type. (*Issue 22563*)

### **Order Cancellation Wizard Fails to Proceed After Selecting Order Line for Cancellation**

Currently in the Aptify web interface, there is an issue where when a user selects an order line to cancel from the Order Cancellation wizard, the wizard does not run and an error is generated. Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the Order Cancellation wizard runs as expected. (*Issue 23413*)

### **PayPal Merchant Error: Given Key is not Present in Dictionary**

Currently in Aptify, there is an issue where a PayPal error occurs because the expected key is not present in the dictionary. Aptify 5.5.4.3000 updates the Electronic Payment Verisign object to ensure that in this scenario, PayPal works as expected. (*Issue 24258*)

### **Reference Transaction: Number Gets Incorrectly Overwritten For Saved Payment Methods With Same Credit Card Number**

In Aptify 5.5.4, there is an issue where when a Persons record has two different Saved Payment Method (SPM) records for same credit card number, but they are tied to different Credit Card Reference Transaction Payment types (which in turn are tied to different merchant accounts), and one of the SPM records is used to pay for an order, the new reference transaction number received from the merchant

account is updated for both the SPM records. The reference transaction number (and reference transaction expiry date) should be updated only in the SPM record that is used to pay for the order. This issue is also seen in Company SPM records. Aptify 5.5.4.3000 updates the Payments object and modifies the SQL for two stored procedures to ensure that in this scenario, Person and Company SPM records are processed as expected. Aptify 5.5.4.3000 also updates the Payments object by adding a parameter to a procedure to get a single record from payment methods and modified parameter data type. (*Issue 23731*)

### **Save for Future Use Option Does Not Appear After Upgrade**

Currently in the Aptify web interface, there is an issue where after upgrading to Aptify 5.5.3, the **Save for Future Use** option does not appear on the Orders form for payment types that have the **Allow “Save for Future Use”** option enabled. Aptify 5.5.4.3000 updates the Aptify.Applications.PaymentInformation.UI JavaScript file to ensure that the **Save for Future Use** option appears on the Order form as expected. (*Issue 23938*)

### **Shipping Charges Recalculated on Original Order**

In Aptify, when the Orders entity attribute, *ShippedOrTaken*, is set to 1, and a user partially ships an order that fulfills a backorder, the shipping cost on the original order is recalculated based on the partial shipment, when it should not. Aptify 5.5.4.3000 updates the Orders Entity and Order Controls objects and adds a new field to the Orders entity to ensure that in this scenario, the order is not saved and a validation message for the missing Ship To or Bill To person is issued. (*Issue 22763*)

### **Transaction ID Error Occurs When Saving Approved/Ready Bulk Order**

Currently in Aptify, when a user attempts to save a Bulk Order record in Ready and Approved status, a Transaction ID error may occur. Aptify 5.5.4.3000 updates the Generic Entity object to ensure that the record is saved as expected. (*Issue 24117*)

### **Unable to Save Order for Class Product**

There is an issue in the Aptify Desktop client, where the solution to a previous issue with the Conflict wizard creating duplicate sub-types causes a user to be unable to save an order for a class product. Aptify 5.5.4.3000 updates the Generic Entity object to ensure that in this scenario, an order for a class product can be saved as expected. (*Issue 24775*)

### **Aptify Web: Order Line Price and Allow Override Not Working Correctly**

Currently in the Aptify web interface, there is an issue where the options that control a product price are not working correctly. For example, when a product has been configured in the Desktop client to use the **Allow Price Selection** option, the product price cannot be selected using the web interface. The same problem also applies to the use of the **Allow Free** and **Allow Price Override** options. Aptify 5.5.4.3000 updates two JavaScript files to ensure that the options that control a product price work as expected. (*Issue 16042*)

## **Aptify Web: Price Not Kept for Product When Set in AddProduct With UserPricingOverride**

Currently in the Aptify web interface, when a user adds a Product to an Order, the ProductPrice endpoint is called to add the product to the Order and calculate the Price. Typically, the AddProduct method on the Orders Entity object is used to add the Product. There is an issue where when an override of AddProduct is created that sets the Price and the UserPricingOverride flag to true, the ProductPrice endpoint does not respect the Price set in AddProduct. When AddProduct overrides the Price and sets the UserPricingOverride flag to true on the OrderLine, the Price set in AddProduct should not be overwritten unless UserPricingOverride is set to true. Aptify 5.5.4.3000 updates an object so that in this scenario, the product price is kept as expected. (*Issue 24328*)

## **Products**

---

The following issues are resolved in the Products system as part of Aptify 5.5.4.3000.

### **Error While Creating Product Price of Base Price Type in Rule-Based Process Flow Code**

In Aptify, there is an issue where when a user creates a product price of the Percent of Base price type in a rule-based process flow code, an error is logged. Aptify 5.5.4.3000 updates an object by adding a condition that checks that ParentProductObject does not have a value set, to ensure that in this scenario, the creation of a product price in a rule-based process flow code works as expected. (*Issue 22764*)

## **Setup Program**

---

The following issues are resolved in the Aptify Setup program as part of Aptify 5.5.4.3000.

### **Addmimemap Dynamic Compression Code Missing From Web Setup Program**

In Aptify 5.5.3, the Addmimemap dynamic compression code for atom and msword setting is removed from the Aptify web interface setup program. Aptify 5.5.4.3000 updates the web interface setup program to include this code. (*Issue 24161*)

### **Aptify Web Installation on SQL Server 2012 R2 Fails With Error ASP.NET 4.5 Not Detected**

Currently in the Aptify web interface, there is an issue where the web interface installation fails in an SQL Server 2012 R2 environment with an error indicating that ASP.NET 4.5 is not detected, when the destination computer has .NET 4.6 installed. The installation fails because the web interface setup program is hard coded to verify the presence of .NET 4.5. Any other version of .NET causes the installation to fail. Aptify 5.5.4.3000 update the web interface setup program to verify the presence of .NET 4.5 and up. (*Issue 24876*)

## Setup Failed for Last Step of Service Pack Update

In Aptify 5.5.3, there is an issue where sometimes when the service pack update setup program is run, the program fails. Aptify 5.5.4.3000 updates the Service Pack Base object to ensure that the service pack update setup program. (*Issue 23834*)

## Survey Management

---

The following issue is resolved in the Survey Management application as part of Aptify 5.5.4.3000.

### Aptify Web: Missing Accordion and Other Elements in Surveys Panel View Form

Currently in the Aptify web interface, there is an issue where when a user opens the Surveys Panel View, the left hand side of the form is missing, resulting in the structure of the survey not being visible. Aptify 5.5.4.3000 updates two CSS files to ensure that the Surveys Panel View is displayed as expected. (*Issue 23271*)

## Viewing System

---

The following issues are resolved in the Viewing System as part of Aptify 5.5.4.3000.

### Aptify Web: Error When Multiple Views are Opened, In Place Editing is Used on a View, and a Different View is Closed

Currently in the Aptify web interface, there is an issue where a validation message when a user has multiple views are opened, and is using In Place Editing on one view, and then closed a different view. Aptify 5.5.4.3000 updates two JavaScript files to ensure that in this scenario, a validation message is not opened. (*Issue 24024*)

### Aptify Web: Exception Logged After Clicking Save in the In Place Edit Validation Message

Currently in the Aptify web interface, there is an issue where an exception is logged when an authorized user working in an In Place Editing session in a view clicks **Save** in the validation message that is displayed when the user closes the view without saving the changes. Note that in this situation, the changes made are saved correctly. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, no exception is logged. (*Issue 24023*)

### Aptify Web: Export to Excel On A Drill Down View May Export All Results

Currently in the Aptify web interface, there is an issue where when an export to excel is performed from a drill down list view that is based on a view ID, all of the records in the full list view are exported, instead of the list of records in the drill down list view. Aptify 5.5.4.3000 updates the Services Layer and the UI (User Interface) Layer to pass and apply the SQL filter while filtering the rows to export to ensure that in this scenario, the exported file contains the expected records. (*Issue 21685*)

### **Aptify Web: Filter Value Should Get Selected When Entered**

Currently in the Aptify web interface, there is an issue with Aptify view properties, where when a user adds a filter value that is not in the drop-down list, that value does not get selected if the user clicks outside the list box, Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the value is selected as expected. (*Issue 20756*)

### **Aptify Web: In Chart View Summary Tab, Summary Function Field Always Loads as Average**

Currently in the Aptify web interface, there is an issue where when a user working in a chart view sets the value of the **Summary Function** field in the **Summary** tab, after running the view, the value of **Summary Function** is always **Average**. Aptify 5.5.4.3000 opens a JavaScript file to ensure that in this scenario, the **Summary Function** field remains as the value selected. (*Issue 23172*)

### **Aptify Web: List View Field List Does Not Load for Large Entities**

Currently in the Aptify web interface, there is an issue where when a user attempts to open the Fields tab in a new view within an entity with a large number of records, the loading indicator appears, the screen locks, and the field list does not load. This issue updates Aptify so the field list loads as expected. (*Issue 22979*)

### **Aptify Web: Manual Column Resize Settings are not Used the Second Time View is Loaded**

Currently in the Aptify web interface, there is an issue where when a user manually resizes column widths in a view, the new column widths are used again the first time the view is loaded, but a subsequent loading of the view does not use those settings. Aptify 5.5.4.3000 updates a JavaScript file to make the column resizing process synchronous, to ensure that the user-defined column widths for a view are used as expected. (*Issue 22779*)

### **Aptify Web: Mouse Interaction is not Working for Specific Areas**

Working with View Filters in the Aptify web interface requires selecting a value from the list before tabbing out of the field, which is not intuitive. Aptify 5.5.4.3000 resolves that behavior to improve the user experience when defining view filters. (*Issue 23430*)

### **Aptify Web: No Validation Message When Exiting View Without Exiting In Place Edit Mode**

Currently in the Aptify web interface, there is an issue where when an authorized user is working in the In Place Edit mode in a view, and the user exits the view without exiting In Place Edit mode, there is no validation message issued before exiting. Aptify 5.5.4.3000 updates three JavaScript files to ensure that in this scenario, a validation message is issued before exiting a view. (*Issue 23640*)



## **Aptify Web: Performance Issue Occurs When Setting Filter Values for All View Types**

Currently in the Aptify web interface, there is an issue where the application does not respond when setting filter values for any view type in environments with more than eight active users active. Aptify 5.5.4.3000 updates a JavaScript file to optimize the loading and binding of large data at the client side and bind data on demand. (*Issue 23140*)

## **Aptify Web: Prompt View Does Not Display Results When Prompt Value Contains Apostrophe**

Currently in the Aptify web interface, there is an issue where when a user creating a Prompt view and a prompt text value entered contains an apostrophe, the cursor changes to a loading indicator and the Prompt view does not display any results. Aptify 5.5.4.3000 updates a JavaScript file to ensure that in this scenario, the Prompt view displays as expected. (*Issue 16739*)

## **Aptify Web: Sub-View Generates an Error for a Hierarchical View**

With 5.5.4, a list view with a hierarchy may fail to load in Aptify Web if a sub-view is specified for that hierarchy. This issue resolves that behavior and the sub-view loads as expected. (*Issue 18060*)

## **Aptify Web: View Fields are not Displayed in View Properties When All Available Fields are Moved to Selected Fields**

In the Aptify web interface, there is an issue where the fields in the View Dialog's Fields list may disappear after moving all of the fields. Aptify 5.5.4.3000 updates a JavaScript file to address this issue. (*Issue 23195*)

## **Aptify Web: View Filters Are Ignored When Drilling Down Into A Chart View**

Currently in the Aptify web interface, there is an issue where when a user drills down in records in a chart view, the drill down view does not filter records based on the group or section that is drilled down in addition to the filters applied at view level. Aptify 5.5.4.3000 updates the viewing system to ensure that in this scenario, the drill down view filters as expected. (*Issue 21842*)

## **Aptify Web: View Filters UI Should Support Date Keywords**

Currently in Aptify web, the ability to create view filters that use date keywords is not supported. Aptify 5.5.4.3000 supports the ability to type in date keywords such as NOW, GETDATE(), and TODAY in view filter rules to create filter rules that are based on the current date. (*Issue 20758*)

## **Aptify Web: View May Become Unresponsive When Working With Records Within the View**

In the Aptify web interface, there is an issue where in some cases a prompt view may no longer return results after working with it for some time, a user is unable to go to a new page in a view. Aptify 5.5.4.3000 updates the viewing system to address this issue. (*Issue 22331*)

## **Exporting to Excel Feature for Views Exports Incorrect Date Format on Non-US Environments**

In Aptify 5.5.4, there is an issue where when a user exports view results to Excel in an environment that is configured to use a non-United States date format, such as *dd/MM/yyyy*, the dates in the exported file are in the United States date format (*MM/dd/yyyy*). Aptify 5.5.4.3000 updates an object to ensure that in this scenario, the dates in the exported Excel file are in the expected format. (*Issue 23999*)

## **Map Views: Pinpoint Functionality Limited to Highest Record in Database When Multiple Records are in Same Zip Code**

Currently in the Aptify web interface, there is an issue where when using the Google Map API implementation and the data set is based on a particular zip code, the results only pin-point the record with the highest ID from the database. This is not at all useful when trying to view the number of persons in a particular area. Aptify 5.5.4.3000 updates a JavaScript and CSS file to ensure that in this scenario, the full set of records are identified on the map. (*Issue 21306*)

## **Pivot Grid: Measures on Numeric and Decimal Field are not Working**

In the Aptify web interface, there is an issue where a user cannot create a pivot grid measure for numeric or decimal fields. Aptify 5.5.4.3000 updates a JavaScript file to address this problem. (*Issue 23186*)

## **Prompt Wizard on View is not Working for Date Field**

In Aptify 5.5.4, there is an issue where the Prompt wizard may not open when you click the button on a view filter that uses a date. Aptify 5.5.4.3000 updates two JavaScript files to resolve this issue. (*Issue 22726*)

## **Scheduled View Emails are Generated and Sent for Dataless Views**

In Aptify, there is an issue where scheduled views that do not contain any data are still generating Excel report files and emailing the files. Aptify 5.5.4.3000 updates three objects and adds a new stored procedure database object, `spCreateViewNew`, and adds five metadata items to ensure that in this scenario an administrator can configure Aptify to either send no email at all, or send an email with the blank Excel report file. (*Issue 14692*)

## **View Fails to Load for Proximity Search When Certain Distance From Postal Code is Entered**

In Aptify 5.5.3 and higher, there is an issue where in an environment with a proximity view where the distance from the postal code is 100, the view does not load with results and an error is displayed. However, if the distance from postal code is decreased to a smaller number, for example, 5, the view loads with results. Aptify 5.5.4.3000 updates a database object to ensure that in this scenario, proximity views work as expected. (*Issue 22130*)

## ACH Procedures

### Limitations Concerning This Update to ACH Payment Processing:

- This update does not support Fraud Level checking in PayPal. If fraud level checking is configured in PayPal, the ACH payment may not settle.
- When shipping an order, if inventory is not available and a backorder is created, the payments always stays with the original order. If your organization practices is to have the payment on the new order, you will need to manually connect the payment to the new order. This is a known issue and will be addressed in a future release of this functionality.

This section contains procedures that describe how to set up and use the updated ACH functionality provided by this hotfix:

- [Adding ACH Payment Type to Merchant Account](#)
- [Workflow for Processing an ACH Payment](#)
- [Cancelling an Order with an ACH Payment](#)

### Adding ACH Payment Type to Merchant Account

To enable the use of the ACH payment type for a bank, an administrator must update the Merchant Account record for the bank as follows:

1. In the Merchant Account service, find and open the Merchant Account record for the desired bank.
2. Click the **Payment Types** tab.
3. If there is no ACH Payment Type record on the system, open a new Payment Types record. Otherwise, open the current ACH Payment Type record and proceed to Step 7.
4. In the **Payment Type** field, enter **ACH**.
5. In the **Tender Type** field, select **ACH**.
6. If desired, enter a **Description** of the payment type.
7. If you want to be able to save an ACH payment record for future use, perform the following steps:
  - a. Click the **Payment Type** link to open the Payment Types record.
  - b. In the **General** tab, select the **Allow "Save For Future Use"** option.

c. Save and close the Payments Types record.

Payment Types ID: 11

Filters | Attachments

General | Advanced | Comments | Service Charge | GL Accounts

Name: ACH

Description: ACH Transfer

Type: Wire Transfer

Inflow

Active

Allow "Save for Future Use"

Credit Card Type: [Dropdown]

Web Enabled

d. Click **OK** to close the Payment Types Record.

8. Ensure that the **Is Active?** option is selected.

Payment Types Record

General

Payment Type: ACH

Tender Type: ACH

Description: ACH

Is Active?

OK and New | OK | Cancel

9. Click **OK** to save and close the ACH Payment Types record.

Merchant Accounts ID: 2

Currency Types | Additional Parameters | Attachments

General | PlugIns | Attributes | Fraud Mappings | **Payment Types**

Payment Type	Payment Type	Tender Type	Description	Is Active?
3	Visa	Credit Card		<input checked="" type="checkbox"/>
7	Mastercard	Credit Card		<input checked="" type="checkbox"/>
9	Discover	Credit Card		<input checked="" type="checkbox"/>
8	American Express	Credit Card		<input checked="" type="checkbox"/>
11	ACH	ACH	ACH	<input checked="" type="checkbox"/>
14	ref tran Visa	Credit Card		<input checked="" type="checkbox"/>

6 Items

10. **Save and Close** the Merchant Account record.

## Workflow for Processing an ACH Payment

### Limitations Concerning This Update to ACH Payment Processing:

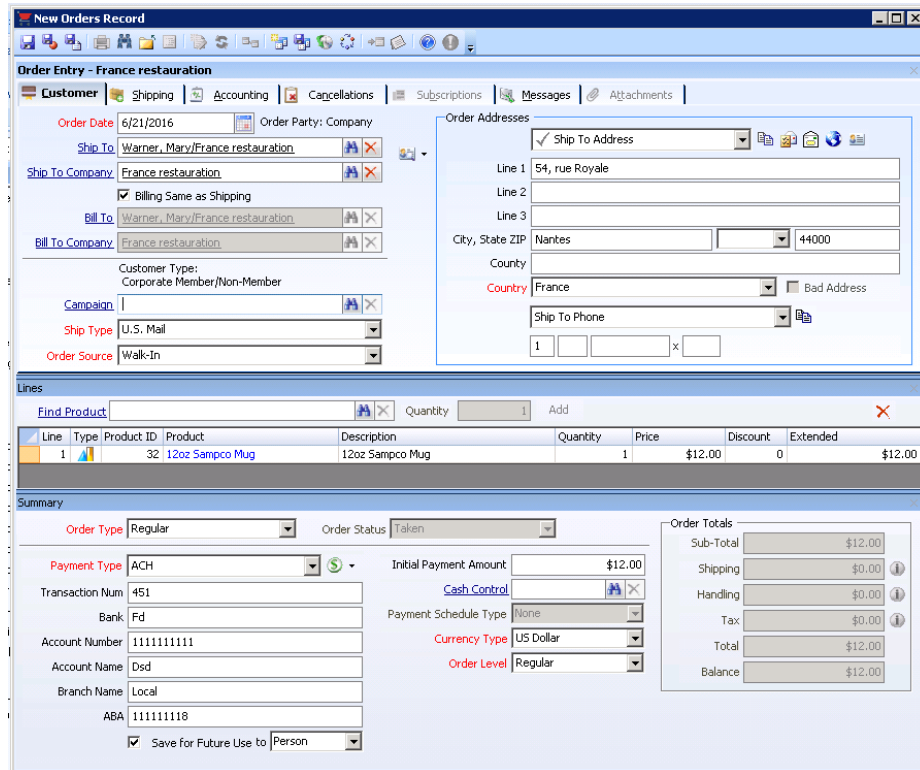
- This update does not support Fraud Level checking in PayPal. If fraud level checking is configured in PayPal, the ACH payment may not settle.
- When shipping an order, if inventory is not available and a backorder is created, the payments always stays with the original order. If your organization practices is to have the payment on the new order, you will need to manually connect the payment to the new order. This is a known issue and will be addressed in a future release of this functionality.

The workflow for processing an ACH payment is described in the follow steps.

**Note:** The full procedures for the steps below can be found in the Product Knowledge site found in Aptify Online Community.

**Note:** ACH payments can be used as Saved Payment Methods (SPMs).

1. Open an Orders form and enter the customer and order information.
2. Add one or more Order Lines.
3. Enter the Payment information for the Order, ensuring that the **Payment Type** is set to **ACH**, and the following fields are updated:
  - **Transaction Num (required):** The number assigned to the electronic transaction.
  - **Bank (required):** The bank where the account is located.
  - **Account Number (required):** The number of the account from which the funds will be withdrawn.
  - **Account Name (required):** The name of the account from which the funds will be withdrawn.
  - **Branch Name:** The name of the purchaser's bank branch.
  - **ABA:** The bank's nine-digit ABA (American Bankers Association) routing number. This number identifies the bank in electronic transactions.
  - **Save for Future Use to <account\_type>:** This option appears if the ACH payment type has been setup to allow for the saving of the account information for future use. Select this option and select the type of account (**Person** or **Company**) to save the ACH account details to be used again.

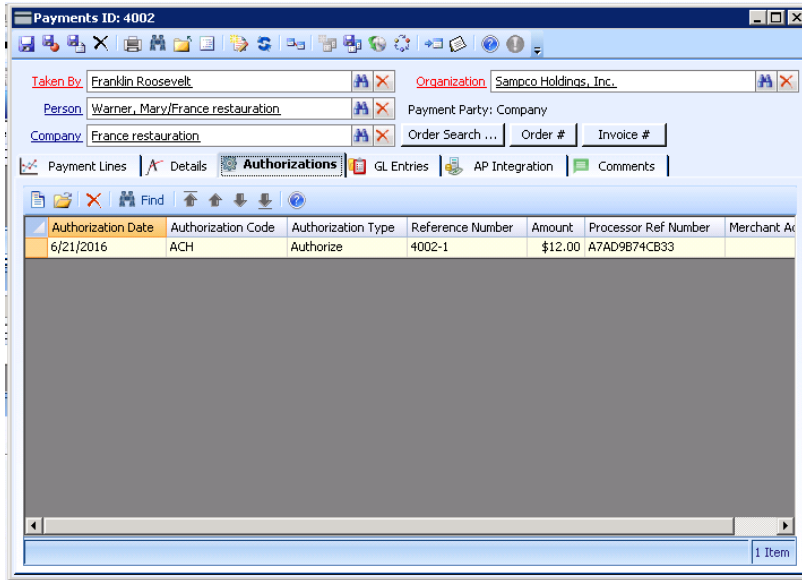


The screenshot displays the 'New Orders Record' window with the following details:

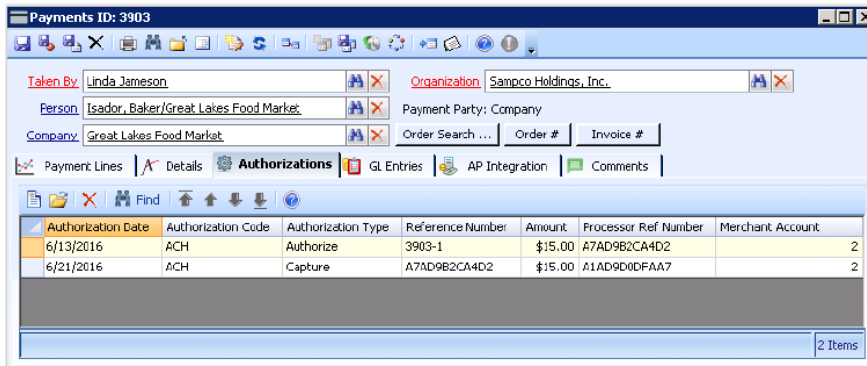
- Order Entry - France restauration**
- Customer:** Warner, Mary/France restauration
- Order Date:** 6/21/2016
- Order Party:** Company
- Shipping:** France restauration
- Accounting:** Billing Same as Shipping (checked)
- Order Addresses:**
  - Line 1: 54, rue Royale
  - City, State ZIP: Nantes, 44000
  - Country: France
- Summary:**
  - Order Type: Regular
  - Order Status: Taken
  - Payment Type: ACH
  - Transaction Num: 451
  - Bank: Fd
  - Account Number: 1111111111
  - Account Name: Dsd
  - Branch Name: Local
  - ABA: 111111118
  - Initial Payment Amount: \$12.00
  - Payment Schedule Type: None
  - Currency Type: US Dollar
  - Order Level: Regular
- Order Totals:**
  - Sub-Total: \$12.00
  - Shipping: \$0.00
  - Handling: \$0.00
  - Tax: \$0.00
  - Total: \$12.00
  - Balance: \$12.00

4. Complete and save the Order.
5. Ship the Order.
  - Once the Order has shipped, the Payments record is updated with an Authorization record, but this does not indicate that the payment has been authorized. The Authorization record can be opened from the **Authorizations** tab.

- It will take two days after shipment for the bank to authorize the payment.



- Two business days after shipment of the order, the ePayment Capture wizard must be run to capture the ACH payment information.
  - Successful capture of the ACH payment is reflected in the **Authorizations** tab of the Payments record when the Authorization Type is **Capture**.

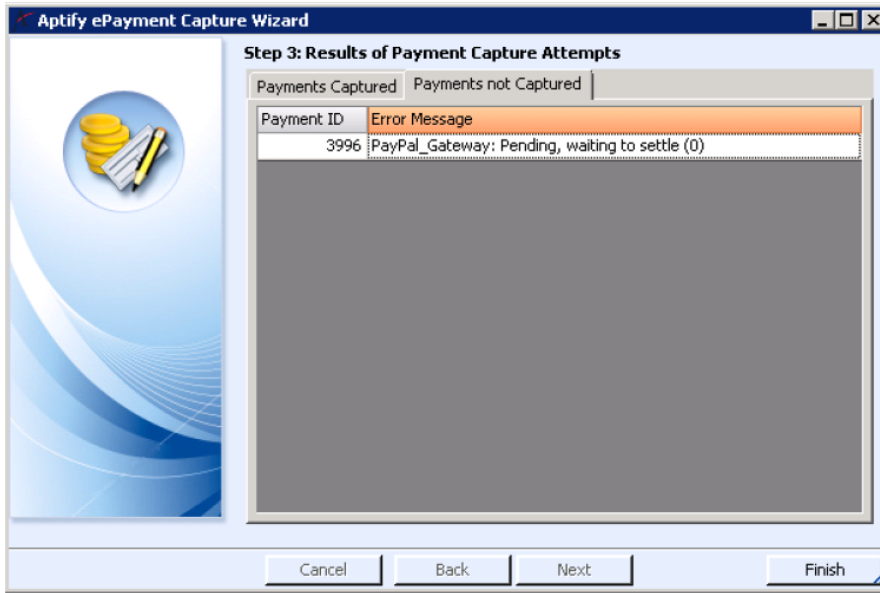


**Note:** A process component can be defined to run the ePayment Capture wizard automatically.

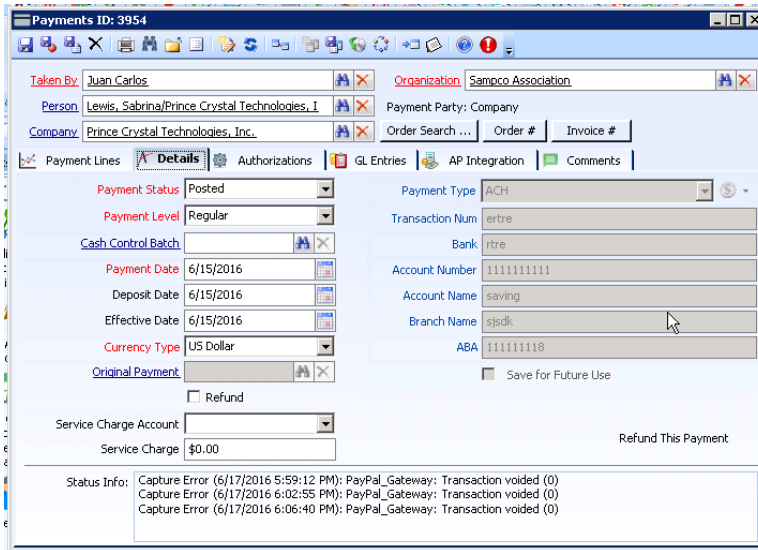
**Note:** For an ACH payment to be included as part of a batch payment, it must be first captured.



**Note:** If the ePayment Capture wizard is started and the ACH payment is not authorized by the bank, an error message appears in the Payments not Captured tab.



**Note:** If the ePayment Capture wizard is finished when the ACH payment has not been authorized, the wizard fails, the **Payment Status** of the ACH Payment record is *Exception*, and an error is displayed in the **Status Info** field of the ACH Payment record's **Details** tab.



---

## Cancelling an Order with an ACH Payment

---

Perform the following steps when using the Order Cancellation wizard to cancel an order that was paid using the ACH payment type:

1. Cancel the order as described in the *Using the Order Cancellation Wizard* topic in the Product Knowledge website.
  - The system verifies whether the order has been settled (order has shipped and the payment has been authorized and captured).
2. If the order has been settled, the system automatically runs the ePayment Capture wizard, . cancels the order, and a refund is generated.
  - The original Payment should have a new authorization record with the **Auth Type** field set to **Capture**. The Refund Payment will also have an Authorization record with the **Auth Type** set to **Capture**.
3. If the order has not been settled, the order is cancelled and the **Status Info** field on the **Details** tab of the Payments record is updated to indicate that the transaction has been voided.
  - If the payment has also not been captured, the refund process through the wizard initiates the capture process automatically.
  - If the payment has not been authorized by the bank, the refund payment is created with the **Auth Type** set to **Capture**.