

#### Vision 7.0 Enhancements

1. **Audit Tracking** can be turned on from the system settings for Roles, Users, Screen Designer, and Exchange Rates.
2. **User Defined Revenue** can be defined from the accounting configuration preferences.
3. **Contract Management** can be set to synchronize fees from the contract tab to the budget/revenue tab and an employee credit field is available in the contract tab.
4. **Credit Memos** — full or partial credit can be issued for posted invoices, created in Interactive Billing under Tools.
5. **Display Settings** for the dashboard can be changed in your user settings (i.e. required fields can be a color other than yellow).
6. **Email EFT Remittance** in Accounts Payable, Employee Expenses and Payroll Processing.
7. **Employee Realization** measures the profitability of employees. The dollar amounts of billed and unbilled revenue attributed to an employee will be calculated for reporting purposes.
8. **Invoice Transactional Detail** — AR Reporting support new fee billing options
9. **Generic Resources** can be assigned in Resource Planning.
10. **Check Review**
11. **Organizations** can now have a status designation.
12. **Pin the Grid View** in all Info Centers.
13. **Revenue Allocation for Fee Based Jobs** allows for revenue to be broken out by labor, expenses, consultants plus, and over/under revenue account.
14. **Search and Replace** has been expanded for Billing Terms.
15. **List View is available in Security Roles**
16. **Self Service can be enabled for Employee Review**
17. **Timesheet Comments** is now a memo field with a text editor and spell check
18. **Update Billing Status** from Bill to Hold, Write Off, or Delete for a group of projects
19. **User Defined Info Centers**

#### Vision 7.1 and 7.2 Enhancements

1. **Transactional Document Management** — receipts can now be attached to AP Vouchers and Employee Expense Reports.
2. **Invoice Approval Process** can now be entirely handled inside Vision, including all notes.
3. **Biller Field** has been added to the Project Info Center in the General Tab.
4. **Forgot Password Option** added to the log in screen.
5. **Kona and Project Navigator Integration**
6. **Timesheet Auditing** now available to help companies with government contracts.
7. **Updated Bank Reconciliation**
8. **Unlimited Tax Codes**
9. **Chart of Accounts** can now be printed under Reporting/Accounting.
10. **Image Upload** option allows you to browse and select the image you want (e.g. logo on invoices).
11. **Memo fields can be HTML**
12. **Transactional Document Management** is now available under Vendor Review.
13. **Invoice Approvals** can retain the approval status (in version 7.1, the status would revert to “New”).
14. **Check Remittance Email — Grid View**

#### Vision 7.3 Enhancements

1. **Compensation Breakout** now has new fields to track expenses and labor in the budget/revenue tab in the Project Info Center.
2. **New Credit Card Feature** allows you to reconcile the credit card charges from your credit card company with the expenses entered in Vision that were paid with the company-issued credit cards.
3. **AR Invoice Review Dashpart**
4. **Dashboard Column Selection for System Dashparts** – Select the Info Center columns you want to show on your Dashboard.
5. **WBS 2 and WBS 3 can be selected for Project Dashparts**
6. **View Supporting Documents in Project Review** including AP vouchers and employee expense reports.
7. **New Closed Reason field and Closed Notes fields** have been added to the General tab of the Opportunity Info Center
8. **Opportunity Forecast Report Based on Fiscal Year**
9. **Activity Grid in Activity Manager and Info Centers Now Editable**
10. **Work Week Number in Company Timesheet Configuration**
11. **Print Supporting Documents in Expense Report**
12. **Text Editor has been upgraded** to include a spell checker and add new words to the dictionary.
13. **Track User Login Activity** – A new Log User Activity check box has been added to the Audit Trail tab of the system settings allowing you to track user log in and log out times in the User Activity utility, in the Utilities application.
14. **Configuration Enhancements that Support the Navigator Application**
15. **New Kona Log In and Log Out Procedure**
16. **CRM Enhancement** allow you to forecast pipeline for any fiscal year.
17. **General Usability Improvements** allow you to select the fields you want to view when selecting a dashpart and WBS can be displayed with the Project Info Center dashpart
18. **New AR Invoice Review Dashpart**