## **Deltek Vision** At-a-glance version enhancements Version 7.4



# Deltek Premier Partner

### Vision 7.1 and 7.2 Enhancements

- 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
- 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.
- 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

### Vision 7.4 Enhancements

- Prevent Account Name changes if transactions are already entered or posted.
- 2. Audit trail functionality added for Open/Closed periods.
- 3. **Pre-Invoice** or "Request for Payment" features have been added for fees not recorded in the General Ledger.
- 4. Check Register description
- 5. Fee Estimate tab has been added to Opportunities.
- 6. Task Dependencies in Planning when made available to security role.
- 7. Invoice Enhancements:
  - a. insert fields from the project info center into the invoice header
  - b. highlight invoice total
  - $\ensuremath{\textbf{c.}}$  simplify subtotal lines
  - d. hide all details with sections
    e. simplify the format for projects with lower WBS levels
    f. include currency for section subtotals
  - **g.** group billing phases
- 8. Recurring/Reversing journal entries
- 9. Upgrades to Purchasing module

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