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Hibiscus Release Notes

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Overview

Accounting Seed is pleased to announce the Hibiscus Fall 2019 release. This article presents a summary of the new features and enhancements available in the Hibiscus release. Click [here](#) to download the comprehensive Hibiscus Release Notes, which includes steps for Configuration changes, where necessary.

Please test all new features and enhancements in your sandbox environment. Follow the links below to learn more about each update. For more information on best practices with testing sandboxes, refer to [Sandboxes: Staging Environments for Customizing and Testing](#) and [Considerations for Creating Sandboxes with Accounting Seed Data](#).

Schedule

Our Hibiscus release has been deployed to all sandbox environments based upon the [Release Schedule](#). To benefit from Hibiscus in your production environment sooner, please contact Support by creating a case in our [Customer Support Portal](#) to request the installation link.

New Features

Field Service Lightning Integration

Create Billing from Work Order

Users will be able to create and post Billings directly from the standard Work Order in Salesforce. This integration will carry over applicable information from the Work Order and Work Order Lines to the actual Billing and Billing Lines, respectively.

Create Sales Order from Work Order

Users will be able to create Sales Orders directly from standard Work Order in Salesforce. This integration will carry over applicable information from the Work Order and Work Order Lines to the Sales Order and Sales Order Lines, respectively.

Orders and Inventory (Average Cost)

Weighted-Average Cost

Accounting Seed has implemented a Weighted-Average Cost methodology for all new implementations of its Orders & Inventory module, replacing the Standard Unit Cost methodology supported in our earlier releases. The Weighted-Average Cost system is automatically enabled for fresh installs of the Hibiscus release. For information about the general process for the migration to Weighted-Average Cost, refer to the [Migration to Weighted-Average Cost](#) article. For more details about the new Weighted-Average Cost methodology, refer to the [Inventory Valuation - Weighted-Average Cost](#) article.

Important: If Weighted-Average Cost is enabled in Accounting Seed, the ability to disable Product Costing is NOT an option.

Purchase Prices (Weighted-Average Cost system only)

Purchase Price is *only* enabled for Weighted-Average Cost users. A default Purchase Price can be set up to be vendor specific or non-vendor specific. Once a default Purchase Price is set up, the Purchase Order Line Unit Price defaults to this price based upon the selected vendor.

Allocate and Build Manufactured Products (Weighted-Average Cost system only)

Build and Allocate Manufactured Products is a new feature in the Lightning Experience, which is designed to allocate and build manufactured products for Weighted-Average Cost users. The new build process will not enforce a limit to the quantity of products built. In addition, the new build process provides the ability for users to build manufactured products where the underlying child product parts can also be manufactured products (multi-level Bill of Materials).

Enhancements

Orders and Inventory Enhancements (existing Standard Unit Cost users)

Product Costing Setting

The Product Costing setting is automatically enabled as part of Accounting Seed's Orders and Inventory module install. For existing Standard Cost Orders and Inventory users, upon upgrade to Hibiscus this setting will remain defaulted to your previous selection (enabled or disabled).

Important: If Standard Cost is enabled in Accounting Seed, and you want Product Costing disabled, you *must* contact Customer Support.

If the Product Costing setting is unchecked (disabled), and Orders and Inventory is installed, no costing transactions will be recorded, which is the equivalent of not having Orders and Inventory.

Inventory Balance

The label name for Inventory Balance has been changed to "Inventory Quantity Available."

Purchase Order Status Field

A 'Purchase Order Status' field has been added to the Create Payable from Purchase Order screen so that users can set the status of their Purchase Orders, as per their business process.

Purchase Order Required Fields

The Purchase Order Type and Status fields are now required fields.

Purchase Order System Business Rules

- As a safeguard, the Ledger and Unit Cost can no longer be changed on a Purchase Order Inventory Movement. To make changes, delete the Purchase Order Inventory Movement, then Receive with the corrected information.
- The ability to Receive a Purchase Order with a negative unit cost is no longer an available option.

Purchase Order Unit Cost

The field label name on Purchase Order Unit Cost has been changed to Unit Price.

Purchase Order Multi-Currency Supported

Purchase Orders have been implemented for **Multi-Currency** users. For Multi-Currency users the Initial Receive Date, Currency Conversion Rate and Ledger Amount fields have been added to the Purchase Order header. The Currency Conversion Rate is determined by the **Initial Receive Date** on the Purchase Order. A Payable created from the Purchase Order inherits this Currency Conversion Rate. For multi-currency users, the Purchase Order must first be received in order to use the Create Payable from Purchase Order process.

Prior to the upgrade, existing users of our Orders & Inventory Management package who have also enabled Multi-Currency will need to verify the following:

1. You have no partially received Purchase Orders
2. You have no partially received Purchase Orders with a Payable created
3. You have no fully received Purchase Orders without a Payable created.

Sales Order Status Field

A 'Sales Order Status' field has been added to the [Create Billing from Sales Order](#) screen so that users can set the status of their Sales Orders, as per their business process.

Sales Order Required Fields

- The Status field on the Sales Order is now a required field.
- If a Project name is entered on the Sales Order Line, then the Project Task is now a required field.

Manufacturing Orders

- The Build limit of 100 on a Manufacturing Order for non-serialized products has been removed. The Build limit of 100 *remains* in place for serialized products.
- A Manufactured product can have up to 100 parts.

Inventory Movements

As a safeguard, when Inventory Movements are deleted, they are now automatically emptied from the Recycle Bin. This prevents the ability to un-delete them.

Additional Enhancements

Customer Statements PDF Format Assignment

The PDF Format field has been added to both the Outstanding and the Activity Statements tabs. This will default to the same PDF value on the Customer Account, and if not populated there, the value will be inherited from the user's active ledger.

Customer Statements Multi-Currency Supported

The Currency pick list has been added to both the Outstanding and the Activity Statements. The value defaults to the Account Currency value on the Customer Account. If not populated on the Account, it will be inherited from the user's active ledger.

Customer Statements Formatting

- Negative number and amount formatting has been added to [PDF formats](#) to show them in parentheses.

- Cash Receipt adjustments applied are now shown on the Activity Statement and tagged with the Type 'adjustment.'
- Column headers on the Activity Statement have been renamed from:
 - i. 'Activity' to 'Type';
 - ii. 'Balance' to 'Running Balance';
 - iii. 'Billed Amount' & 'Paid Amount' Columns combined and renamed 'Amount';
 - iv. 'Balance' at the bottom of the table and in the header renamed to 'Statement Total.'

GL Account Current Balance

The new GL Account Current Balance component is a Lightning web component that shows the balance on a Balance Sheet or Profit & Loss GL Account as of the current accounting period. Cash Flow Categories are not supported. For our multi-currency users, this will show the balance in the active Ledger's currency. The new component also takes into account amounts from archived periods. To add this new component, refer to the [Edit a page to add a Lightning Component](#) article.

Note: This component can *only* be used in Lightning mode.

System Business Rules

Safeguards have been put in place to prevent incorrect posting to GL Accounts.

The GL Account listed below...	Cannot be referenced on the following Source Objects...
Current Year Earnings GL Account	<ul style="list-style-type: none"> • Amortization Entry Debit or Credit GL Accounts • Billing Cash Receipt Adjustment GL Account • Billing Line Revenue GL Account • Cash Disbursement Debit GL Account • Cash Receipt Credit GL Account • Expense Line Expense GL Account • Inbound Inventory Movement Debit or Credit GL Accounts • Journal Entry Line Debit or Credit GL Accounts • Manufacturing Inventory Movement Debit or Credit GL Accounts • Outbound Inventory Movement Debit or Credit GL Accounts

	<ul style="list-style-type: none"> • Outbound Inventory Movement Debit or Credit GL Accounts • Payable Line Expense GL Account • Product's Revenue, Expense, Inventory GL Accounts • Project Task Expense GL Account • Purchase Order Inventory Movement Debit or Credit GL Accounts • Recurring Billing Line Revenue GL Account • Recurring Journal Entry Line Debit or Credit GL Accounts • Recurring Payable Line Expense GL Account • Sales Order Inventory Movement Debit or Credit GL Accounts
AR Control GL Account	<ul style="list-style-type: none"> • Amortization Entry Debit or Credit GL Accounts • Billing Cash Receipt Adjustment GL Account • Billing Line Revenue GL Account • Cash Disbursement Debit GL Account • Cash Receipt Credit GL Account • Expense Line Expense GL Account • Inbound Inventory Movement Debit or Credit GL Accounts • Manufacturing Inventory Movement Debit or Credit GL Accounts • Outbound Inventory Movement Debit or Credit GL Accounts • Payable Line Expense GL Account • Product's Revenue, Expense, Inventory GL Accounts • Project Task Expense GL Account • Purchase Order Inventory Movement Debit or Credit GL Accounts • Recurring Billing Line Revenue GL Account • Recurring Journal Entry Line Debit or Credit GL Accounts • Recurring Payable Line Expense GL Account • Sales Order Inventory Movement Debit or Credit GL Accounts
AP Control GL Account	<ul style="list-style-type: none"> • Amortization Entry Debit or Credit GL Accounts • Billing Cash Receipt Adjustment GL Account

	<ul style="list-style-type: none"> - Billing Cash Receipt Adjustment GL Account • Billing Line Revenue GL Account • Cash Receipt Credit GL Account • Expense Line Expense GL Account • Inbound Inventory Movement Debit or Credit GL Accounts • Manufacturing Inventory Movement Debit or Credit GL Accounts • Outbound Inventory Movement Debit or Credit GL Accounts • Payable Line Expense GL Account • Product's Revenue, Expense, Inventory GL Accounts • Project Task Expense GL Account • Purchase Order Inventory Movement Debit or Credit GL Accounts • Recurring Billing Line Revenue GL Account • Recurring Journal Entry Line Debit or Credit GL Accounts • Recurring Payable Line Expense GL Account • Sales Order Inventory Movement Debit or Credit GL Accounts
Vouchers Payable GL Account	<ul style="list-style-type: none"> • Amortization Entry Debit or Credit GL Accounts • Billing Cash Receipt Adjustment GL Account • Cash Disbursement Debit GL Account • Cash Receipt Credit GL Account • Expense Line Expense GL Account • Inbound Inventory Movement Debit or Credit GL Accounts • Manufacturing Inventory Movement Debit or Credit GL Accounts • Outbound Inventory Movement Debit or Credit GL Accounts • Project Task Expense GL Account • Recurring Billing Line Revenue GL Account • Recurring Payable Line Expense GL Account • Sales Order Inventory Movement Debit or Credit GL Accounts

Void Cash Disbursements

When voiding a Cash Disbursement, the AP Disbursement record created when the Payable was paid (and Cash Disbursement created) is deleted.

Cash Disbursement and Cash Receipt Product

The Product field has now been added to the Cash Disbursement and Cash Receipt so users can tag a product, if necessary. When added, the product value will be shown on the Cash Disbursement's or Cash Receipt's transactions posted to the General Ledger, respectively.

Time Cards Enabled for Lightning Experience

Time Cards have now been implemented for Lightning Experience. However, due to a known Salesforce bug we were unable to deploy upgrades made with Lightning Web Components to these features in our Hibiscus Release. All existing functionality continues to be supported in the Classic UI. However, users will need to make some configuration changes in order to continue using these features in the legacy Time Card Classic UI. In order to do so, please follow the steps below. If you are using Time Cards and are using the Lightning UI, please refer to our [Set Up Classic UI Time Cards in Salesforce Lightning](#) article. If you are using Time Cards and are using the Classic UI, please refer to our [Set Up Classic UI Time Cards in Salesforce Classic](#) article.

Time Card Line Permissions

The Billable and Overtime checkboxes and the Time Card Variables on the Time Card Line object are now controlled by permissions.

Expense Reports Enabled for Lightning Experience

Expense Reports have now been implemented for Lightning Experience. However, due to a known Salesforce bug, we were unable to deploy upgrades made with Lightning Web Components to these features in our Hibiscus Release. All existing functionality continues to be supported in the Classic UI. Users will need to make some configuration changes in order to continue using these features in the legacy Expense Report Classic UI. If you are using Expense Reports and are using the Lightning UI, please refer to our [Set Up Classic UI Expense Reports in Salesforce Lightning](#) article. If you are using Expense Reports and are using the Classic UI, please refer to our [Set Up Classic UI Expense Reports in Salesforce Classic](#) article.

Expense Report Multi-Currency Supported

Expense Reports have been implemented for Multi-Currency users. Billings and Payables created will inherit the Currency from the

created expense report.

1. Billings and Payables are aggregated on the Currency dimension.
2. The Currency Conversion Rate on the Billing or Payable created from an Expense Report is driven by the date on the intermediate Create Billing or Create Payable screen.

Expense Report Line Permissions

The Billable and Employee Reimburse checkboxes on the Expense Report Line are now controlled by permissions.

Opportunity Closed/Won Requirement Removed

A user should now be able to create a Billing, Recurring Billing or Sales Order at any Opportunity stage; the Closed/Won requirement has been removed.

Software Corrections

Time Cards

The Time Card Line comment hover has been corrected and now functions as expected.

Opportunities

References to the Total Price field on the Opportunity have been removed from our queries. Users should no longer experience errors related to access for this field.

Financial Reports

Balance Sheet report - An issue with the Total rows not rendering correctly when Balance Sheet GL Accounts had their Sub type 2 value set to None has been addressed.

Recurring Payables

Payee Reference on Recurring Account Payable has been reverted to the earlier format and the unique ID has been removed.



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