

PSA Integrations – Release Notes

This document is regularly updated with the current release notes (as well as future) for the native integrations in the CORE platform (also known as PSA Integrations).

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Next Iteration (due 12th July 2023)

The next iteration of native integrations is currently due to be deployed on the 12th July 2023.

Features

Below are the cumulative features that will be available in deploying the next iteration of the native integrations package.

- PFR-6295 & PFR-6302
 - This will bring Sage Accounting and Dynamics 365 Business Central integrations into CORE.
- PFR-6304
 - For Autotask and ConnectWise integrations, a termination task is now created for subscriptions that expire naturally without a cancellation order so that customers are not charged for expired subscriptions.
- PFR-6552
 - For ConnectWise integrations, a separate addition will be created for the first month in prorated agreements.
- PSA-3344
 - A new user privilege Application PSA Integration: View Native Integrations Menu in UX1 which allows providers to control the visibility of the integration menu item is now supported.
- PFR-5335
 - Now, automatic task synchronization can be configured for each customer account individually.
- PFR-6348
 - Native integrations now support migration orders. For every newly migrated subscription, a reconciliation task is created and can be synchronized manually. Automatic synchronization is not supported for migrated subscriptions.
- PFR-6556
 - For Xero integrations, when products are imported from CORE, sales account field is now mandatory. Previously this field was optional which could lead to an import error.
- PFR-6551
 - Now, mapping results can be reviewed directly in the UI, eliminating the need to export the results to Excel.
- PFR-6534
 - Now, several products from CORE can be mapped to a single product in an external system. In such a case, a separate agreement must be used for synchronizing each of these products. You can enable this feature in the integration settings.

- PSA-3125
 - For Sage integrations, it is now possible to synchronize products, including their prices and SKUs, between CORE and the integrated system.
- PFR-6315
 - When configuring integration with ConnectWise, the Serial # parameter can be specified to identify CORE as a source of the data synchronized to the integrated system.
- PFR-6172
 - For Autotask integrations, contracts can now be created in the integrated system upon synchronization of accounts of Customer type.
- PFR-6143
 - For QuickBooks integrations, items of the inventory category can now be also synchronized.
- PFR-5887
 - For ConnectWise and Autotask integrations, if there is only one suitable contract to be selected in a synchronization wizard, it will be preselected.
- PFR-5419
 - For ConnectWise integrations, it is possible to include or exclude taxes during synchronization using a new configuration setting Tax settings. The existing additions will not be affected by this change.
- PFR-6595
 - For ConnectWise integrations, the option to add a prorated agreement is no longer available for change orders if they are not prorated.
- PFR-6625
 - In ConnectWise integrations, for Change orders, prorated additions should be created in the current period of prorated agreements.
- PFR-6624
 - It is now possible to trim order line details and leave only the product description.
- PFR-6625
 - In ConnectWise integrations, for Change orders, prorated additions should be created in the current period of prorated agreements.
- PFR-6624
 - It is now possible to trim order line details and leave only the product description.

Fixes

- PSA-3312
 - Sage integrations could not be installed.
- PSA-3176
 - The Sync button could become inactive without any prompt for a user on how to proceed.
- PSA-3305
 - In ConnectWise integrations, invoice lines for prorated agreements could be created incorrectly if the subscription is co-termed or if it has calendar billing enabled.
- PSA-2808
 - Native Integrations now supports the ability to disable synchronization for certain products.
- PSA-2812
 - Now an external system product cannot be mapped to multiple CORE products.
- PSA-3346
 - A termination task could not be synced in Autotask integrations.
- PSA-3356
 - A contract could not be synced to Autotask.
- PSA-3384
 - A notification about failed mass checking for changes could appear, while the task completed successfully.
- PSA-3315
 - Synced mapped operation could fail in Xero integrations.
- PSA-3327
 - A termination task could attempt to sync all subscription of the customer.
- PSA-3316
 - Sometimes it was not possible to map a new customer in ConnectWise integrations.
- PSA-3295
 - The State field was not filled automatically during customer import in Autotask integrations.
- PSA-3247
 - Autotask does not automatically sync tasks.
- PSA-3349
 - ConnectWise integration does not sync renewal orders.
- PSA-3355
 - Renewal Orders not showing on PSA Integrations.

Current Iteration (4.4)

This is the current version of the native integrations in the CORE platform, along with its fixes and features as of this major version. Minor releases may happen for hotfixes and patches of specific issues.

Features

- PSA-2908
 - In Xero integrations, resellers can now sync data from orders to a repeating invoice in Xero so that their customers are billed periodically for all items consumed within a month.
- PSA-2998
 - A new setting was added that allows to not sync the information about the refunds received by a customer because of subscription downgrade and only sync the resource quantity change. To configure your integration that way, set the downgrade sync settings to sync only quantity change.

Fixes

- PSA-3118
 - The effective date of an addition for a prorated ConnectWise agreement with no invoices could be calculated incorrectly.
- PSA-3102
 - Prorated fees were not synced for co-termed subscriptions based on plans with the Billing period alignment option enabled.
- PSA-3103
 - An incorrect quantity adjustment value could be synchronized for cancellation orders with refund items.
- PSA-3092
 - The synchronization wizard failed on the last step if there was an order with an unsupported detail type.
- PSA-3088
 - The Autosync task could synchronize an order for a customer that was previously unmapped.