



Maica Release Notes V.0.139

Ticket #	Ticket Title	Description
CC-453	Appointment List – Active Schedule	<p>Enhancement: Appointment List – Active Schedule</p> <p>The Active Schedule component has been introduced to the Contact object within Maica. This enhancement provides visibility into all active Recurring Appointment Schedules associated with a Participant. It aims to improve operational transparency and support planning and service delivery by allowing users to view detailed information about a Participant's ongoing schedules.</p> <p>What's Changed?</p> <ul style="list-style-type: none">• New Active Schedules component displaying:<ul style="list-style-type: none">◦ Schedule ID◦ Schedule Start Date◦ Schedule End Date◦ Frequency◦ Interval◦ Appointment Service(s)◦ Next Appointment Date (linked)

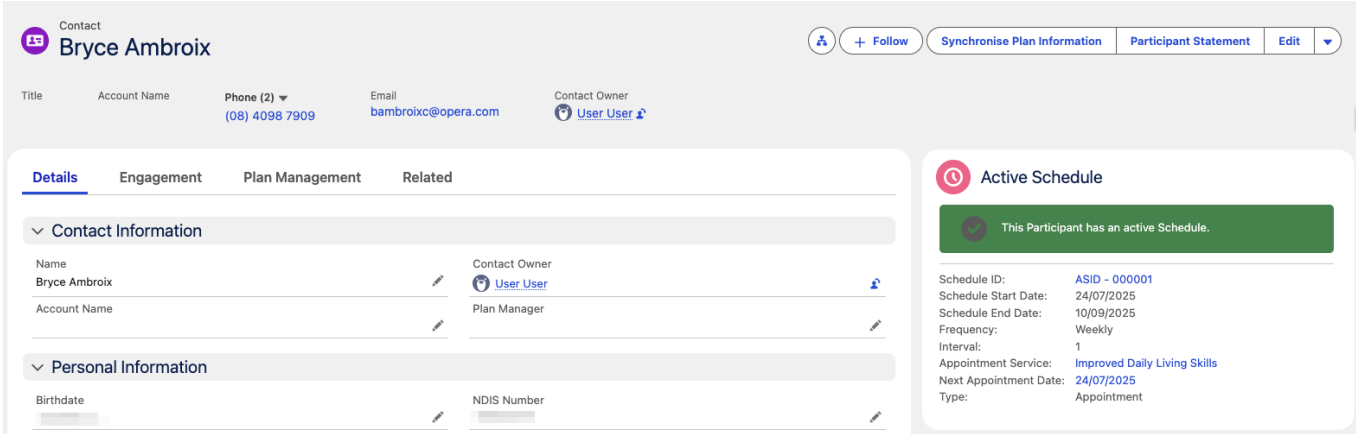
- Type
- Schedule records that meet the following criteria are displayed:
 - Under Evaluation = TRUE
 - Related Master Appointment is not cancelled
 - Master Appointment has a valid Record Type
- Sorting implemented by Schedule Start Date (ascending)
- Scroll bar and placeholder UI implemented for better user experience with large lists

Example Scenarios

- A Participant has multiple recurring schedules:
 - ✓ All active Schedules are shown, with next appointment dates clearly listed.
- A Schedule's Master Appointment is cancelled:
 - ✓ That Schedule is excluded from display.
- Schedule ends before today's date:
 - ✓ Not shown in the Active Schedules list.

Post-Install Steps

- Add the **Maica - Active Schedules** Lightning Component to the required Lightning Page Layouts on the Contact object

		
CC-452	Upcoming Appointment List – UI and Email Functionality	<p>Enhancement: Upcoming Appointment List – UI and Email Functionality</p> <p>This enhancement delivers the core functionality for generating and sending the Upcoming Appointment List for a Participant. The list is sent via email using a configured Lightning Email Template and is available via a Quick Action on the Contact record. The enhancement supports dynamic filtering and customisation of the content, improving the way Maica Participants are informed about their upcoming appointments. The email is triggered manually via the Quick Action on the Contact.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> Added a new Upcoming Appointments Quick Action on the Contact record. Enabled email generation using a configured Lightning Email Template. Implemented logic to query and format upcoming Appointment data dynamically.

- Introduced a Quick Action, titled Upcoming Appointments, with filter functionality to tailor the appointment list output to be included in the email:
 - Start Date and End Date range for filtering based on **Scheduled Start** and **Scheduled End** Dates.
 - **Status** filter supporting multiple appointment statuses (e.g. Scheduled, Cancelled).
 - Optional filters for Location, Appointment Service, and Resource.
- Created a default Lightning Email Template titled **Upcoming Appointments Email Template**, available for cloning and customisation.

Upcoming Appointments Quick Action on Contact:

The screenshot displays the Salesforce interface for a contact named Bryce Ambroix. At the top, the contact's name and profile picture are shown, along with a toolbar containing buttons for 'Follow', 'Synchronise Plan Information', 'Upcoming Appointments' (highlighted with a red arrow), and 'Edit'. Below this, the contact's details are organized into sections: 'Contact Information' and 'Personal Information'. The 'Contact Information' section includes fields for Name, Account Name, Phone, Email, Contact Owner, and Plan Manager. The 'Personal Information' section includes Birthdate and NDIS Number. On the right side, there is a sidebar titled 'Active Schedule' which indicates that the participant has an active schedule and lists details such as Schedule ID, Start/End Dates, Frequency, Interval, Appointment Service, Next Appointment Date, and Type.

Contact Information	
Name	Bryce Ambroix
Account Name	
Phone (2)	(08) 4098 7909
Email	stephen.kent@vertic.com.au
Contact Owner	User User
Plan Manager	

Personal Information	
Birthdate	
NDIS Number	

Active Schedule	
This Participant has an active Schedule.	
Schedule ID:	ASID - 000002
Schedule Start Date:	24/07/2025
Schedule End Date:	01/10/2025
Frequency:	Weekly
Interval:	1
Appointment Service:	Improved Daily Living Skills
Next Appointment Date:	24/07/2025
Type:	Appointment

Upcoming Appointments Modal with Filter Options:

Upcoming Appointments

Enter the Start and End Dates to generate a list of upcoming Appointments for this Participant.
Click "Generate" to create an email with the list of Appointments matching your criteria.

* Start Date

22 July 2025

* End Date

21 Aug 2025

* Status

1 value(s) selected

Scheduled

Appointment Service

All

Resource

All

Location

All

Close

Generate



Email Template

Upcoming Appointments Email Template

Edit

Clone

Delete



Details

Related

Information

Email Template Name

Upcoming Appointments Email Template



Description

A Maica Email Template containing the email body that is sent to a Participant. The Upcoming Appointments list is displayed in the body of the Email.



Made in Email Template Builder



Related Entity Type

Folder

Maica Templates



Message Content

Subject

Your Upcoming Appointments



Enhanced Letterhead



HTML Value



Upcoming Appointments

Hi,

Please find a summary of your upcoming appointments below.

If you have any questions or need to make changes, feel free to contact us at [Support Email] or call [Support Phone Number].

Thank you, and we look forward to seeing you soon.

{content}

Best regards,
[Your Name]
[Your Company]

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Example of a generated email:

Upcoming Appointments

Hi,

Please find a summary of your upcoming appointments below.

If you have any questions or need to make changes, feel free to contact us at [Support Email] or call [Support Phone Number].

Thank you, and we look forward to seeing you soon.

Upcoming Appointments for Bryce Ambroix

Schedule Period: 22/7/2025 - 1/10/2025

Service Agreement Period		Service Agreement Balance	
Start Date:	10/4/2025	Total Allocated:	\$95812.57
End Date:	10/4/2026	Total Expenditure:	\$0.00
Agreement Period Progress:	28%	Total Remaining:	\$95812.57
Agreement Period Remaining:	72%	Utilisation:	0%

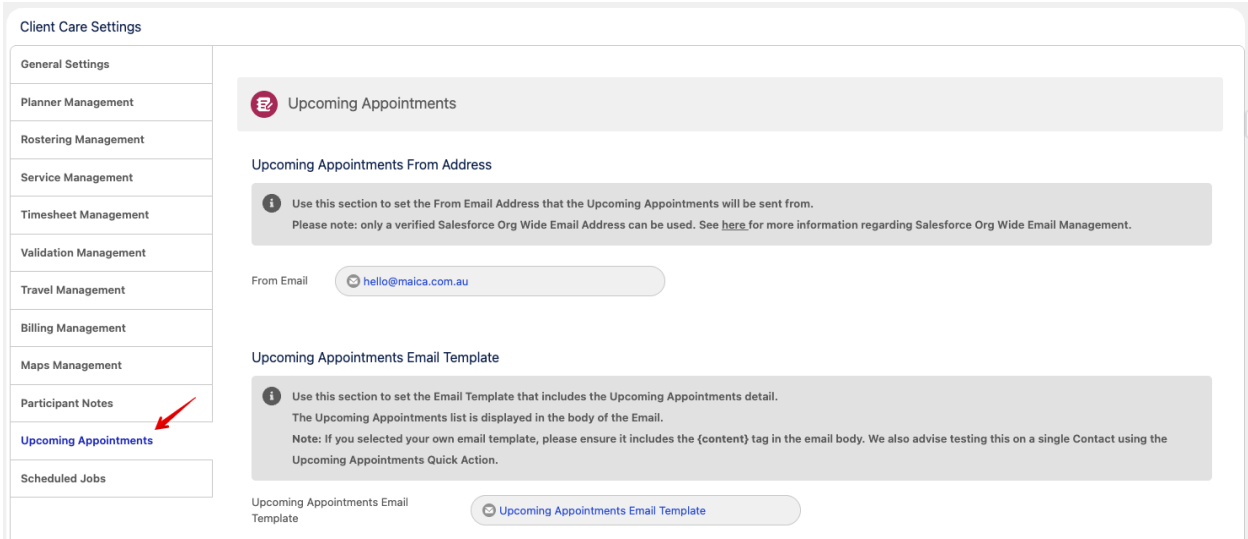
Upcoming Appointments

Scheduled Time	Service	Location	Resources
Thu, 24 Jul 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Mon, 28 Jul 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Thu, 31 Jul 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Mon, 04 Aug 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Thu, 07 Aug 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Mon, 11 Aug 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Thu, 14 Aug 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony
Mon, 18 Aug 2025, 12:00 PM – 12:45 PM	Improved Daily Living Skills	208 Bridge St Melbourne_3844	Nicolette O' Mahony

Best regards,
[Your Name]
[Your Company]

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CC-468	Appointment List - Settings UI	<h3>Enhancement: Appointment List – Settings UI</h3> <p>A supporting extension to CC-452, this enhancement introduces a new Upcoming Appointments tab within the Client Care Settings. It enables administrators to configure how upcoming appointment lists are emailed to Participants using a designated Lightning Email Template.</p> <p>What's Changed?</p> <ul style="list-style-type: none">• Added a new Upcoming Appointments tab to Client Care Settings.• Introduced the setting:<ul style="list-style-type: none">◦ Upcoming Appointments Email Template – Select the Lightning Email Template used to display the Appointment list within the body of the email.• Introduced a supporting setting:<ul style="list-style-type: none">◦ From Email Address – Choose the verified org-wide email address used to send these emails• An example Lightning Email Template named Upcoming Appointments Email Template is included with this release. This can be cloned and customised to match organisational tone, layout, and branding needs.
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		<p><i>Client Care Setting Update</i></p> 
CC-534	Total Committed Calculation	<p>Enhancement: Total Committed Calculation</p> <p>This enhancement introduces a new system-calculated field, Total Committed, to help Maica Users monitor committed funding under a Service Agreement. The value reflects both actual Delivery Activity records and forecasted usage from recurring schedules, with a combination of system logic and manual overrides. A global setting controls whether this feature is active.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> • New Fields Introduced:

- **Total Committed** (on **Agreement Item**)
 - Shows the committed funding for individual service lines.
- Roll-up field **Total Committed** (on **Service Agreement**)
 - Summarises the committed values from all related **Agreement Item** records
- **Committed Override** (on **Delivery Activity**)
 - Allows manual control over whether a Delivery Activity is included in the **Total Committed** calculation. Use “Include” to force inclusion, or “Exclude” to prevent it. Leave blank to apply system logic.
 - **Include**: Forces inclusion
 - **Exclude**: Forces exclusion
 - **Blank**: Defers to system-calculated formula
- Formula field **Is Committed** (on **Agreement Item**)
 - Indicates whether the **Delivery Activity** meets the criteria for the **Total Committed** calculation based on override settings, status, billing status, and invoice linkage. Summary below:
 - Override settings
 - Delivery Activity status
 - Billing status
 - Invoice status
 - Completed-but-not-invoiced edge cases
 - Full formula included below
- Calculation Mechanism:
 - Three background batch jobs:
 - Clear existing values
 - Process existing **Delivery Activity** records

- Forecast values from uncreated **Appointment** records based on recurring schedules
- Quick Action Support:
 - Allows manual recalculation for a specific **Service Agreement**.
- Settings:
 - Enable Total Committed Calculation toggle added in General Settings (default: OFF).
 - Scheduled job automation controlled via the Scheduled Jobs tab.
- Permissions & Architecture:
 - Service Agreement & Agreement Item field resides in CM package
 - Calculation logic resides in CD package

Is Committed Formula Logic

None

```
IF(
  TEXT(maica__Committed_Override__c) = "Include",
  TRUE,
  IF(
    TEXT(maica__Committed_Override__c) = "Exclude",
    FALSE,
    (
      (
        ISBLANK(TEXT(maica__Committed_Override__c)) &&
        NOT(ISPICKVAL(maica__Status__c, "Cancelled")) &&
        NOT(
          ISPICKVAL(maica__Billing_Status__c, "Do Not Bill") ||
          ISPICKVAL(maica__Billing_Status__c, "Generated")
        )
      )
    )
  )
```

```
    ) &&  
    ISBLANK(maica__Invoice_Line_Item__c)  
  ) ||  
  (  
    ISBLANK(TEXT(maica__Committed_Override__c)) &&  
    ISBLANK(maica__Invoice_Line_Item__c) &&  
    ISPICKVAL(maica__Status__c, "Completed")  
  )  
)  
)  
)
```

Example Scenarios:

- A Delivery Activity marked "Exclude":
 - ✓ Omitted from all calculations
- Completed Delivery Activity not yet invoiced:
 - ✓ Included, unless overridden
- A Service Agreement includes 5 Agreement Items with forecasts:
 - ✓ Service Agreement's Total Committed field shows the combined committed amount
- Setting is disabled in Maica:
 - ✓ Calculation is not triggered; fields remain empty or unchanged

		<p>Post Install:</p> <ul style="list-style-type: none"> • Update Service Agreement Layout: <ul style="list-style-type: none"> ◦ Add new Calculate Total Committed Quick Action ◦ Add new Total Committed field • Update Agreement Item Layout: <ul style="list-style-type: none"> ◦ Add new Total Committed field • Update Delivery Activity Layout <ul style="list-style-type: none"> ◦ Add new Is Committed field (if desired) ◦ Add new Committed Override field (if desired) • Enable the Total Committed calculation setting (if needed) in Client Care General Setting • Schedule the calculation batch from the Scheduled Jobs settings tab.
CC-546	Client Goal Lookup Filters not Applied in Participant Note Modal	<p>Fixed: Client Goal Lookup Filters not Applied in Participant Note Modal</p> <p>This bug fix resolves an issue where the Client Goal lookup filters were not correctly applied in the Participant Note modal when the Participant was auto-populated from the Planner view. As a result, users could inadvertently select goals unrelated to the intended Participant.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> • Corrected logic to ensure Client Goal lookup filters are dynamically applied when a Participant is pre-filled in the Participant Note modal. • Fix ensures the filtered goals match the selected Participant, regardless of whether

		the Participant was added manually or automatically.
CC-565	Standalone Appointment Converted to Master Appointment in Schedule: Inheritance Bug Fix	<p>Fixed: Standalone Appointment Converted to Master Appointment in Schedule: Inheritance Bug Fix</p> <p>This bug fix addresses an issue where converting a standalone Appointment into a Master Appointment within a Schedule would incorrectly display the Inherit Participants and Inherit Resources options as selected—even if they were initially left unchecked during creation.</p> <p>What's Changed?</p> <ul style="list-style-type: none"> • Corrected defaulting behaviour for inheritance checkboxes when a standalone Appointment is edited to create a Schedule. • Ensures that when no inheritance is selected, the interface does not misleadingly display these options as active upon subsequent review.
CC-582	Bulk Price List Update Filter	<p>Fixed: Maica Settings Bulk Price List Update Filter</p> <p>This bug fix resolves multiple issues within the filter functionality of the Maica Settings Bulk Price List Update screen. The changes ensure that a user applying a filter using Price List Name can now correctly locate and apply the relevant record.</p>

