



Maica Client Management Release Notes V.0.345

Ticket #	Ticket Title	Description
NDIS-886	Invoice Line Item Trigger - Plan Budget	Enhancement: Automatic Plan Budget Population for Invoice Line Items A new trigger has been introduced to automatically populate the Plan Budget lookup field on the Invoice Line Item object. This ensures each Invoice Line Item is correctly linked to its associated Plan Budget within the related Service Agreement Plan, improving financial traceability and budget utilisation reporting for Support at Home compliance. What's Changed? • Automatic Trigger on Create: ◦ The trigger executes automatically whenever a new Invoice Line Item is created. • Relationship Traversal: ◦ The trigger uses the Agreement Item on the Invoice Line Item to locate the related Service Agreement and then identify the associated Plan. • Active Budget Matching:

- From the identified **Plan**, the system filters to find a **Plan Budget** record where **Status = Active**.
- Budget Type Matching (Standard Case):
 - If the **Invoice Line Item** already contains a **Budget Type**, the system searches for an **Active Plan Budget** with the same **Budget Type**.
- Budget Type Inference (Fallback Case):
 - If the **Budget Type** field is blank, the trigger retrieves the **parent Product** linked to the **Invoice Line Item**.
 - It then reads the **Product Budget Type** value(s) and searches for a matching **Active Plan Budget** for the related **Plan**.
- Populate Fields When Fallback Used:
 - When a match is found using the inferred **Budget Type**, the trigger populates both:
 - The **Plan Budget** lookup field.
 - The **Budget Type** field on the **Invoice Line Item** (using the matched **Plan Budget** value).
- Null Handling:
 - If no suitable **Plan Budget** is found, the trigger leaves both fields blank.

Full Flow Process:

1. **Invoice Line Item** is created
2. Trigger fires
3. From the **Invoice Line Item**, retrieve the linked **Agreement Item**
4. From the **Agreement Item**, retrieve the parent **Service Agreement**
5. From the **Service Agreement**, retrieve the related **Plan**
6. From the **Plan**, retrieve all related **Plan Budget** records

		7. Apply the following logic: ○ If the Invoice Line Item has a Budget Type value: ■ Filter retrieved Plan Budget records where: ● Status = Active ● Budget Type = Invoice Line Item → Budget Type ■ If a matching Plan Budget is found, assign it to the Invoice Line Item → Budget Type field. ○ If the Invoice Line Item → Budget Type is blank: ■ Retrieve the parent Product of the Invoice Line Item. ■ Obtain the available Budget Type value(s) from the Product. ■ Filter Plan Budget records where: ● Status = Active ● Budget Type = Product → Budget Type ■ If a matching Plan Budget is found: ● Assign it to the Invoice Line Item → Budget Type ● Write the matched Budget Type value from the Plan Budget back to the Invoice Line Item → Budget Type field. 8. If no match is found: ○ Leave both Plan Budget and Budget Type blank.
NDIS-962	Support at Home Claim – New Claiming Attributes	Enhancement: Support at Home New Claim Fields New fields have been added to the Invoice Line Item object to support updated claiming requirements under the Support at Home (SaH) framework. These fields capture additional information about service delivery, professional type, and assistive technology

purchase details to ensure compliance with SaH data standards.

What's Changed?

The following fields have been added to the **Invoice Line Item** object:

Field Name	Type	Description
Delivered by Third Party	Checkbox	Indicates whether the service linked to the Invoice Line Item was delivered by a third-party provider rather than directly by your organisation.
Health Professional Type	Picklist	Specifies the type of health professional who delivered the service (e.g. Physiotherapy, Occupational Therapy, Psychology, Allied Health Assistance, etc.).
Health Professional Type - Other	Text (255)	Used to record a custom health professional type when the correct option is not available in the picklist.

		Prescribed Item	Picklist (Yes/No)	Indicates whether the service or item being invoiced is a prescribed item.
		Loaned By - Organisation Name	Text (255)	Records the name of the organisation or government scheme that loaned the assistive technology item.
		Loaned By - Invoice Number	Text (255)	Captures the reference or invoice number associated with the loaned item.
		Purchase Method Type	Picklist (Purchased/Loaned)	Indicates whether the assistive technology item was purchased outright or loaned from another organisation.
		Item First Payment	Checkbox	Identifies whether this Invoice Line Item represents the first payment for the item or service. This field is mandatory for Home Modification products.

		Post-Install Steps • For existing installations, the new fields must be manually added to the <code>maica_cc__Invoice_Line_Item__c</code> Lightning Record Page.
NDIS-924	Support Item Number Validation Update	Change: Conditional Validation for Support Item Numbers The validation logic for Support Item Numbers has been updated to support the requirements of Support at Home (SaH). Maica previously enforced global uniqueness for Support Item Numbers across all active <code>Support Item</code> and <code>Product</code> records, which prevented valid duplication scenarios required under the new funding model. What's Changed?

		Conditional Validation Logic: ○ Uniqueness is now enforced only when the Funding Type is not <i>Support at Home</i>. ○ For records where Funding Type = Support at Home, duplicate Support Item Numbers are permitted. Scope of Change: ○ Applies to the following objects and fields: ■ Product2.Support_Item_Number__c ■ Support_Item__c.Support_Item_Number__c ○ Inactive or archived records are excluded from uniqueness checks. Removed Field: ○ The previously introduced field Allow Duplicate Support Item Number was deprecated and removed from the package, as shown below.
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Product Custom Field

Allow Duplicate Support Item Number (Managed)

[Back to Product Fields](#)



This Custom Field Definition has been removed from the managed package. You can delete the component if no longer

Custom Field Definition Detail

Edit

Set Field-Level Sec

Field Information

Field Label	Allow Duplicate Support Item Number
Field Name	Allow_Duplicate_Support_Item_Number
Namespace Prefix	maica
API Name	maica__Allow_Duplicate_Support_Item_Number__c
Description	Allows the Product to be used in multiple records with the same Su
Help Text	Check this only for Products where duplicate Support Item Number

- Validation is now handled directly through the conditional logic described above.

Validation Rule Coverage:

- Validation rules, Apex triggers, and relevant flows have been updated to reference the new conditional logic.
- Enforces uniqueness only where **Funding Type ≠ Support at Home**.

		Example Scenarios •  NDIS record: Support Item Number duplication is blocked across active records. •  Support at Home record: Duplicate Support Item Numbers are allowed. •  Inactive record: No validation is triggered. •  Attempting to create a duplicate Support Item under NDIS funding displays the updated error message.
NDIS-988	SaH - Update Support Item Number field	Enhancement: Centralised Support Item Number Formula The logic determining the Support Item Number has been centralised and standardised across the platform. An existing formula field on the Product object has been updated and now provides a single, consistent source of truth for all records referencing Support Item Numbers. This simplifies maintenance and ensures data consistency across Service Delivery and Financial records. What's Changed? • Centralised Formula Logic: The updated formula field, Product2.Support_Item_Number_Formula__c, defines the Support Item Number as follows:

		<pre> IF(ISBLANK(Support_Item_Number_Override__c), Support_Item_Number__c, Support_Item_Number_Override__c) </pre> - The logic prioritises the Support Item Number Override when populated and falls back to the standard Support Item Number when blank. Standardised Field References: The following objects now reference the centralised Product formula field: Invoice Line Item → maica_Support_Item_Number__c Approved Service → maica_Support_Item_Number__c Booking Item → maica_Support_Item_Number__c Agreement Item → maica_Support_Item_Number__c Opportunity Line Item → maica_Support_Item_Number__c Metadata Updates: Field Description: <i>Determines the Support Item Number for this record based on the Product's Support Item Number Formula. The value is derived from the Product's Support Item Number Override when populated, or the Support Item Number when the override is blank.</i>
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- **Help Text:** *Displays the Support Item Number from the related Product record. If the Product's Support Item Number Override is populated, it is used; otherwise, the Support Item Number value is displayed.*

Example Scenarios

✓ **Override value populated:**

- Support Item Number Override = 123-OVR
- Support Item Number = 123
- All related records display **123-OVR**

✓ **Override value blank:**

- Support Item Number Override = (blank)
- Support Item Number = 123
- All related records display 123.

✓ **Both blank:**

- Support Item Number Override = (blank)
- Support Item Number = (blank)
- All related records display (blank).