AlarmBiller / SalesAutomation / eForms

Release Notice version 4.20.0

Revision 01

June 2021

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About This Document

This document provides information related to new enhancements and applications corrections for AlarmBiller, SalesAutomation and eForms for version 4.20.0.

Enhancements - AlarmBiller

AlarmBiller / Stages Integration

This integration ensures greater continuity between linked databases with two-way synchronization functionality, reduces data entry as much as possible on both ends of the integration, and includes a smooth user experience that creates ease of use when transferring, linking, and synchronizing accounts. The main features of this new integration are listed below.

For more detailed information on this new feature, please refer to the AlarmBiller-Stages Integration document available for download on BoldU.

- Push AlarmBiller accounts as new accounts into Stages alarm monitoring software
- Link AlarmBiller accounts to existing Stages alarm monitoring software account.
- Add ability in customer wizard to allow users to push/link an AlarmBiller customer into/from Stages alarm monitoring software at the time they create a new customer.
- Synchronizing AlarmBiller and Stages Accounts.
- Manual Synchronizing - On the AlarmBiller side, this will give users the ability to compare data from AlarmBiller with Stages and determine if they want to push AlarmBiller information to Stages or pull information into AlarmBiller from Stages. This option will be available for all the entities that can be pushed/linked to Stages.
- Full Account Synchronization - Users will have the ability to synchronize a full account all at once with the ability to utilize the data in AlarmBiller or Stages in one consolidated area instead of needing to synchronize individual entities one at a time.
- AlarmBiller AutoSync - There will be an autosync option on the AlarmBiller side that, if enabled, will automatically push any changes made to pertinent fields on a linked account in AlarmBiller to Stages.
- Stages AutoSync - On the Stages side, we will be ensuring that if a linked entity is changed in Stages, the change is also made to the AlarmBiller account for pertinent fields.

Contacts and Zones

A new area has been added to linked AlarmBiller accounts where users can view the contacts and zones that exist on the linked Stages Account. This area will pull live Stages data and display it in AlarmBiller. Users will have the ability to add, edit, and remove contacts and zones directly from this area in AlarmBiller. The contacts and zones accessed here will be separate from the contacts and zones in AlarmBiller.

Enhancements – SalesAutomation, eForms, AlarmBiller

Item/Part Grouping

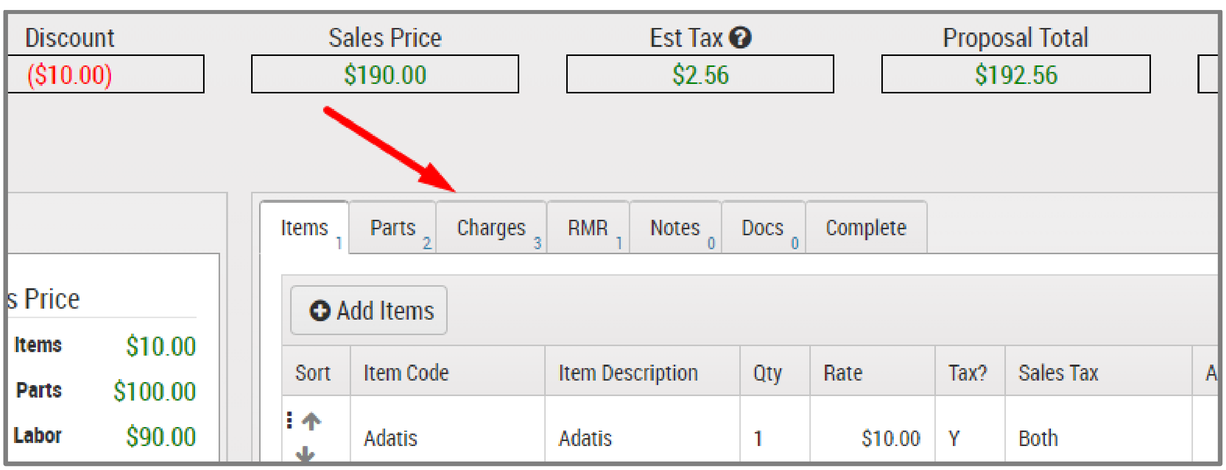
For more detailed information on this new feature, please refer to Appendix I, later in this document.

Added the ability for users to group items and parts on their proposal and sales package by a group heading and description, along with providing the ability to add a sub total to the group of items/parts.

SalesAutomation Proposals Item/Part Grouping

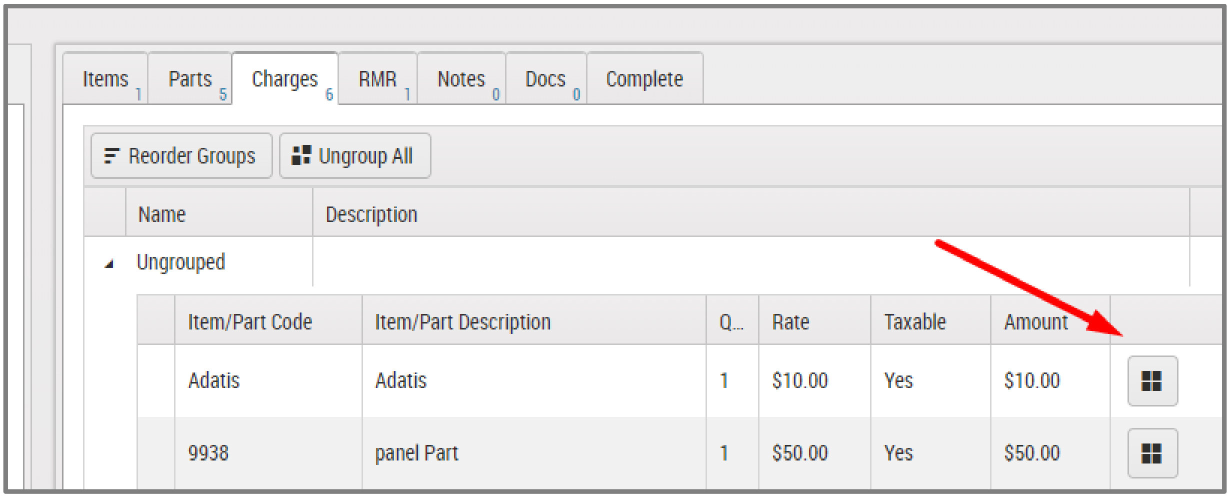
A Charges tab appears on the proposal in SalesAutomation. This tab includes a grid that populates with all the items and parts from the Items and Parts tab on the proposal.

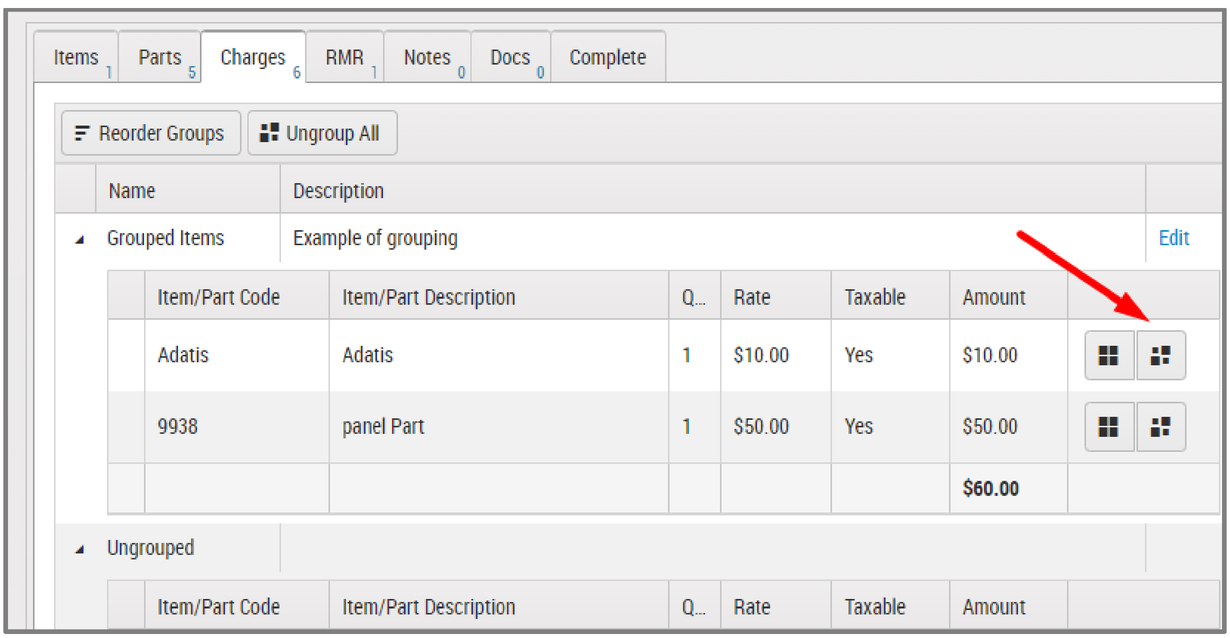
Users can select the items and parts to group by selecting an item or part and then clicking the ‘Move to Group’ button located to the right in the row. Users will then have the ability to enter a Group Name and a Group Description for the created group. The Group name defaults as blank and has a 50-character limit. The Group description defaults as blank and has a 1,000-character limit. Once groups are established, users can add items and parts by clicking the Move to Group button for each item and part, or the user may drag them into a group.



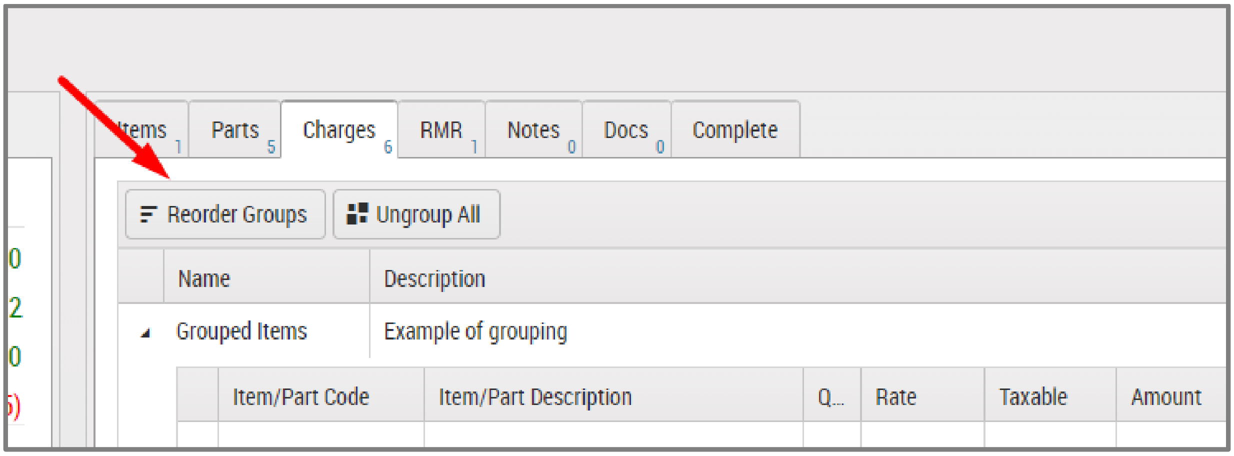
The items and parts that are grouped, are separated from the un-grouped items and parts. The grouped items and parts contain an Un-Group button in the right column to allow users to remove them from the group. Users can also drag items and parts out of the group.

Click on the  icon to access the grouping feature.



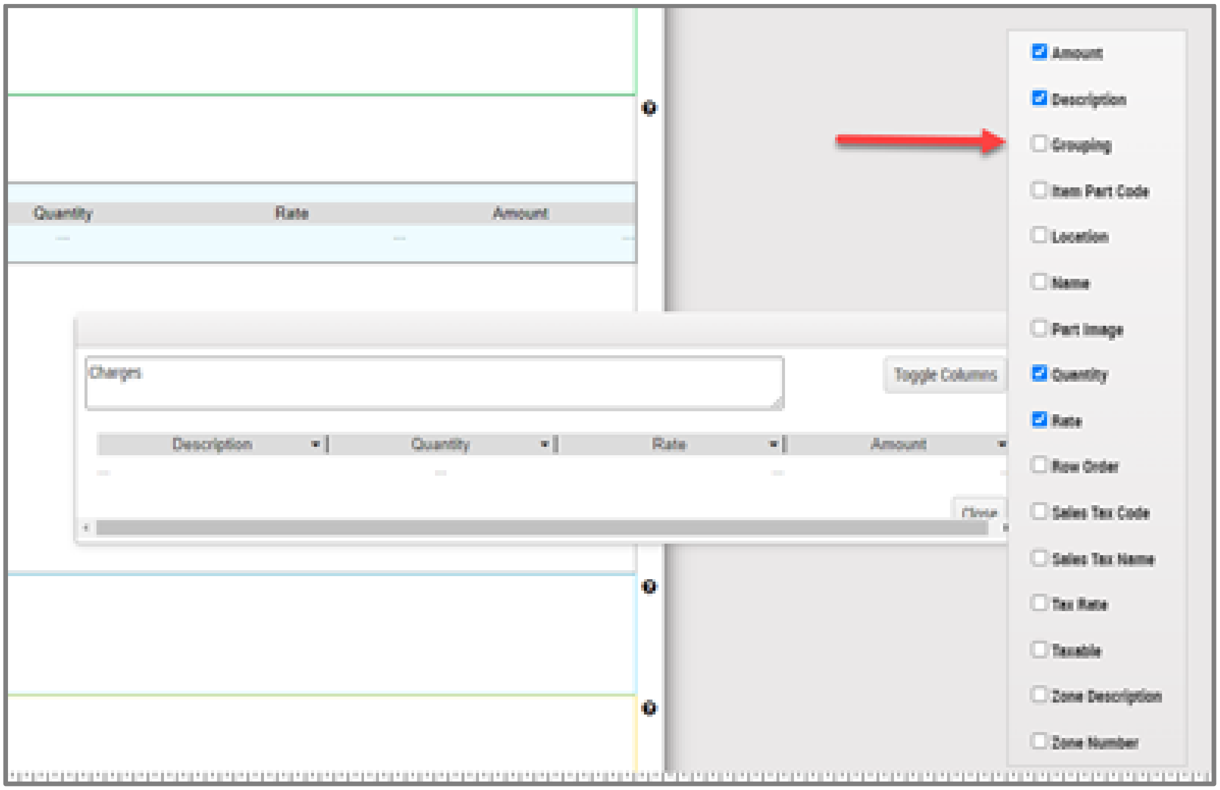


Users have the ability to drag and reorder the items and parts up and down within a group and between the groups. The users may also reorder the groups within the proposal by selecting the Reorder Groups button and then they may drag the groups into the desired display order.



eForms Item/Part Grouping

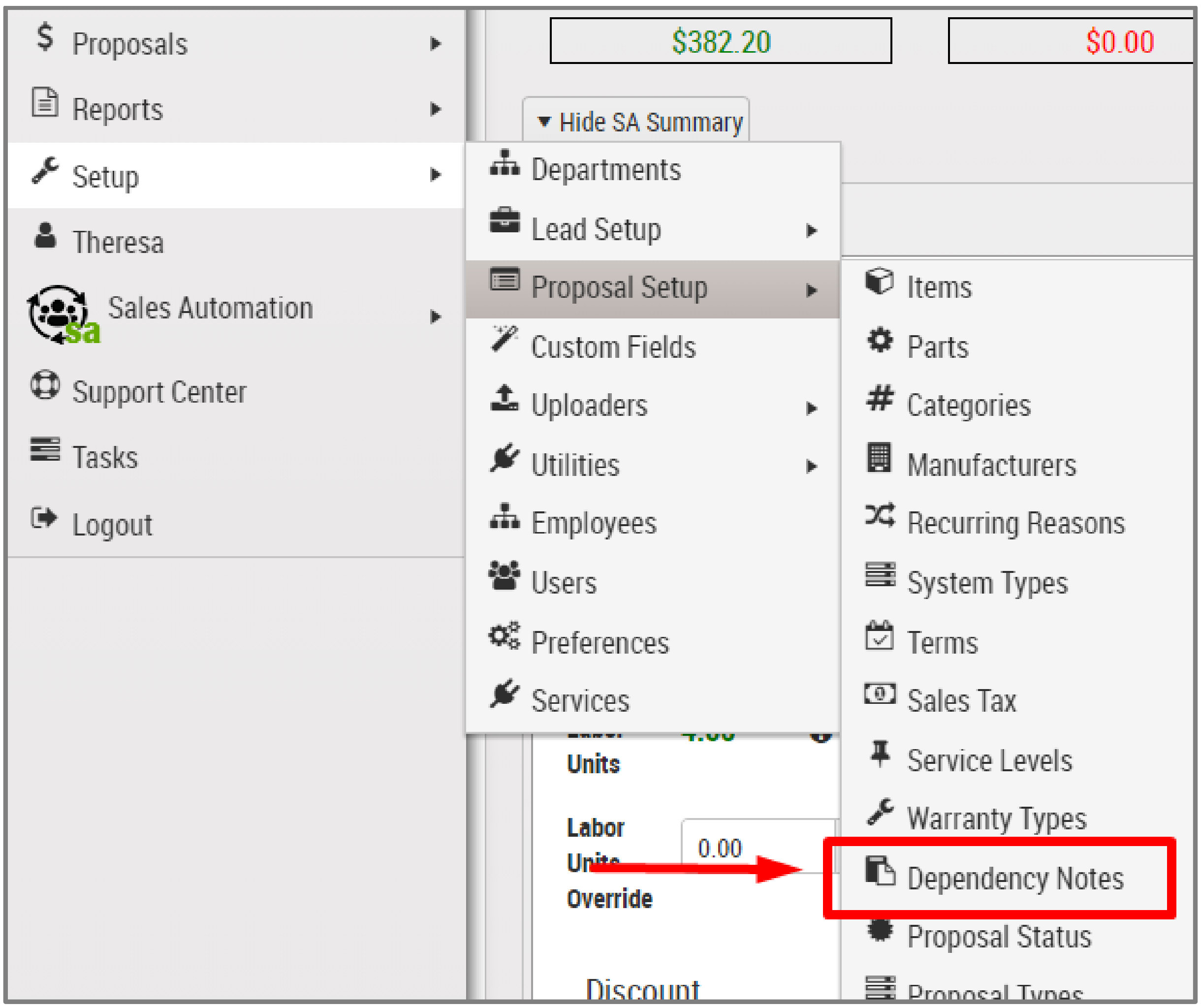
A grouping option has been added to the charges shared data fields for proposals. This allows grouped items and parts to be displayed under their group name and group description on the proposal. Groups can be set up to display a Sub Total on the proposal.



Dependency Notes

A Dependency Notes section has been added to the SalesAutomation Setup list. Clicking on Dependency Notes allows you to search for parts, items and recurring from the SedonaOffice database that are available for SalesAutomation and add dependency notes. The dependency notes field is a free form text field.

For more detailed information on this new feature, please refer to Appendix II, later in this document.



These dependency notes are available to add as an available column to add on the proposals template for charges, items, parts and recurring.

Actual view of Dependency Notes in proposal template.

Alternate Description Fields

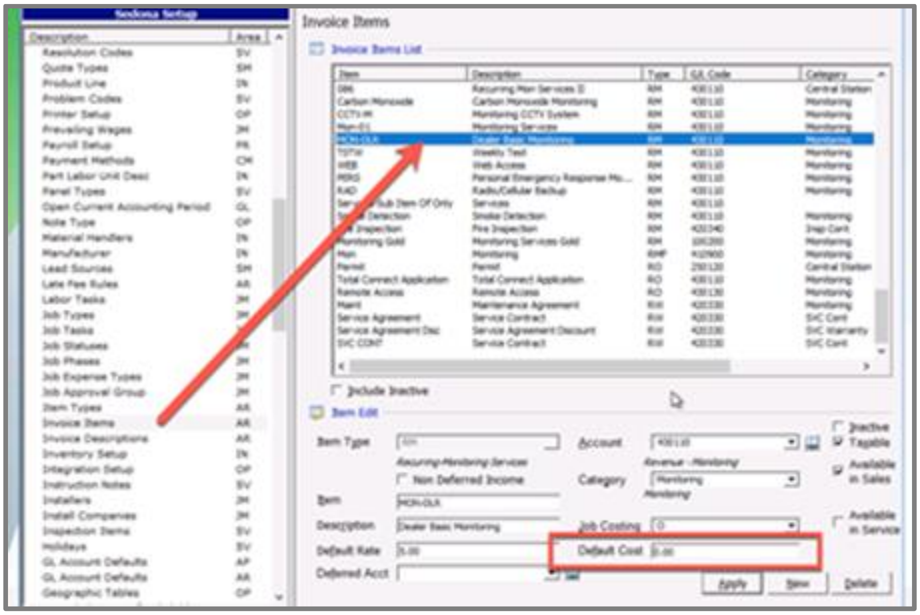
Alternate description fields have been added to Items, Parts, and RMR Item entities. These fields are available for utilization in the SalesAutomation and eForms modules.

For more detailed information, please refer to Appendix III later in this document.

Note: The ability to use this feature requires SedonaCloud version 1.30.0.1.

SalesAutomation - Viewing Recurring Default Cost

Viewing the default cost is a user security permission per user in setup. The default cost will populate from the invoice item in SedonaOffice when adding the RMR.



AlarmBiller – Sales Tax Report

The Grand Totals on the Sales Tax Report previously only included the sum of tax that were marked No in the Base? column in Setup>Accounting>Sales Tax. The individual totals by tax included all regardless of the setting in the Base? column. This caused some confusion when the totals for the taxes did not match the grand totals on the report. We have enhanced the report to include two additional rows for the Totals for Non Base Tax Codes and Totals for Base Tax Codes. The Grand Total will now include the total for all Tax codes.

Totals - Non Base Tax Codes	$21,214.65	$121,609.28	$633.49
Totals - Base Tax Codes	$42,378.95	$249,727.90	$664.95
Grand Totals	$63,593.60	$371,337.18	$1,298.44

Application Corrections

Alarm Biller

Work Order Print Issue (13124)

Issue – Work orders were only printing from the selections on the current screen listing. Selections on any subsequent screen were ignored and did not print.

Solution – To resolve this, the print logic had to be refactored to correctly pass all selected work order ids to the controller when individual records have been selected, as well as an update to the “Print All” functionality.

GL Ledger Journal Entry Performance – Details and Add/Edit Views (13627)

Issue – The issue here was with performance and the user having access to the details screen inputs while the program is processing in the background; when the page loaded any details entered were lost.

Solution – Performance improvements were made to both the Journal Entry Details and Add/Edit views processing. Also, to prevent users from losing data, an 'updating' spinner overlay was added on the page whenever the 'Save' button is clicked, to prevent users from attempting to add or edit any more of the detail records while the view is waiting for the save to complete.

Work Order Custom Field Crashes the Work Orders Grid (13775)

Issue – When the user selected the “Custom Fields” checkbox in the Work order tab, the details listing would disappear.

Solution – To resolve this, we created a dynamic query that will append the custom fields, and identified and corrected an issue of different data types causing database errors.

Time Zone Issues with Appointments (14638)

Issue – Central time zone customers keep getting some items popping up in the Eastern time zone.

Solution – The default time zone was set to the local zone in which the host code was running, which is ET. To resolve this, set the default to 'Unspecified' to prompt the code to properly convert the datetime using the user's current time zone associated with it.

NOTE: This is not a retroactive fix. Previously saved appointments will not be changed because the time is already saved in the database. This application change will only apply to new appointments created/updated moving forward.

RMR Custom Fields Error (14645)

Issue – When the user selected the "Custom Fields" checkbox in either the RMR or Work order tab, the details listing would disappear.

Solution – To resolve this, we had to identify and exclude any properties from the query, which did not have corresponding columns in the database.

Note: This change only resolves the RMR tab. The issue in the work order tab is resolved in item 13775 (please see prior page).

Work Order Validation Messages Overlap (14892)

Issue – The validation error messages overlapped and were not legible.

Solution – To resolve this, we repositioned the messages so that messages did not overlap and were legible to the user.

Adding a New Part - Unable to Delete an Uploaded Picture (15167)

Issue – When adding a new part, the **"**Delete Picture" button and 'X' window buttons do not remove the picture.

Solution – The issue was resolved by adding code to remove the image from temporary data.

Adding Duplicate Authorities - No Error Message Displayed (16043)

Issue – In Setup > Other > Authorities page, when adding a duplicate Authority name, and attempting to save, no error message is displayed; the entry is simply rejected.

Solution – The issue was resolved by adding an error message whenever a duplicate Authority name is detected.

Closing a Work Order with RMR (17743)

Issue – When closing a work order, when the Customer delivery method is set to email, an error message # 502 was displayed to the user.

Solution - Fixed an issue with the save in the deliver invoice logic when the delivery method is email.

Inventory Issue (duplicate of 17606) (17475)

Issue – After deleting all parts from inventory, the application still showed a parts balance on the warehouse screen.

Solution – The Warehouse grid and Details page now use the same formula to compute the total value.

Custom Fields Not Working in RMR (17476)

Issue – RMR listing goes blank when the user selects the “Custom Fields” check box.

Solution – To resolve this, we had to identify and exclude any properties from the query, which did not have corresponding columns in the database.

Note: This fix only resolves the RMR tab. The issue in the work order tab is resolved in work item 13775 (please refer to this item earlier in the application correction for AlarmBiller [Work Order Custom Field Crashes the Work Orders Grid]).

Viewing Panel Type from Customer (17477)

Issue – When looking at the panel from the customer's page it displays the description of the panel and not the panel code / type.

Solution – Instead of displaying the description, we will display the panel code/type that was set for the system, and the column will show as "Panel Type" for better clarity.

Update: Also updated the Site->System and Customers->System grid tabs to show the panel type code instead of description.

Accounts Payable Bill - Description Column (17481)

Issue - When creating a bill and adding a description, only the first 27 characters of the description are displayed.

Solution - To resolve this issue we have implemented resizable columns that you can drag to change the width of the column. We also added a hover text box that will appear with the full text if the column exceeds the width. The text will display an ellipsis "..." at the end if the contents exceed the width of the column.

Warehouse Grid Value Does Not Match Warehouse Detail Value (17606)

Issue – This item was previously recorded under work item 15868, however was not completely rectified. Warehouse is showing a value for parts, even though the warehouse is empty. The previous solution did not filter out inactive parts and used a different formula to compute the total value compared with what was used to display the Details page.

Solution – The Warehouse grid and Details page now use the same formula to compute the total value.

Custom Fields at Customer Level (17607)

Issue – If you setup a custom field at the Customer Level and the Field Name begins with a number it will cause an error and not work.

Solution – The issue was resolved by enclosing the Custom Field names in double quotes to allow for numeric starting characters.

Remove the New Support Ticket Button (17724)

Issue – When we removed the ability for customers to submit support tickets from AlarmBiller in a previous issue, we did not remove the New Support Ticket button on the Support Center home screen.

Solution – The issue was resolved by removing the New Support Ticket button on the Support Center home screen.

GL Entry Details - Disable or Hide 'Book' icon for GL Journey Entry (17881)

Issue – For Journal entries which are not associated with an entity such as an invoice, deposit, etc., an exception message was thrown.

Solution – The issue was resolved by hiding the book icon for manual entries which do not have an associated invoice, deposit, etc.

Payment Method – Added the Ability to Change the Payment Method on Transaction Details Page for eCheck and Credit Card Transactions (18996)

Issue – Some Transactions do not have an eCheckID or CreditCardID during payment processing. This causes the transaction indicator to change to an M which stops the transaction from processing.

Solution – We have added the ability to click on the Transaction number for the M Transaction in Payments> CC/eCheck Transactions, to open the Transaction Details screen and change the payment method to regenerate the eCheckID or CreditCardID. This will change the indicator to E or C and allow the transaction to

screen and change the payment method to regenerate the eCheckID or CreditCardID. This will change the indicator to E or C and allow the transaction to
process when payments are submitted.

SalesAutomation

Spelling Error on Message Received Upon Document Completion of a Proposal (16954)

Issue – The issue here was that the word presented on the form, was spelled incorrectly in a pop-up message.

Solution – To resolve this, we modified the message and corrected the spelling on the error message.

Error When Using 1 Decimal Place on Part on Proposal (17010)

Issue – The issue here was with rounding calculations or truncation after the third digit. For example, 0.1 * 167.95 = 16.79499999, which should round to 16.795, however, 16.79 was returned instead of 16.80.

Solution – To resolve this, we first rounded the calculated values to 3 decimal places, and then format them as currency. In the example above, 16.79499999 will be rounded to 16.795, and then formatted to $16.80, which is the correct rounded value.

Create Date Does not Have Value on Proposal Grid (17012)

Issue – Customer was unable to get metrics based upon proposals by date.

Solution – The creation date was not being populated to the Estimates Grid; the data is now being populated and displayed properly.

Copying Proposals Requires a Lead (17486)

Issue – The issue is that when the customer is copying a proposal in AlarmBiller, the tooltip message states that the “SA Lead” field is required, when it is not. The SA Lead field is only required when copying proposals with the SalesAutomation feature.

Solution – The tooltip message will display the appropriate message dependent on whether the user is copying a proposal in AlarmBiller versus SalesAutomation. For AlarmBiller, the message will read “SA lead is optional to automatically load the associated Customer”. For SalesAutomation, the message will read “SA Lead is required to automatically load the associated Customer”.

Proposal Status (18089)

Issue – In SalesAutomation, the user cannot edit the 'Proposal Status' in the 'Setup: Proposal Setup page.

Solution – The issue was being caused by client-side browser errors. The issue was resolved by correcting a browser element 'Change' event.

eForms

Inactive eForm (17014)

Issue – Customer was not warned that there is an incomplete inactive form which will be lost/replaced when a new template is selected.

Solution – In order to address this bug with multiple stage forms, AlarmBiller will check that all Stages are complete, before designating the form as completed. If a user tries to add a new eForm when an existing one is not fully completed, AlarmBiller will display an error message, and request confirmation before continuing.

eForms Designer Preview Dealer Log Errors (17889)

Issue – Errors are being logged when previewing an eForm and there is no data template element found in the eForms template data.

Solution – The issue was resolved by adjusting the preview logic to not throw these errors.

Data Entry Field Names Where a Period is Entered (18092)

Issue – The issue here was that the field name contained a period in it (alarm.com).

Solution –The issue was resolved by restricting the user from placing periods or commas in the field names.

Time & Attendance

Time & Attendance – Time Zone Issue (14638) & (18104)

Issue – When logging times there are some entries that are listed with mixture of GMT time and Central Standard Time.

Solution – The default time zone was set to the local zone in which the host code was running, which is ET. To resolve this, we had to set the default to 'Unspecified' to prompt the code to properly convert the datetime using the users time zone currently associated with it.

NOTE: This is not a retroactive fix. Previously saved entries will not be changed because the time is already saved in the database. This will only pertain to new entries created/updated moving forward.

Appendix I

SalesAutomation & eForms - Item/Part Grouping

Overview

This functionality lets users in SalesAutomation create a set of groups (called charges) on proposals and put both items and parts in those groups. This grouping can then be used on eForms as a method of breaking down lists of charges to the end user in a manner determined by the central station / dealer instead of just enforced by the "type" defined in AlarmBiller. It gives the ability to decide to display a sub-total for the charges groups on a selective basis.

This feature is only available on Proposals (both SalesAutomation and AlarmBiller), Sales Packages, and eForms. Groups will show up on a PDF from eForms but NOT on the standard Proposal PDF.

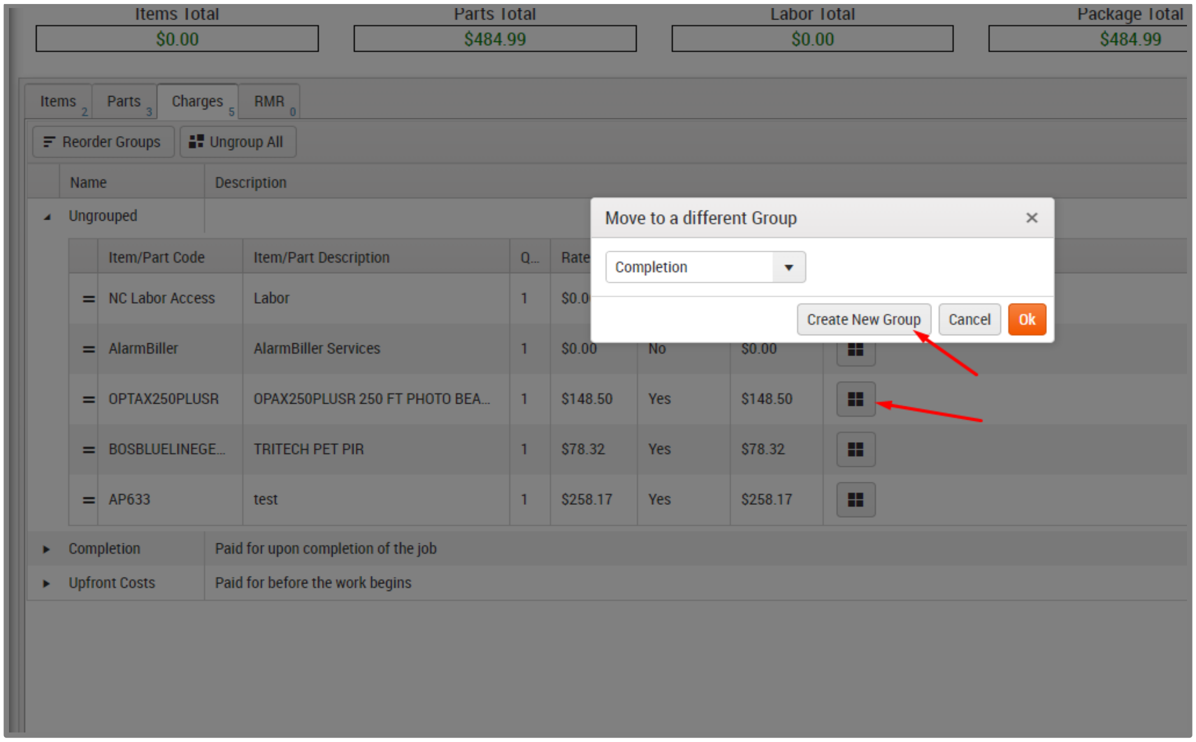
Technical Information

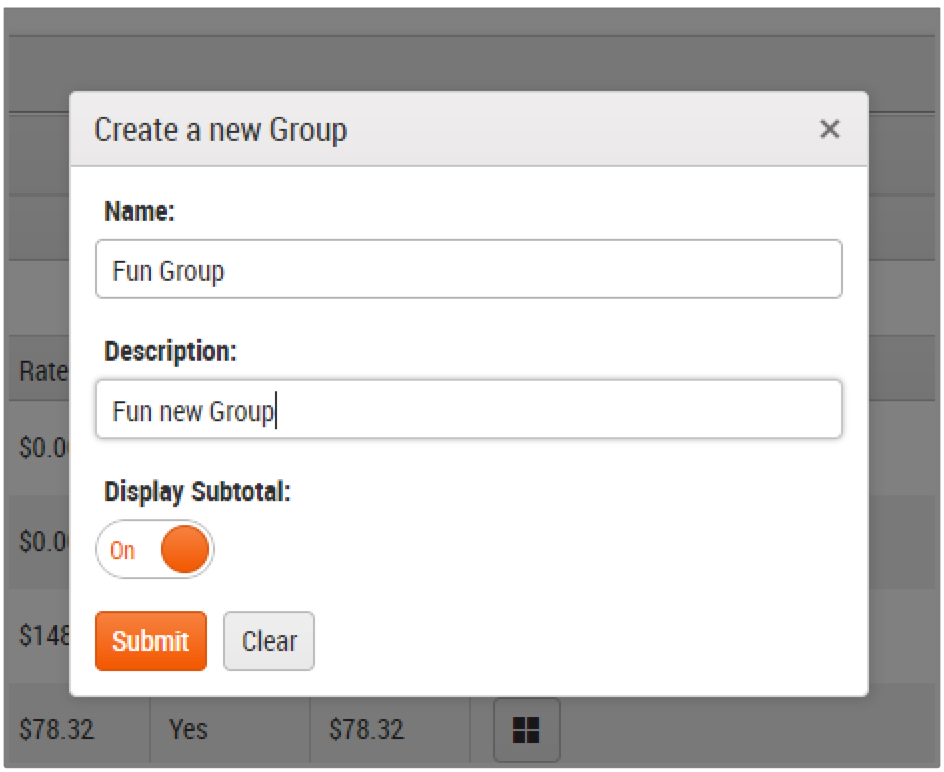
There are two ways to create these groups:

- Define them on a Sales Package
- Create/edit them on a per-Proposal basis

In both cases, you are able to rework a combined list of containing both Items and Parts into user defined groups. These groups are purely a UI functionality. This means that until saved, these groups only exist on the Client.

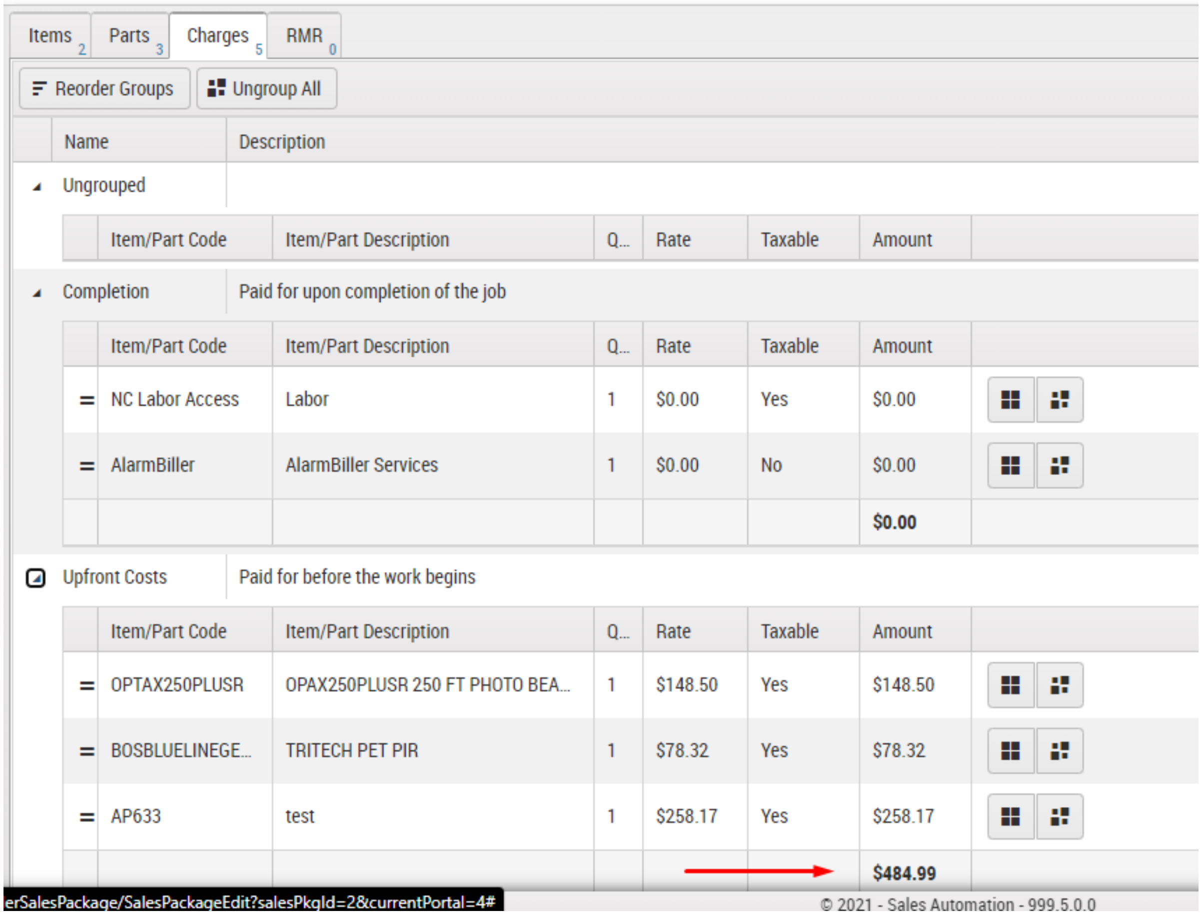
The groups can be created new, or you can move to an existing group.



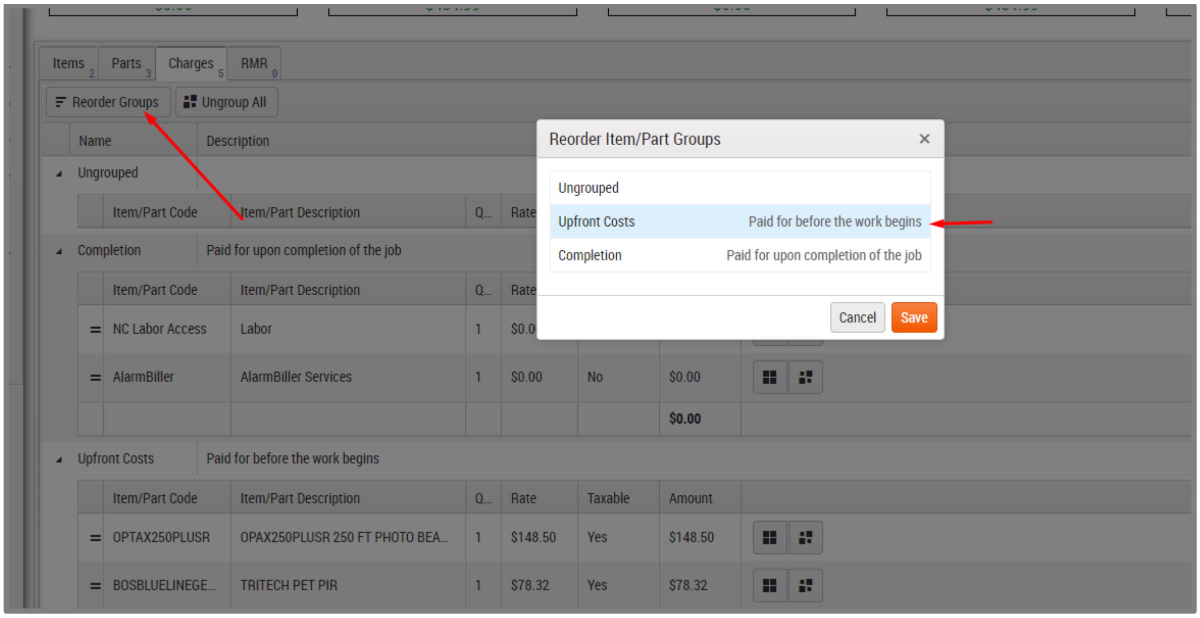


Currently each one must be moved to a group individually. The primary use case is to define a Sales Package and then if individual things are added for a unique proposal, they must be added to groups manually.

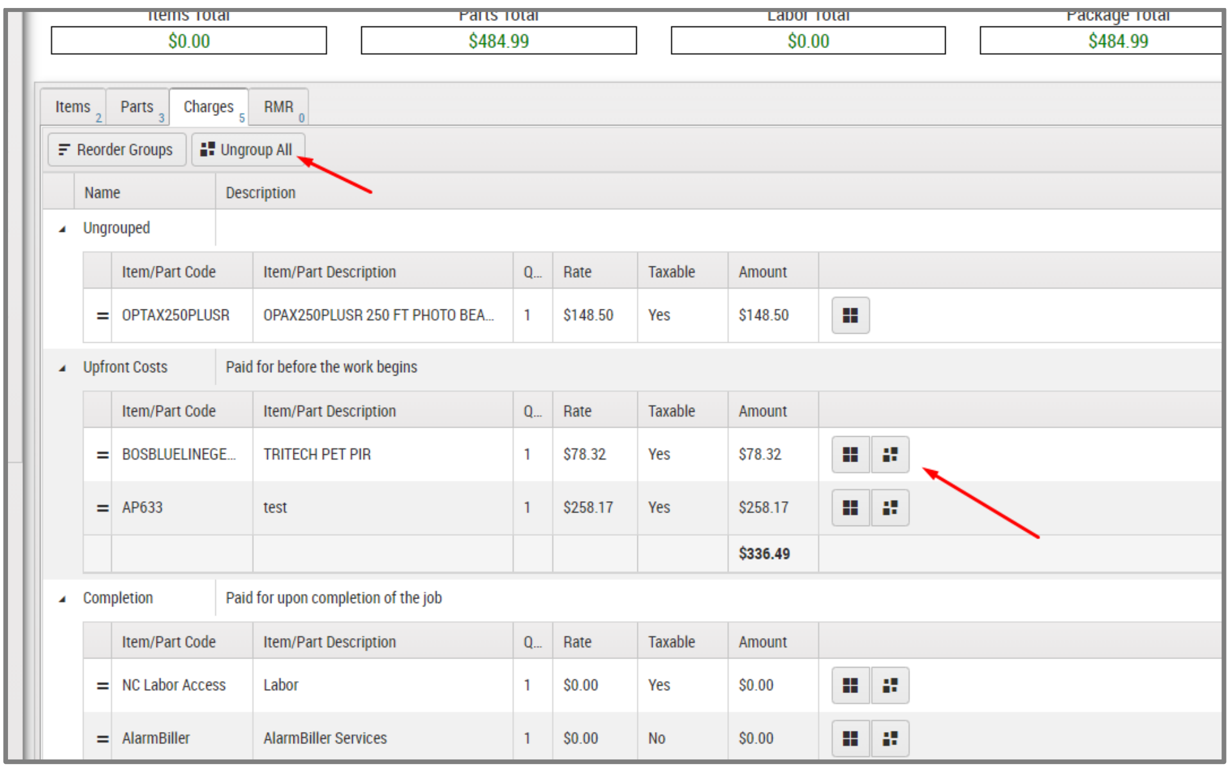
If the Display Subtotal is on, then each group will show a sub-total for that group.



The entire group list can be reordered. Just drag/drop into the desired order.

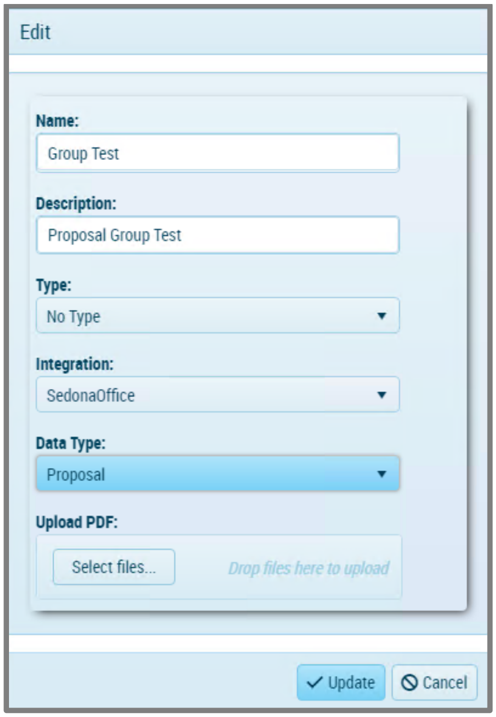


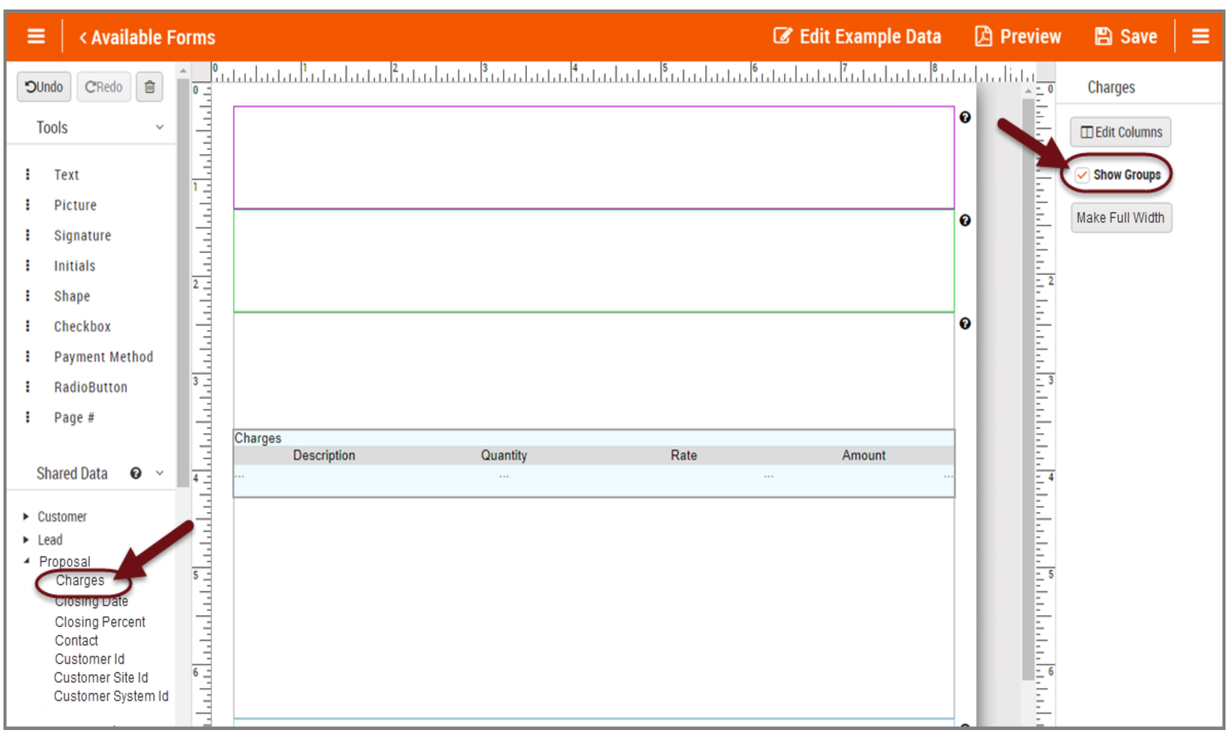
Things in a group can be either moved to another group, or completely removed from the group (back to the ungrouped state). You can also Ungroup All everything.



eForms

Proposal templates in eForms can be edited to include the groups.



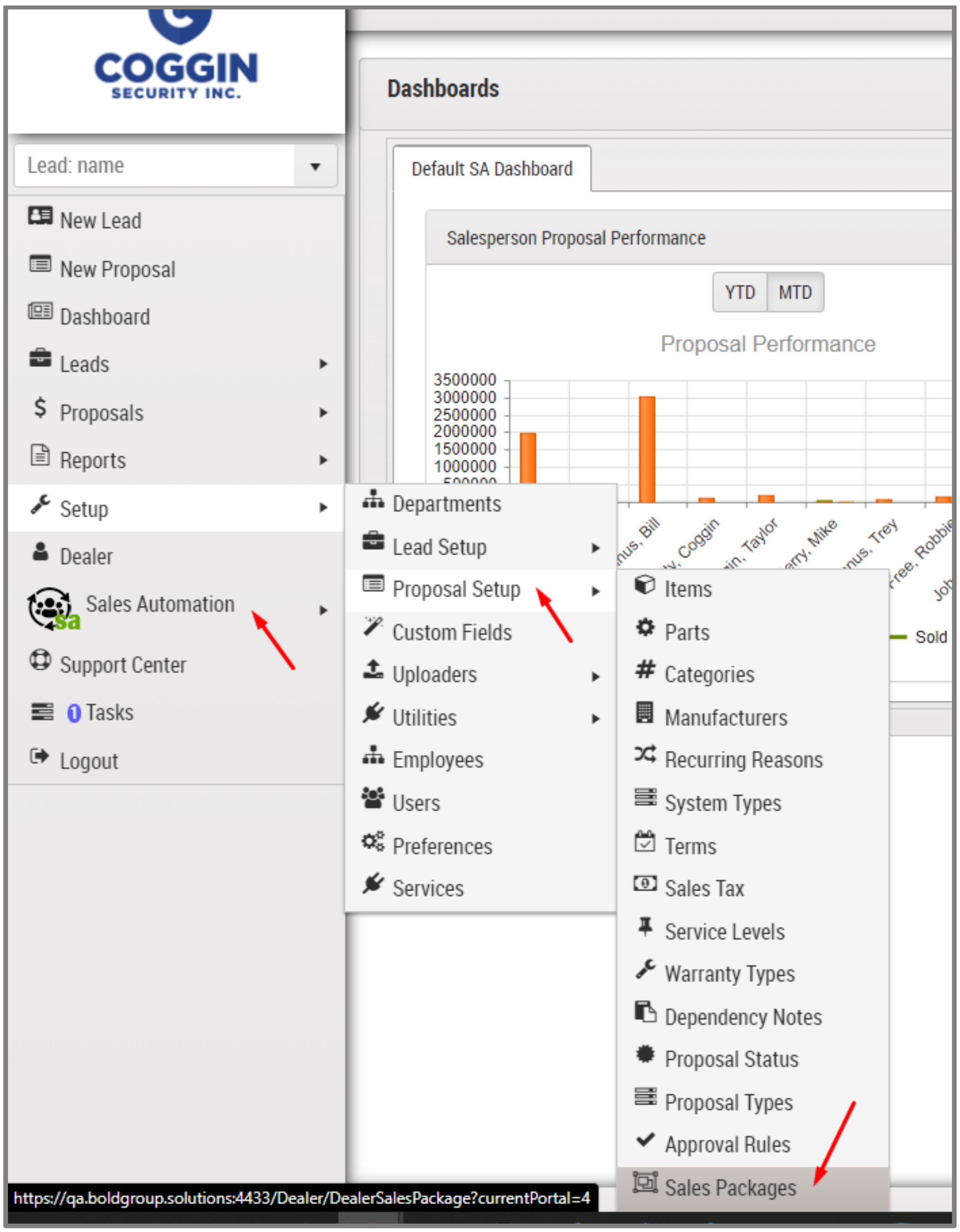


Installation

No special installation needed. Just SalesAutomation and eForms for the full value.

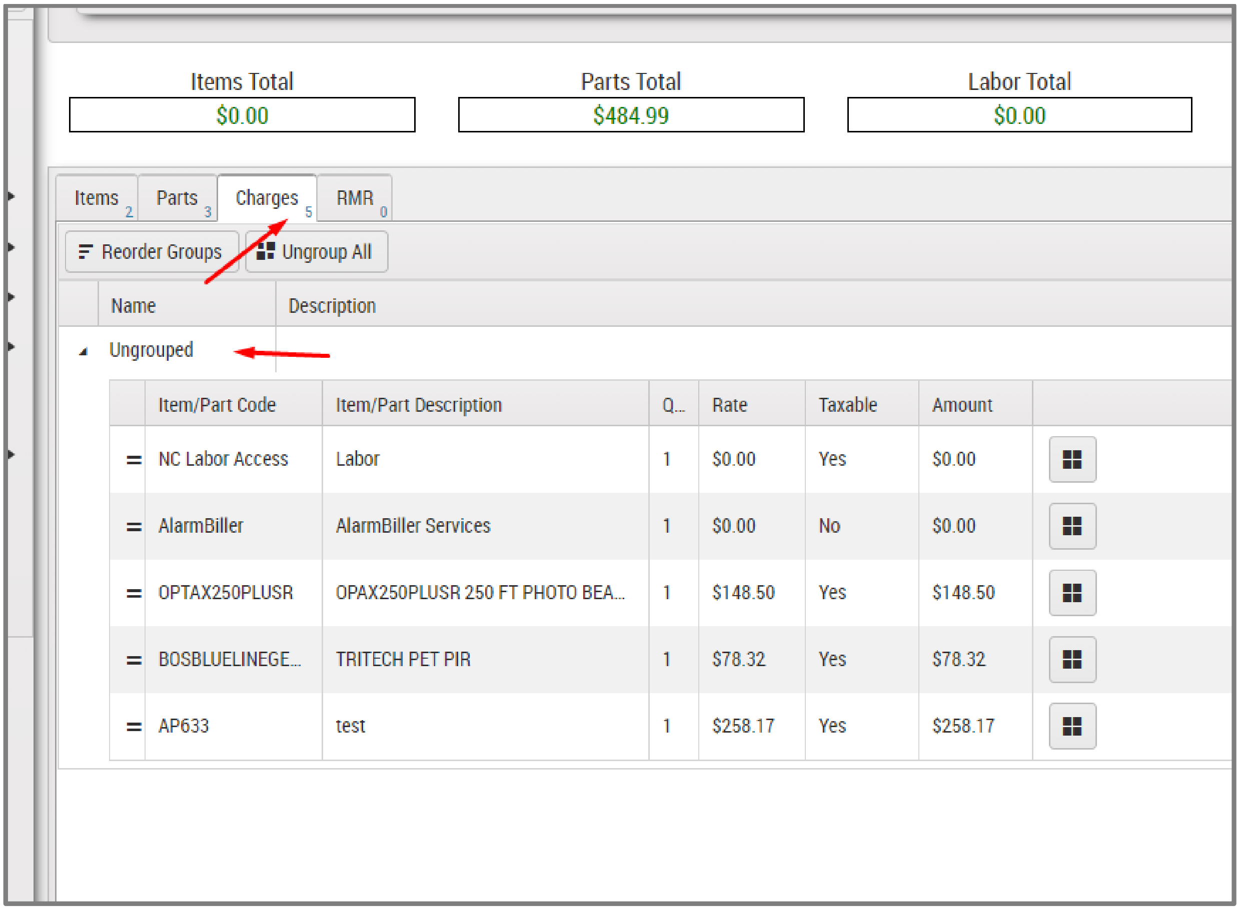
Configuration

The ideal use for this is with Sales Packages. These Charge groups can be defined and then applied to proposals easily.

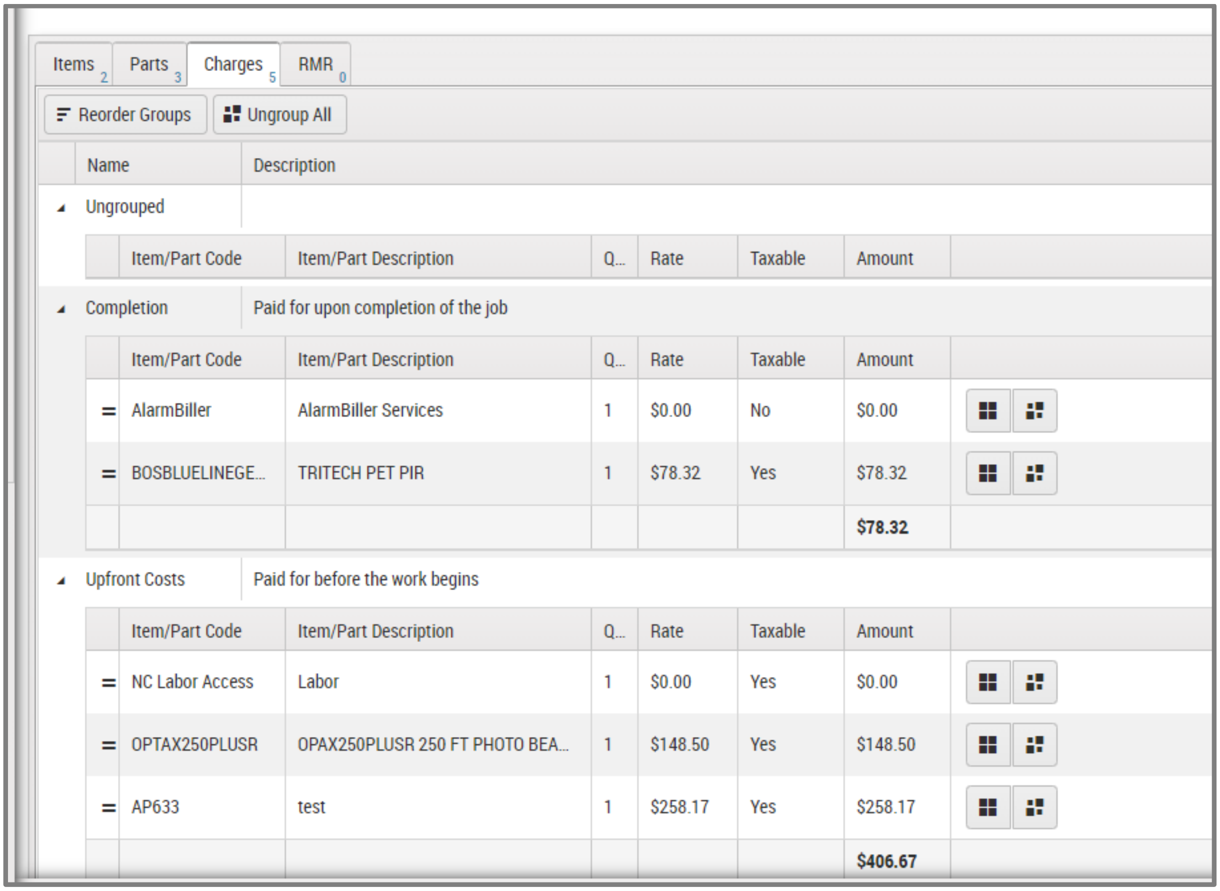


You must first add Items and Parts to your Sales Package. Then you can go to the Charges tab and build a package.

They start out "Ungrouped" but you can then define the groups you want.



This setup will be applied to any proposal that uses this sales package.



Appendix II

SalesAutomation & eForms – Dependency Notes

Overview

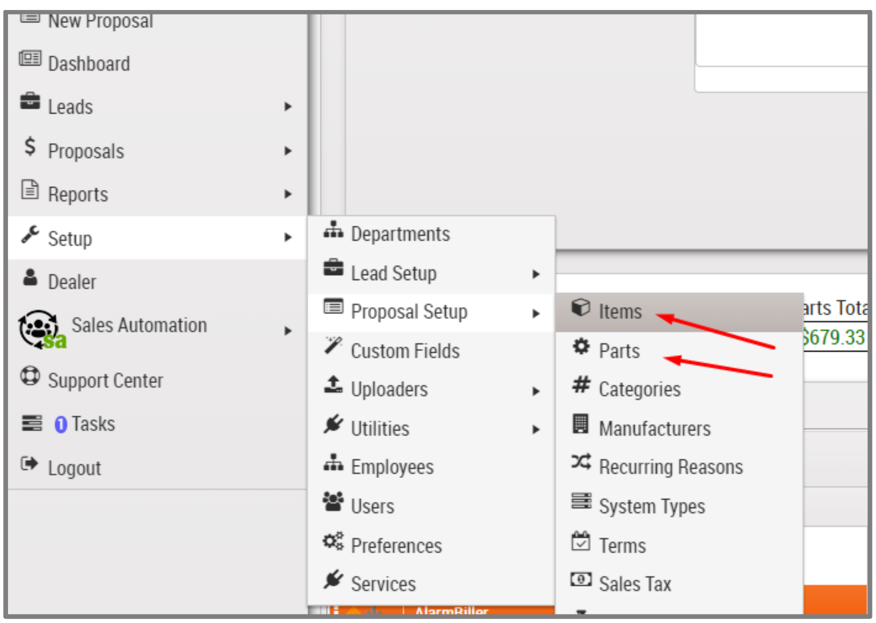
This feature will create greater ease of use for the sales representative's quote configuration process and bring in additional sales from creating more crisp concise proposals for their prospects. Dependency notes are notes pre-assigned to parts, items and recurring items and can appear on the proposal, depending on the proposal eForms template setup. These are free form text fields with up to 1,000 characters available and are setup in the setup tables in SalesAutomation.

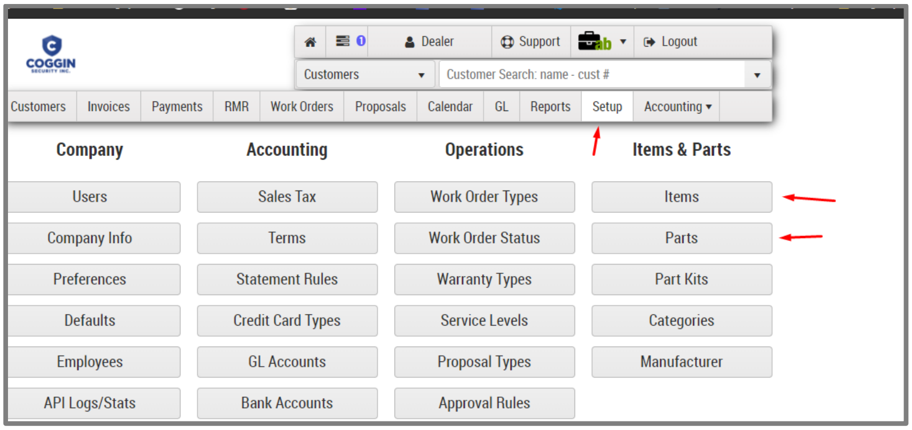
Technical Information

There are several places that these show up. They can be seen on the view grid for Items and Parts. Also, Proposals show these fields when building up the Items, Parts, and Recurring Items lists. Finally, these fields can be included in eForms.

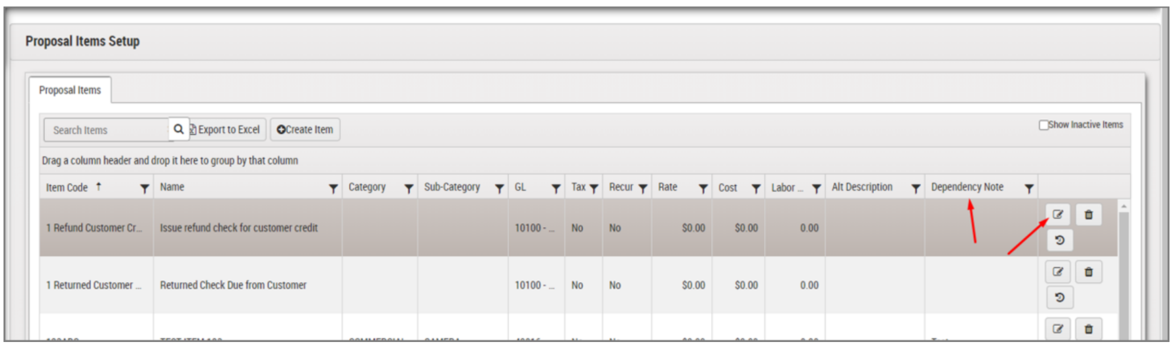
Item/Part

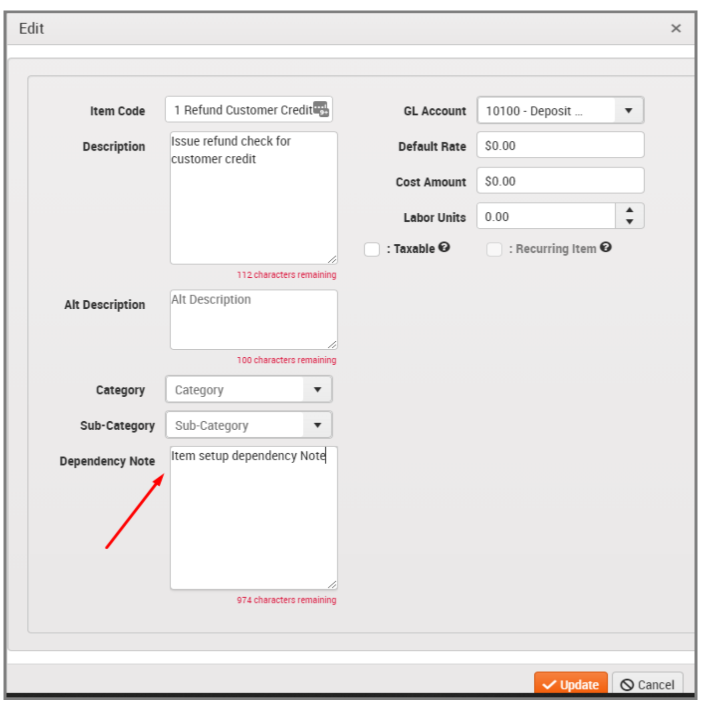
You can add Dependency notes from the Items/Parts setup in SalesAutomation or AlarmBiller.





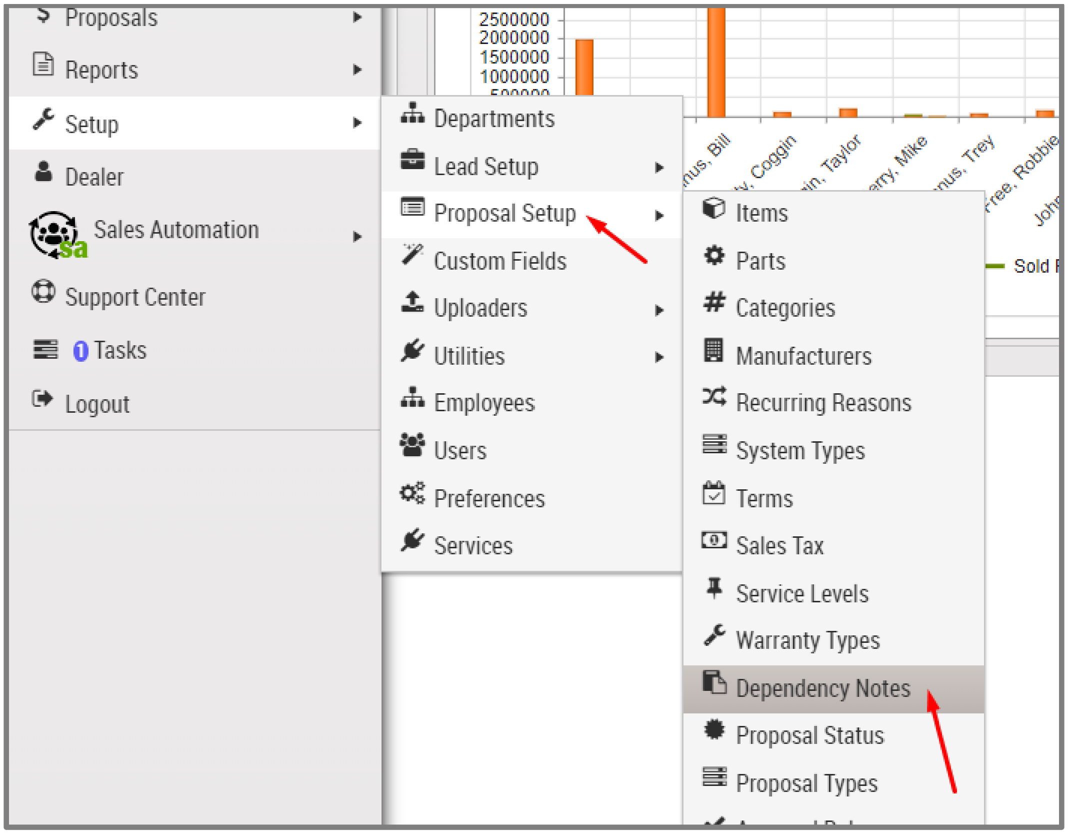
From there, you simply edit an item to set the note.



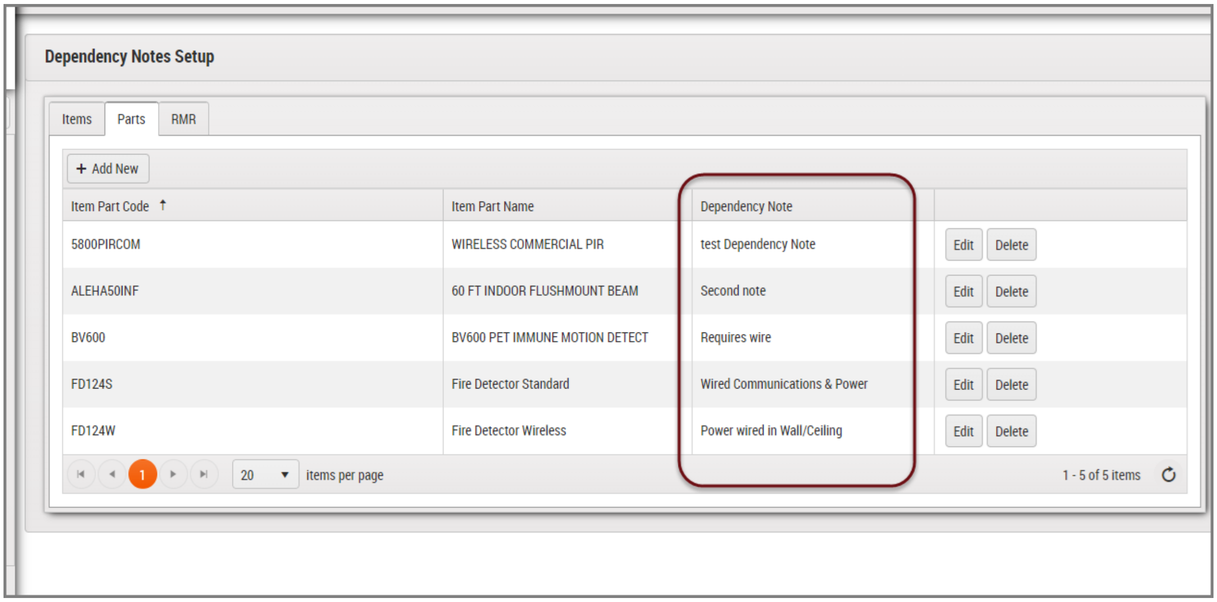


Dependency Note Quick Grid

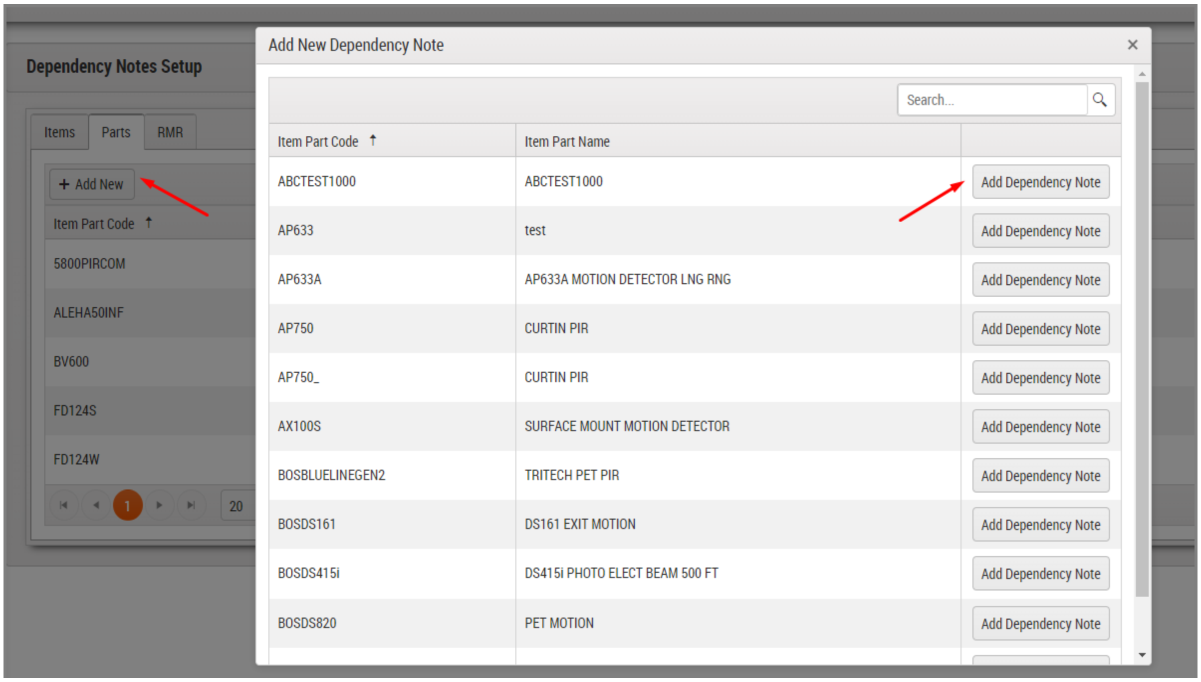
In SalesAutomation, there is a quick grid to show these Dependency Notes and quickly add new ones. It is found under the Proposal Setup area.



This provides a quick way to setup Items, Parts, and RMR dependency notes as well as Edit and Delete them.

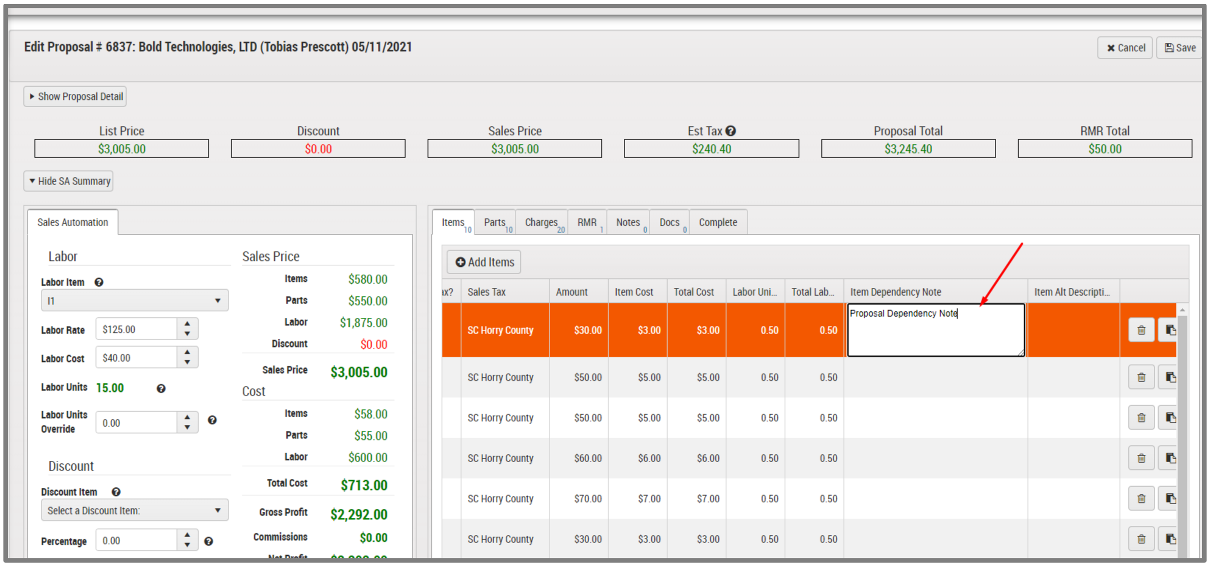


You can add new ones, which will bring up a list of all the things that do not yet have a Dependency Note. There is a search feature here as well if you are looking for a specific thing. Simply click the Add Dependency Note button to quickly attach a note to the desired thing.



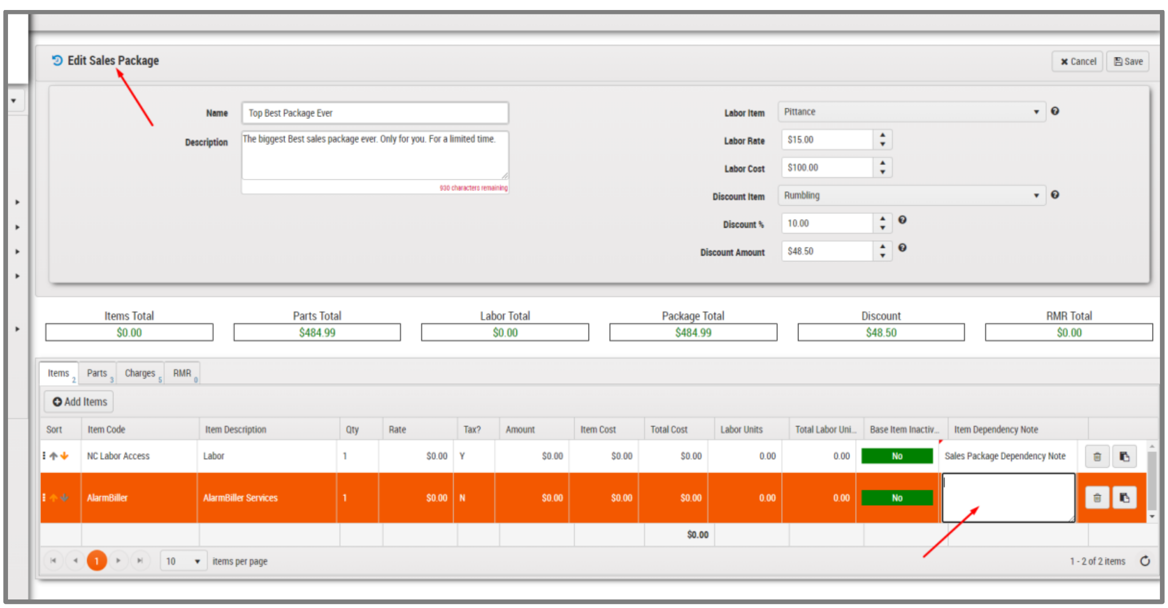
Proposal

Dependency Notes can also be added/changed directly from the Proposal. In edit mode, the default value will come from the underlying item or the sales package. This can be added/modified directly on the proposal. This can be done for Items, Parts, and Recurring Items.



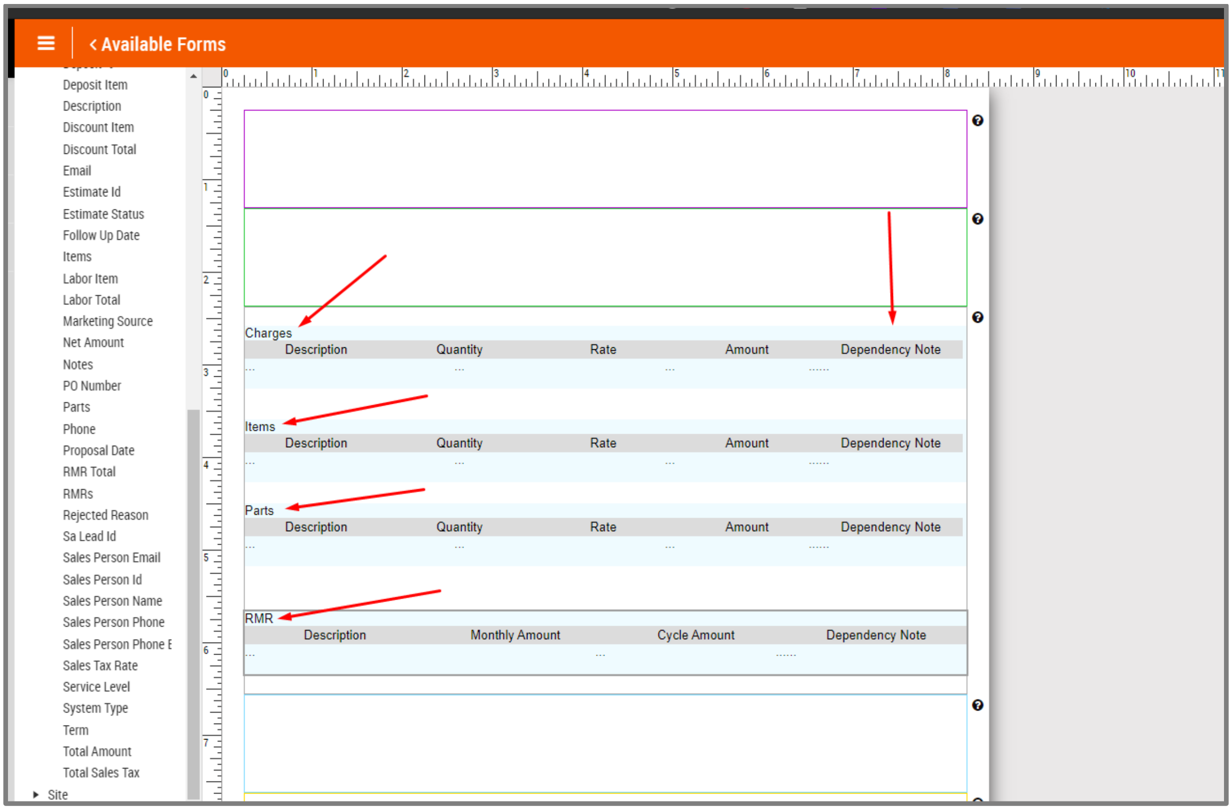
Sale Package Edit

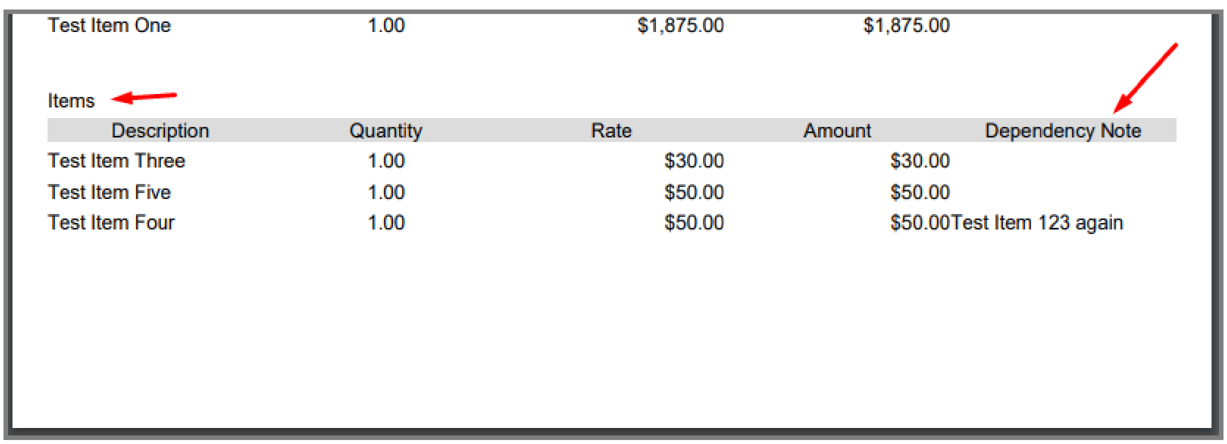
These will be used to populate a Proposal with default values. You can set Dependency Notes on Items, Parts, and Recurring Items from here. If you add one that already has an underlying Dependency Note, it will be used as the default one, however you can then edit as needed.



eForms

Depending on how the end user wants the form to appear, the Dependency Note values can be displayed on Charges, Items, Parts, and RMR lists on an eForm.





Test Item One	1.00	$1,875.00	$1,875.00	

Items

Description	Quantity	Rate	Amount	Dependency Note
Test Item Three	1.00	$30.00	$30.00	
Test Item Five	1.00	$50.00	$50.00	
Test Item Four	1.00	$50.00	$50.00	Test Item 123 again

Installation

No special installation needed. Just SalesAutomation and eForms for the full functionality.

Configuration

Setting up Dependency Notes can be done through many areas.

- From the Item/Part Edit form
- From the Dependency Note Quick Grid
- From the Proposal Edit form
- From the Sales Package Edit form

Each of these provides a way to set a note providing additional details or clarity.

Appendix III

SalesAutomation & eForms – Alternate Descriptions

Overview

This feature allows Items and Parts to have Alternate Descriptions. These could be more user-friendly descriptions compared to the Part Vendor description OR they can be alternate languages to support multi-lingual regions. Additionally, these fields have been added in SedonaOffice and can be brought over to SalesAutomation through SedonaCloud. Finally, these fields have been made available in eForms so that customer-facing documents can take advantage of them.

Note: SedonaOffice customers must update to version 6.1.60 to take advantage of this new feature.

Note: SedonaOffice Cloud customers using SalesAutomation must have SedonaCloud version 1.30.0.1 installed.

Technical Information

Alternate Descriptions have been added to both AlarmBiller/SalesAutomation and the SedonaOffice/SalesAutomation products. This means alternate descriptions can be added to Items and Parts in two ways.

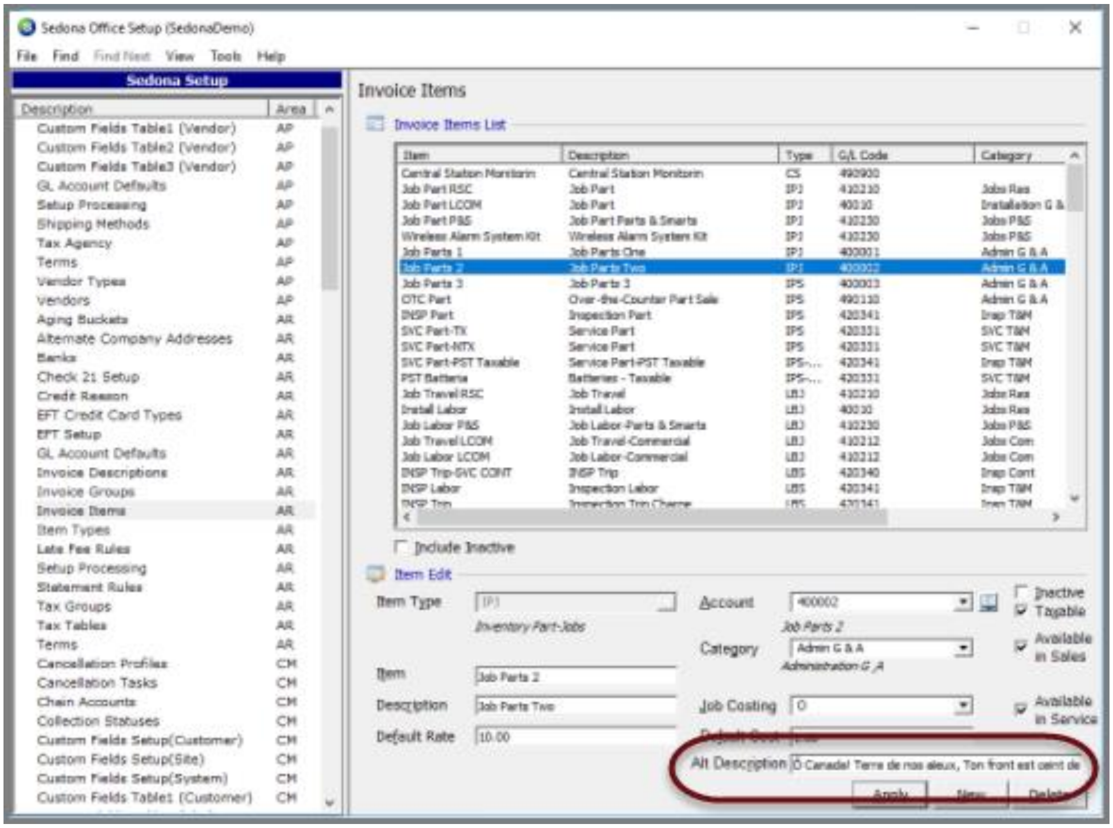
- Defined in SedonaOffice and Synchronized over into SalesAutomation
- Defined in AlarmBiller/SalesAutomation

Items have one new field labeled Alt Description. This also applies to Recurring Items. Parts have three new fields called Alt Part Description, Alt Sales Description, and Alt Service Description.

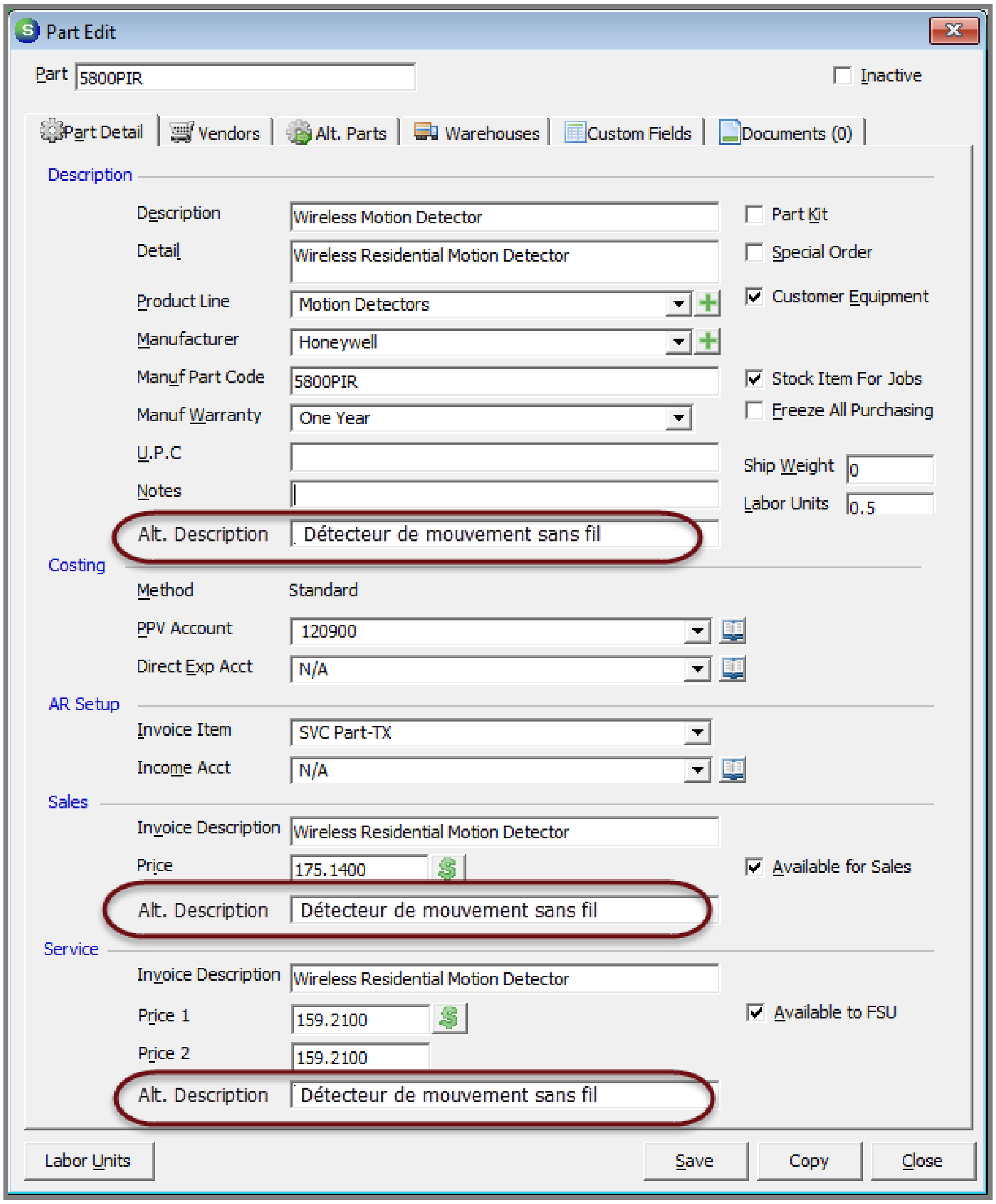
SedonaOffice

An alternate description can be added in SedonaOffice for Items and Parts.

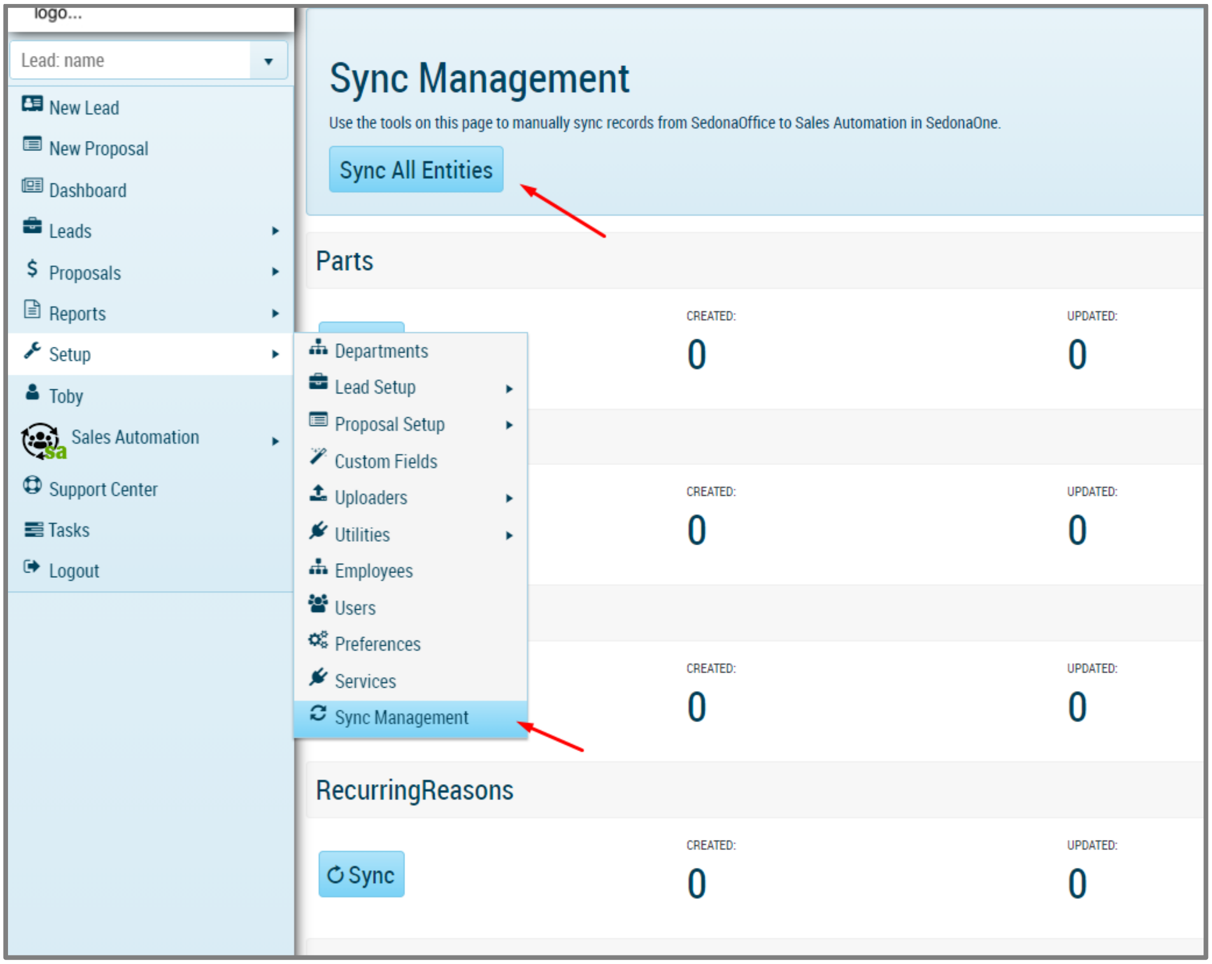
Below is the new Alt Description field for Invoice Items.



Below are the three new Alt Description fields for Parts.

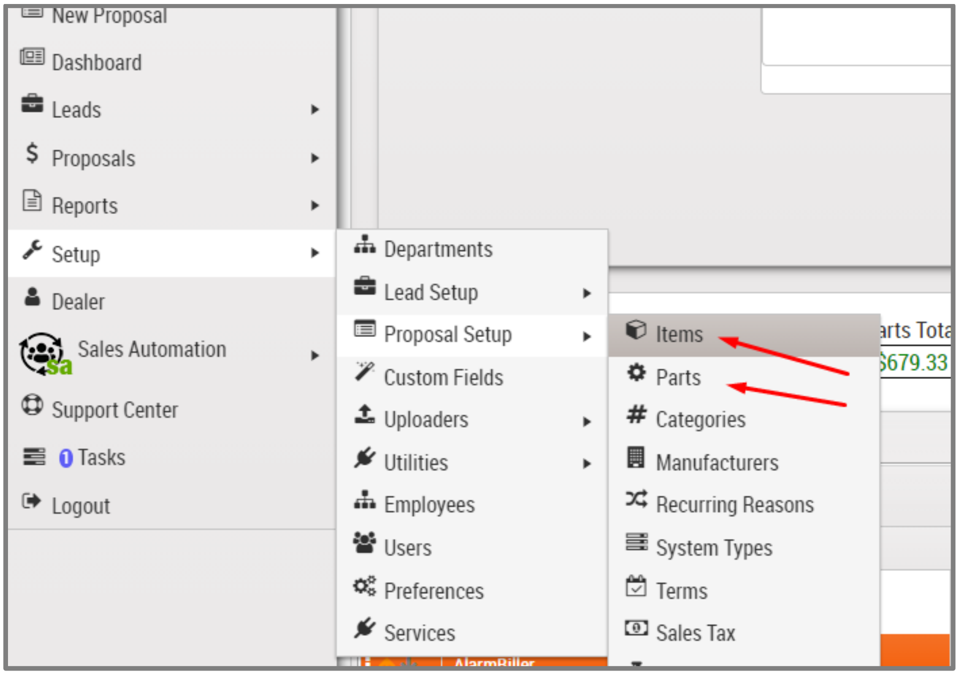


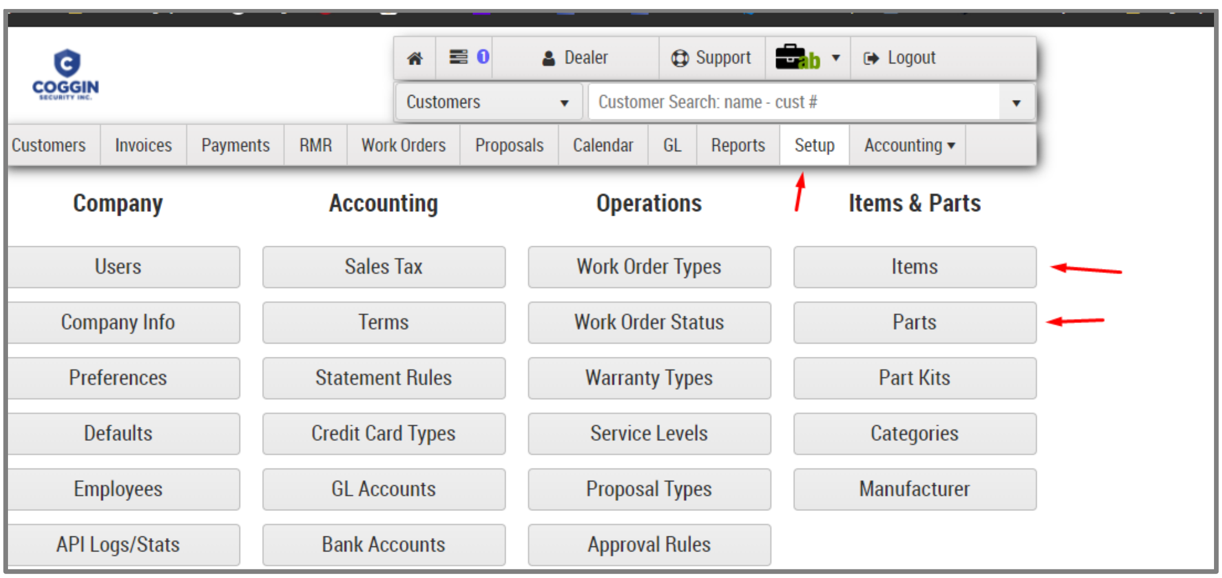
Once the Alt Descriptions have been entered for invoice items and/or parts, you then synchronize over to the SalesAutomation product through the SedonaCloud integration.



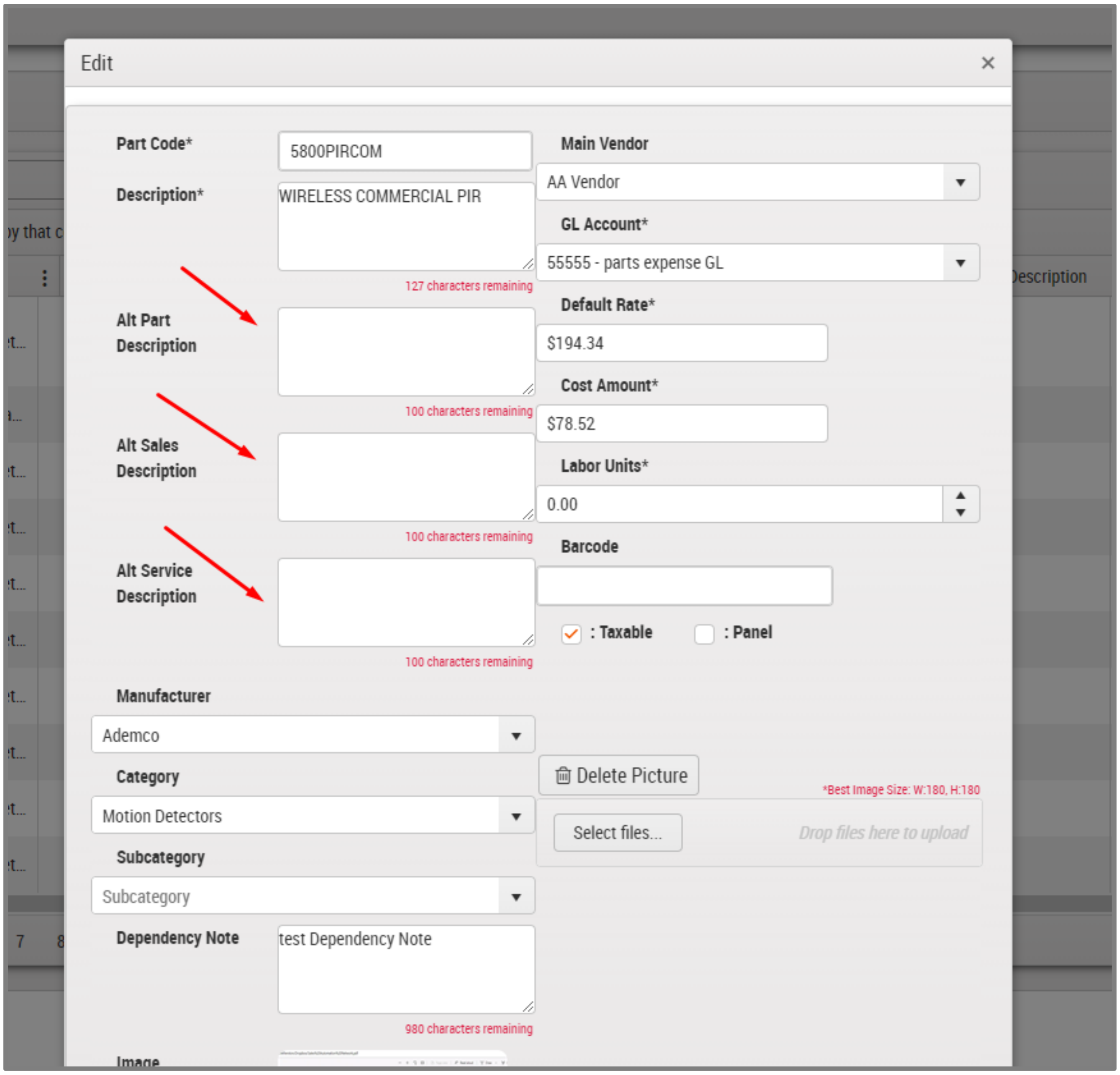
AlarmBiller/SalesAutomation

You can add Alternate Descriptions from the Items/Parts setup in SalesAutomation or AlarmBiller.

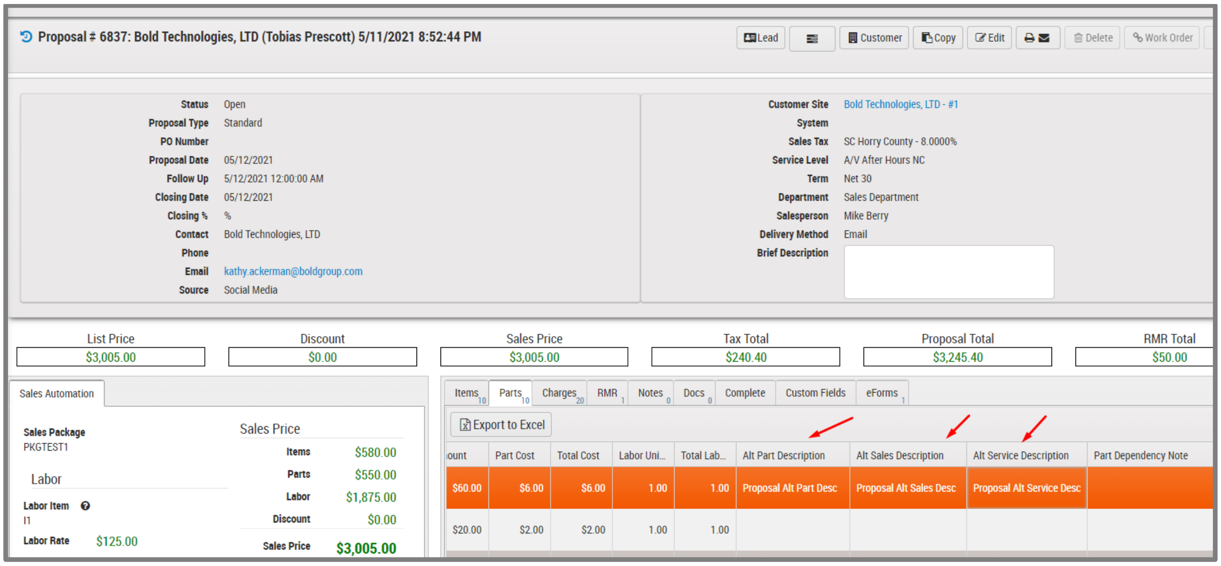


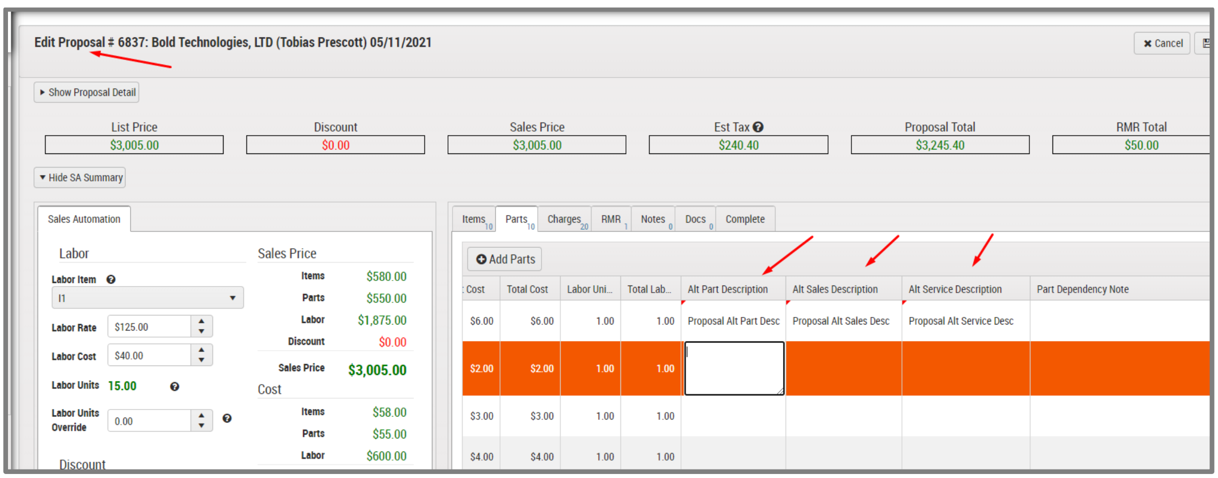


From there you can edit an item and add the Alternate Description.



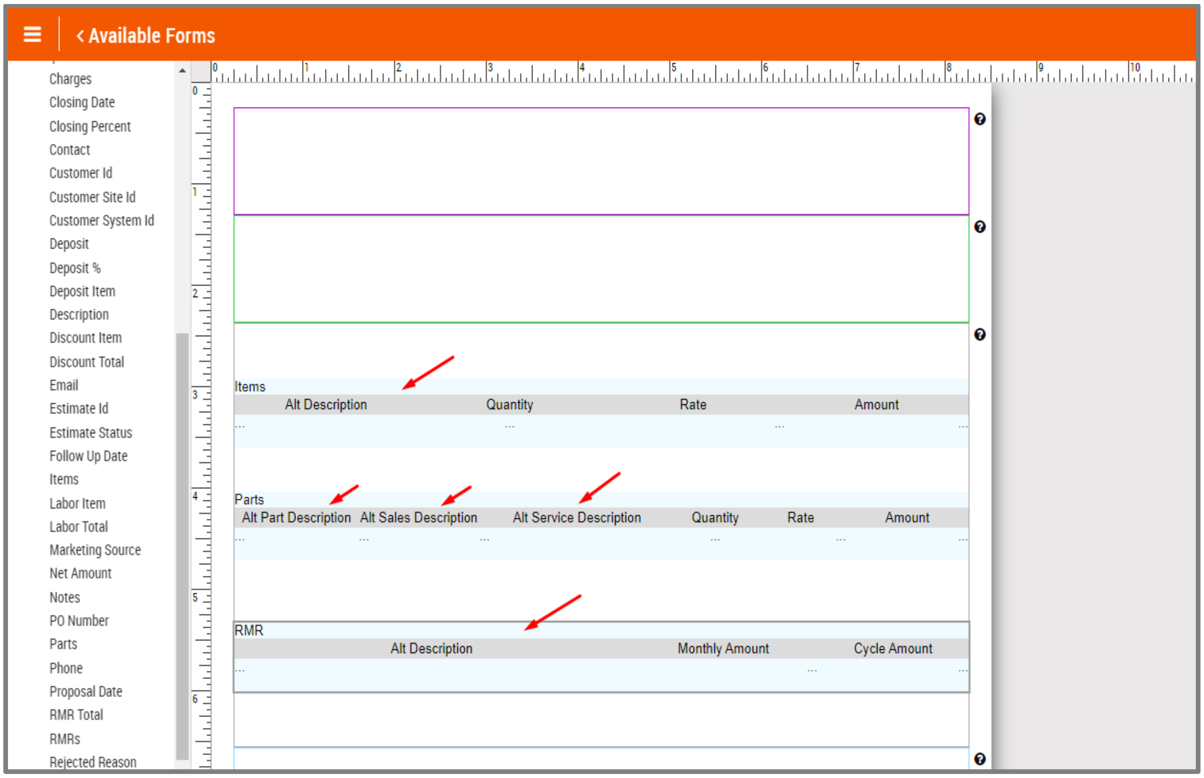
Once the alternate descriptions have been added, they can be seen on a proposal. When editing the proposal, the alternate descriptions can be added/updated as well. This applies to Items, Parts, and Recurring Items.





eForms

The new Alternate Descriptions can then be used on an eForm, so that the customer document can be displayed in an Alternate Language or with clear descriptions.



Alternate Descriptions on a Proposal.

Items

Alt Description	Quantity	Rate	Amount
	1.00	$30.00	$30.00
	1.00	$50.00	$50.00
	1.00	$50.00	$50.00
	1.00	$60.00	$60.00
	1.00	$30.00	$30.00
	1.00	$70.00	$70.00
	1.00	$80.00	$80.00
	1.00	$90.00	$90.00
	1.00	$100.00	$100.00
	1.00	$20.00	$20.00

Parts

Alt Part Description	Alt Sales Description	Alt Service Description	Quantity	Rate	Amount
Proposal Alt Part Desc	Proposal Alt Sales Desc	Proposal Alt Service Desc	1.00	$60.00	$60.00
			1.00	$20.00	$20.00
			1.00	$30.00	$30.00
			1.00	$40.00	$40.00
			1.00	$50.00	$50.00
			1.00	$70.00	$70.00
			1.00	$80.00	$80.00
			1.00	$90.00	$90.00
			1.00	$100.00	$100.00
			1.00	$10.00	$10.00

RMR

Alt Description	Monthly Amount	Cycle Amount
	50.00	50.00

Installation

No special installation needed. Just AlarmBiller, SalesAutomation, eForms and/or a linked SedonaOffice through SedonaCloud for the full functionality.

Configuration

No additional configuration needed.

Integration

For SedonaOffice customers, this requires SedonaCloud integration connected to a SedonaOffice database.