AlarmBiller

SalesAutomaton

eForms

Time&Attendance

Release Notice

Version 4.40

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About This Document

This document provides information related to application corrections for AlarmBiller version 4.40.

Enhancements / Features

eForms

Prior to this current release, there were no shared data fields available for totaling items or parts that could be used on a proposal. With this release, two new Shared Fields have been added under Proposal based eForms:

- Items Total which displays the total amount of all items on the proposal
- Parts Total, which displays the total amount of all parts on the proposal.

Note - These two new fields were implemented without labels, in order to facilitate those customers using pdf templates with their eForms data.

SalesAutomation

New Quick Quote Feature

This new feature allows users to select an existing lead, an existing customer, or create a new lead when only minimal information such as name, phone or email is provided.

- Streamlines the proposal creation for new leads by creating the new lead and proposal in one-step.
- Allows for multiple 'What if' scenarios prior to saving the New Quick Quote to a proposal. The user can change the Sales Package, quantities, and/or total labor hours. The totals on the New Quick Quote immediately reflect the changes.
- A new Questions Toolbox is only available when creating Sales Packages. These are basically user-defined fields. The field types available are:
    - Dropdown
    - Checkboxes
    - Multiple Choice [radio buttons]
    - Text Input
    - Number Input
    - Multi-line Input

  The user can customize the labels and options of each of the toolbox types. Each Sales Package can have a different set of questions that are pertinent to the package.

  Adding Questions to the Sales Package allows the user to define specific questions to ask the prospect/customer to customize the Quick Quote based on the responses provided. The questions toolbox option types can be set to required, to aid the user in gathering the information required by you company, to improve the quality of the quote.

- A new Time Window field on the quote allows the user to define a window of to give the lead/customer as an estimate of when the work can be planned to be performed.
- A new Map Code field allows the user to use the address defined or use a custom code on the Quick Quote.

Application Corrections

Alarm Biller

Incorrect Due Date Displayed on Invoice [16750]

Issue: When creating a manual invoice, the due date is calculated based upon the term assigned to the invoice. The due date can be manually changed and saved, but when editing the same invoice, the due date reverts to being based on the invoice term. Invoices will not keep a manually changed due date.

Solution: Resolved due date issue in Edit mode.

Payments not Being Applied to Late Fee [27903]

Issue: When adding a payment to a customer that has a late fee, the payment is going towards the invoice even when an amount was specified to go on the customer's late fee.

Solution: The payment batch will apply the late fee balance when the user enters a value in the late fee field. The late fee amount must be less or equal to the total payment amount. The late fee field will only become active when there is an amount entered into the amount field.

Customer Refunds Creating Duplicate G/L Entries [28743]

Issue: Customer refunds are causing duplicate entries in the General Ledger. The refund payment debits the Undeposited Funds account and then credits the Bank account. This should be the end of the transaction. But then an additional deposit is created from this same refund, and making another GL entry to debit Undeposited Funds and credit to the Bank account leaving both accounts out of balance.

Solution: The software has been correct to create only one transaction for the customer refund.

Save Tasks Window Remains Open After Save and Task Time Changes [32502]

Issue: When creating a task and setting the time and date for the reminder and then clicking save, the window remains open, and the time is reset to 2 - 3am (the date remains correct).

Solution: Issue #1: The window is not automatically closing after pressing Save. This issue has been corrected. Issue #2: The follow up and reminder times are off by several hours; this is a time zone issue and is caused by selecting a technician in a different time zone than the server that has text notifications enabled. Now, after saving the Task, when the task is re-opened the follow up and reminder times will correctly reflect what was originally saved.

Duplicate Invoice Number Cannot be Changed [25464, 30010]

Issue: When two people save an invoice at the same time they receive duplicate invoice numbers. The second invoice has to be re-entered because the save button is not active as it was in previous version.

Solution: When the user enters a new invoice number that does not already exist in the system the Save button will be enabled.

Customer Names greater than 50 Characters not Importing

Issue: When attempting to import customer information from a spreadsheet, where the customer name was over 50 characters long, would not import, but did not return an error.

Solution – Customer Import logic validates that the customer 'last name' field is <= 50 chars, and provides error feedback in the import results file if the validation fails.

Customer Batch Uploader Duplicates the Systems [40716]

Issue: Customer batch uploader is duplicating the systems.

Solution: Customer import logic prevents duplicate system from being created if you export pre-existing customer/site/system but with new RMR data.

eForms

Tab Index Incorrect [1168]

Issue: Tab index is jumping to Signature field out of sequence. No way to index signature field and put it in the correct sequence.

Solution: The Tab Index field is not available for Signature fields. It is only available for Data Bound Elements, which include: Shared and Form fields, Radio buttons, and Payment Methods. All other fields (like Signature) are not classified as Data Bound Elements, and do not allow users to see or change the Tab Index. To resolve this, Signature and Initials fields will have their tab indexes set to 0. This should make it so they will always be the "last" elements jumped to when tabbing.

Note: This is a change for forms going forward; it does not affect existing forms.

Signature Moves to Next Page Upon Submission [24062]

Issue: eForm looks correct on the eForm editor and on the customer end, but once the form is submitted, the signature and sometimes the date get pushed to the next page. This issue is caused by the Payment Method box above the Signature/Date fields. When a payment is selected and the form is signed and accepted, the payment information is shifted vertically downwards, which pushes fields below it downwards as well. This results in the signature and date showing on the second page.

Solution: To address this, the Payment Method box will be changed to show the selected payment information more appropriately on a single line.

Search by Percentage not Working

[30670, 31558]

Issue: When you attempt to use the filter on the percent completed column of the Active eForms it does not work.

Solution: The problem was due to the progress column, indicating the percent of recipients who signed the form. Due to the design of this column, filtering/sorting will not work. To resolve this, a new field is created, called Form Progress, and will track the percent of completed recipients over total recipients. This value is rounded to the nearest integer, and will allow sorting/filtering.

Proposal Looks Different in eForm than AlarmBiller [31898]

Issue: When a shared data field is added to a PDF eForm template, the distance (margin) between the beginning of the page and where the text starts or ends, it is not kept proportional. Chart data runs to the edge of the page, with no margin.

Solution: The discrepancy was caused by any table element (RMRs, Items, Parts, etc.) expanding to fill the width of the form. For forms without a PDF background, it will expand until it hits the margin, hence leaving a small gap on the left and right edges. However, forms without a PDF have no margins, which causes the table to expand all the way to the edge of the page. Table elements will now be centered with a 75px margin on either side.

Note: This is a change for new forms created going forward; it does not affect tables on existing forms.

Credit Cards not Pushing into SedonaOffice [36964]

Issue: Credit cards do not push into SedonaOffice from eForms when the default field name "Payment_0" has been changed.

Solution: eForms will no longer use the default field name to find the payment method when pushing to SedonaOffice. The code will now search through CustomData of the Form and find the first "Payment" type, then use the Name, which corresponds to the FieldName to locate the payment info.

SalesAutomation

Unable to Delete RMR on a Proposal [28748]

Issue: The delete button is not accessible to remove any RMR items inside of the proposal tab for any customer.

Solution: This was a display issue. The delete button was not being displayed because the column was too narrow. The column has been expanded to accommodate both the Edit and Delete buttons.

Time&Attendance

Issues with Clocking Out [11517]

Issue: When clocking out on a shift or to end a task, an error message is presented several times before the application will let you clock out or end the task. When viewing the record the next day, it appears that you actually have not clocked out.

Developer investigation: The problem is an artifact of having Shift Rounding enabled, and ending a Task within the active shift, and then immediately trying to end a Shift. The issue was caused by shift rounding, and is only applied to shift start and end times and not task time. Tasks are clocked to the exact time of the start or end task action. Depending on which half of the 5-minute shift time boundary the task end and end shift time is being executed, the end shift logic may be trying to round the shift end time to the 5-minute boundary, which may be earlier than the already ended task time.

Solution: Shift rounding logic fixed to handle end shift times that are rounded down to an earlier time than the end time of the last completed shift task. If that scenario is found, the shift end time is rounded up to the start of the next shift time boundary. In addition, shift start checks if the previously completed shift has a shift end time later than current time due to the above shift time rounding scenario. If found, then the new shift will start at the next shift time boundary to ensure no overlapping shift times.

Unable to Approve Payroll – Error Message Received

[37138, 38035]

Issue: When a manager adds a tracked paid time off to a time sheet, such as a holiday paid time off, the system will save it on the back end but it will not show up on the timesheet. Consequently when the manager tries to approve the payroll, the error in question shows up saying there are PTOs waiting to be approved.

Solution: The software was changed to correctly set the PTO Approved Date and the PTO Approved by User, when new PTO data is added through either the ‘Add New Employee Shift’ or the ‘End Shift’ when viewing Pay Period Details.