



AlarmBiller
SalesAutomaton
eForms
Time&Attendance

Release Notice
Version 4.41

April 2022

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About This Document

This document provides information related to new features for eForms, and application corrections for AlarmBiller version 4.41.

Enhancements / Features

eForms

Support added for French and English translations on the terms and conditions at the beginning of the signing process of an eForm, as well as to the emails that are sent out to customers when sending an eForm. This change is for Canadian companies only.

For additional information on this new enhancement, please refer to the end of this document under the topic [eForms French Language Enhancement](#).

Application Corrections

AlarmBiller

Apply a Credit to a Bill (25823) [39634]

Issue: Applying a credit larger than \$1,000.00 to a bill will cause the Apply Amount to display as \$1.00 instead of the amount of the credit.

Solution: This was caused by incomplete parsing of the formatted string currency value - had to make sure both the dollar sign and ',' were stripped from the string before parsing the value as a number.

Sales Automation

Part Price Reverts to Default on Proposal when Job Type is Changed (24879) [32639]

Issue: After setting up a customized parts rate in a Sales Package and using the sales package in creating a proposal, the parts rate showed correctly but once the user changes the job type on the proposal, the part rates reverse back to the default rate.

Solution: Script change for editing SA sales packages and proposals to only allow the Parts \$0 Rate logic to trigger on SO Job Type change IF the original Job Type and the new Job Type have different ZeroPartPrice state. This prevents inadvertently overwriting configured parts prices in the Parts grid when there is not a change in the state of Job Type ZeroPartPrice.

Copy Proposal does not Copy Labor Override (25148) [35291]

Issue: The values in Sales Automation are not carried over when you copy a proposal.

Solution: Updated proposal copy logic to include missing non-calculated properties (TotalLaborUnitsOverride and MonthlyMonitoringFees) entered thru the proposal edit.

Time&Attendance

User Cannot Clock-in after Submitting PTO Request for Future Date (27161) [43538]

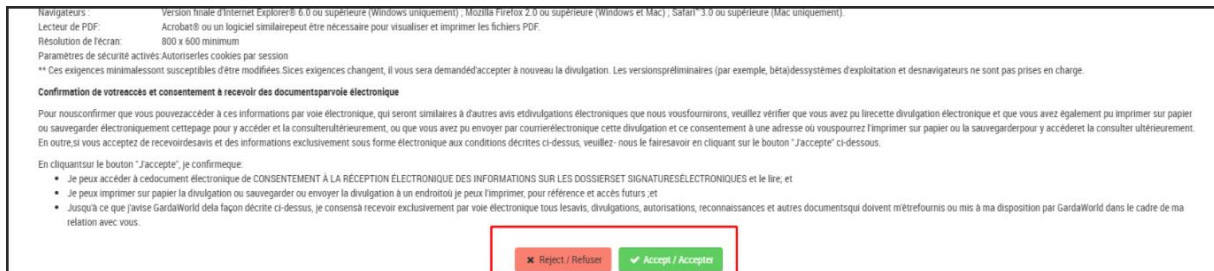
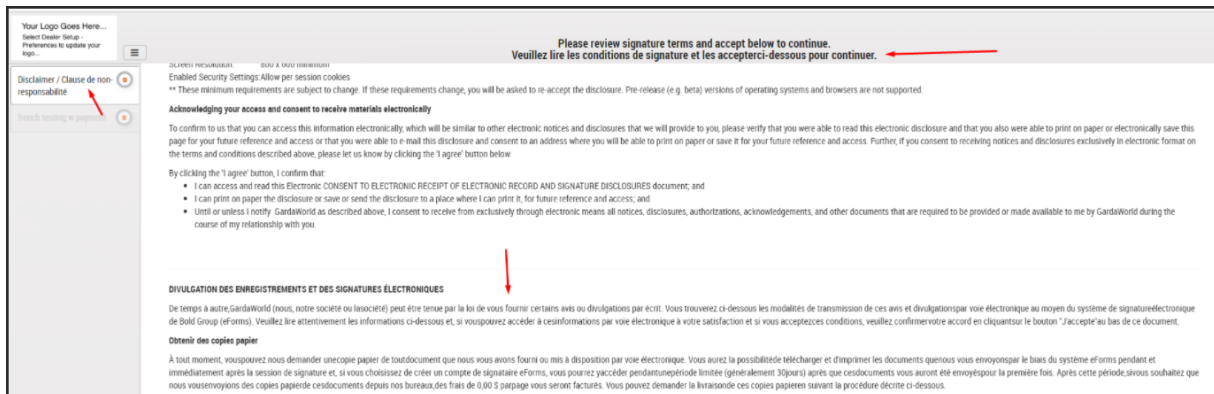
Issue – When a user submits a PTO on a future date, whether the PTO is approved, when the user tries to clock-in to start a new shift in the current pay period, the shift start date automatically default to the month of the PTO instead of the current date of the current pay period. When the user tries to end the shift, he gets an error and the user cannot end the shift or start a new shift.

Solution – Fixed the internal logic to find an employee's last completed shift to exclude future dated PTO shifts by checking for shifts that were started prior to the requested start time of the current shift being started. This issue only affected companies where the Setup > Preferences > Shift Rounding is set to a non-zero value.

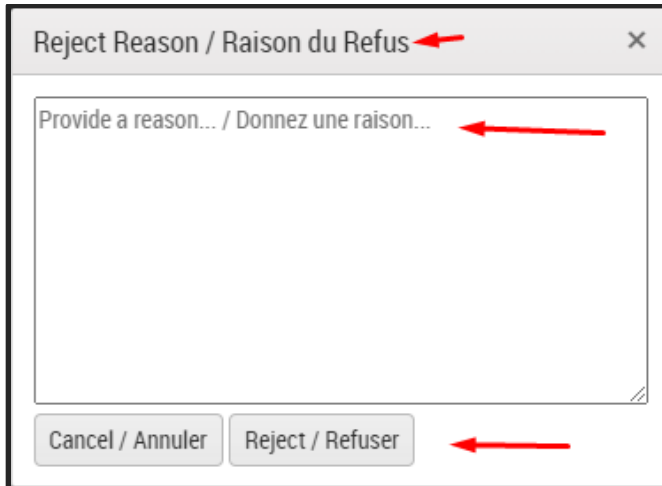
eForms French Language Enhancement

eForms Signing Page French Additions

The eForms signing viewer has been updated to show both English and French for the T&C (Terms and Conditions) boilerplate body and command buttons on the boilerplate page. The T&C view container has been updated with French strings. Further, the 'reject' popup window has been updated, which was not identified in the original scope of work.

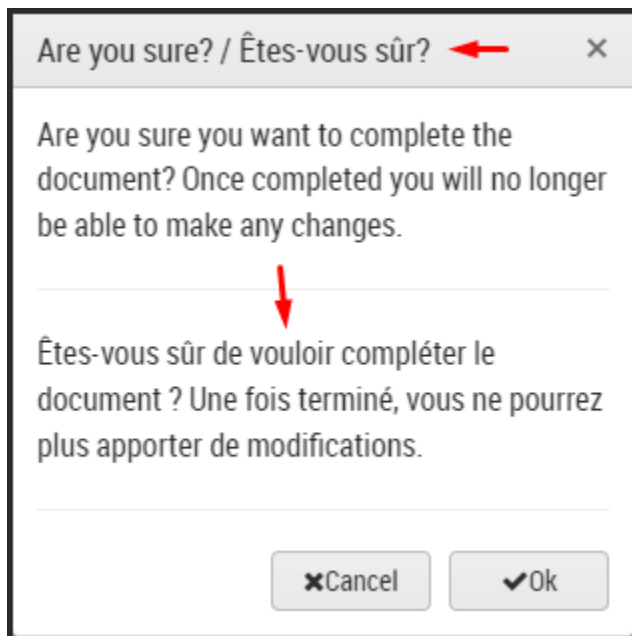


If the recipient clicks on the Reject/Refuser button, below is the form that will be displayed.



The screenshot shows a dialog box titled "Reject Reason / Raison du Refus" with a close button (X) in the top right corner. The main area contains a text input field with the placeholder text "Provide a reason... / Donnez une raison...". Below the input field are two buttons: "Cancel / Annuler" and "Reject / Refuser". Red arrows point to the title bar, the input field, and the "Reject / Refuser" button.

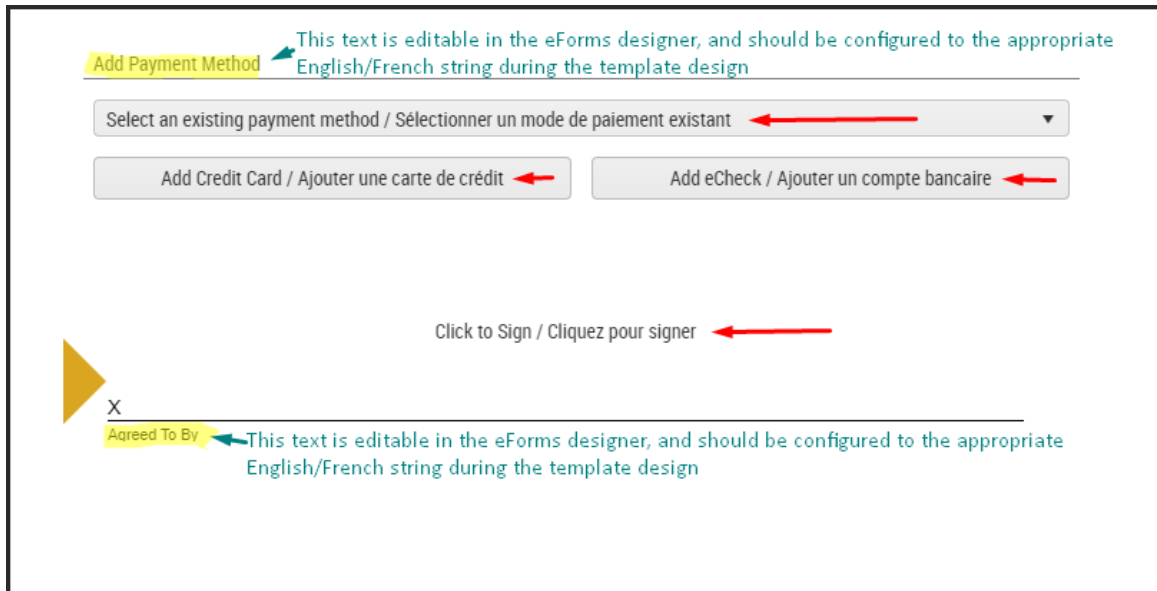
If the recipient clicks on the Accept/Accepter button, below is the form that will be displayed.



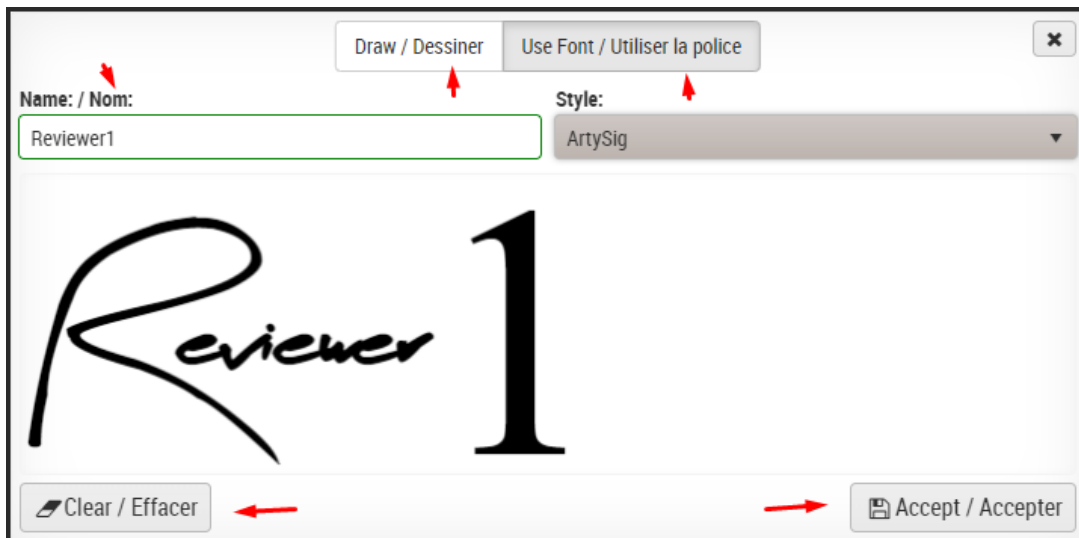
The screenshot shows a dialog box titled "Are you sure? / Êtes-vous sûr?" with a close button (X) in the top right corner. The main area contains two lines of text: "Are you sure you want to complete the document? Once completed you will no longer be able to make any changes." and "Êtes-vous sûr de vouloir compléter le document ? Une fois terminé, vous ne pourrez plus apporter de modifications." Below the text are two buttons: "XCancel" and "✓Ok". A red arrow points to the title bar, and another red arrow points to the first line of text.

eForms Payment and Signature Field French Additions

For companies in Canada, if the eForms 'Signature' element or the 'Payment Method' element is included in an eForms template, when the eForms is being signed by the end recipient, these elements will display in both English and French for all user action prompts.



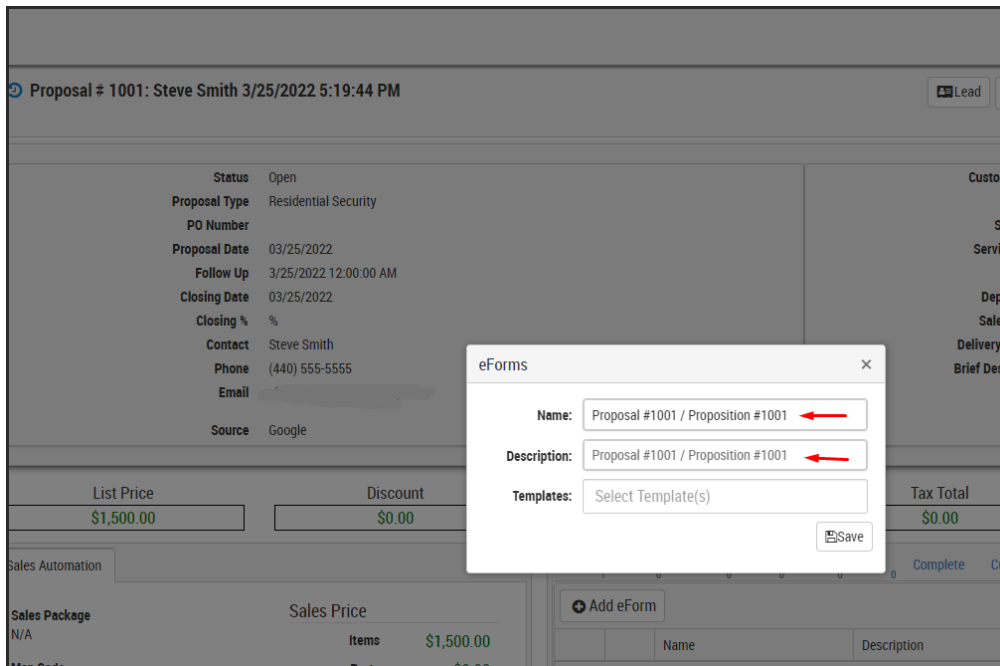
The signature elements popup entry window has been updated to support English/French.



Note: The French strings on the various action elements do not display in the eForms designer, but only in the Signing view for the target recipient. Hence, the eForms design process should size these elements appropriately for properly displaying the additional French strings at signing.

eForms Email French Additions

The 'Add eForm' logic from the Proposal Details view was changed to generate the correct eForms document name and subject with the appropriate French string for the current SalesAutomation proposal.



Note: This is not specific to SalesAutomation proposals. It will also execute the same for AlarmBiller only proposals.

When clicking the Save button, the eForm details page is presented with the initial auto-generated boilerplate for the email subjects and body content, presented in English and French.

The screenshot displays the 'eForm Details' interface. At the top, there are navigation tabs for 'History', 'Proposal #1001', 'Customer', 'Push Data', and 'Push Document'. Below these are 'Undo' and 'Redo' buttons. The main area is divided into four sections:

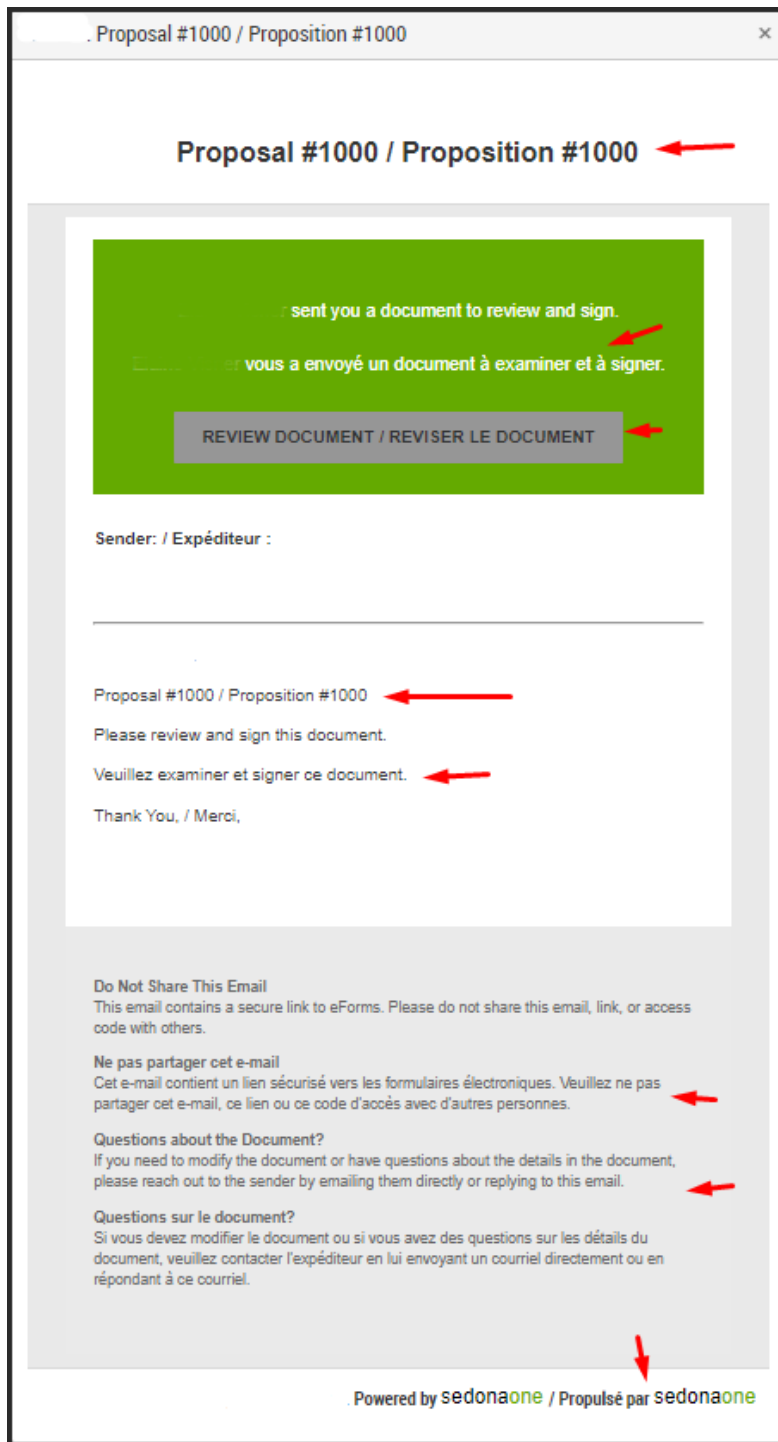
- Stages:** A section for managing stages. It includes an 'Add Stage' button, a table for existing stages (with columns for Stage Name and Subject), and an 'Add Recipient' section with a table for recipients (with columns for Email and Name). A red arrow points to the 'Subject' field in the stage table.
- Details:** A section for document details. It includes fields for 'Name', 'Description', and 'Expires On'. Red arrows point to the 'Name' and 'Description' fields.
- Forms:** A section for managing forms. It includes an 'Add Form' button and a table for existing forms (with columns for Form Name and Description). A red arrow points to the 'Assign' button.
- Email:** A section for email content. It includes a 'Subject' field and a 'Body' text area. A red arrow points to the 'Subject' field. The body text area contains a red box highlighting the auto-generated boilerplate text: 'Please review and sign this document. Veuillez examiner et signer ce document. Thank You / Merci.'

! Important Notes

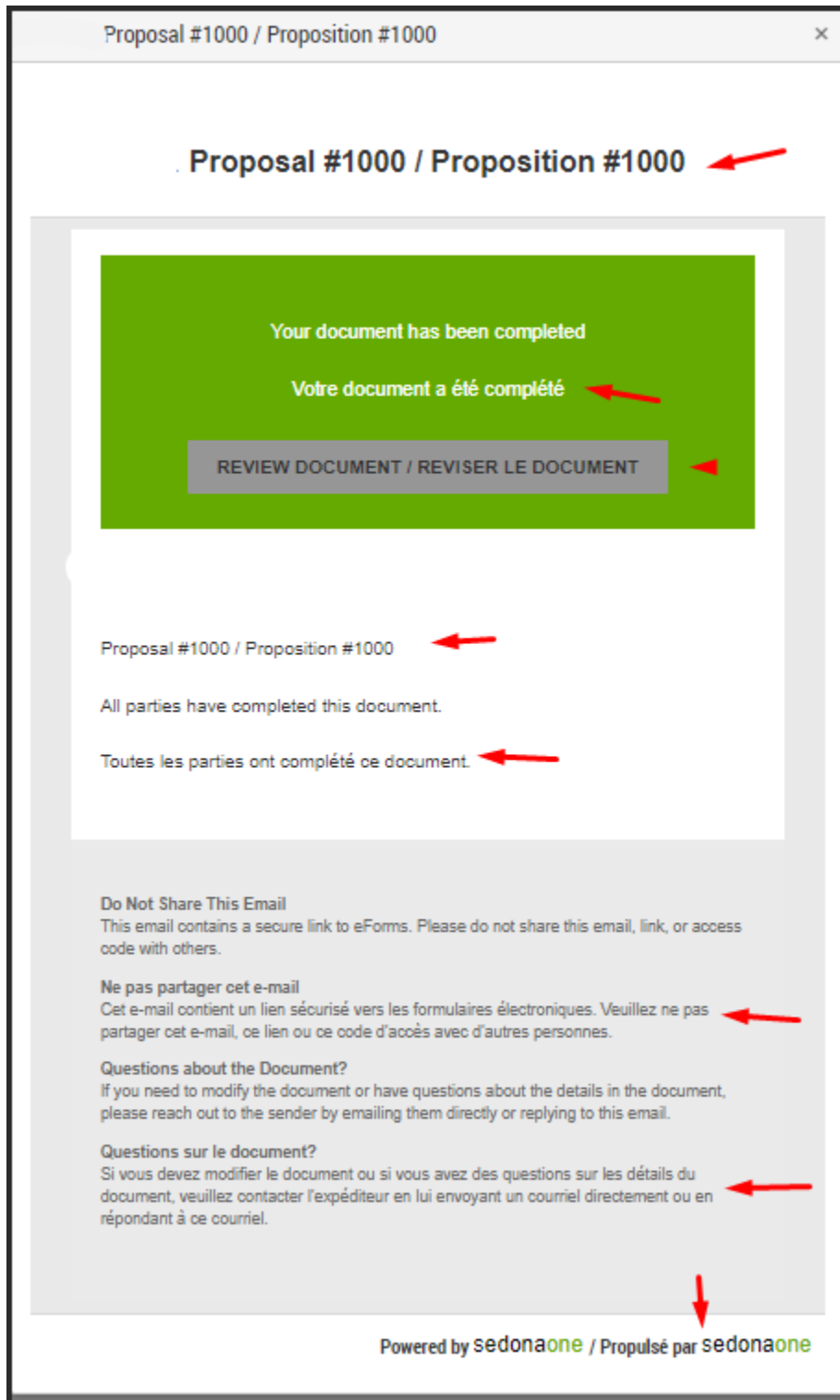
- Users may change the content of all of the fields on the eForm Details view, except the Recipient stage subject. Hence, any edits to these fields become the responsibility of the user to maintain the desired English/French content.
- The English/French auto-generated content takes place when creating a new eForm. The application does not analyze and update any existing eForms. The reason for this is that all of the fields shown on the eForms details view, are stored into the individual database records. Since users may edit most of these fields, we will not attempt to parse and update previously saved content.
- The English/French auto-generated Body content will be created when creating a new eForm from the eForms portal.

Email templates have been updated to support the English & French static strings.

Recipient email for document review request:



Recipient email when all recipients have completed the eForm:



Recipient has rejected the eForm email:

Recipient Reviewer1 has rejected the form / Le destinataire Reviewer1 a rejeté le formulaire

**Proposal #1000 / Proposition #1000
has been rejected / a été refusée**

Proposal #1000 / Proposition #1000
has been rejected by Reviewer1 / a été refusé par Reviewer1

Reason - 'Price is too high'.

Raison - 'Price is too high'.

Thank You, / Merci,
Elaine Visner

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répondant à ce courriel.

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Salesperson email when all recipients have completed the eForm:

