



AlarmBiller
SalesAutomaton
eForms
Time&Attendance

Release Notice
Version 4.42

June 2022

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About This Document

This document provides information related to new features for eForms, and application corrections for AlarmBiller version 4.42.

Enhancements / Features

Site Copy/Transfer

(27773)

A new feature, Site Copy, has been added to the application. When creating a new site, this feature allows users to copy site information from a different customer. This option is typically used when an existing customer moves, and a new customer moves into the same property location. A new customer would be created for the new occupant, and then users may save data entry time by copying the site information from the previous customer.

To use this new feature, follow the instructions below.

- 1. From the New Site page, select the Copy Existing Site checkbox.
- 2. In the From Customer field, select the customer from which you want to copy a site.
- 3. In the Copy Site field, select a site to copy.

The screenshot shows a web form titled "New Site: Vinmar Galena - 1093" with "Customer" and "Save" buttons in the top right. The form is divided into four main sections:

- Site Info (Left):** Contains a "Use Customer Address" checkbox (unchecked) and a "Copy Existing Site" checkbox (checked and highlighted with a red border). Below these are two dropdown menus: "From Customer:" set to "Cairo's Domain - 1081" and "Copy Site:" set to "#Basenji1 Cairo's Domain - 7222 Up...". Below these are text input fields for "Cairo's Domain", "7222 Upper Albany Dr", "Loft 1", "New Albany", "Ohio" (dropdown), "43031", "1234", "Phone:" (with sub-fields for "(614) 123-4444" and "76"), and "Email:" (with a redacted field).
- Site Info (Right):** Contains "Site Number:" (Basenji1), "Sales Tax:" (None - 0.0000%), "Tax Exempt:" (xxxx12345), "Site Since:" (2/20/2019 with a calendar icon), "Inactive:" (checkbox), and "Inactive Date:" (text field).
- Service Info (Bottom Left):** Contains "Warranty Start Date:" (2/20/2019 with a calendar icon), "Warranty Labor:" (90 Day Warranty dropdown), "Warranty Part:" (90 Day Warranty dropdown), and "Service Level:" (Basic Level dropdown).
- Comments (Bottom Right):** A text area containing "now is the time" and a "250 characters remaining" indicator.

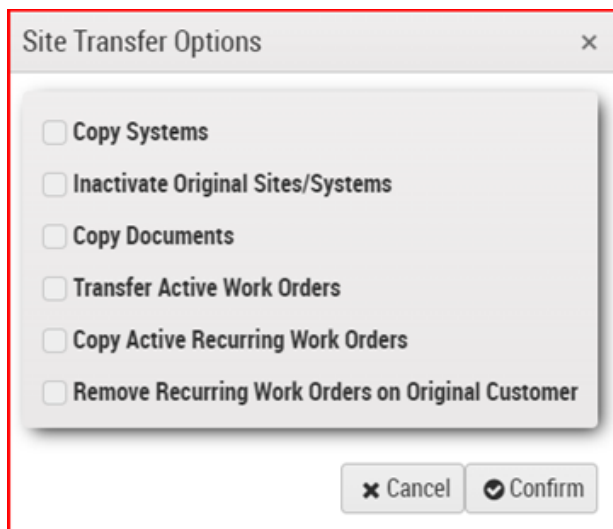
4. Complete the remaining fields on the page, and then click the Save button. Clicking the save button validates that the Copy Existing Site checkbox is selected and a Copy Site is selected. The new site cannot be saved unless a Copy Site is selected.

All fields on the new site form and other site data elements are copied automatically from the original site (in the Copy Site list). The site data elements that will be copied to the new site are:

- Notes
- Site Parts
- Contacts
- Zones
- Authorities

5. A popup window titled Site Transfer Options will be displayed. Users can choose additional options to copy from the original site. Make the desired selections, and then click on the Confirm button to save the new site.

Each site transfer option is described below.



- **Copy Systems** – select this checkbox to copy all the systems associated with the original site. This includes all fields from the system details, notes, system parts, and zones.
- **Inactivate Original Site/Systems** – select this checkbox to make the original (copy from) site inactive. If the Copy System checkbox is selected, any systems associated with the original (copy from) site are also made inactive. (Note: A site and/or system will not be made inactive if it has any active systems, open RMR, or open work orders. Users will be alerted if an original site or system cannot be made inactive.)
- **Copy Documents** – select this checkbox to copy all documents from the original site (and original system if the Copy System checkbox is selected)

- **Transfer Work Orders** – select this checkbox to copy all active work orders from the original site (and original system if the Copy System checkbox is selected) to the new site/system. (Note: All closed and voided work orders remain associated with the original site and system. Any RMR associated with copied work orders is updated with the new site/system. Any calendar appointments associated with copied work orders are updated with the new site/system.)
- **Copy Active Recurring Work Orders** – select this checkbox to duplicate all active recurring work orders from the original site (and original system if the Copy System checkbox is selected) to the new site/system. (Note: Any recurring work order that has no more “Next Recurrences” is not copied to the new site/system. If a recurring work order is setup as appointment based on a recurring work order, the calendar appointment is copied to the new site/system with the same recurrence rule.)
- **Remove Recurring Work Orders on Original Customer** – select this checkbox to delete the active recurring work orders that are on the original site (and original system if the Copy System checkbox is selected) (Note: if the recurring work order has an appointment, the recurring calendar appointment is deleted.)

Application Corrections

AlarmBiller

Proposals - Unable to Edit Discount

(26641) [40097]

Issue: Proposals in AlarmBiller will not allow users to edit the deposit field once the proposal is saved.

Solution: Resolved the issue when editing proposals by opening the (Discount) Percentage field and (Discount) Amount field for edit.

AP Aging Report Does not Agree with Trial Balance

(26779) [36211]

Issue: Credits applied are using their Created Date to determine whether they are included in the AP Aging Report.

Solution: This has been resolved so that credits applied will use the Applied Date instead of the Created Date (applied date must be prior to the run report date to be included).

Invoice Sorting not Working

(27163) [45031, 34161, 39383, 39264]

Issue: When in edit mode of invoice, some parts cannot be moved up and down.

Solution: This is caused when the RowOrder number, which is not visible on the screen, is the same for two items. This has been fixed so that when sorting items and two items have the same RowOrder number, the RowOrder number of the bottom item is incremented by 1. This allows items to be moved up or down.

Sales Automation

Proposal Email Subject not Displaying Proposal Number

(26642) [37536]

Issue: Proposal emails sent to end customers do not include the Proposal number in the email body or subject

Solution: Proposal emails sent to customers now include the proposal number in email subject line.

Receiving Signed eForm Allows Bypass of Proposal Approval

(17011) [5242, 16461, 28970, 38266]

Issue: Only creators of the proposal have to go through submit for approval process.

Solution: If proposal approval rules have been configured in SalesAutomation, a signed eForm attached to an open proposal will not allow the proposal to be completed if that proposal still requires approval per the configured approval rules.

Proposals – Users able to Bypass Approval Process

(22585) [29400 and 34810]

Issue: Users can bypass the approval process and mark a proposal as sold without going through the proper steps.

Solution: This has been resolved so that when a user saves a proposal, the proposal approval rules will be re-evaluated and will not allow the proposal to be saved with a 'Sold' or 'Accepted' status if the proposal changes triggered the proposal approval required flag.

Discount Amount Instead of % not Updated when Sales Package is Changed

(26262) [35829]

Issue: If a user changes the sales package on a proposal, and the proposal is using a discount amount instead of %, that discount will not update properly when the sales package is changed.

Solution: This has been resolved to ensure both Discount Amount and Discount % values are updated when changing Sales Packages in the proposal edit view.