AlarmBiller Release Notes

September 2022

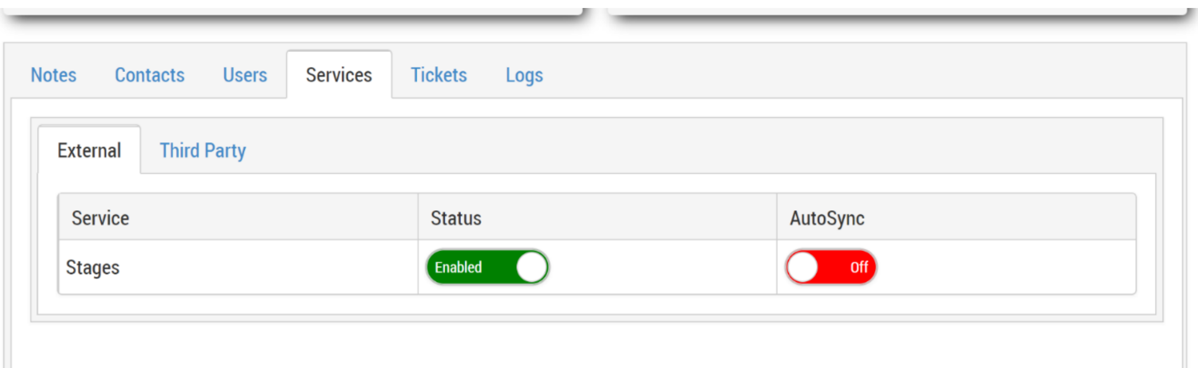
Contents

Enhancements/Features 2
Stages Integration Sync Restrictions 2
Application Corrections (Corrected Bugs) 3
AlarmBiller 3
Sales Automation 5

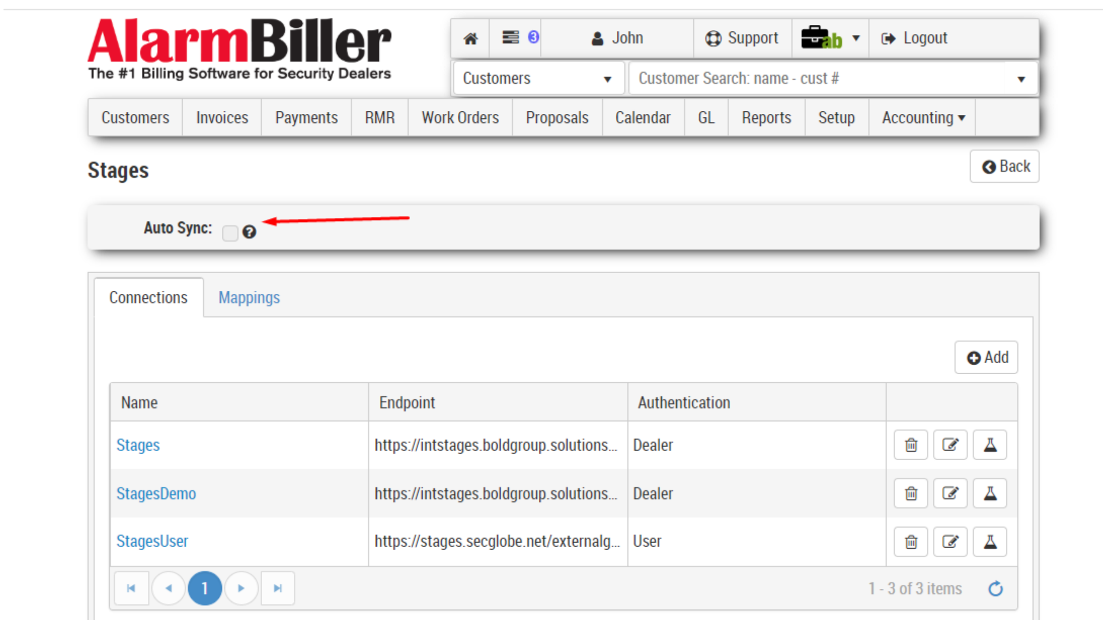
Enhancements/Features

Stages Integration Sync Restrictions

In the Host setup, the Services tab has a new External tab. The External tab has a setting for enabling the Stages integration and a setting called AutoSync to enable or disable the Stages integration services for the dealer. Stages setup in the Dealer will only be available if Stages is enabled at the Host level. (The setting for Stages on the 'Third Party' tab is obsolete.)



If the AutoSync switch is set to off in the Host setup, the Auto Sync checkbox in the Dealer site Stages setup is not visible to dealer users, and data will not sync from or to Stages.



In the Host setup, if the AutoSync is set to enabled, dealers can select or clear the Auto Sync checkbox at the dealer level.

Also, the Stages tab on the AlarmBiller Customer/Site details view is visible only if the Stages service status is enabled on the Host setup Services tab > External tab.

Application Corrections (Corrected Bugs)

AlarmBiller

Resolved Issue
(AB) Working Trial Balance values are incorrect Changed the date filtering on the Working Trial Balance Report so that GL records that fall on the End Date (entered on the report) are included on the report, which means that if a user types the same start and end date on the report, any GL records with that entry date are shown.
(AB) Inventory mismatch between the inventory cost and the GL value Resolved an issue with the physical inventory process adding a part to a new warehouse by using the cost amount of the part as the default value for the warehouse.
(SO/SC-SA) SA Proposal is not displaying the job detail When a proposal has been successfully imported and creates a job, opening the proposal should show the Job Detail button; however, it was not. This has been resolved by changing the conditions on the Job Details button to only look at whether the proposal has a JobID. This makes the Job Detail button appear when it should.
(AB) Customer was charged twice for Feb but we only show once on our end Enabled a lock on the Forte transaction before it is submitted to prevent duplicate records. Also enabled additional error logging as well as added a Run Now button on the Dealers Setup > Automation for the Forte submit job to start the Forte job on demand.
Parts Uploader template updating AB with Yes Taxable when it should not Resolved by changing the template to accept these values to indicate a part is taxable: '1', 'y', 'yes', or 'true'. Any other value or a blank cell indicates a part is not taxable. The uploader template now has instructions describing what indicates a part is taxable.

Resolved Issue
(AB) Clicking 'On Hand' Crashes Inventory Resolved an issue that would make the Warehouse screen become non-responsive when clicking the On Hand button. This issue occurred when creating a physical inventory and clicking the On Hand button when there were no parts.
Cancelled customers in SedonaOffice can be selected in SA when creating a lead Resolved an issue that was allowing customers who were cancelled in SedonaOffice to be selected in Sales Automation when creating a lead.
Customer Import - add validation that phone numbers do not contain invalid characters Changed the validation to catch and report any model validation errors that occur during data import using Excel. The validation errors are reported in the import job's results file.
Auto Payment taken out 27 times Resolved a database save error after submitting an autopayment transaction that was not setting the submitted date, which was causing the transaction to re-run the autopayment transaction. Now the submitted date will be set before submitting the autopayment to Forte, which will prevent an automated payment from being run more than once.
SA users cannot use All Approval Rules (User and General) Resolved the issue that Sales Automation users were having with approval rules: ▪ If an eForm is sent and signed after a proposal has been approved, the status of the proposal is set to a ready to submit status that reflects the pending/accepted status of the eForm and will not require the proposal to go through the approval process. ▪ If an eForm is attached to a proposal before submitting the proposal for approval, a signed eForm received before the proposal approval will not allow the approval to be bypassed. When the approval is complete, the proposal status is set to the appropriate ready to submit status that reflects the state of the attached eForm. ▪ The SA Leads Proposal Conversion dashboard widget has been updated to include the proposal statuses.
(AB) Physical Inventory Count Resolved an out of memory issue with completing a physical inventory count by adding paging and blocked displaying images on the summary view.

Sales Automation

Resolved Issues
(S0/SC-SA) Existing Customer is pulling in the wrong branch Resolved an issue with creating a new lead in SA from SedonaOffice that was pulling the wrong branch for the customer. This would happen when the customer account already had an existing lead in SA; the lead would default to the main branch instead of the branch associated with the customer in SedonaOffice.
(AB/SA) Changing the Status Description on the Proposal Status 'Sold' breaks the Salesperson Report Changed the SA Salesperson report to use the 'StatusActionEnumId' of the EstimateStatus assigned to proposals. Originally, the report was using the 'Name' of the EstimateStatus, which allowed users to change the Name causing the report code to fail to find the correct matching estimate records for each report category.
(Display Issue) the values/numbers on the Sync Management screen are displaying incorrectly after a while Restricted the sync progress and counts to only the specific Sales Automation Sync Management page for the user logged in viewing the Sync Management page.
SA Sync allows duplicate customer records to be created with same customer number Updated the customer sync logic to check if a customer number to be synchronized is already used for another customer; if a duplicate number exists, the unsynchronized customer is given the next unused customer number.
(AB/SA) SA New Lead - multiple Save clicks creating duplicate leads and customers Resolved an issue where users could click the Save button on the SA New Lead View multiple times, which caused duplicate leads and customer records to be created. Now the Save button on the SA New Lead View is disabled after clicking it once.

Resolved Issues
SA Sync logic - only check for change in 'Available for Sales' status after initial sync Resolved an issue that was duplicating SA aSyncEntity records for Parts during the initial sync due to the 3rd step of the part sync that checks for any change in 'Available for Sales' status since the last sync. Changed the SA parts sync logic to not execute the 'Available for Sales' status change on the initial SA sync (nothing previously synced); this only executes when requesting changes to previously synced parts.
Sales Automation, Customer Email Address - Sedona = Failure Resolved an issue with customer email addresses not appearing SedonaOffice when users complete proposals by correcting the customer mapping from Sales Automation to SedonaOffice.