AlarmBiller Release Notes

April 2023

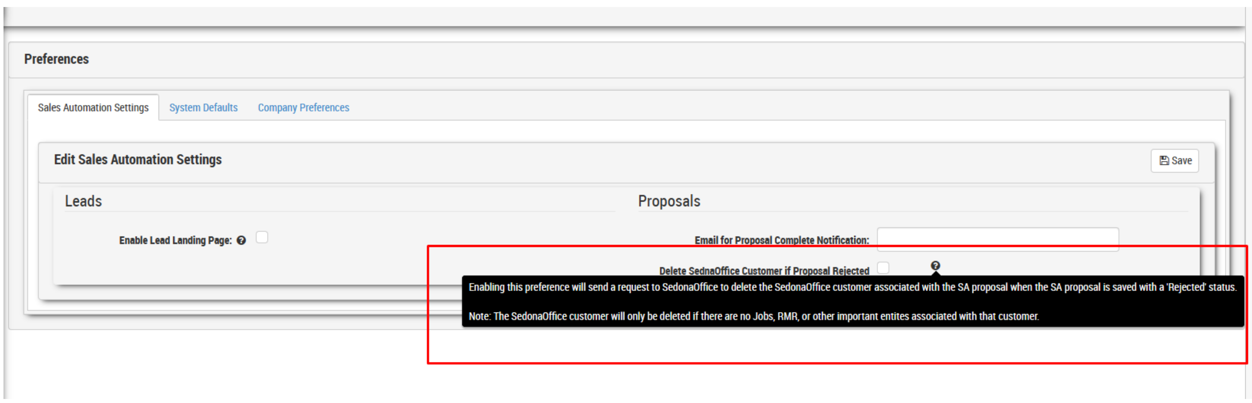
Contents

Enhancements/Features

SA Preference to allow deletion of SedonaOffice customer when proposal Rejected

We have added a feature for Sales Automation dealers with SedonaOffice integration enabled. This feature gives the ability to automatically delete a SedonaOffice customer when a Sales Automation proposal for the customer is rejected.

There is a new checkbox on the Sales Automation Setting tab called Delete SedonaOffice Customer if Proposal Rejected. By default, this checkbox is cleared, which means the feature is not enabled.



To enable the feature, select the checkbox. If this feature is enabled, when users save a proposal with a Rejected status, SedonaOffice deletes the customer associated with the rejected proposal. SedonaOffice deletes the customer only if there are no jobs, RMR, or other important entities associated with the customer. If the customer could not be deleted, there is a message indicating why.

To use this feature requires an update to SedonaOffice version 6.2.0.11 and requires SedonaAPI 2.0 version 1.43.1.

Application Corrections

AlarmBiller

Resolved Issues
(AB) Chart of accounts - Show All button does nothing Removed the Show All and Show Inactive checkboxes from the GL Accounts Setup View and Chart of Accounts grids. Also cleaned up these grids to have consistent presentation of account descriptions and inactive status. Fixed the Excel export from both grids to present the account descriptions with the inactive status and properly show the balance type (credit or debit).
Unable to Complete Proposals Created by Another User This fixes an issue with the SA 'Finalize and Complete' proposal workflow that prevented the proposal edit page from showing the 'Complete Proposal' button. This issue was specific to the Chrome browser standard mode that is believed to have started with a Chrome browser update released on 8/17/22.

Sales Automation

Resolved Issues
Clicking the all salespersons checkbox is displaying all inactive leads Fixed the SA Leads list grid to not show inactive leads when the **All Salespersons** checkbox is selected and the **Show Inactive** checkbox is cleared.
Unable to add new leads - Object reference exception message in log Resolved this issue so that checking the SedonaOffice customer group occurs only if the Sales Automation user has an associated Sales Automation employee and that employee has a SedonaOffice Salesperson selected. If the Sales Automation user does not meet either of these conditions, the Sales Automation New Lead view will present the full SedonaOffice customer list in the existing customer dropdown, instead of a list filtered by SedonaOffice customer groups.

Resolved Issues
Cannot create a new lead - Error - Sales Automation Sedona Added a check for older versions of SedonaAPI 2.0 (prior to version 1.30.2), the Sales Automation New lead page will load and show the full SedonaOffice existing customer list. It will not filter customers by assigned SedonaOffice customer groups.
SA - Receiving error when selecting Master Customer from the New Lead screen - type ahead selection Resolved this issue so that Sales Automation users can select Master customers by typing into the master customer dropdown and seeing a filtered list of master customers that match the typed filter. Users can also click and unclick the Choose Master Customer checkbox during new lead entry and see the customer dropdown populated correctly with no history of previous selections.