AlarmBiller Release Notes

January 2025

Version 4.51.0

AlarmBiller®

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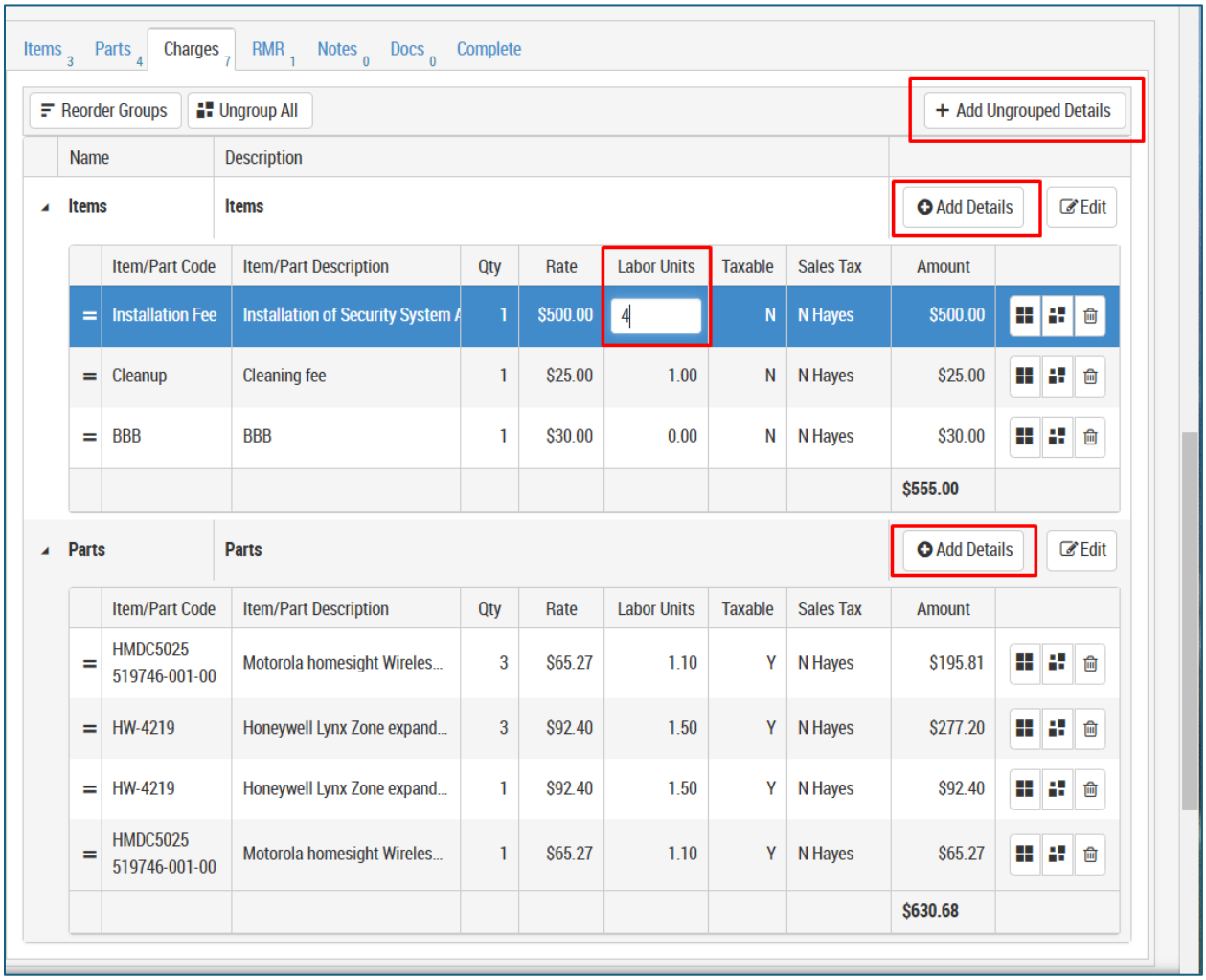
Enhancements/Features

Added Ability to Change the Part (Item/Part Code) Directly in the Charges Table (Charges Tab) While Editing a Proposal [00025237]

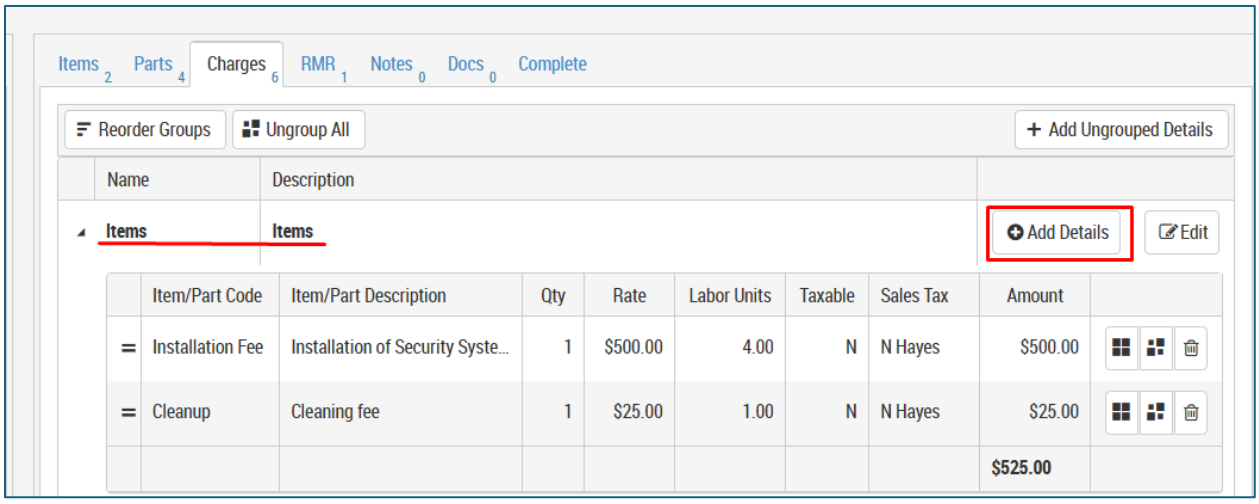
On the Proposal/Sales Package Charges tab, we added some more editing functionality:

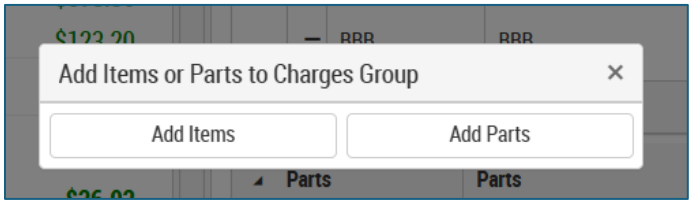
- There are new buttons to add items/parts to the individual Charges group or as ungrouped.
- We added Labor Units as an editable field.



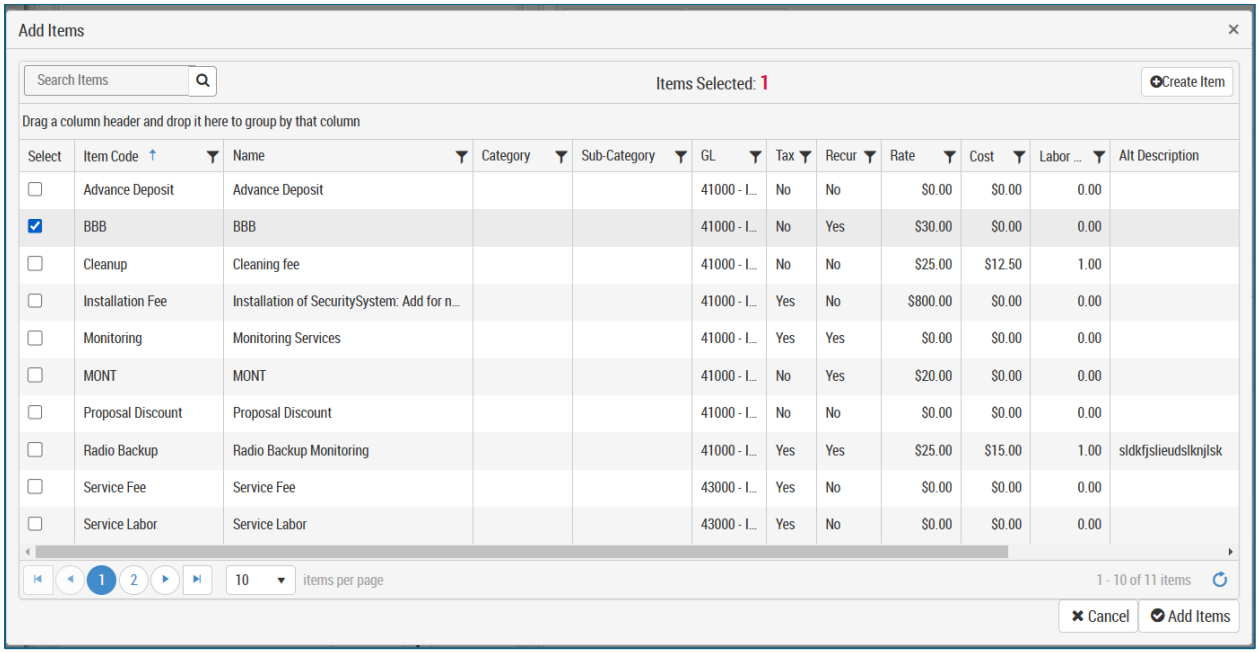
Add new items/parts from the Charges Tab

If users click the **Add Details** button in a particular Charges Group, a popup opens so they can choose to add items or parts to the proposal or sales package (parent entity).

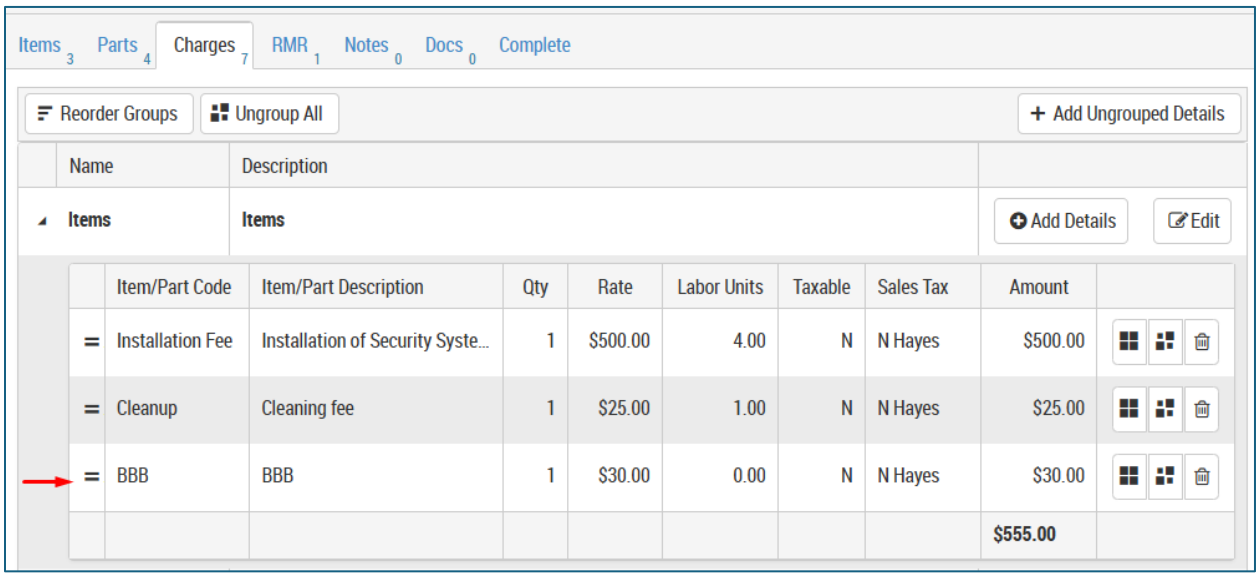




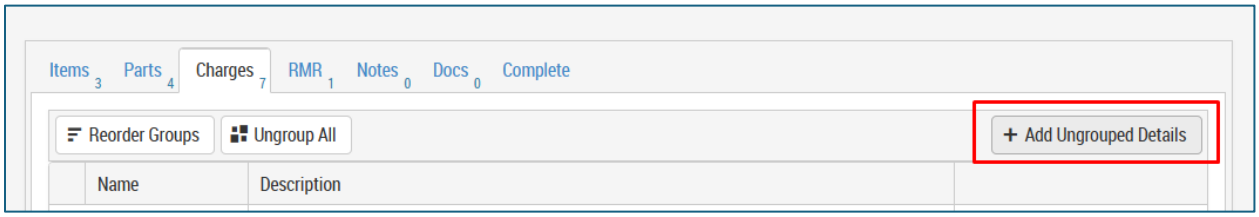
By clicking either **Add Items** or **Add Parts**, a popup window opens to select additional items or parts to be included in the overall proposal or sales package.

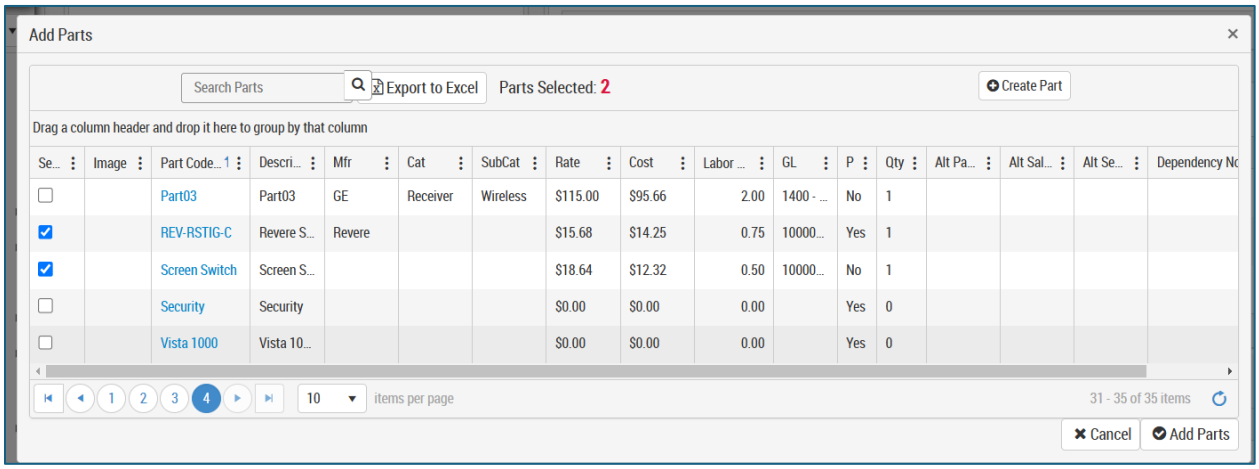


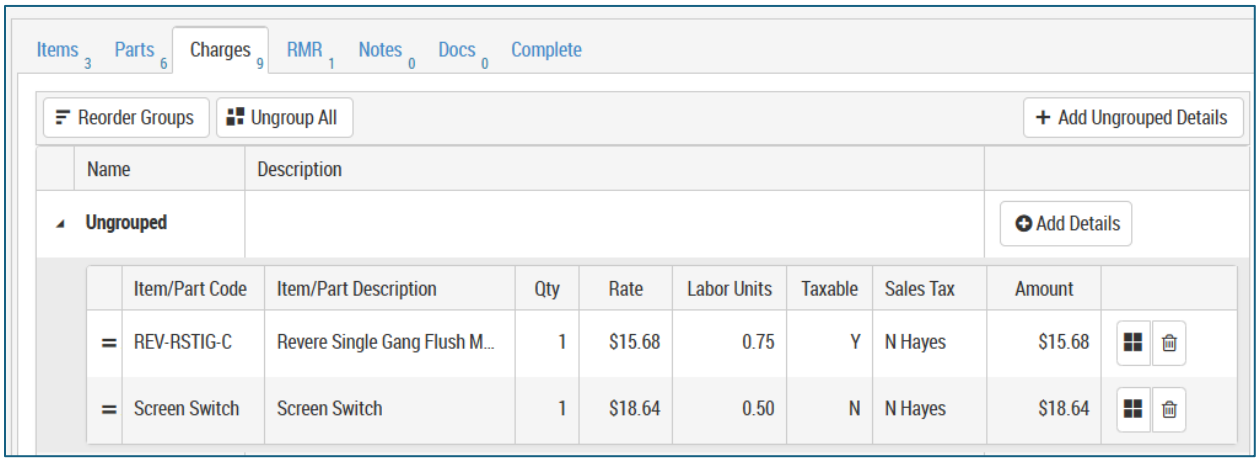
Once the new items or parts are selected via the selection popup, they are added to the main Items or Parts grids. This triggers a change on the main Items or Parts grids, and all totals are updated on the parent entity page. This also triggers the Charges tab to refresh with the new items or parts in the Charges details list, showing in the Charges Group in which the **Add Details** button was clicked.



If new items or parts need to be added to the proposal or sales package and are not initially associated with an existing Charges group, click the **Add Ungrouped Details** button in the top toolbar of the Charges tab. This adds items or parts the same way as clicking the **Add Details** button, but the selected items or parts are added as ungrouped.







Note: The Add Ungrouped Details is mainly helpful if all existing items and parts are configured into a specific Charges group and no longer shows as ungrouped. If this is the scenario, the 'ungrouped' group is no longer displayed in the Charges grid. The only way to get this group visible again is to use the Add Ungrouped Details to select new ungrouped items or parts.

Labor Units added as an editable field

Users can change the Labor Units value of individual items and parts via the Charges tab detail record. These changes are propagated back to the respective original Items grid and Parts grid. This triggers a change on the original Items grid and Parts grid, which updates all Labor totals on the overall parent entity.

Enforced Site Level, Required Custom Fields for New Customers [00112506]

Users had set up required custom fields for sites; however, they discovered that when creating new customers, the required fields were not appearing so data for those were not entered.

We added the Site Custom Field Tab to new customer creation so that as new customers are created, required fields for sites are shown.

PCI 4.0 Compliance

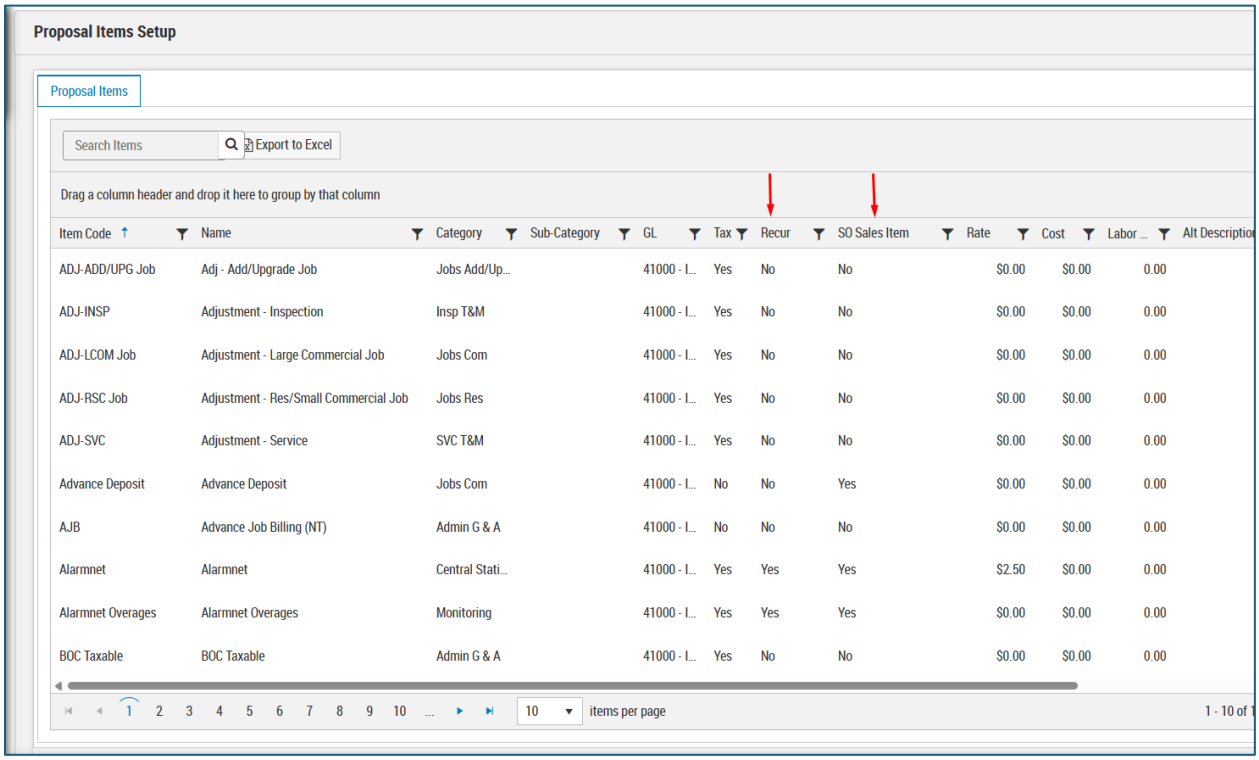
We updated AlarmBiller for PCI 4.0 compliance. Users will not see anything new in AlarmBiller for this. For additional information about PCI 4.0, refer to the PCI Security Standards Council.

Item Filtering for Sales Automation Proposals Integrated with SedonaOffice

This change relates to Sales Automation proposals for dealers integrated with SedonaOffice.

The Labor Item, Discount Item, and Deposit Item dropdowns on the Sales Automation tab will show only those items that have been set up as available for sale, which corresponds to the available for sales setting in the SedonaOffice item configuration view. (These dropdowns were already filtered to show only items that are not recurring items.)

When looking at the Sales Automation Setup > Proposal Setup > Items list, the Labor Item, Discount Item, and Deposit Item dropdowns on the proposal will only list Items that show as Recur = No and SO Sales Item = Yes.



Item Code	Name	Category	Sub-Category	GL	Tax	Recur	SO Sales Item	Rate	Cost	Labor ...	Alt Description
ADJ-ADD/UPG Job	Adj - Add/Upgrade Job	Jobs Add/Up...		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	
ADJ-INSP	Adjustment - Inspection	Insp T&M		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	
ADJ-LCOM Job	Adjustment - Large Commercial Job	Jobs Com		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	
ADJ-RSC Job	Adjustment - Res/Small Commercial Job	Jobs Res		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	
ADJ-SVC	Adjustment - Service	SVC T&M		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	
Advance Deposit	Advance Deposit	Jobs Com		41000 - I...	No	No	Yes	$0.00	$0.00	0.00	
AJB	Advance Job Billing (NT)	Admin G & A		41000 - I...	No	No	No	$0.00	$0.00	0.00	
Alarmnet	Alarmnet	Central Stati...		41000 - I...	Yes	Yes	Yes	$2.50	$0.00	0.00	
Alarmnet Overages	Alarmnet Overages	Monitoring		41000 - I...	Yes	Yes	Yes	$0.00	$0.00	0.00	
BOC Taxable	BOC Taxable	Admin G & A		41000 - I...	Yes	No	No	$0.00	$0.00	0.00	

Application Corrections

AlarmBiller

Accounts Receivable

Data not transferring to Excel properly: customer system zones [00111711]

The data for signal type was not displaying properly when exported to Excel. Beyond zone 10 it only showed numbers rather than words, and the data would get scrambled. We fixed the Customer System Zones grid to export the full data list with all data values when there are multiple pages of zones configured in the grid and the grid is only showing the first page.

Do we receive a mailed date from Sebis [00112144]

Users noticed that AlarmBiller was showing invoices as mailed approximately 10 days after billing.

The date in the Status Updated column would change any time the modified date would change on outgoing mail records. While the invoices were being mailed on the original date, the date in the Status Updated column would change, which caused confusion. To resolve this, we added a new field called StatusDate to the outgoing mail table. Users will see this in the Status Updated column in the grid (instead of the modified date). This field tracks when the status changes for the invoices or other mailed documents. This field will change only when the status changes, for example, when invoices are mailed.

This will affect all mail records going forward but will not affect existing records; they will still show the same date as before.

Service

Cannot export closed work orders - custom grid layout [00110370]

We fixed an error that users received when attempting to export closed work orders using a custom grid layout.

Sales Automation

Work order appointment customer email wrong time zone [118052]

Work order appointment notification emails sent to a customer and technician show the scheduled appointment time using the assigned technician's time zone, not the time zone of the logged in AlarmBiller user.

For example, if the logged in AlarmBiller user is configured as Eastern time zone but is scheduling appointments for technicians configured in Central time zone, the email notifications sent to both the customer and technician show the scheduled appointment per the technician's Central time zone.

Sales Automation proposal completion fails when 2 eForms sent after proposal approved

If multiple eForms are sent when proposal approval is required, once the proposal has been approved and no additional proposal changes are made that require proposal approval again, as subsequent eForms are sent, the proposal status is set to 'Ready To Submit eForm Pending' on each eForm sent, so the eventual proposal completion workflow will be able to be completed successfully.