



AlarmBiller Release Notes

June 2023

AlarmBiller[®]

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Enhancements/Features

33315 | eForms Shared Data Tables Font Size Control

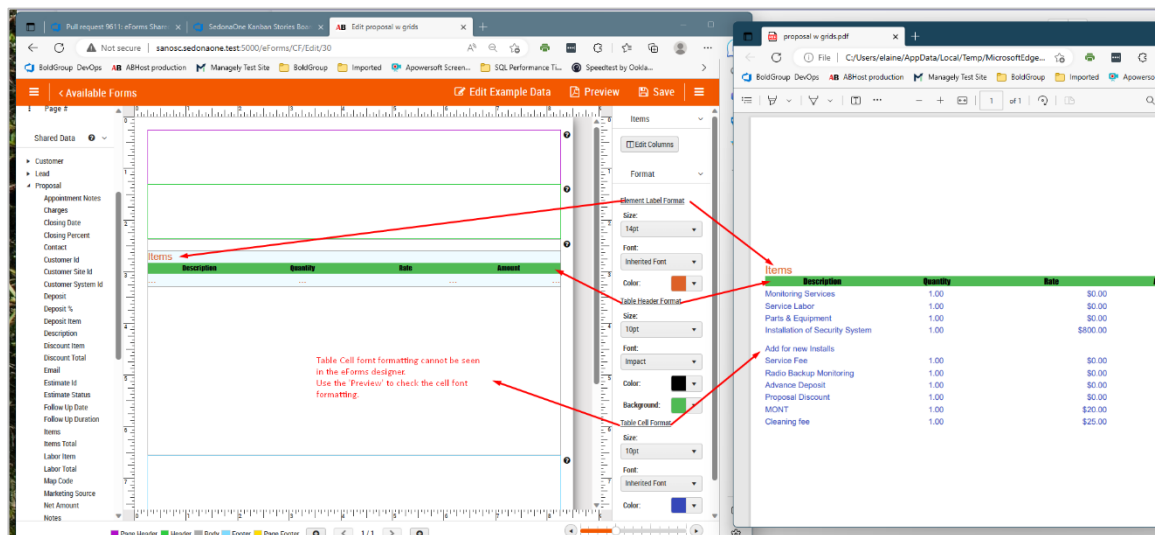
eForms users can now format the font size for three sections of shared data tables (mapped tables) when using the eForms designer to create an eForms template. eForms documents created with these templates will render using any font formats specified for these mapped tables.

The following shared data fields are the eForms elements that have been updated to show font formatting controls in the eForms designer:

- Proposal Charges
- Proposal Items
- Proposal Notes
- Proposal Parts
- Proposal RMRs

When one of these eForm elements is dropped on the eForms template designer, the right side edit menu will show these formatting controls:

- Element Label
- Table Header
- Table Cell
- Image



33462 | (SA) Edit/Delete Items/Parts from Proposal Charges Tab

We changed the Charges tab from read-only to allow users to edit selected fields (Description, Quantity, and Rate) of the items and parts grouped on the Charges tab, as well as allowing users to delete items and parts from the parent entity (proposal) using a delete button on the Charges tab.

Name	Description	Item/Part Code	Item/Part Description	Qty	Rate	Taxable	Sales Tax	Amount	
Ungrouped									
= Monitoring	Monitoring Services			1	\$0.00	N	None	\$0.00	[Grid] [Delete]
= Service Labor	Service Labor			1	\$0.00	N	None	\$0.00	[Grid] [Delete]
= Service Parts	Parts & Equipment			1	\$0.00	N	None	\$0.00	[Grid] [Delete]
= Installation Fee	Installation of Security System Add for n			1	800	N	None	\$800.00	[Grid] [Delete]
= REV-RSTIG-C	Revere Single Gang Flush Mount Stro...			1	\$15.68	Y	None	\$15.68	[Grid] [Delete]

When users make changes to an individual item or part by editing or deleting using the Charges tab, those changes are propagated back to the respective original Items/Parts grid, which shows the changes for totals on the parent entity page.

35358 | SA Sync Management - customer sync adjustments for deleted SO customers/sites

Internal Note: This requires user story 35296 and user story 35445.

Sales Automation Customer sync will detect and inactivate in AlarmBiller any SedonaOffice customers/sites/systems that have been deleted from SedonaOffice using the API through an interface other than Sales Automation or by using the 'delete' button in SedonaOffice. This will prevent the customers/sites/systems in AlarmBiller from being used for future Sales Automation leads or proposals.

Also, in Sales Automation when a proposal is sold, there is an initial check to verify that the SedonaOffice customer/site/system that may be referenced by that proposal still exists in SedonaOffice. If not, an error will be shown, and the proposal will not be pushed to SedonaOffice.

This requires SedonaWeb 2.0 version 1.44.0 or higher.

Application Corrections

AlarmBiller

Resolved Issues
<p>14894 28842 Expired Credit Card Email Customer Portal Information</p> <p>The expired credit card email that was sent to customers included information on how to log in to the customer portal, even for dealers that did not use the customer portal. Now, the expired credit card email sent to customers only shows the 'log into customer portal' text and URL if the Dealer Preferences 'Allow Portal' is selected and the generated URL is not blank.</p>
<p>32396 00062878 Display issue for Charges Count on Proposal Details View</p> <p>The Proposal Details Charges tab count now reflects the correct number of items configured in the saved proposal.</p>
<p>32580 00068503 Have to click the Apply button 3x to get the payment to show</p> <p>Resolved an issue where users needed to select the checkboxes in the vendor payment and vendor bill add and edit view multiple times to complete the full action. Also made a correction so that the Apply Amount value defaults to the Amount Due when a user selects the Apply checkbox.</p>
<p>33423 00072382 Customer batch loader - RMR Do Not Prorate is not working</p> <p>Changed the customer import to properly handle duplicate 'DoNotProRate' column names. This allows the Excel row column search to optionally specify a starting column name to locate and then begin the search for the first occurrence of the desired data.</p>
<p>35269 00068928, 70096, 77725, 77727,79095 Time and Attendance - Why is work week incorrect?</p> <p>Resolved an issue showing unexpected dates on employee timesheets in the final week of a pay period.</p>
<p>35548 Internal Mailing job setting processing documents missing</p> <p>Pending documents are marked missing if the Sebis server has no tracking file record for it, since that means the document did not send and must be resent. Documents already in the "Processing" stage have been acknowledged by Sebis and are being processed, so these are not marked as missing.</p>

Sales Automation

Resolved Issues
<p>28730 00049641, 52373 Sales Automation Salesperson Report not displaying all Won Sales</p> <p>Sales Automation Salesperson Report now includes all sales in the Open, Won, and Lost buckets based on proposal status, estimate date, and closing date.</p>
<p>29351 00004123 Labor cost only shows on edit screen of proposal</p> <p>In Sales Automation, when editing a proposal with SedonaOffice integration, the labor cost field in the Sales Automation tab, which is populated by the selected SedonaOffice job type, will not show a value until a labor item is selected. Previously, editing would show the labor cost associated with the selected job type even though a labor item was not selected, but when the proposal was saved, the labor cost would be saved with \$0. Now, if no labor item is selected, the labor cost shown will be \$0, and the proposal will be saved with \$0 labor cost.</p>
<p>32252 Internal (SA/eForms) Categories are listing backwards in Charges tab</p> <p>On eForms, the order for the charges groups is now the same as on the Sales Automation screen.</p>
<p>33372 Internal SA Salesperson Report Quota Value Wrong</p> <p>The Sales Automation Salesperson Report has been changed for the Quota value. The Quota value is now properly shown for the employee.</p>
<p>35210 Internal SA New Lead - State dropdown not populated with SO customer state</p> <p>When using Sales Automation with SedonaOffice integration, the Sales Automation New Lead - State dropdown field is now populating with the proper state from the selected SedonaOffice customer,</p>
<p>35217 Internal SA Lead Details - hide 'New Proposal' button if lead inactive</p> <p>This has been resolved so that on the Sales Automation lead details view the New Proposal button is disabled if the lead is inactive.</p>
<p>35418 Internal (SO/SA) Proposal [Edit] still available after proposal rejection when just site deleted</p> <p>Resolved this issue so that the edit buttons are disabled for a Sales Automation proposal and lead when the SedonaOffice proposal has been rejected and related SedonaOffice entities have been deleted.</p>

Resolved Issues

35421 | Internal | (SO/SA) Inactive Lead [Edit] button still available after customer deleted

Resolved this issue so that the Edit button on a lead is disabled after the customer has been deleted and the lead is inactive.

35760 | Internal | (SA) Charges updates on a new unsaved proposal fail

Resolved an issue with Proposals > Charges tab when making changes on the Charges tab and saving changes, but the Charges tab was blank, and the changes were not updated to the Items and Parts tabs.

35795 | Internal | (SA) Charges Edits - Click [Save] on a new proposal with an active field ignores edit

Resolved an issue with creating a new proposal where the value in the last field entered/edited that is still active (meaning the user does not press tab or click away with the mouse) does not get saved when the user saves the proposal.

35798 | Internal | (SA) Charges Edits: Editing either the Items or Parts grids caused the Charges grid to go blank

Resolved an issue causing the Charges tab to go blank when editing the Item grid or Parts grids and clicking Save without pressing enter or tab.

35894 | Internal | (SA) Edit Charges feature allowing >0 rate when Part \$0 rate checked

Resolved an issue that was allowing users to change part rates when Part \$0 rate was checked. When this is checked users should only be able to change item rates.

eForms

Resolved Issues

34685 | 00073593 | eForms displaying on incorrect customer site or system

Correction for the eForms tab on AlarmBiller Customer Site/System so that it does not list eForms that do not belong to that specific customer site/system.