AlarmBiller Release Notes

September 2023

Version 4.46.0

AlarmBiller®

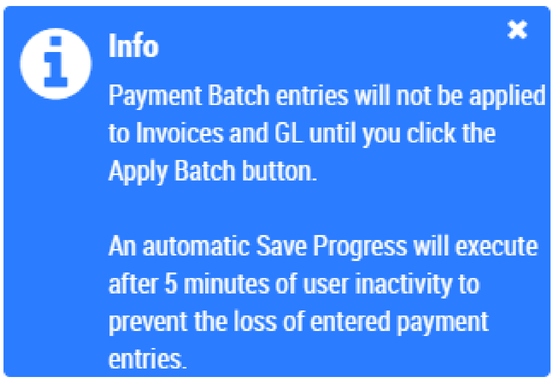
Contents

Enhancements/Features

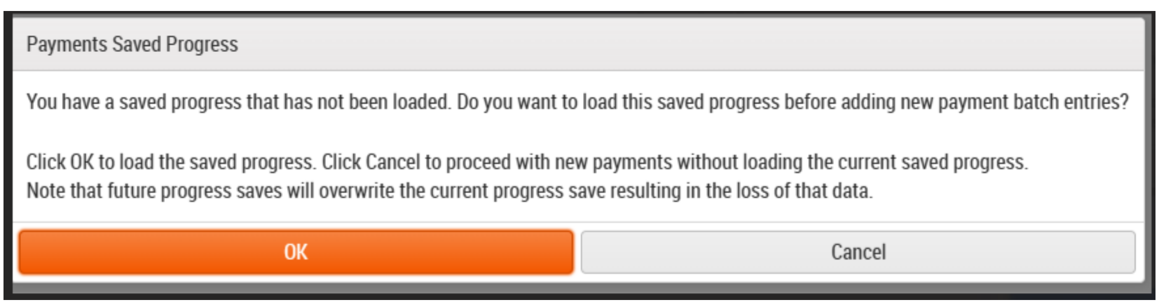
16566 | Payment Batch Progress Save

We added auto-save functionality for users creating batch payments to prevent losing entered payment entries if the page becomes inactive. This automatically saves progress every five minutes when creating batch payments.

There is a new message when opening the batch payments page:



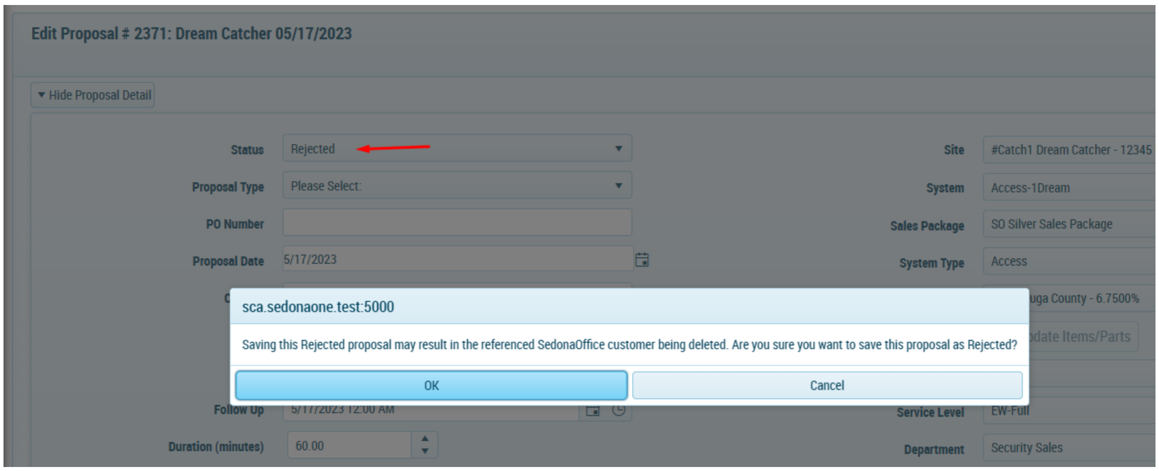
We also added a prompt for users if there is automatically saved information for a batch that has not been submitted (users can see this when clicking the Add Payment button):



This gives users a chance to load the saved progress or to continue adding new entries to the payments grid. Users click OK to load the saved progress. If users click Cancel, the saved progress will be lost.

35215 | SA with SedonaOffice Rejected Proposals Confirmation popup for SO Customer delete

If the Sales Automation Rejected Proposal workflow is enabled for SedonaOffice integration, when users save a rejected proposal, there is a confirmation window alerting them that the referenced SedonaOffice customer may be deleted.



Clicking OK saves the proposal and deletes the SedonaOffice customer on the proposal.

Clicking Cancel leaves the proposal in edit mode, so users can change the proposal status to a non-rejected status and then save without deleting the SedonaOffice customer.

35616 | SA Preferences only expose the 'Rejected Proposal' preference if SedonaAPI 2.0 is the correct version

In Sales Automation preferences, a Rejected Proposal is visible only if SedonaAPI 2.0 is the correct version. This prevents dealers who have not updated from setting that preference and potentially have Sales Automation try to execute the SedonaAPI 2.0 'delete customer/site' request when a proposal gets saved as rejected. The minimum SedonaAPI 2.0 version is 1.43.1.2 to see the Sales Automation preference Rejected Proposal.

Application Corrections

AlarmBiller

Resolved Issues
31922 | CRM 00064879 | Technician can view all technician appointments with Supervisor permission disabled For a user who is a Time and Attendance Pay Group Manager but not an Administrator or Supervisor, AlarmBiller Calendar will now only show appointments for the Pay Group Manager's employees and the user's own appointments. We also cleaned up the Setup User and Employee grids to be fully pageable and filterable for Time & Attendance, Sales Automation, and eForms.
34490 | CRM 00073724, 73333 | New customer cannot be submitted while adding RMR, problem loading new customer We resolved two issues: 1) a new customer cannot be submitted 2) problem loading a new customer. We fixed an issue on the RMR tab to make sure the Monthly Amount gets reset to either the default rate of the selected RMR item or $0 if there is no default rate specified on the selected RMR item. This ensures that the Cycle Amount and Monthly Amount both are set to the correct values. Users will have to update the amount if a different amount is required. We fixed an issue on the Customer tab by checking that the manual invoice term id is not null before attempting to save the value.
35627 | CRM 00036374, 57580, 82719 | Recurring Misc. Tasks - all day - do not appear We resolved an issue that users were experiencing by creating miscellaneous recurring appointments using the all-day check box that would disappear after saving the appointment. When creating a new calendar recurring appointment, if the recurrence rule results in an initial first occurrence date that is different from the calendar Start/End dates, then the calendar updates the Start/End date to match the first occurrence date. The Calendar appointment editor now includes a tooltip indicating that a configured Repeat schedule takes precedence over the Start/End. When saving a new recurring calendar appointment, if the entered repeat schedule resulted in the saved Start/End dates being changed, a popup notification is shown: "Due to the configuration of the appointment's Repeat schedule, the 1st appointment instance is M/DD/YYYY [this is the changed start/end date] not the originally clicked date of M/DD/YYYY".

Resolved Issues
We also fixed an issue with recurring appointments not showing in the Day view but showing in the Calendar Week/Month view. If users want an appointment on the original Start/End date, and it does not match the recurring schedule, they need to create two appointments: ▪ a non-recurring appointment on the desired Start/End date ▪ a recurring appointment with the desired recurring schedule
36376 | CRM 00082019 | Receive an error when saving a check, but the entry actually gets created We corrected an error displayed when creating check entries with a very large check number, although the entry was created anyway.
36377 | CRM 00081964 | When creating a journal entry, you receive an error but the JE actually takes place We corrected an error displayed when creating journal entries, although the journal entry was created anyway.
37359 | CRM 00085245 | Appt based recurring WO does not create 1st appointment on the calendar We resolved an issue where the initial date chosen was not selected, but it did select the following dates so that appointment based recurring work orders will create the first appointment.
38051 | Internal | (AB) Recurring event logic with Scheduled vs Repeat appts We clarified the way the Scheduled vs Repeat On dates are implemented for recurring appointments. AlarmBiller will create the first appointment based on the date specified in the Repeat On field, not the Scheduled date field. [This was resolved by 35627.]
38055 | Internal | (AB) Calendar: "All Day Event" checkbox problem with Misc events We resolved an issue where All Day recurring miscellaneous appointments did not appear in the Day view mode of the calendar on the current start date if the user selected a time before the current time. The appointment would show up for all other view modes: week, month, year, and technician. [This was resolved by 35627.]
38075 | Internal | (AB) Calendar: "All Day Event" checkbox problem when scheduling recurring appts for an existing work order We resolved an issue where a recurring event banner would appear on the screen, but it did not have any of the work order details. The recurring event banner would appear for all other view modes: week, month, year, and technician. [This was resolved by 38055.]

Resolved Issues
38214 | Internal | (AB) Payment Batch reloading saved progress info box issues When users click the Add Payment button, there is a double check for a current progress save that the user has not loaded back in. If so, there is a prompt to the user to give one more chance to load the saved progress or to continue adding new entries to the payments grid.
38716 | Internal | AB 'Add New CC' widget not loading for Forte sandbox The Forte checkout URL can either be V2 or V1 (not V3 like the Forte transactions API).

Sales Automation

Resolved Issues
37487 | CRM 00083580 | When editing a sales pkg the Charges tab is blank and shows 0 in the tab We fixed an issue that was causing the Charges tab in the sales packages to show an empty grid — no totals or any other rows — when it should have shown a combination of the records from the Items/Parts tabs.

eForms

Resolved Issues
27716 | CRM 00046717 | Fields on the Grid data within eForms do not all have the money fields formatted to have a $ For the eForms RMR table, we changed the display format for Monthly and Cycle amounts to be currency, instead of plain decimal.
33374 | CRM 00071190, 88699 | Completed Eform not Showing Signatures Once an eForm has been sent to the first recipient for signing, the AlarmBiller eForms user can no longer make changes to the form data. By checking the modify date, AlarmBiller can determine if the eForm has been modified by an end recipient. If the modify date is different, when a user clicks Save Changes in the details view, this indicates the eForm has either been signed or progress saved, and the form data currently saved will reflect the changes that recipient made to the eForm. The Save Changes will not overwrite that form data value when saving the rest of the updated eForms changes made in the Details view.

Resolved Issues
35959 | CRM 00080985 | (AB) eForms Shared Data 'Discounts' Formatting On an eForm that is integrated with a proposal, we changed the shared field Discount Item Total so that it is displayed as a negative value.
36637 | CRM 00083270, 65560 | Credit card not being sent to SO from payment widget in eForms We updated eForms so new SedonaOffice eForms get the Customer ID and Customer Number before making the credit card customer post to SedonaAPI 2.0 and make the posting values match those from AlarmBiller. This ensures that when a new customer is pushed to SedonaOffice and synchronized back to Sales Automation, the credit card post uses the Customer ID and Customer Number received from SedonaOffice during the synchronization.
36724 | Internal | (AB) eForms: Form data is not being saved in 'Assign' screen We fixed the eForms Details view Save Changes logic to check that any signatures saved to database after the details page was opened are not overwritten and lost and that new updates to the eForms FormData are also captured and saved properly.
38315 | Internal | (AB) eForms: loss of signature/accept date on pdf We changed the Save logic to not look for just signature differences between the database and viewmodel. We simplified the logic to use the ModifyDate of the database record and the in-memory viewmodel. On save, a different ModifyDate between these two datasets indicates that the eForm has been updated by the signing process, and the logic should not overwrite that data.