

AlarmBiller - 4.44.4 - 6/14/2023 - (DRAFT)

01/05/2024 11:13 am EST

Enhancements/Features

Title

description

Corrected Bugs (Application Corrections)

AlarmBiller

Development ID	CRM ID	Resolved Issue
14894	28842	Expired Credit Card Email Customer Portal Information The expired credit card email that was sent to customers included information on how to login 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.
32396	00062878	Display issue for Charges Count on Proposal Details view Proposal Details Charges tab count now reflects the correct number of items configured in the saved proposal.
33423	00072382	(AB) Customer batch loader - RMR Do Not Prorate is not working Changed the customer import to properly handle duplicate 'DoNoProRate' 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.
32580	00068503	Have to click the Apply button 3x to get the payment to show 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.

Sales Automation

Development ID	CRM ID	Resolved Issue
28730	00049641, 52373	(SA) Sales Automation Salesperson Report not displaying all Won Sales Sales Automation Salesperson Report has been changed to include all sales in the Open, Won, and Lost buckets based on proposal status, estimate date, and closing date.

Development ID	CRM ID	Resolved Issue
29351	00004123	(SC/SA) Labor cost only shows on edit screen of proposal In Sales Automation, when editing proposal with SedonaOffice integration, the labor cost field in the Sales Automation tab, which is populated by the selected SO 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 selected, the labor cost shown will be \$0, and the proposal will be saved with \$0 labor cost.
32252	Internal	(SA/eForms) Categories are listing backwards in Charges tab On eForms, the order for the charges groups is now the same as on the Sales Automation screen.
33372	Internal	SA SalesPerson Report Quota Value Wrong The Sales Automation Salesperson Report has been changed for the Quota value. The Quota value is now properly shown for the employee.
35210	Internal	SA New Lead - State dropdown not populated with SO customer state 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,
35217	Internal	SA Lead Details - hide 'New Proposal' button if lead inactive This has been resolved so that on the Sales Automation lead details view the New Proposal button is disabled if the lead is inactive.
35418	Internal	(SO/SA) Proposal [Edit] still available after proposal rejection when just site deleted We resolved this issue so that the edit buttons are disabled for a Sales Automootion proposal and lead when the SedonaOffice proposal has been rejected and related SO entities have been deleted.
35421	Internal	(SO/SA) Inactive Lead [Edit] button still available after customer deleted We resolved this issue so that the Edit button on a lead is disabled after the customer has been deleted and the lead is inactive.

Time & Attendance

Development ID	CRM ID	Resolved Issue
NA	NA	NA

eForms

Development ID	CRM ID	Resolved Issue
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.

Special Upgrade/Installation Instructions

None

Supported Environments

N/A