



Release Notes

September 23, 2021

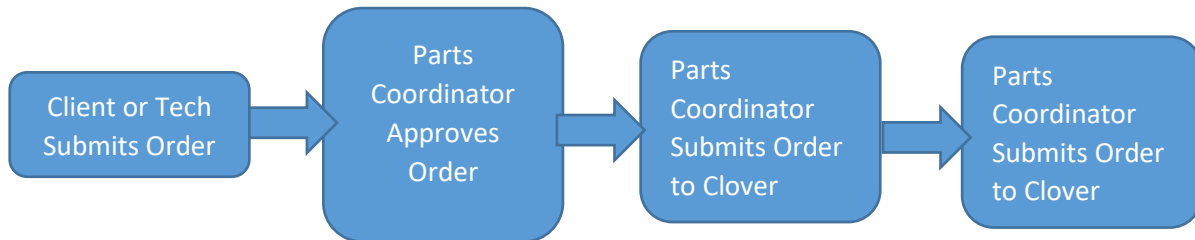
<https://test.bm-365.com/admin/>

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Ordering Flowchart



Clover Submit

General

- Merged the Clover Submit page into the Parts Coordinator page.

The screenshot shows the 'Parts Coordinator' interface. At the top, there are navigation tabs: 'Simple Approval (1)', 'Clover Submit (1)', 'Price Sheet Requests (389)', 'Expiring Warranties (0)', 'Expiring Leases (0)', 'Expiring Licenses (0)', and 'Min/Max Inventory (0)'. Below these is a 'Submit to Clover' button. The form includes fields for 'Required Date' (09/28/2021), 'Payment Method' (Check), and 'Clover Account' (Clover Account [redacted]). A 'Search' button is located to the right. Below the form, there is a section for 'Order Items for Clover Submission' with columns for 'Asset', 'Shipping', and 'NSC Dropship'. An example item is shown: 'Order ID: 149531 - Lexmark Paper Feed Acrn Tires 2 Pack Pick Up Rollers (E260, E460DN E460DTN E462DTN ES460DN, X264DN MFP)' with a quantity of 1 and a retail price of \$32. The bottom of the page shows 'ver. 09/26/2021' and a 'Return' button.

- Included a count in our Clover Account drop down list.
- A dropdown filter is now available for the type of Clover Account wanted.

This close-up shows the 'Clover Account' dropdown menu. The 'Required Date' is 09/28/2021 and the 'Payment Method' is Check. The 'Clover Account' dropdown is highlighted in yellow and shows 'Clover Account 2' as the selected option.

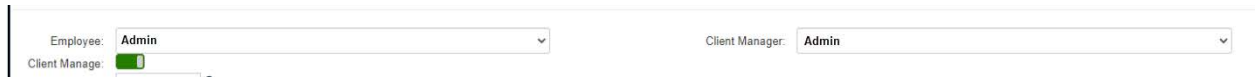
- “Supplier transmit setup” labels have been changed to “Clover Account” labels.
- The Clover tab now has a count.
- Reworked the Clover Submission logic.
- The Submit Tab now has a search button.

This close-up shows the 'Clover Submit (1)' tab, which now includes a count of 1.

Tickets

General

- Ticket update tab order has been updated to prevent tabbing to the delete button
- The delete button now displays a confirmation message before completing the delete process.
- Renamed “Master Ticket” to “Parent Ticket”.
- Add Child Tickets now populates the location and department dropdown lists.
- Assigned User for a ticket can now be differentiated between a Client Manager or an employee.

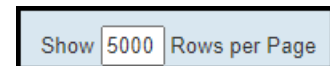
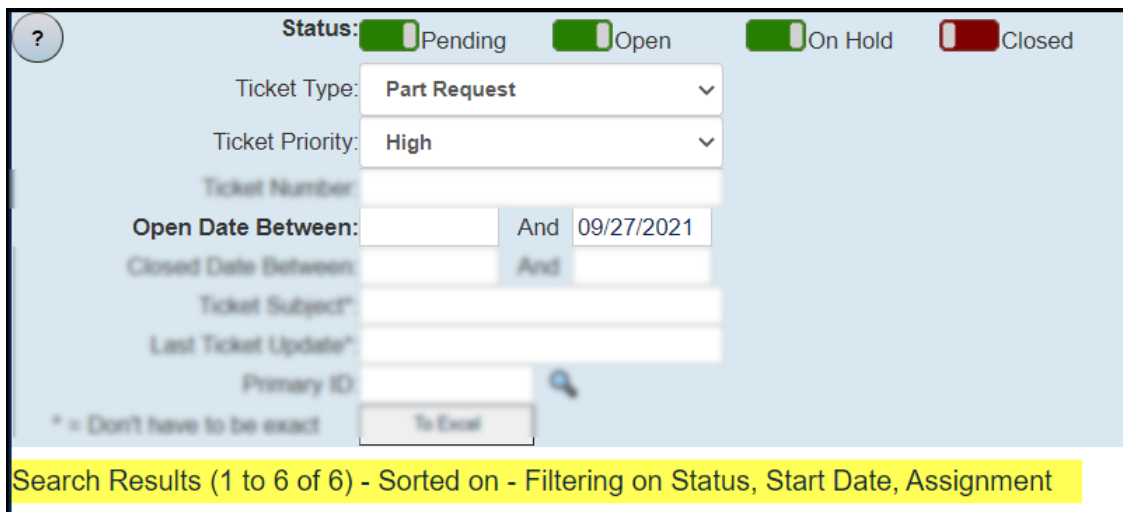


- Tickets without a filled in “Added By” field now default to the company name. They were added in the Client app using a generic Client account.

Ticket Searching

General

- Widened the “Rows Per Page” box to fully fit the number entered.
- The Rows per Page entry only allows a maximum of 5000 now.
- Verified the functionality of the filtering and sorting on the ticket search tabs.
- The counter for the archived ticket tab matches the result from the grid.
- Now displays the current active filters above the grid headers.
- Captions for active filters are now bolded.

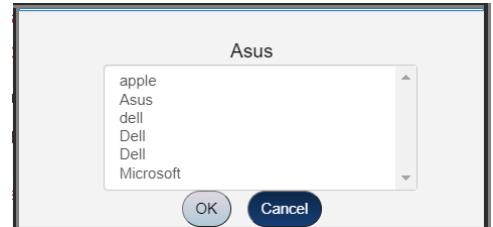
Archived Tickets

- The status filer is now hidden on the archived tickets tab (all tickets there are ‘Closed’)
- Fixed the sort functionality on the Archived Tickets tab.

Parts --Price Sheets

General

- Reordered the entry fields in the general section.
- Created a “Show More” button that will display additional entry fields, will function as a toggle between showing and hiding these additional entries.
- “Manufacturer” and “Mod/Ref No” have been re-labeled as “Make” and “Model” respectively.
- Converted the Make and Model entries from dropdown lists to text fields with autocomplete functionality. Includes magnifying glasses that will pull up a list of options.
- Added a new “Inactive and Replace” button that inactivates the current price sheet and makes a copy with an updated description, navigates to the new price sheet.
- Added new header buttons including “Duplicate”, “Don’t Approve and Delete”, and “Inactivate”.
- Added a new Order button that will create a new quick quote page with the price sheet already included in it.
- Updated the Inactive checkbox to a Recommend button selection including No Preference, Always, Never, and Inactive
- After Inactivating a price sheet, the return button will take the user back to the price sheet search page.
- When deleting a price sheet tied to an order with a status of “Submitted to Coordinator”, it will display a popup asking to confirm delete.
- Updated the text from “Save and Approve” to “Save and Activate”.
- Fixed the border of the Pricing section.
- The Vendor dropdown list is now properly populated.



Show Less

Man Desc:

Recommend: No Preference Always Never Inactive

Varranty Description:

Associated Assets

- You can associate multiple assets to a price sheet based on Make and Model
 - This is most useful for NSC which associates toners with printer.
- You can also un-associate assets individually.

Quick Quote/ Part Order

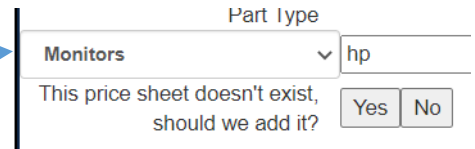
- Updated functionality for selecting price sheets, now functions on the page

Vendor	Part Type	Make	Model	Part Number	Description	Quantity	Internal Price	Markup %	Unit Price	Received
<input type="text"/>	Backups and peripherals	BE650G	3030161	APC Backup Battery UPS 650 8-Outlet 120V	1	72.03	30	93.64	One-Time	0

Part Type	Make:	Model:	Part Number:	Description:	Quantity:	Add
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

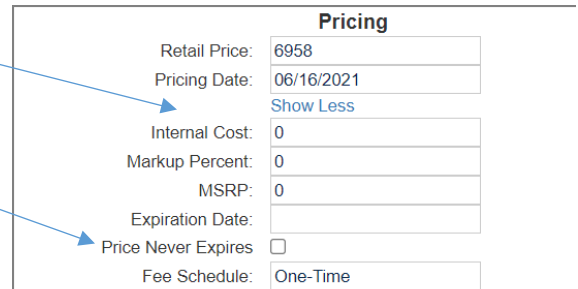
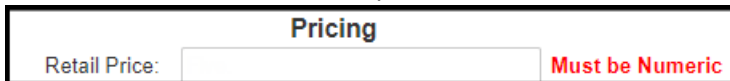
- Updating the internal price, markup or retail will update the value to the nearest cent value.

- “Description” is now selectable, navigating to the price sheet page. Returning from that page will navigate the user to the Quick Quote they were on.
- If a Quick Quote contains an inactive price sheet, a button named “Refresh, and replace obsolete price sheets” will appear. When pressed it will find any inactive price sheets and replace them.
- When hitting add to the order items, if the price sheet is unknown, includes a button to add a new price sheet.
- Quotes that are “Awaiting Approval” now have a “Mark as Approved” button
 - This allows the Parts Coordinator to move the quote forward in the process manually.
- POs now have a “Mark as Received” button.
 - This allows the Parts Coordinator to manually mark the PO as having been received.
- A submitted quick quote will now have the status: “Submitted to Coordinator”.



Pricing

- Created a “Show More/Show Less” button that will display additional entry fields, will function as a toggle between showing and hiding these additional entries.
- Added new checkbox “Price Never Expires” that will prevent the price from expiring.
- Prices are now rounded to the nearest penny.
- Fixed a bug with the “Must be Numeric” fields that allowed the user to enter multiple decimals.

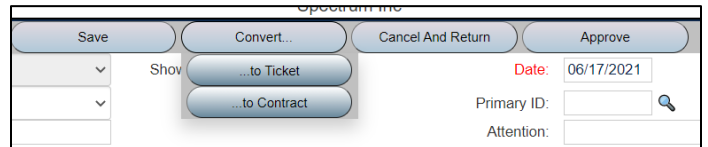
Saving

- When user enters unrecognized Manufacturer, displays popup asking if they want to add the manufacturer.
- When performing a save on a price sheet fails, will provide a popup message of the error.
- Updated logic behind the internal saving process.

Parts – Parts Ordering

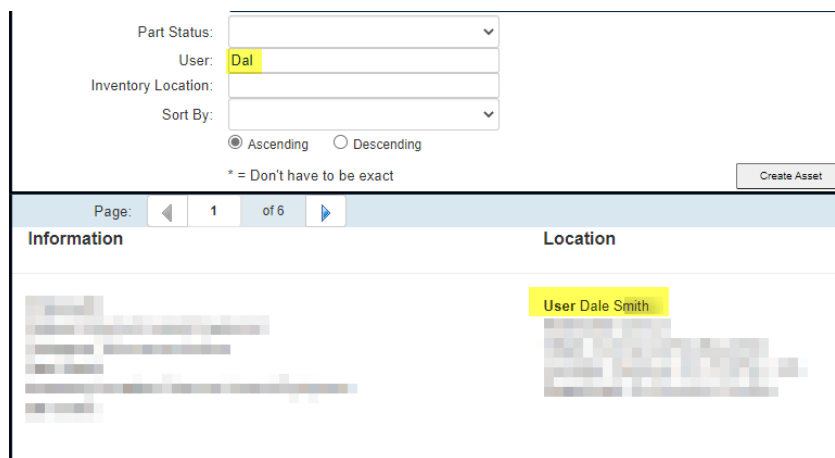
General

- Updated the new “Add Item” section at the bottom of the Part Order page. Fields that were previously dropdown lists are now textboxes that automatically get filled out as you type into them (Just like quick quotes)
- Added a “Confirm” button when editing an order that has already been submitted to Clover.
- Changing the internal price, sell price, or markup fields for order line items now recalculates the relevant values and rounds them to the nearest cent.
- The Convert button now appears before the order has been saved or submitted allowing users to generate tickets and contracts with fewer clicks.



Assets

- You can now search User and Username with partial names instead of exact names.



- Removed toggles in the Asset Search page.

Parts Coordinator

- Changed the tabs to better reflect the NSC process.

Parts Coordinator				
Simple Approval (0)	Clover Submit (1)			
Price Sheet Requests (389)	Expiring Warranties (0)	Expiring Leases (0)	Expiring Licenses (0)	Min/Max Inventory (0)

- XOptimized the logic when populating the Receiving tab.
- XAdded an additional tab “Pending Purchase” used for parts waiting on internal approval. (S
- Grid is now sortable on all of the column headers with arrows to signify the active sort order.

Part Orders Search:			
Status	Ticket	Company	Due Date

- Added column “Status”.
- XParts waiting on the internal approvals page now shown on the pending purchases tab.
- XUpdated the Aesthetics of quote requests.

- Now displays the Primary ID for the associated quote.
- XUpdated the list of statuses you can search by on the order and receiving tabs.
- Updated the information displayed by the “?” buttons.
- Removed duplicate Ticket ID column.
- The price sheet requests, expiring leases, licenses, warranties, and bulk inventory can now be seen on the Part’s Coordinator page.

Price Sheet Requests (6)	Expiring Warranties (110)	Expiring Leases (0)	Expiring Licenses (261)	Min/Max Inventory (5)
<div style="text-align: right;"> ? </div> <div style="text-align: right;"> Price Sheet Category: <input type="text"/> </div> <div style="text-align: right;"> General Description: <input type="text"/> </div> <div style="text-align: right;"> Name / Part No: <input type="text"/> </div> <div style="text-align: right;"> Requestor: <input type="text"/> </div> <div style="text-align: center;"> <input type="button" value="Search"/> </div>				
Show <input type="text" value="25"/> Rows per Page				
Price Sheet Requests: <input type="button" value="To Excel"/>				
Search Results (1 to 6 of 6) - Sorted on				
Name / Part No	General Description	Model Number	Manufacturer	Requestor
3001	48" touch display Version B	ViewMaster		Select
	48" touch display Version C			Select
123	32 viewscreen			Select
pn03	48" touch display Version D	model03		Select
pn04	sample price sheet 09-22a	model04		Select
123	49" Digital viewscreen	model03		Select
1				
ver. 09/26/2021 <input type="button" value="Return"/>				

Parts Approval

- Part Order page has a new button “Request Approval” which will navigate the user to a dropdown selection seek approval from.

Select Who Gets the Approval Request

Request Approval From:

been submitted for approval.

- When requesting approval, the requested user will receive an email that will allow them to approval them request from a hyperlink located in the email.
- Removed duplicate names within the request approval dropdown list.
- The buttons that allow you to add items to the order do not appear on the page once the order has

Vendors

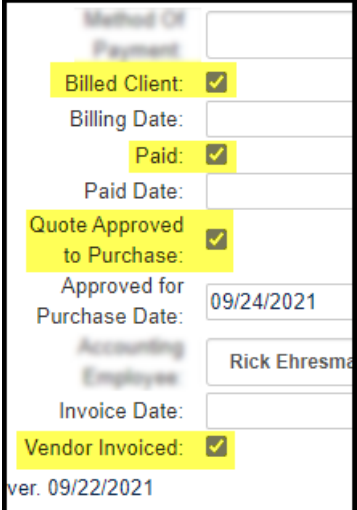
- Now saves the email from an associated Vendor.

Internal Approvals Search

- Updated the page layout
- Added a sortable “Order” column to the grid. This is now the default filter.
- There are now has three tabs; Clients Not Billed, Clients Not Paid, and PO Submitted. Each tab is outfitted with a count of the number of orders within each tab.

Internal Approvals

- Updated the page layout
- Added “Quote Approved to Purchase.” Checking this box allows the Parts Coordinator to create POs for the order and submit them to Vendors.
- Removed the “Save and Approve” button. Users must now manually toggle the Billed Client, Paid, and Quote Approved to Purchase checkboxes.
- Properly ordered the “Billed Client”, “Paid”, “Quote Approved to Purchase” and “Vendor Invoiced” checkboxes.
- A “Paid Date” field is now included.
- Removed extra UI elements (e.g. Inquiry button and Approval ID label).
- When “Quote Approved to Purchase” is checked and the order is saved, it will now update in the same fashion as “Save and Approve”.



Method Of Payment:

Billed Client:

Billing Date:

Paid:

Paid Date:

Quote Approved to Purchase:

Approved for Purchase Date: 09/24/2021

Accounting Employee: Rick Ehresma

Invoice Date:

Vendor Invoiced:

ver. 09/22/2021

POs/Receiving

- Multi-vendor quotes are now available
 - If you create a quote with multiple vendors it generates one PO for each vendor.
- Added “Next PO” and “Previous PO” buttons that appear when you’re viewing a PO record. These allow you to navigate between POs tied to the same Quote.

Parts – Bulk Ordering

General

- The “Save and Submit” button will now set a status of “Accounting Approved”.
- After submitting a bulk order, irrelevant buttons will now be disabled.
- Editing a bulk order that has been approved will now give a warning.
- Defaults for “Contact Name” and “Phone Number” are now based off of the logged in user.
- Default ship date is set to the next business day.
- Bulk Orders now display the order status in the header.
- Changed the order status “Accounting Approved” to “Approved by NSC”.

Clients

General

- Clients can now be assigned to different Clover Accounts.

Client Detail; Unassigned		
General	Company Info	Demographics
Locations/Sub Clients (13)	Departments (0)	Appointments (0)
Tasks (1)	Proposals (0)	Former Opportunities (0)
Attachments (0)	Contracts (0)	Assigned Employees

	Save	Clear Changes	Add Lead	Client Info
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Customer Name:

Abbreviation:

Address1:

Address2:

City:

State:

Zip:

Country:

Website:

Clover Account: **Clover Account 2**

User Name:

- Properly formatted the Clover Account drop down list.

CRM

Contracts

- When a new contract is approved it no longer displays multiple popup messages at once.

Client Contacts

- Removed duplicate client contact user records and updated logic to prevent duplicate contacts.

Tech Management

Scheduling Dashboard

- New employees are now automatically assigned to holidays.

Group/Employee	12/27/2021 Monday		12/28/2021 Tuesday		12/29/2021 Wednesday		12/30/2021 Thursday		12/31/2021 Friday		1/1/2022 Saturday		1/2/2022 Sunday	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
Executives														
AnEmployee	Helpdesk	Helpdesk	Helpdesk	Helpdesk	Helpdesk	Helpdesk	Helpdesk	Helpdesk	Holiday	Holiday	Helpdesk	Helpdesk	Helpdesk	Helpdesk

Tasks

- Created process to remove inactive employees.

App Management

Parts Setup

- While in the general tab, we now allow for the default Classification setting for new assets to be changed.

Default Classification: Bulk Asset Basic Asset Major Asset Show All

- Each Part Status now has its own color associated with it

PartStatus Detail

Save
Cancel
Add
Delete

Part Status:

Available:

Inactive:

Color:

- Removed the "Simplified Ordering" toggle.

Reporting

Reporting Font

- Updated the font to Ariel 12 pt. on the following reports
 - Time by Customer
 - Time Clock
 - Quick Quotes
 - Timesheet by Cust and BT With Desc
 - Timesheet by Cust, BT with Desc by Loc
 - Time By Ticket and Bill Type
 - Hour Usage by Employee
 - Billing Summary By Client
 - Time By Employee Summary
 - Timesheet by Customer and Ticket Type
 - Timesheet by Customer and Bill Type
 - Timesheet by Cust, BT by Location
 - Timesheet by Customer, Ticket Type and Category
 - Time By Ticket
 - Expenses by Client
 - Expenses by Employee
- Time by Admin Summary now displays the actual clocked in time.
- Selecting employees defaulted to active only.
- Reports now properly filter on Bill Type

Ticket:

Bill Type: All Bill Types Billable Extra-Billable Non-Billable

- If no results 06/15/2021 would be returned by your report criteria, we pop up a message indicating that no results were found instead of generating a blank report document.

Additional Reports

- **New Report (Export to Excel): Client Helpdesk Detail**
- **New Report (Export to Excel): Tech Summary by Day**
- **New Report: (Export to Excel) Aging Ticket**

	A	B	C	D	E	F	G	H	I
1	Admin	ClientAbbreviation	ticketID	TTAbbreviation	subject	Open Date	LastUpdatedDate	StatusDisplay	LastUpdate
2	Admin 1		198243	P	Server Clusters & Consolidate Install Locations	02/23/2018	07/29/2020	Open	Project is on hol
3	Admin 2		219146	P	Quote - Poliwall and Barracuda	11/29/2018	08/07/2020	Open	Update from Jol
4	Admin 3		235496	P	Customer Login and Registration Site Software Deve	07/01/2019	08/04/2020	On Hold	Called Amber re
5	Admin 2		236213	P	Website Project 2019	07/15/2019	04/03/2020	Open	DateStartWorkS
6	Admin 3		237918	P	Web Application Development Project	08/08/2019	07/24/2020	On Hold	All billing is up tc
7	Admin 1		240270	P	- New File Server	09/11/2019	07/29/2020	Open	Update from We
8	Admin 3		241471	P		10/01/2019	08/04/2020	Open	Need a quote fo
9	Admin 2		245259	P	LoginTC Quote	11/25/2019	07/29/2020	On Hold	This project is or
10	Admin 1		245294	P	Migration to Office 365	11/26/2019	08/07/2020	Open	Brian will be inst

Email

Email notifications

- Creation of new Email notification Timesheet Edited
- Receive an email notification for every step in the ordering process.
- “Order was completed” email sent upon “Save and Submit” for bulk orders.

Miscellaneous

User Dashboard

- Dates on the Dashboard with a time of “12:00 AM” now show only the dates; not the time.