



Release Notes

Nov 8, 2021

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

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## Tickets

### General

- Renamed Master Ticket to Parent Ticket.
- Ticket update tab order has been updated to prevent tabbing to the delete button straight away.
- The delete button now displays a confirmation message before completing the delete process.
- Assigned User for a ticket can be differentiated between a Client Manager or an employee.

Employee: Admin Client Manager: Admin

Client Manager: Admin

- Add Child Tickets now populates the location and department dropdown lists.
- In the ticket history tab, tickets that don't have their "Added By" field filled out will default to the company name in the "Employee" column.
- Ticket description lengths have been greatly increased.

## Ticket Searching

### General

- Widened the "Rows per Page" box to fully fit up to four digits.
- Sorting the grid on the Archived Tickets tab no longer changes the data being shown. (It just sorts the data.)
- The Rows per Page entry only allows a maximum of 5000.
- 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.

Show 5000 Rows per Page

Ticket Number:

Open Date Between:  And 06/18/2021

Closed Date Between:  And

Ticket Subject\*:

Last Ticket Update\*:

Primary ID:

\* = Don't have to be exact

Search Results (1 to 25 of 246264) - Sorted on - Filtering on Start Date, Assignment

- Fixed a bug that caused an error message when sorting a ticket's part orders by their Order Date.

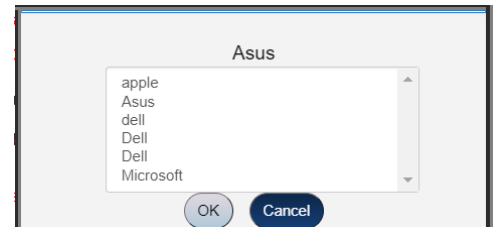
### Archived Tickets

- Removed the status toggles for "Pending", "Open", "On Hold", and "Closed" while in the archived tickets tab.
- Fixed the sort functionality so that it still shows archived tickets after sorting on a column.
- Fixed a bug that prevented users from sorting Archived Tickets on the ticket search page.

## 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.
- Addition of “Inactive and Replace” button that inactivates the current price sheet and makes a copy with an updated description, navigates to the new price sheet.
- Addition of new header buttons including “Duplicate”, “Don’t Approve and Delete”, and “Inactivate”.
- Addition of an Order button that will navigate to the 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 will take the user back to the price sheet search page.
- Updated the text from “Save and Approve” to “Save and Activate”
- Fixed the border of the Pricing section.
- Fixed the alignment of the Recommended section on a price sheet.



Man Desc:

Recommend: ☒ No Preference ☐ Always ☐ Never ☐ Inactive

Warranty Description:

**General**

Classification: ☐ Bulk Asset ☒ Basic Asset ☐ Major Asset

Price Sheet Category:

Make:

Model:

Name / Part No:

General Description:   
[Show Less](#)

Man Desc:

Recommend: ☒ No Preference ☐ Always ☐ Never ☐ Inactive

Warranty Description:

Lease Description:

License Type:

Software Assurance:

- A message now pops up alerting the user when they duplicate price sheets.
- Replaced and duplicated price sheets are now sent back to the Price Sheet Request tab of the Parts Coordinator page.
- Clicking “Refresh and Replace” now displays a message that alerts the user.

- The “Return to Search” button on a price sheet will now return you to the Parts Coordinator page.

### Associated Assets

- Allows us to bulk associate assets by selecting a make and model

### Quick Quote/ Part Order

- Updated functionality for selecting price sheets, now functions on the page (EX 1)
- 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 use 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.

Part Type  
Monitors hp

This price sheet doesn't exist, should we add it? Yes No

EX 1

Vendor	Part Type	Make	Model	Part Number	Description	Quantity	Internal Price	Markup %	Unit Price	Received
<span>▼</span>	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: 1 Add Add from Search

- When hitting add to the order items, if the price sheet is unknown, includes a button to add a new price sheet.
- Added a “Mark as Approved” button for quotes with a status of “Awaiting Approval”. This allows the Parts Coordinator to move the quote forward in the process manually.
- Added a “Mark as Received” button that appears on the PO page. This allows the Parts Coordinator to manually mark the PO as having been received.
- After clicking “Add Item” at the bottom of the part order page (below the line items), any filled out fields in that section return to their default states including having a Quantity of 1.
- New Quick Quote items will now be marked as “Submitted to Coordinator”.
- Changed “Convert to contract” to “Convert to proposal”.

Quick Quote - 11270 -

Save Submit to Coordinator Convert... Cancel Order

Customer: ▼ Show Leads: 0 to Ticket to Proposal Date: 11/08/2021

Loc/Sub Client: ▼ Primary ID: ▼

Shipping Address: ▼ Attention: ▼

City/State/Zip: ▼

Code: ▼

Employee	Ticket ID	Ship Date	Ship Via	Terms
<span>▼</span>	<span>▼</span>	<span>▼</span>	<span>▼</span>	<span>▼</span>

This item shows off the “Convert” button changes.

Comments: ▼

Contact Name: ▼

Phone: ▼ Ext: ▼

Cell Phone: ▼ Email: ▼

Order Items:

## 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 prices with too many decimal places. (Ex: \$25.567)

Pricing	
Retail Price:	6958
Pricing Date:	06/16/2021
	<a href="#">Show Less</a>
Internal Cost:	0
Markup Percent:	0
MSRP:	0
Expiration Date:	
Price Never Expires	<input type="checkbox"/>
Fee Schedule:	One-Time

Pricing	
Retail Price:	<input type="text"/> <span style="color: red;">Must be Numeric</span>

## Saving

- When user enters an 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.
- The “Save and Activate” button on a price sheet now takes you back to the Price Sheet Requests tab of the Part Coordinator page.

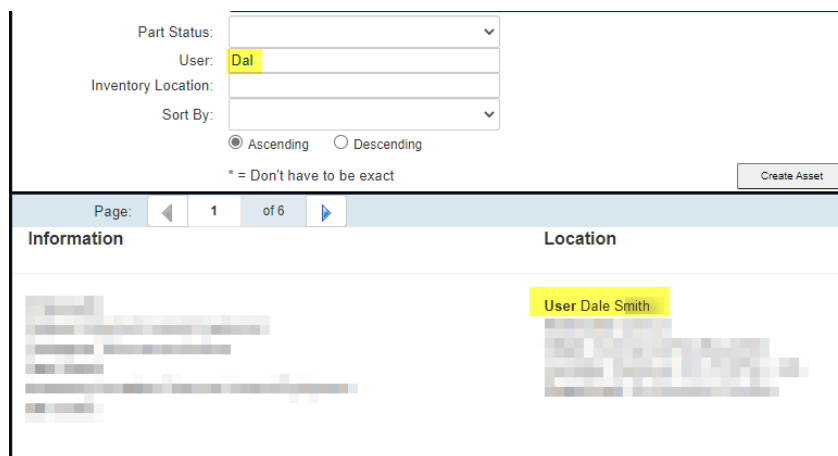
## Parts – Parts Ordering

### General

- Removed duplicate client contact user records and updated logic to prevent duplicate contacts.
- Created process to remove inactive employees.
- Updated the Internal Approvals and Internal Approvals Search pages.
- 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.
- 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.
- When filling out a new part order, if there is more than one location is available, no default will be selected.
- Overtime entries now require techs to enter in notes before they can be submitted.

### Assets

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



Part Status:

User:

Inventory Location:

Sort By:

☒ Ascending ☐ Descending

\* = Don't have to be exact


Create Asset

Page: 1 of 6

Information	Location
	User Dale Smith

### Parts Coordinator

- Optimized the logic when populating the Receiving tab.
- Added an additional tab “Pending Purchase” used for parts waiting on internal approval.



Part Orders Search:

Status  Ticket  Company  Due Date

- Grid is now sortable on all of the column headers with arrows to signify the active sort order.



- Added additional column "Status".

Exec: Management Team Email

**Parts Coordinator**





Quote Requests (4)	Pending Purchase (3)	Purchased (9)
Price Sheet Requests (3)	Expiring Warranties (139)	Expiring Leases (0)

☒ Submitted to Coordinator  
 Search Status: ☒ Approval Declined  
☐ Awaiting Approval

Search Order ID:   
 Search Client:   
 Search Ticket ID:   
 Order Date Between:

Page: ◀ 1 of 1 ▶

**Quote Requests:**


Order	Status	Ticket	
11240 First Part: sample price sheet 09-22a Count: 1	Submitted to Coordinator	0	
11239 First Part: 48" touch display Version D Count: 1	Submitted to Coordinator	0	
11235 First Part: 48" touch display Version B Count: 2	Submitted to Coordinator	288016	
11227 First Part: Asus Prime H370M-Plus / CSM LGA 1151 mATX Intel Motherboard Count: 1	Submitted to Coordinator	0	

- Parts waiting on the internal approvals page now shown on the pending purchases tab.
- Updated the button design for individual quote requests.

Save
Convert...
Cancel And Return
Approve

Show ▼  
▼

...to Ticket  
...to Contract

Date: 06/17/2021  
 Primary ID:    
 Attention:

- There is now an Order column that displays the Primary ID for the associated quote.

Part Orders Search: Page: 1 of 1 Page Size: 20

Order	Status	Ticket	Approved?	Shipped?	Received?	Company	Due Date
11240	Submitted to Coordinator	0	Approved? <input checked="" type="checkbox"/>	Shipped? <input checked="" type="checkbox"/>	Received? <input checked="" type="checkbox"/>		9/22/2021
First Part: sample price sheet 09-22a Count: 1							
11239	Submitted to Coordinator	0	Approved? <input checked="" type="checkbox"/>	Shipped? <input checked="" type="checkbox"/>	Received? <input checked="" type="checkbox"/>		9/22/2021
First Part: 48" touch display Version D Count: 1							
11235	Submitted to Coordinator	288016	Approved? <input checked="" type="checkbox"/>	Shipped? <input checked="" type="checkbox"/>			9/22/2021

- Updated 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.
- Fixed the spelling of the word "Quote" on the parts coordinator page.
- The "Status" column of the "Orders" tab now properly displays data.
- Clicking on a company under the "Company Name" column will now take you to that company's page.

Parts Coordinator

Quote Requests (5)	Pending Purchase (4)	Purchased (9)	Receiving (1)	Orders (18)
Price Sheet Requests (9)	Expiring Warranties (155)	Expiring Leases (2)	Expiring Licenses (334)	Min/Max Inventory (5)

☐ Awaiting Submission  
☒ Submitted to Coordinator  
☒ Approval Declined  
☒ Done Snoozing  
☒ Awaiting Approval  
☒ Approved  
☒ Awaiting Invoice  
☒ Accounting Approved  
☐ In Progress  
☐ Completed  
☐ Converted to Contract  
☐ Converted to Ticket  
☐ Order Cancelled  
☐ Snoozed

Search Status:

Search Order ID:   
 Search Client:   
 Search Ticket ID:   
 Order Date Between:  And

Page: 1 of 1 Page Size: 20

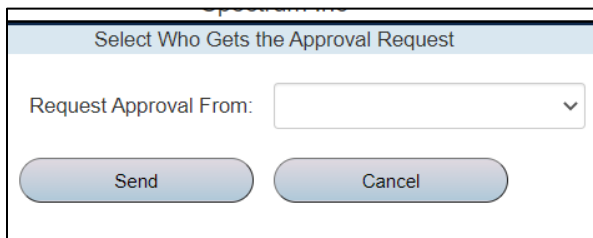
Order	Status	Ticket	Approved?	Shipped?	Received?	Company	Due Date
11214	Approved	0	Approved? <input checked="" type="checkbox"/>	Shipped? <input checked="" type="checkbox"/>	Received? <input checked="" type="checkbox"/>	Company A	9/8/2021

First Part: Dell Latitude 5510 Laptop - i7 Processor, Win10Pro, MS Office Home & Business 19, 16GB Ram, 256GB Class 35 SSD, 15.6" Display with Camera & Mic, 1Yr Hardware Warranty Count: 1

- When navigating from the Parts Coordinator page, clicking on a price sheet's "Return" button will take you back to the Parts Coordinator.

## Parts Approval

- Part Order page has a new button "Request Approval" which will navigate the user to a dropdown selection seek approval from.
- 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 been submitted for approval.
- Fixed a bug where comments were deleted after approval.

- Removed old employees from the “Request Approval” drop down list.
- When selecting an employee to request for approval from, we now sort the “Request Approval” list by type and then first name.

## Vendors

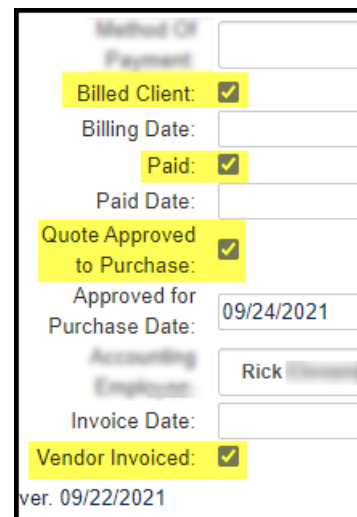
- Now saves the email from an associated Vendor.

## Internal Approvals Search

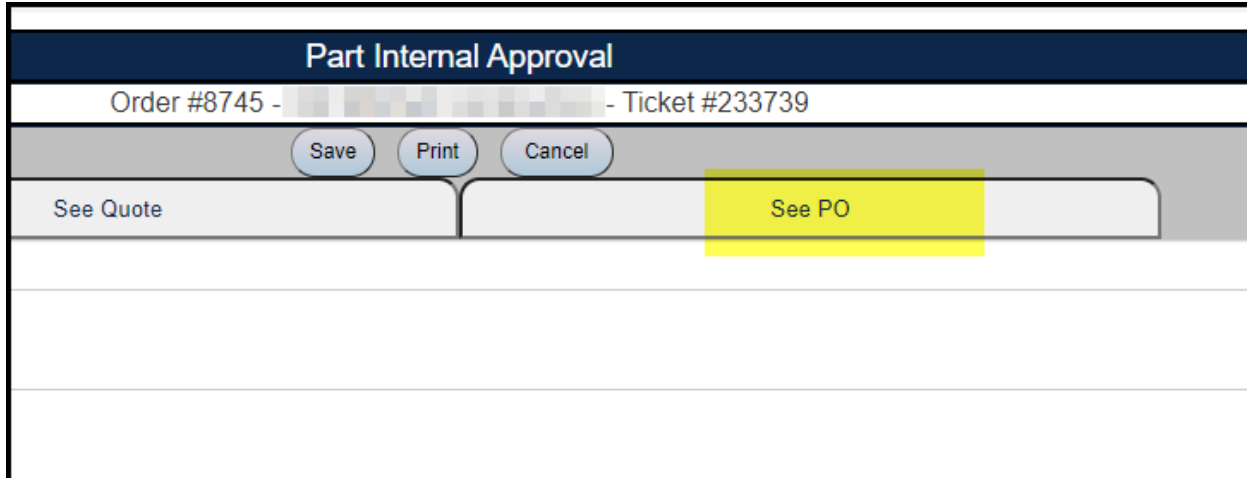
- Added a sortable “Order” column to the grid. This is now the default filter.
- There are now has three tabs; Clients Not Billed, Clients Not Paid, and PO Submitted. Each tab is outfitted with a count of the number of orders within each tab.

## Internal Approvals

- 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”.

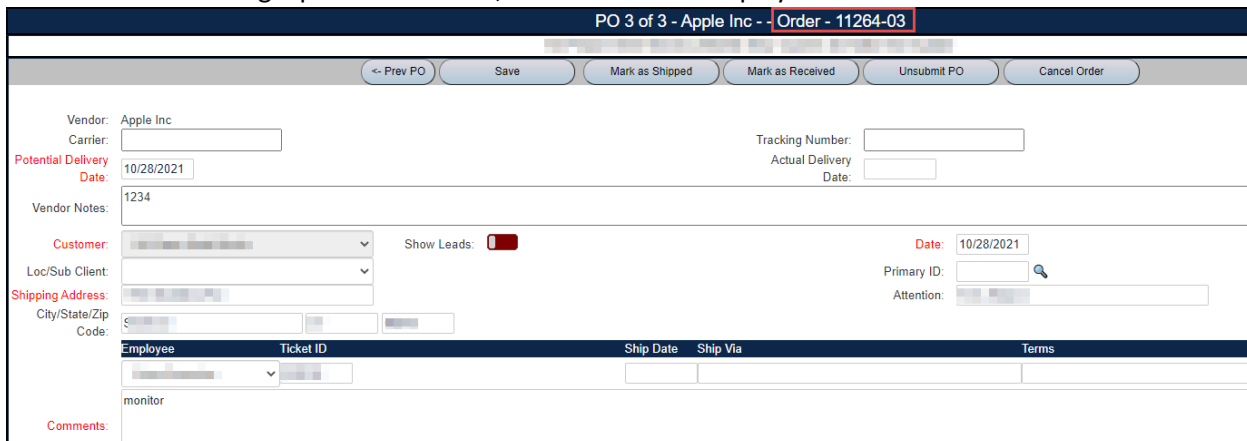


- Renamed “See Vendor Req” to “See PO”.



## POs/Receiving

- 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.
- Fixed a bug that prevent users from returning to the Parts Coordinator after they used the “Next PO” or “Prev PO” buttons on a purchased order.
- When viewing a purchased order, the header now displays the current item number.



## Clients

### General

- Former clients are now set to inactive.

### Locations

- Added a “Show Inactive” toggle, which defaults to false.

## CRM

### Contracts

- When a client creates a new contract no longer displays multiple popup messages.

## 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

## 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

- In the Part Status tab, when you select a part, you can now set each Asset category to its own defined color.

PartStatus Detail

Save

Cancel


Add

Delete

Part Status:

Available: ☒

Inactive: ☐

Color:  

### HR Setup

- Changed the default filter in the MBO tab of the HR Setup page. It now defaults to "All Active Employees".

## 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

06/15/2021

pop up a message indicating that no results were found instead of generating a blank report document.

- If no results would be returned by your report criteria, we

### 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
	Admin	ClientAbbreviation	ticketID	TTAbbreviation	subject	Open Date	LastUpdatedDate	StatusDisplay	LastUpdate
1	Admin 1		198243	P	Server Clusters & Consolidate Install Locations	02/23/2018	07/29/2020	Open	Project is on hol
2	Admin 2		219146	P	Quote - Poliwall and Barracuda	11/29/2018	08/07/2020	Open	Update from Jol
3	Admin 3		235496	P	Customer Login and Registration Site Software Deve	07/01/2019	08/04/2020	On Hold	Called Amber re
4	Admin 2		236213	P	Website Project 2019	07/15/2019	04/03/2020	Open	DateStartWorkS
5	Admin 3		237918	P	Web Application Dvelopment Project	08/08/2019	07/24/2020	On Hold	All billing is up tc
6	Admin 1		240270	P	- New File Server	09/11/2019	07/29/2020	Open	Update from Wi
7	Admin 3		241471	P		10/01/2019	08/04/2020	Open	Need a quote fo
8	Admin 2		245259	P	LoginTC Quote	11/25/2019	07/29/2020	On Hold	This project is or
9	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

## Miscellaneous

### User Dashboard

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

The screenshot shows the 'Items Due' dashboard. At the top, there are filters for 'Show results for...' (Today, the next 7 days, the next 30 days) and 'Use the sliders to turn search filter results ON or OFF'. Below this, there are several filter categories with counts: Document Approvals (12), Tasks Due (3), Incomplete User Defined Forms (1), Tickets Due (7), Project Tickets Due (1), Bulk Orders (9), Tickets with Follow-up Due (7), and Software / License (7). The main table has columns: Heat, Item, Ticket, Client, and Due Date. The 'Due Date' column shows dates like '10/2/2019 9:55:00 AM', '3/2/2020 11:54:00 AM', '4/20/2020 9:21:00 AM', '02/03/2021', and '02/03/2021'. A green box highlights the date '02/03/2021' and the text 'No Time Shown'.

### Rich Text

- The rich text has been updated to allow pictures and a variety of other improvements in the textbox.

The screenshot shows the 'Quick Ticket Add' form. It has fields for Ticket Type, Category, Customer Name, Loc/Sub Client, Department, Contact Name, Primary ID, and Subject. There is an 'Add Client' button. Below these fields is a rich text editor with a toolbar containing options like Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Image, Table, and others. The description field contains the Business Manager 365 logo. At the bottom, there is an 'Employee' dropdown menu set to 'Unassigned' and an 'Assign to me' button. The version number 'ver. 12/31/1600' is displayed at the bottom left.

## Markup Calculator

- Fixed a bug with the markup calculator that was throwing off unit prices.

Order Items:

Vendor	Part Type	Make	Model	Part Number	Description	Quantity	Internal Price	Markup %	Unit Price	Received
<div><div></div><div></div></div>	Laptops		Latitude 5510 - Option 1	Latitude 5510	Dell Latitude 5510 Laptop - i7 Processor; Win10Pro; MS Office Home & Business 19; 16GB Ram; 256GB Class 35 SSD; 15.6" Display with Camera & Mic; 1Yr Hardware Warranty	1	\$ 196.80	21.95	\$ 240.10	One-Time 0