Business MANAGER 365™

Release Notes

Nov 8, 2021

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

LibertyOne SOFTWARE, LLC.

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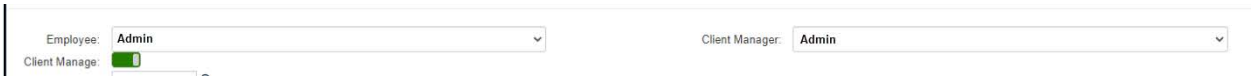
Tickets

General

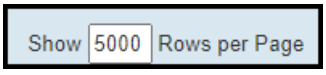
- Renamed Master Ticket to Parent Ticket.
- Ticket update tab order has been updated to prevent tabbing to the delete button straight away.
- The delete button now displays a confirmation message before completing the delete process.
- Assigned User for a ticket can be differentiated between a Client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



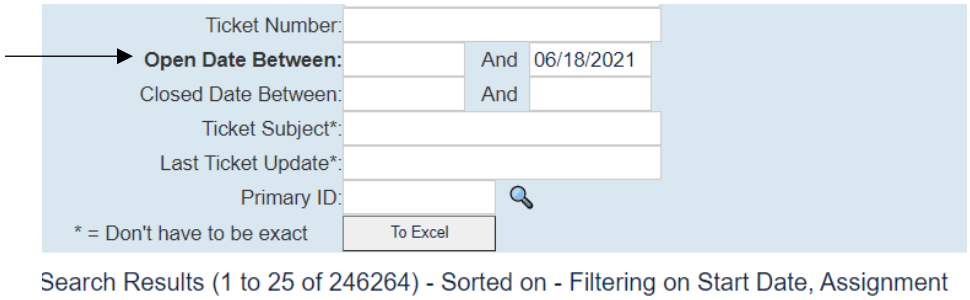
- Add Child Tickets now populates the location and department dropdown lists.
- In the ticket history tab, tickets that don't have their "Added By" field filled out will default to the company name in the "Employee" column.
- Ticket description lengths have been greatly increased.

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.



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

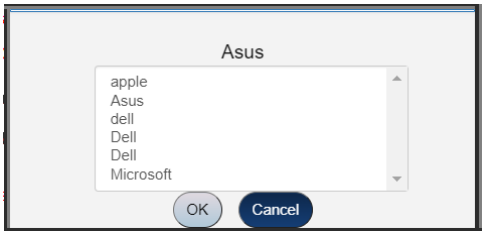
Archived Tickets

- 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.

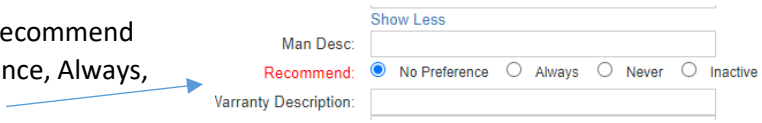
Parts --Price Sheets

General

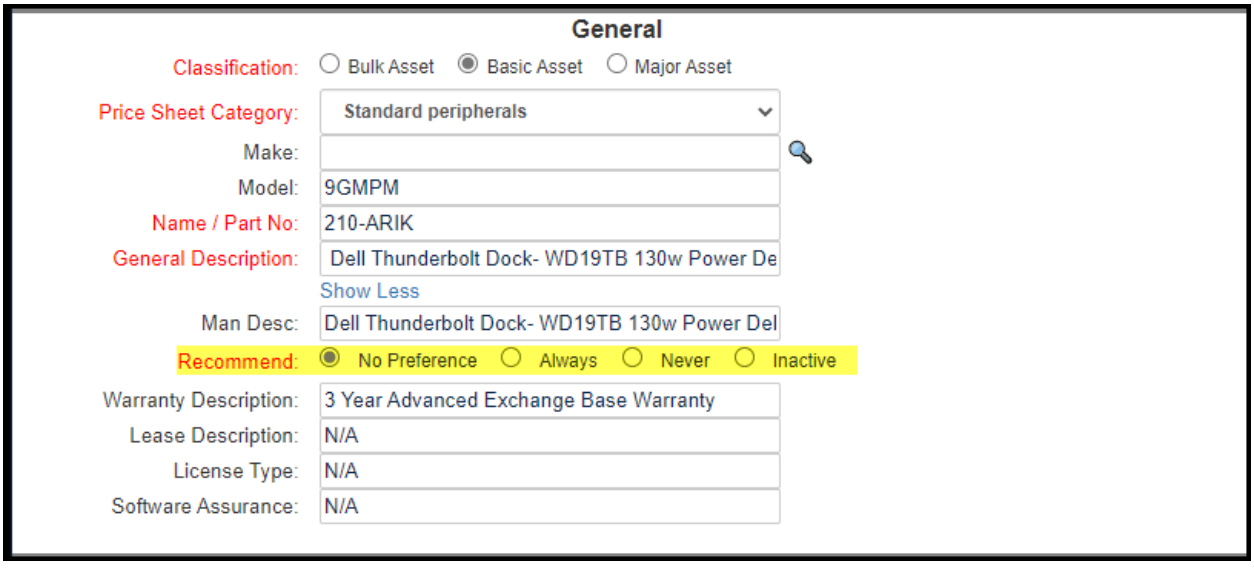
- Reordered the entry fields in the general section.
- Created a “Show More” button that will display additional entry fields, will function as a toggle between showing and hiding these additional entries.
- “Manufacturer” and “Mod/Ref No” have been re-labeled as “Make” and “Model” respectively.
- Converted 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.



- 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.

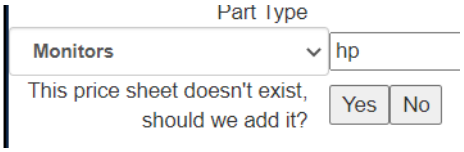
- The “Return to Search” button on a price sheet will now return you to the Parts Coordinator page.

Associated Assets

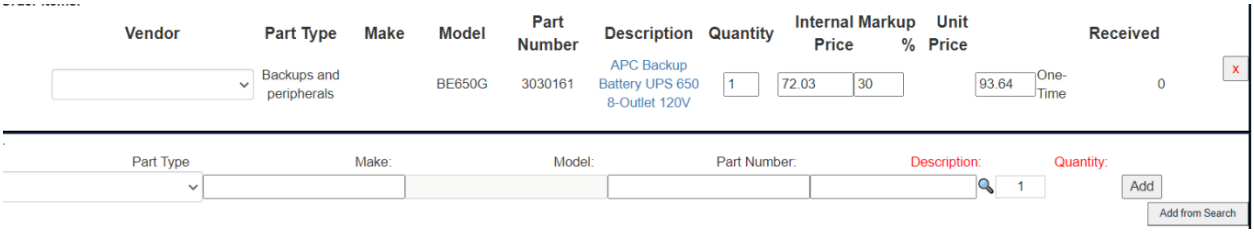
- Allows us to bulk associate assets by selecting a make and model

Quick Quote/ Part Order

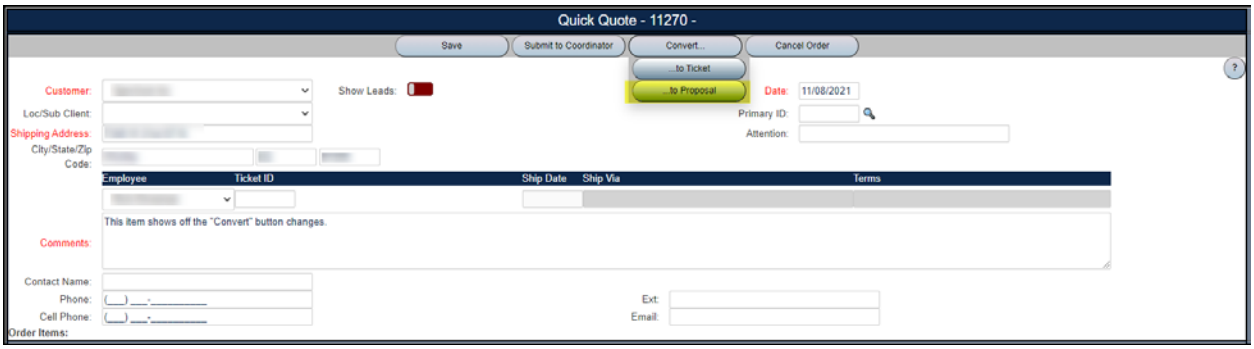
- Updated functionality for selecting price sheets, now functions on the page (EX 1)
- Updating the internal price, markup or retail will update the value to the nearest cent value.
- “Description” is now selectable, navigating to the price sheet page. Returning from that page will navigate the use to 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.



EX 1

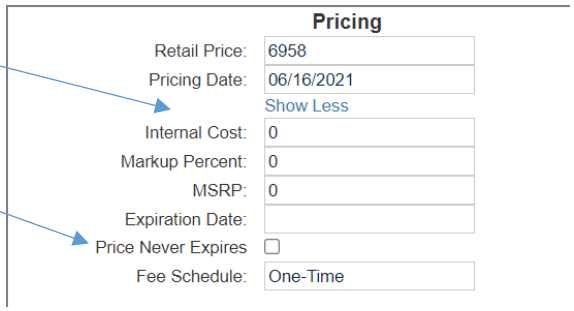


- When hitting add to the order items, if the price sheet is unknown, includes a button to add a new price sheet.
- Added a “Mark as Approved” button for quotes with a status of “Awaiting Approval”. This allows the Parts Coordinator to move the quote forward in the process manually.
- Added a “Mark as 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”.



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)



Saving

- When user enters an unrecognized Manufacturer, displays popup asking if they want to add the manufacturer.
- When preforming 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.

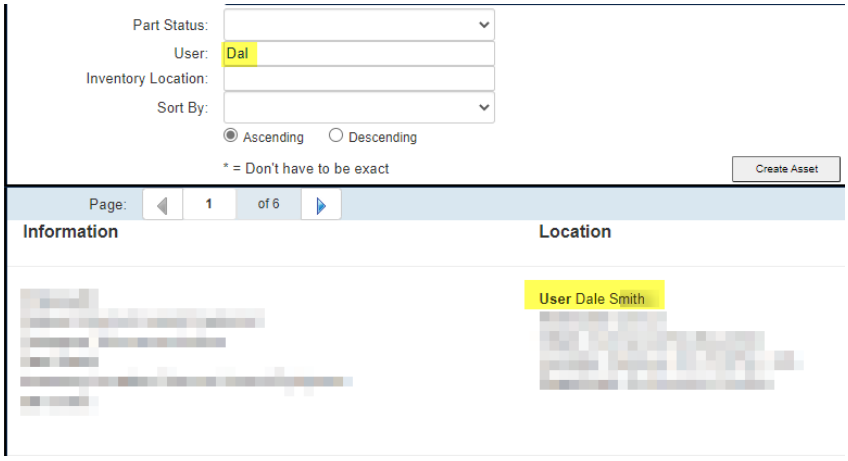
Parts – Parts Ordering

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.

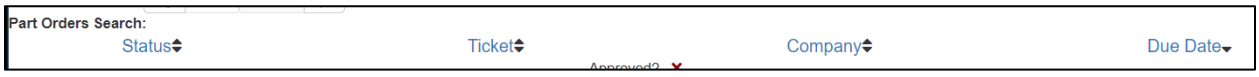
Assets

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



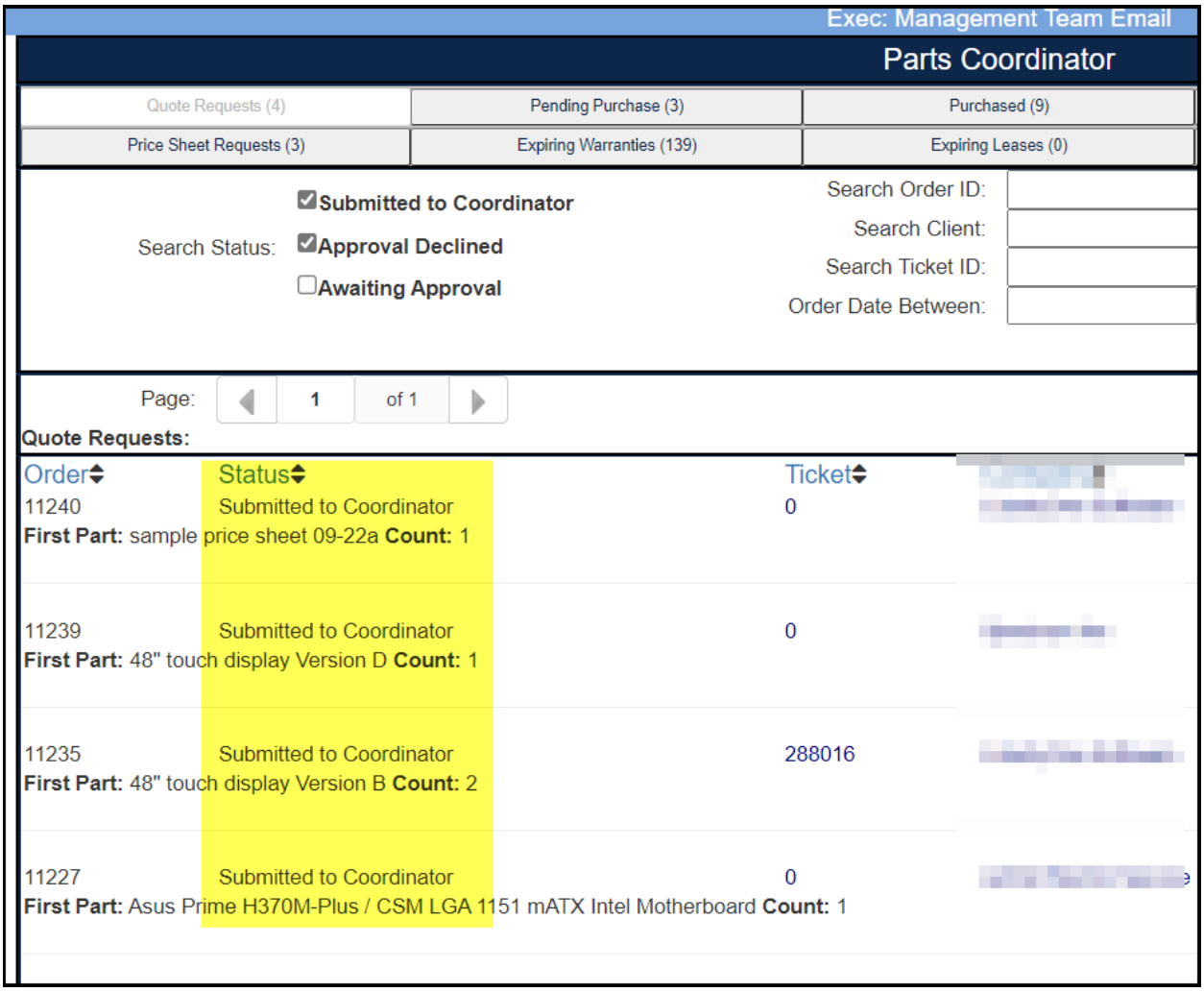
Parts Coordinator

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

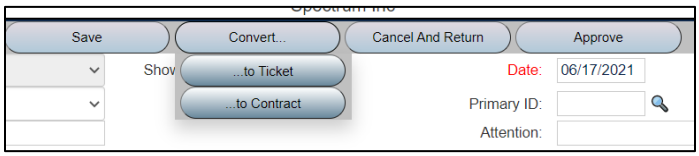


- Grid is now sortable on all of the column headers with arrows to signify the active sort order.

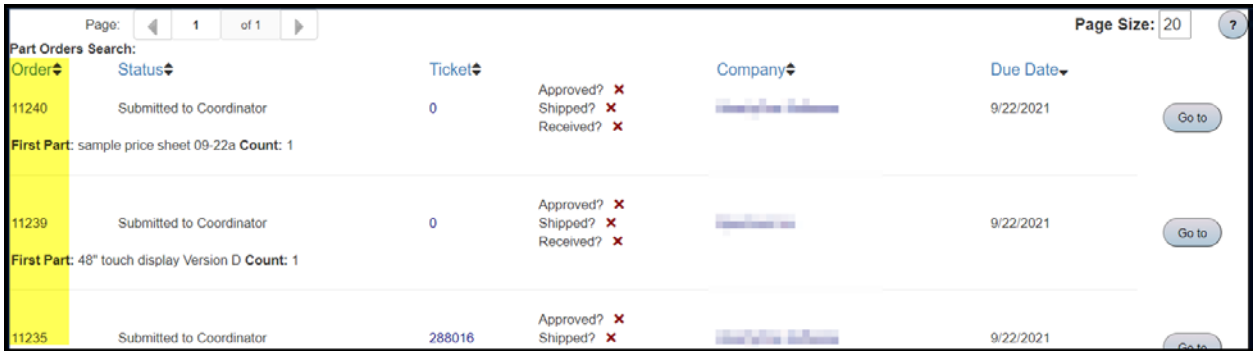
- Added additional column “Status”.



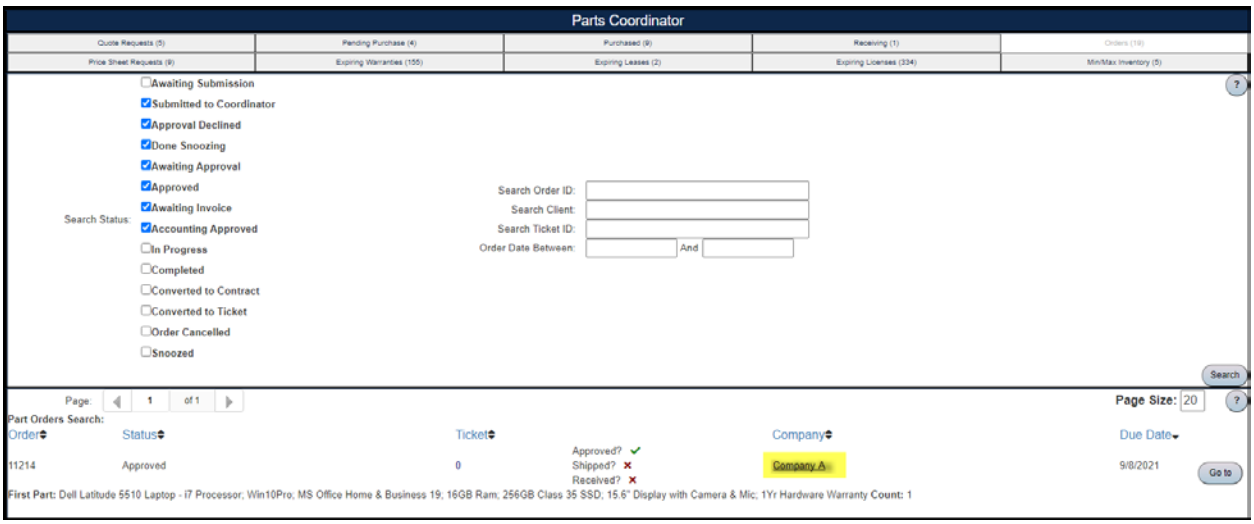
- Parts waiting on the internal approvals page now shown on the pending purchases tab.
- Updated the button design for individual quote requests.



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



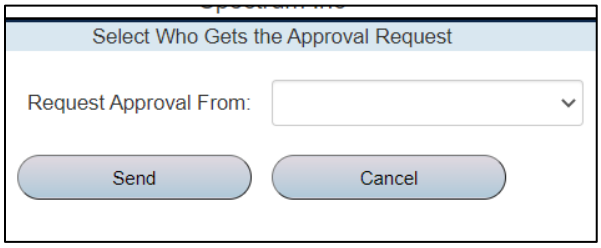
- Updated the list of statuses you can search by on the order and receiving tabs.
- Updated the information displayed by the "?" buttons.
- Removed duplicate Ticket ID column.
- The price sheet requests, expiring leases, licenses, warranties, and bulk inventory can now be seen on the Part's Coordinator 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.



- 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.



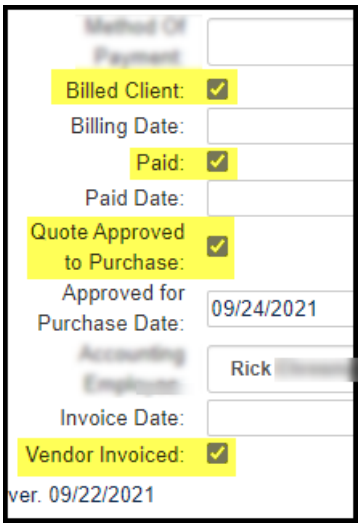
- Removed duplicate names within the request approval dropdown list.
- The buttons that allow you to add items to the order do not appear on the page once the order has been submitted for approval.
- Fixed a bug where comments were deleted after approval.
- Removed old employees from the "Request Approval" 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

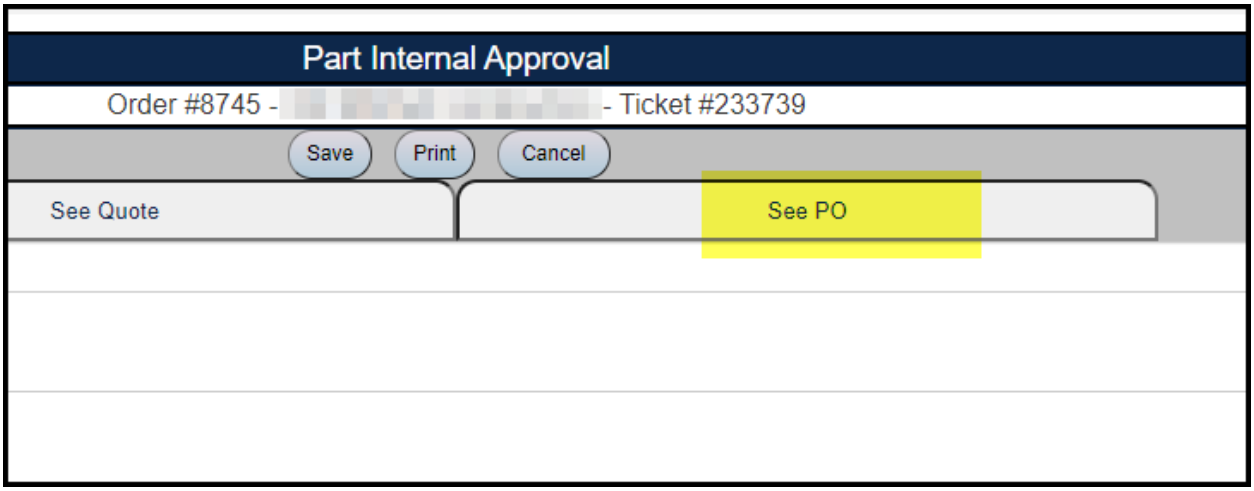
- Added a sortable "Order" column to the grid. This is now the default filter.
- There are now has three tabs; Clients Not Billed, Clients Not Paid, and PO Submitted. Each tab is outfitted with a count of the number of orders within each tab.



Internal Approvals

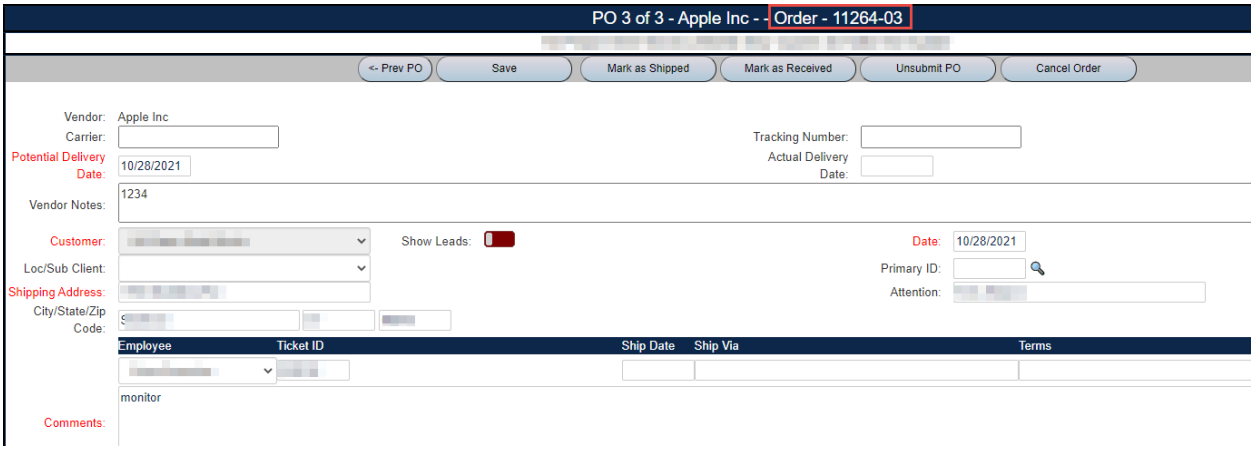
- Added "Quote Approved to Purchase." Checking this box allows the Parts Coordinator to create POs for the order and submit them to Vendors.
- Removed the "Save and Approve" button. Users must now manually toggle the Billed Client, Paid, and Quote Approved to Purchase checkboxes.
- Properly ordered the "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

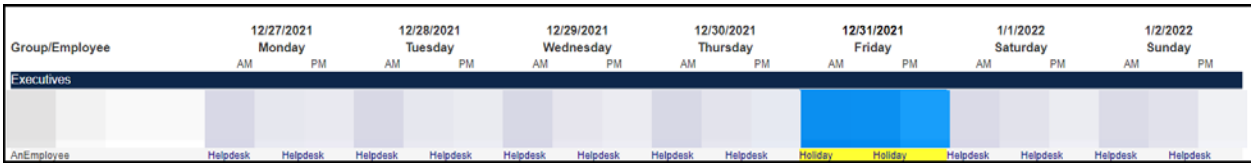
Contracts

- 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.

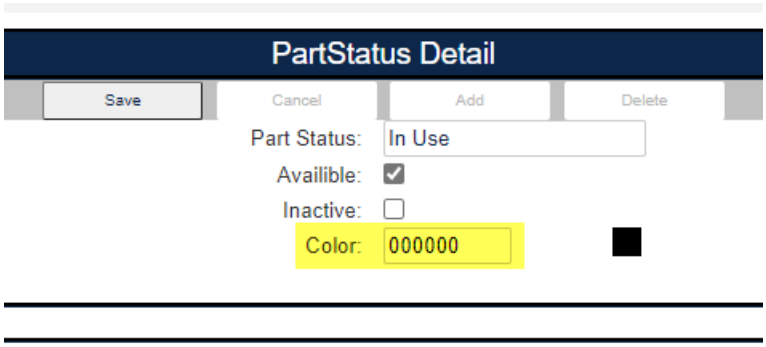


App Management

Parts Setup

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

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



HR Setup

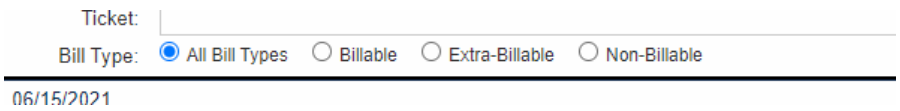
- Changed the default filter in the MBO tab of the HR Setup page. It now defaults to “All Active Employees”.

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



- If no results 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

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

Email

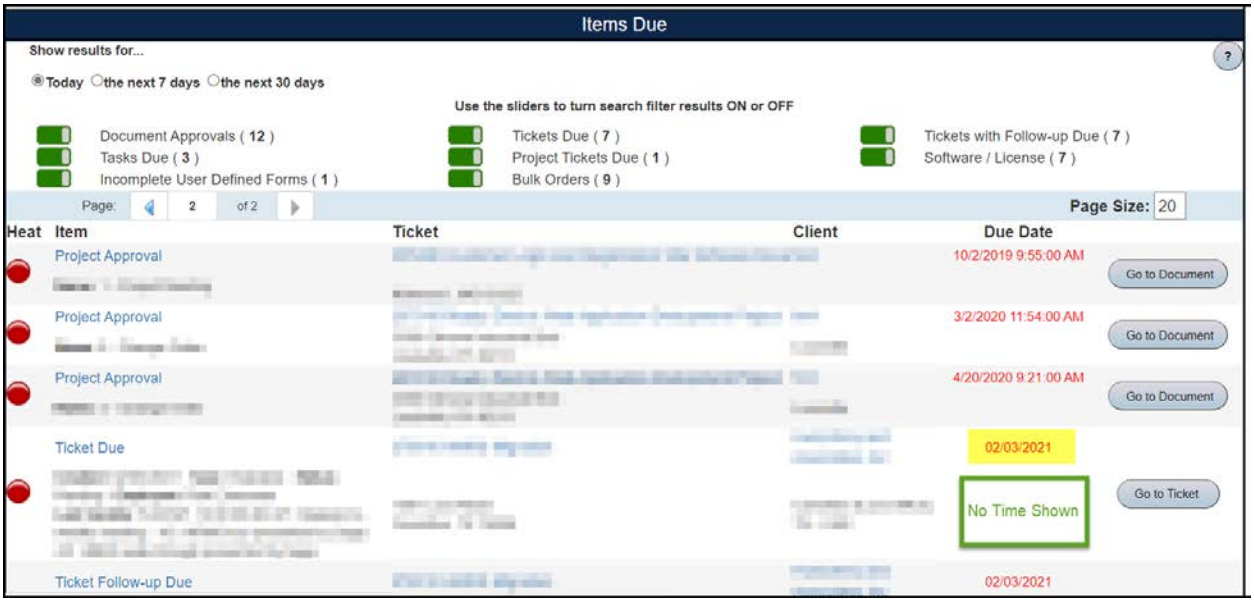
Email notifications

- Creation of new Email notification Timesheet Edited

Miscellaneous

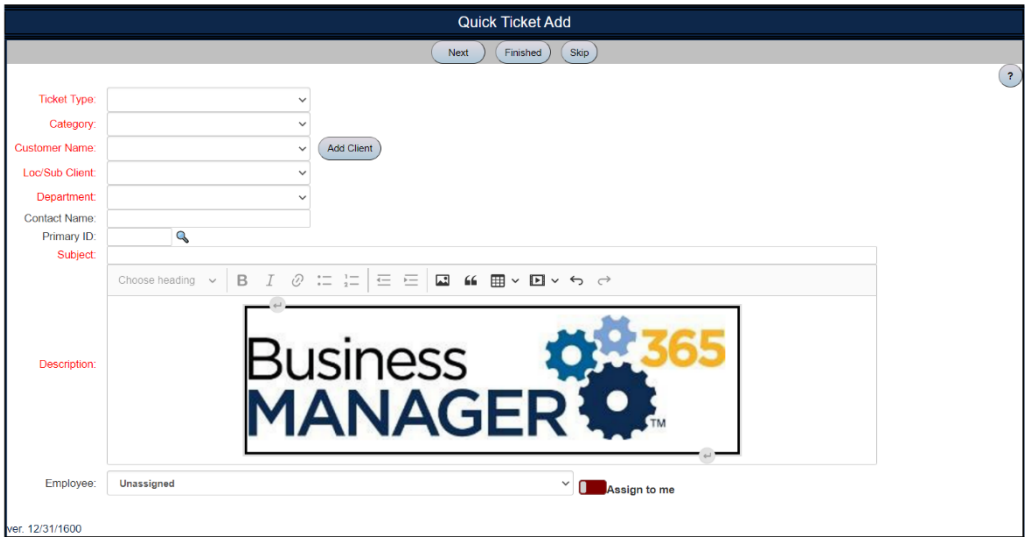
User Dashboard

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



Rich Text

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



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
	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