

# SALES STUDIO

We are currently updating our site; thank you for your patience.

## VERSION RELEASE NOTES

Sales Studio Version List:

[\[1.1.0.9 - Official Release\]](#) [\[1.1.0.8\]](#) [\[1.1.0.6\]](#) [\[1.1.0.5\]](#) [\[1.1.0.1\]](#) [\[1.0.10\]](#) [\[1.0.0.0 to 1.0.0.21\]](#)

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**1.1.0.9 - Official Release** (22.04.2022 04:36 PM)

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- **Release Priority:**Low
- **Database Prerequisites:**
  - BPO v2.4.0.10 or later
  - BPO Sales Studio v1.1.0.8

### Modifications

- **CR 173:** New functionality to allow columns in grid views to be hidden from the user interface using Grid Caption options. By setting fldVisible = 'No' and fldAllowSizing = 'No' in tblCNFGCaptions, the specific column will no longer be available for selection from the Column Chooser.



### Rollout details

- Run the BPO\_SS\_v1.1.0.9 upgrade, and check for errors in the results file
- Database objects are not modified so validation is not required.
- Install BPO\_SalesStudio\_v1109\_Setup\_x64

## File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.1.0.9

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1.1.0.8 (18.02.2022 06:05 PM)

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- **Release Priority:**Low
- **Database Prerequisites:**
  - BPO v2.4.0.10 or later
  - BPO Sales Studio v1.1.0.6
- **Application Type:** Windows Desktop Application – BPO Companion

## Modifications

- DBN0122308 - When configuring a new Payment Factor, on selecting a value in the FinanceProviderCode field, the Description instead would then be populated in this field.
- DBN0122373 - Item Meter Rates in Sales Packages only allowed entry of integer values. It should be displayed to 4 decimal points.
- DBN0123089 – The Item Order number was duplicated after re-adding items that had previously been removed on the same Sales Package.
- DBN0122367 - Adding and then removing a dependency changed the previously defined and saved order of the items on a Sales Package.
- DBN0123696 - A deleted Sales Package that was included in another Sales Package, would still appear on new Sales Quotes when the main Sales Package was selected.
- DBN0123697 – Users could not unselect a Sales Package item that was included in another Sales Package on a quote.



## Rollout details

- Run the BPO\_SS\_v1.1.0.8 upgrade, and check for errors in the results file
- Run the BPOSalesStudio\_v1.1.0.8 Validation, and check that there are no errors.
- Install BPO\_SalesStudio Setup\_x64

### File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.1.0.8

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1.1.0.6 (26.11.2021 5:04 PM)

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- **Release Priority:**Low
- **Database Prerequisites:**
  - BPO v2.4.0.10 or later
  - BPO Sales Studio v1.1.0.5
- **Application Type:** Windows Desktop Application – BPO Companion

### Modifications

- Corrected the calculation of the mark-up for A, B and C Class parts. If the commercial has a zero mark-up value, then A and B Class parts will use the Asset mark-up that is set in the Sales Office while C Class parts will use the Inventory mark-up set in the Sales Office.



### Rollout details

- Run the BPO\_SS\_v1.1.0.6 upgrade, and check for errors in the results file
- Validation is not required as none of the DB objects are upgraded
- Install BPO\_SalesStudio Setup\_x64s

## File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.1.0.6

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1.1.0.5 (11.12.2020 4:39 PM)

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- **Release Priority:** **Low**
- **Database Prerequisites:**
  - BPO v2.4.0.10 or later
  - BPO Sales Studio v1.1.0.1
- **Application Type:** Windows Desktop Application – BPO Companion

## BPO Sales Studio v1.1.0.5 MODIFICATIONS

- CR 93: Remove the restriction where only active customers are returned during the quote create / edit process.
- CR 95: The performance of the Quote Maintain screen will be improved ensuring overall performance enhancement of the entire app; and information such as the sales package comments, image, total monthly fees, and min billing will be added to the Sales Proposal report.
- CR 97: Create the ability to set defaults in Sales Studio. When adding a new quote, if there is a default payment option it needs to be added to the payment options grid by default. When adding a new quote, if there is a default sales proposal document layout then it needs to be set in the lookup edit for the Document layout on the screen.
- CR 99: The ability to add documents to a Sales Package is needed in Sales Studio. A new grid to add Files and Brochures (top right auto-hide panel) will be added in the Sales Package Maintain

screen and this will work like the grid in the Quote Maintain screen to link documents to a Sales Package.

### Fixes

- DBN0097664 - When adding a new quote and the user has selected a customer and the user then attempts to search for a different customer or contact name, the search button does not work. Issue resolved.
- DBN0097682 - Issue resolved, when deleting an item from a quote via the right click option, the Item Type pane has the word delete and the item selection list is cleared.
- DBN0097719 - Resolved the issue where Unit Costs are not pulling through for parts added to a quote in Sales Studio even though the parts have a unit cost assigned in BPO.
- DBN0098035 - Bug fixed where the printed Gross Profit Analysis report was taking the last items price and repeating it for all the items.
- DBN0098068 - On saving a sales package without filling in the Comment field, an input validation message box is displayed. After clicking 'OK', the same message box is displayed again. This issue has been resolved.
- DBN0098091 - Sales Studio has been updated to correct an issue where the user could select less than the minimum number of items allowed in a Sales Package that is added to a Sales Quote.
- DBN0098107 - When editing a Sales Package and the user deletes an item, the item order numbers did not update accordingly. This has been fixed.
- DBN0098167 - After installing Sales Studio and the user wants to uninstall the software, the version displayed in control panel for Sales Studio is 1.0.24. Issue corrected.

- DBN0098189 – Bug fixed when adding a new quote and selecting a customer, the form title changes to Edit Customer Quote even though a new quote is being added. Furthermore, there is no Quote Number on the form title since this is a new Sales Quote which has not yet been saved.
- DBN0098192 – Resolved an issue where users were able to input negative values in the exchange rate and item price fields of a Sales Quote.
- DBN0098198 - On emailing a quote, when attempting to select the 'To' and 'CC' fields, an object reference error is displayed. This problem has been resolved.
- DBN0098210 - When clicking on the save layout buttons on the Sales Package and Quote Default items maintain screens, an object reference error is displayed. This problem has been resolved.
- DBN0098270 – The item order arrows were not working when editing a Sales Package. After changing the order of the items on the Sales Package and saving, this change was not pulled through when adding the Sales Package to a quote. Issue resolved.
- DBN0098302 – Commercial prices were being ignored when it was set to a Sales Package. Issue resolved.
- DBN0098337 – Users were unable to save a quantity of less than '1.00' when adding a Service, Craft or Travel Charge to a quote. Sales Studio rounds this amount to '1.00'. This issue has been fixed.
- DBN0098349 – Fixed an issue where users can add the same payment option repeatedly to a quote as if these were different payment options selected.

- DBN0098375 - When a user has two or more Sales Packages on a quote and then deletes one of the Sales Packages, an error message was displayed. This issue has been fixed.
- DBN0098691 - When saving a copy of a quote that has Item Fees, the copied quote does not save the Item Fees from the original quote. Issue resolved.
- DBN0099164 - If the user edits a Sales Package, ticks the 'Mutually exclusive' tick box, and clicks on Save, the Sales Package will always have the 'Mutually exclusive' tick box checked even when unticking the box and clicking on Save. Issue resolved.
- DBN0098099 - On adding or editing a Sales Quote, the tax rate field could be edited. Sales Studio has been updated so that this field cannot be edited but rather defaults to the tax rate set for the customer in BPO when adding or editing a quote in Sales Studio.
- DBN0099168 - On adding or editing a quote and the user attempts to delete an item from the quote where no items were selected using the right-click and delete option, an object reference error is displayed. This issue has been fixed.
- DBN0099142 - When a user emails a quote out from Sales Studio the description column on SQL table tblSALSEmails displays 'Email Created From Call Centre'. This has been resolved.
- DBN0098225 - Error stating document used by another process when users attempt to email out the same quote for the second time in succession. Issue resolved.
- DBN0099171 - On adding or editing a sales quote and the user right-clicks and selects the clear filters option on the payment options area, an object reference error is displayed. Issue resolved.

- DBN0097787 – An issue has been fixed when deleting an item from a quote, the ‘Selected Item’ pane on the right of the screen, still shows the deleted item and does not refresh.
- DBN0098098 – On editing a quote that has a Sales Package, the minimum and maximum quantities were being ignored as the user could select a quantity below the minimum and/or above the maximum. This issue has been resolved.



### Rollout details

- Run the BPO\_SS\_v1.1.0.5\_v1.1 upgrade, and check for errors in the results file
- Run the BPOSalesStudio\_V1.1.0.5\_Validation, and check that there are no errors
- Install BPO\_SalesStudio Setups

### File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.1.0.5

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1.1.0.1 (30.10.2020 5:06 PM)

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- **Release Priority:** **Low**
- **Database Prerequisites:**
  - BPO v2.4.0.10 or later
  - BPO Sales Studio v1.0.0.23
- **Application Type:** Windows Desktop Application – BPO Companion

### Fixes

- DBN0090605 - The forward button in Sales Studio does not perform any action when the user clicks on the button. This button



has now been removed from Sales Studio.

- DBN0090606 - When creating a new quote and the user types in part of the customer name in the 'Customer Name' search box and thereafter, presses enter, Sales Studio does not bring up the closest matches or the customer itself but instead brings up all the customers. Sales Studio has been updated to fix this issue.



### Rollout details

- Run the BPO\_SS\_v1.1.0.1\_v1.0 upgrade, and check for errors in the results file
- Run the BPOSalesStudio\_V1.1.0.1\_Validation, and check that there are no errors
- Install BPO\_SalesStudio Setups

### File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.1.0.1\_PostBPOv2.4.0.10

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1.0.23 (07.08.2020 4:59 PM)

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- **Release Priority:**Low
- **Database Prerequisites:**
  - BPO v2.3.0.2 or later
  - BPO Sales Studio v1.0.0.21
- **Application Type:** Windows Desktop Application – BPO Companion

### Fixes

- DBN0090605 - The forward button in Sales Studio does not perform any action when the user clicks on the button. This button

has now been removed from Sales Studio.

- DBN0090606 - When creating a new quote and the user types in part of the customer name in the 'Customer Name' search box and thereafter, presses enter, Sales Studio does not bring up the closest matches or the customer itself but instead brings up all the customers. Sales Studio has been updated to fix this issue.
- DBN0090628 - After installing Sales Studio v1.0.0.22 and the user wants to uninstall the software, the version displayed in control panel when attempting to uninstall Sales Studio is v1.1.1 which is incorrect. Sales Studio has been updated to fix this issue.



### Rollout details

- Run the BPO\_SS\_v1.0.0.22-v1.0.0.23\_v1.0 upgrade, and check for errors in the results file
- Run the BPOSalesStudio\_V1.0.0.23\_Validation, and check that there are no errors
- Install BPO\_SalesStudio Setups

### File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.0.0.23\_PreBPOv2.4.0.10

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**1.0.0.0 to 1.0.0.21 Combined Official Release** (03.07.2020 5:16 PM)

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- **Release Priority:** **Medium**
- **Database Prerequisites:**
  - BPO v2.3.0.2 or later
  - BPO\_BridgeModPreSalesStudio\_v1.0.0.21
- **Application Type:** Windows Desktop Application – BPO Companion

## Functionality

- Sales Studio functionality leverages off the existing building blocks of sales templates, customer commercials and Sales quotes within the existing BPO framework, to give Salesmen an advanced quote configuration tool, which encompasses the following functionality:
  - Create quotes for customers in Sales Studio, with approval processing and ability to convert to Sales Order
    - Notes, Comments and digital documents can be linked to quotes
    - Cloned quotes are related so that salesmen can create and keep track of multiple quotes for a customer and approve the client's preferred quote.
  - Configure sales packages / bundles that can be added to quotes within Sales Studio
    - Bundles have multiple configuration options - including mandatory items; ability to set a mutually exclusive; and where not mutually exclusive, set the min and max quantities required.
  - Configure Quote Default Items and Payment factors
  - Print Sales Proposal and Gross Profit reports
  - Link Contract Fees to A Class Items.
  - Link Contract Meters to A Class Items where meters are defined on the inventory definition.
  - For more detailed information, please refer to the specification document (Sales Studio Technical Spec-20191114)

## Setup Notes

Some configuration items to take into account:

- Finance Provider Codes - to be set up in BPO Configurator (required to set up Payment Factors in Sales Studio)
- Payment Factors - to be set up in Sales Studio (required for creating Quotes)
- Items to be quotes on to be linked to a Sales Commercial that is linked to a customer - For Quote Selling price to auto populate (can be overwritten in the maintain screen)
- Salesman to be linked to a costing Sales Commercial - either for the company, or per salesman or team of salesman, and linked to each Salesman in CRM - Salesman Settings > Salesman Commercial - For Quote Unit Cost to populate (cannot be adjusted from the front end)



### Rollout details

- Run the BPO\_BridgeModPreSalesStudio\_v1.0.0.21 upgrade, and check for errors in the results file
- Run the BPO\_SS\_v1.0.0.0-v1.0.0.21\_OR\_v1.0 upgrade, and check for errors in the results file
- Run the BPOSalesStudio\_V1.0.0.21\_Validation, and check that there are no errors
- Install BPO\_SalesStudio Setup

### File Location on WinSCP

\\Implementations\CO3\_Releases\Applications\BPO\_SalesStudio\v1.0.0.21

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