BPO2

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

VERSION RELEASE NOTES

BPO2 Version List:

v2.5

v2.4

2.5.1.4 - Official Release (19.01.2023 09:50 AM)

- **Release Priority:**Medium
- **Database Prerequisites:** BPO v2.5.1.3

BPO2 v2.5.1.4 Updates

- DBN0128509 – DRS Reports that were set to run on the last day of the month (e.g. Report Date = 31) would not always run due to the differing number of days in each month. This has been corrected so that invalid days for the current month will be moved to the correct end day of the month.
- DBN0129794 – Users were able to close a contract from the Customer Maintenance screen without having to go through the contract closure process.
- DBN0138376 – The Site filter on the Scheduled Activities Generation screen did not filter the data by site selection.
- DBN0138583 – Generate Tasks – Users were receiving a time out error when Generating Work Orders on the task generator. Some database optimisation has been done to prevent this.
- DBN0139172 – Stock Take – Users were able to view updated or deleted stock take batches on the stock take screen. The new version prevents this.
- DBN0140783 – The Supplier Invoice now correctly displays VAT for items as selected on the Purchase Requisition.
- DBN0140786 – When a Credit Note was issued on an OTC invoice, the values that reflected on the Credit Note were different from the values on the Invoice.

- DBN0141017 – In cases where a Supplier Invoice was captured for a partial quantity of an item, users were not able to capture another Supplier Invoice for the remaining quantity.
- DBN0141428 – POS Lite - Users were able to add a serial number multiple times to the invoice but it would not save. The system will now prevent users from adding the same serial number more than once.
- DBN0141434 – Calls not in New Status could have new assignments added via the Assignment tab on the call. This was causing issues in TechConnect when attempting to accept the call or end work.
- DBN0141649 – Sales Customers – When switching from the Inactive status customer list to the Active status customer list, the Reactivate icon did not change.

Version Specific Companion Applications

BPO_Configurator v2.4.1.2

2.5.1.3 - Official Release (02.09.2022 11:49 AM)

- **Release Priority:**Medium
- **Database Prerequisites:** BPO v2.5.0.14

BPO2 v2.5.1.3 Modifications

- CR136 Extended Call Screen - In the current guise, the Call Centre screen is not being used for its primary purpose (i.e., logging and assigning calls) but rather as an all singing, all dancing screen and users tend to gravitate towards using it as a reporting screen (which was never intended).
    - A new proof of concept design that will force primary-purpose use. The by-product will be speed gains for

the customer solution and segregation of duties (for larger customer-user bases).

- The existing call screen will only be used for logging, releasing, and assigning calls with a call administration screen to aid in call processing.
- A new screen, specifically for SLA monitoring and communication
- In summary, the call centre screens are as follows:
    - 1. Call Centre – Original screen with modifications.
    - 2. Call Centre for small customers – New call centre logging screen.
    - 3. Call Administration – New screen.
    - 4. Service level agreement management and reporting – New screen.
    - 5. Auto-Close Exceptions with corrective action – New screen.
    - Screens 1 and 3 above will be available by a combination of user rights and company config flag (Extended Call Centre). If this Call Centre company config flag is OFF, then screen 2 kicks in. Screen 2 is the original call screen (but with speed modifications as in section 2).
    - Screens 4 and 5 will be available in BPO by default (will need user rights).

- CR172 Procurement changes – The Purchase Requisition maintenance screen now accommodates adding the same non-stock (service) multiple times. The Item Description can be edited.

These changes will be carried through to the Purchase Order and Goods Received Notes.

- CR185 Customer and Supplier Code trim – On Saving a Customer or Supplier Code, the system will prevent special characters from being saved. The system will only allow upper case characters and digits from 0 - 9.
- CR186 POS Lite Modification
    - Enable users to mark Auto-Issue when there are multiple bins under an existing/new warehouse.
    - Enable users to be able to print a delivery note with the use of a company config flag.
    - Enable users to be able to print a picking slip with the use of a company config flag.
    - Enable the user to choose the bin when selecting C-Class items (that are non- Batch tracked). If Batch tracking is enabled, the user must select the batch number and the system will set the associated bin.
    - Enable the user to select a serial number and the system will set the associated bin.
    - A default layout will be provided for the picking slip to be printable from the OTC Screen. In order to be able to print the picking slip from the OTC Screen, a script will be provided for the Report Layout (the script is an insert into tblRPTSCustomLayout, please note there is no DLL for the picking slip for the OTC Screen).

BPO2 v2.5.1.3 Updates:

- DBN0129148 – (Manufacturing - Production) - Errors displayed when attempting to close the production line and when trying to change the contra account before saving. This has been resolved.

- DBN0132565 - (Sales - Customers) – Contacts - When a new contact was created, but delete was selected before saving, nothing was removed. This has been resolved by greying out the delete button if no delete is possible (i.e. contact has not yet been saved).
- DBN0126843 – (Sales - Open Order Items report) – Stored procedure updated to take the populated parameters into account.
- DBN0124051 – (Service - Calls) The incorrect SLA hours were calculated when a call is logged outside of shift hours. This has been resolved.
- DBN0137821 - (Service - Calls) Call change status change where notification emails are configured, and conditional tags removed from template - raises error fldMessage, tableSALSEmails, does not allow nulls. Function updated to handle this templates without conditional (critical) tags.
- DBN0133107 - (Inventory - Stock) - Reserved stock - Reserved stock goes down on the issued from warehouse when stock is returns to a different warehouse. This has been resolved.
- DBN0133257 - (Inventory - Stock Take) - Stock Take Batch Items are deleted on Approval of the batch. This has been resolved.
- DBN0134043 - (Project Progress Chart) - Project Progress report does not display from either Sales - Customers - Project History or from Projects - Projects. This has been resolved.

Version Specific Companion Applications

BPO_Configurator v2.4.1.1

- Allow Auto Issue Warehouse selection where multiple bins exist under an existing or new warehouse. Related to CR186.

BPO_CallHoursService v1.0.0.0

- New service to calculate the elapsed SLA hours for open calls. Related to CR136 Extended Call Screen in BPO.

RSI_CloseCallService v3.0.0.0

- Close call service now pushes call closure candidates into a separate table for further processing. These records are actionable from the new Call Closure screen by an authorized user. Related to CR136 Extended Call Screen in BPO.

2.5.0.14 - Official Release (11.10.2022 08:23 AM)

- **Release Priority:**Medium
- **Database Prerequisites:** BPO v2.5.0.12

BPO2 v2.5.0.14 Modifications

- DBN0132992 – (Procurement – Debit Notes) - When Adding a Debit note for a service item, on save, a SystemData message 'Column fldQuantity does not belong to the table.' Would come up. This has been resolved.
- DBN0133667 – (Service - Calls) – A call could not be closed under a specific condition where multiple Third-Party Services were requisitioned on the call, a PO was generated with one service being cancelled when doing a Non-Stock GRN and PO being closed for the remaining third-party service request. New trigger created to handle this scenario by removing the contractor detail where the PO is closed off.
- DBN0136155 – (Service – Calls) - Call release from Hold or Pending state raised a 'Strong was not recognized as a valid DateTime' error under the specific condition where the same call was edited in different ways in two simultaneous sessions by two different users. This has been resolved.

- DBN0136807 – (Procurement – Purchase Orders / Suppliers) - System allowed for more than one Physical address for a supplier which then duplicated line items on PO. The Supplier Address trigger has been updated to block multiple physical addresses from being saved for a supplier.
- DBN0136944 – (Inventory – Stock Take) - When doing a Stock Take, after you clicked ‘Approve’ on a New Batch, the stock take status did not update correctly. This has been resolved.
- DBN0136947 – (Inventory – Stock Take) - When a new Stock Take batch was added, then the items with no quantity were deleted, the stock take batch could not be saved, specifically on initial creation. This has been resolved.
- DBN0138148 – (Sales - Customers) - Trigger on Customer table updated to check the unprinted invoices or unapproved credit notes, instead of the customer status before allowing the system to inactivate a customer.
- Stock on Order stored procedure and PO Item Received function updated to handle partial SRNs and quarantine warehouse processing.

Version Specific Companion Applications

BPOConfigurator v2.4.0.4

2.5.0.12 - Official Release (08.08.2022 10:03 PM)

- **Release Priority:**Medium
- **Database Prerequisites:** BPO v2.5.0.10

BPO2 v2.5.0.12 Modifications

- DBN0124051: When calls were logged outside of the defined shift times in BPO, the SLA hours were calculated incorrectly.

- DBN0129298: When creating a contract credit note, ticking generate invoice and clicking save, an object reference error was thrown when there were no fees linked to the invoice.
- DBN0130279: While creating a sales invoice and entering the quantity after selecting a part, the Grand Total on the invoice was doubled. After the quantity was re-entered, the correct value would show.
- DBN0132465: In a specific scenario, where a call meter reading had the same source ID (Call ID) as the contract ID for a meter, BPO would use the call meter readings as the current meter readings instead of the current period's contract billing meter readings.
- DBN0133329: An issue was found in Configurator where a new Feetype could only be added to one contract type and then would not be available for other contract types.
- CR66: Functionality was added to prevent users from deleting or deactivating a customer if the customer still had open transactions in the system. However, users were not able to easily identify what these transactions were. A new modification now displays the reason for disabling the buttons in the tool tips.

Version Specific Companion Applications

BPOConfigurator v2.4.0.4

2.5.0.10 - Mod Pack 01 (08.08.2022 10:03 AM)

- **Release Priority:**Medium
- **Database Prerequisites:** BPO v2.5.0.10

BPO2 v2.5.0.10 Modifications

- DBN0129455: Inter-warehouse part requests with more than one item would not be set as completed after being fully issued to the in-transit warehouse.
- DBN0129486: For a service account balance created against a contract item fee and the flag fldDelinkInvoicePosting set to 'Yes', the service account balance would duplicate on the invoice posting.
- DBN0127651: When a sales order was converted into a new deal or invoice, any discount on the sales order was ignored when calculating the value for the customer's credit check.
- DBN0131934: The customer statement layout was modified to prevent an error while previewing or downloading the statement from the customer portal.
- It was found that when generating a contract invoice from a contract credit note, the orderNo parameter was not supplied to the sp_bpoSALSContractInvMeters sproc, which prevented the transaction from completing.
- Some BPO objects have been modified for the new Open for Business applications.

2.4.0.18 - Mod Pack 01 (08.08.2022 10:03 AM)

- **Release Priority:**High
- **Database Prerequisites:** BPO v2.4.0.x

MODIFICATION

- DBN0134018: When raising a contract invoice from a contract credit note, and the meter definition linked to the meter on the contract invoice is also found in tblCTRTAggregateMeters, the meter charges for that respective meter would not display correctly on the invoice.

2.5.0.10 - Official Release (06.05.2022 04:30 PM)

- **Release Priority:** High
- **Database Prerequisites:** BPO v2.5.0.8

BPO2 v2.5.0.10 Modifications

- **CR 172:** Users can add the same service item multiple times on a single purchase requisition and edit the item description to differentiate between them.
- **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.
- **CR 178:** BPO has been modified in preparation for the Navision integration. BPO account drivers can now cater for Navision entries in tblACCTProcessingQueue, however, the Posting Engine updates have not yet been completed.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.18 - Official Release (14.04.2022 04:34 PM)

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.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.5.0.8 - Official Release (04.03.2022 04:49 PM)

BPO2 v2.5.0.4 MODIFICATIONS

- **CR 41** – New functionality giving users the ability to update the Order numbers and comments on Contract Invoices. The Contract Invoices will have to be reprinted if any changes are made. Access to this functionality is controlled by User Rights.
- **CR 42** – The inclusion of User Defined Fields to provide more information within each module so that associated work/-processes can be carried out more efficiently for Customers and Suppliers in BPO. New fields for Contracts (Class and Category) are now available and configured in Static data.
- **CR 44** - Moved forms that are related to exchange rates, interest rates, scheduling site exceptions and short-term contract products from BPO Configurator to BPOv2. Exchange Rates and Interest Rates moved to Finance and HR module in BPOv2, Short-Term Product Configuration moved to Contract module in BPOv2, and Site Exceptions moved to Service module in BPOv2.
- **CR 47** – Functionality to automate the updating of shipping addresses by ensuring the contract item's shipping address cor-relates to the associated item shipping address (asset/functional location). A new company config flag added in BPO Configurator that will enable or disable this functionality within BPO2. User must type in "Yes" or "No" in the new config flag.
- **CR 49** - The ability to authorise Quarantine Revaluations has been added into BPO. This will be done on the Revaluation

Requests screen with the ability to edit/amend the revaluation before authorising it. Auto approval of Quarantine Revaluation requests has been removed.

- **CR 50** – The Contract Type Maintain screen in BPO Configurator allows users to set the default sales account codes for fee types and now also caters for the cost of sales account codes as well. A new meter types grid view has been added and will hold the account code configuration settings for meter types.
- **CR 52** – New functionality to import a list of serial numbers by part code when doing a GRN in BPO. The GRN maintain screen now has the option of importing serial numbers (from CSV or Excel file) into a panel allowing the user to quickly select and drag multiple serial numbers to be received.
    - Bulk GRNs, where the GRN items have a total count greater than the limit value set for the config flag 'fldBulkGRNLimit', will be saved to holding tables and will be processed in a console application (run via Task Scheduler).
    - The new Unprocessed Bulk GRN listing and maintain screen will list GRNs that have not been fully processed yet. From this screen, users will be able to edit serial numbers that are invalid (duplicates) and delete items that have not yet been processed if necessary.
- **CR 53** - A new Service History report driven by a customer code and a functional location to pull out customer specific activity against the location. This new report will be available in Call Centre.
- **CR 55** - Changes made to the saving of a depreciation batch to first check whether all assets in the list of items being depreciated have a depreciation method and ops life before allowing the user

to save, otherwise the user will be notified with the serial number and part code of any given asset that is not ready for depreciation. The purpose of this is to stop erroneous data being entered into a depreciation batch by allowing invalid assets to be saved to a batch.

- **CR 56** - Include an approval step to contract closure events and capture comments from users. When a contract is closed, the user will be prompted to submit a note justifying the closure of the contract. Once this note is submitted, the contract will be moved to status "E" and the relevant approval users will be notified. The contract closure can then be approved or declined by users that have been assigned the new user right to do so.
- **CR 58** - A new report, called Items Issued, is included on the call screen and is accessible via the print button. The report will display all parts issued on a call against a serial number or functional location.
- **CR 61** - Changes to BPO2 and TechConnect objects that will allow for assignments made from the same project to no longer require the prior recipient's acceptance before subsequent assignments can be done. The elimination of the requirement to make a single assignment at a time will result in a more efficient call centre process for calls that require multiple technicians on multiple work orders. Users will no longer have to rely on memory for which calls required additional assignments.
- **CR 62** - Changes made to TechConnect objects, along with a new company config flag, that will allow for the origin warehouse of a TechConnect part request to be set to the technician's boot stock warehouse. This will allow technicians to use their boot stock warehouse as the origin warehouse when making part requests in TechConnect.

- **CR 64** – The Sales Invoice maintain form has been modified to introduce invoice item ordering that will carry through to the final print. This will allow users to customise the printed sales invoice as desired. The user will drag and drop either single or multiple rows to set the order that they wish to have displayed on the sales invoice.
- **CR 66** – The Customer module now has a “Deleted” status in addition to the “Inactive” status to depict customer statuses more accurately. A customer record cannot be deleted if there are any associated transactions, assets, contracts, or calls. For customer records that are deleted in BPO, the synced EVO record will show “customer deleted in BPO”.
  - Active customers can be made inactive in BPO, and the EVO record will be placed on hold. Inactive customers can now be reactivated in BPO, and the EVO record will be updated to on_hold = 0. All assets linked against the customer will be presented for reactivation and placed into the customer warehouse if selected.
  - User rights have been created to control access to the above-mentioned functionality.
- **CR 67** - A new Customer Service History report is now available on the Call Listing, Call Maintain and Asset Listing screens via each screen’s print button. The report will display all calls relating to a customer, the related asset, along with all parts issued, meter readings and work order information that has been captured.
- **CR 68** - BPO2’s system report module required users to manually input parameter values (except for date parameters) when generating a report. This method was error prone as users may type incorrect values when attempting to run a system report. It is now

possible to set predefined lists of data selections to report parameters removing the possibility of incorrectly entered data.

- **CR 69** - A new column (major currency charge) has been added on the contract maintain screen, in the charge level tab under the item meters grid. This will aid users in identifying the currency value for meter charges. The major currency charge column will display the unit charges in financial currency format for the meter's charge level i.e., if the Unit Charge is 105, the Major Currency Charge will be 1.05.
- **CR 70** - The prior part requests method in TechConnect was based on the last 6 work orders and has now been changed to focus on the last 6 issued parts against the machine/functional location. This will give a better understanding about the call's subject based on maintenance history and not work history.
- **CR 7**1 - An 'Export' button has been added on the Stock Take Batch maintain screen to allow users to export stock take items to an Excel document.
- **CR 74** - Configurable email templates DOCPrintServiceEmail and ESCANotificationEmail created for BPO's Contract Escalation Notifications as well as BPO's companion applications – BPO_PrintService and RSI_NotificationService.
- **CR 78** - Part request items generated through OTC invoices are now linked to the invoice items. This will allow the system to get the Sales Department (IDEP) and Department Site (IDST) segment codes for the PSIN and PRET transactions from the department selected on the OTC invoice line item.
- **CR 79** – Functionality has been added to BPO to assist users with easily creating predefined billing batches of optimal size to prevent the timeout errors that occur when processing large batches. These billing batches (and billing preview batches) can then be

scheduled in BPO to be submitted and processed overnight via console applications (BPO_BillingBatchScheduler and BPO_ Billing). The financial posting of the invoices to Evolution will be done via the existing Posting Engine application to prevent timeout errors on the Evolution database.

- A company config flag 'fldDelinkInvoicePosting' is available to specify whether invoices should be posted directly into Evolution from the Print Queue or posted via the Posting Engine application.

- **CR 88** - A Contract Expiry Management screen has been included in BPO to enable users to efficiently close contracts and to perform multi-asset transactions for purchase-to-lease and lease-to-purchase processing. Buy Back Request and Sell Off Request screens have also been added to BPO to assist the user with the relevant end of contract processing.

BPO v2.5.0.8 FIXES AND UPDATES

- **DBN0098460** – On the My Ticket listing, where a ticket is linked to a completed call, the edit and complete ticket buttons are greyed out. However, if you right clicked on the ticket, you were still able to edit or complete the ticket.
- **DBN0099566** - When editing a Part, the tool tip for the Shelf-Life Period field would show “The unit o ftime applicable to the shelf life”.
- **DBN009976**7 - When selecting Short Term Contracts, an error Object Reference error was displayed stating - Column ’fdClass’ does not belong to table.
- **DBN0100177** – The Supplier Invoice and Debit Note number fields allowed the user to input unlimited characters when adding a supplier invoice or debit note. An error would only be displayed

when the user attempted to save. The fields have now been limited to the correct number of characters in BPO.

- **DBN0100197** – On the Invoices for Contract and Credit Notes for Contract screens, the Site and Status drop-down lists do not affect the information displayed on these screens and have been removed.
- **DBN0100239** – On the Work Management screen, when there is no data in the list, clicking on the Complete, Close Work Order, Assign or Start buttons would throw an object reference error.
- **DBN0100494** - The window title bar description on the Purchasing Template maintain form was misspelt as "Add new Purchasing Tenplate".
- **DBN0100677** - When attempting to assign a second work order on a call, a message comes up saying that the call cannot be assigned again. After clicking “OK”, another message would pop up saying that the call is assigned. The second message has been removed.
- **DBN0101613** - When a substitute part was GRN’d from a Purchase Order and then a supplier return was done of that part, BPO would show the message “The goods received will result in the PO being overfilled”.
- **DBN0101614** - When viewing the Supplier Invoices tile or Debit Notes tile from the Supplier Listing screen, the grid was not populated with data or column headings.
- **DBN0101615** - When logging a call, irrespective of the customers status (Active or Inactive) the call would still be created if the data was added by first selecting the contact, functional location, or serial number.
- **DBN0101616** – On the Contract Item Meter Capture screen, when capturing a meter reading and the user saved without

tabbing out of the field, BPO would throw an error: “cannot perform <> operation on System”.

- **DBN0101617** - When viewing the Work Orders for a Call, the Site and Status drop-down boxes do not function in this context. The Site and Status drop-down boxes have been removed to avoid causing confusion.
- **DBN0101775** - When editing a stock take and line items were deleted, on saving the stock take, the items were not removed.
- **DBN0102102** - On the Print Queue Reprint window, the Select Customer lookup control was not functioning as expected.
- **DBN0102136** - When rejecting a credit note and the user decided to cancel the action by clicking on the “No” button, the credit note was still rejected as if the user clicked “Yes”.
- **DBN0102852** – On the Contract Listing screen, when printing the Machine Usage Report, a divide by zero error occurs when printing the report for a contract without meters. The Print Machine Usage Report is no longer available for machines without meters.
- **DBN0102854** - Sales Studio allows the creation of quotes for non-active customers which are visible in BPO. BPO would then allow these quotes to be converted into new deals and invoices. BPO will now prevent a quote from progressing if the customer is not active.
- **DBN0102855** - When adding a Sales Order to a call via the Orders tile, the Billing and Shipping address did not auto populate.
- **DBN0102920** - When editing a customer location, the form was titled frmFNLCMaintain.
- **DBN0103331** - The reason code reference ellipsis button was not available when editing a contract credit note.

- **DBN0103373**, **DBN0103699** - On the Edit Service (Service Maintain) window, the Purchase Orders, Requests and Transactions tiles were not functional. The Transactions tile has been removed the remaining tiles are now functional.
- **DBN0103490** - When viewing the Work Orders for a Project, the Site and Status select boxes did not function in this context. The Site and Status drop-down boxes have been removed to avoid causing confusion.
- **DBN0104092** - On the Contract Maintain window, when attempting to delete a blank row, an object reference error was displayed.
- **DBN0106153** - On the Service Requests for Service Code listing (Sales - Services - Requests tile), when no data was returned, all the ribbon buttons were active on this view only list.
- **DBN0106940** – On the Call Maintenance window, when the user clicked on the ellipsis button to edit the selected customer and then attempted to save or close the Customer Maintenance screen, an object ref error was displayed.
- **DBN0106994** - It was possible to delete or decline a quarantine revaluation after it had been approved.
- **DBN0107069** - The Supplier Listing site drop-down list would always default to “All Sites” even though the user had a default site set.
- **DBN0107074** - When adding a document to a Project Work Order, the new record did not display until the list was refreshed.
- **DBN0107975** - When accessing Services Requests from the Services screen via the Sales module, users were still able to process the data from the right click menu.
- **DBN0108961** - On the Contract Credit Note view screen, the print button had no function and has been removed.

- **DBN0109010** - The Refresh button on the Supplier Return listing screen did not refresh the list correctly, it would remove all the items and not reload them.
- **DBN0109018** - When viewing a supplier return note, the title bar incorrectly displayed as “Edit Supplier Return Note”.
- **DBN0109757** - When clicking on the back button after trying to close a production run, BPO would request to cancel the production run instead of going back to the production listing screen.
- **DBN0110236** - Users were able to save a service account adjustment without populating the mandatory fields. BPO did not display an input validation message.
- **DBN0118348** – When issuing out a part for a call linked to a contract on a functional location and then printing out the Functional Service Profitability report, the Item Type, Item Code, and Item Description fields displayed the incorrect information for Document Type PSIN.
- **DBN0108515** – In cases where the Work Order ID was the same as its parent Project ID, the Project listing screen would crash BPO.
- **DBN0104045** – When adding a short-term product, both charges and usage charges would populate, but users were not able to edit or add charge rates.
- **DBN0106819** – In cases where a serial number was sold to a customer, bought back and then issued to a different customer, the awaiting contracts screen would show a record of the serial number for both customers.
- **DBN0106736** – The Additional Data Labels taken from the User Right Captions for Functional Locations were not displayed as expected.

- **DBN0117557** - The clear filter option did not function on the Purchase Requisition listing screen in BPO.
- **DBN0111806** - The letters ‘ase’ appeared on the supplier invoice screen instead of ‘Links’ for the function tiles window header.
- **DBN0111790** – Set the BPO icon to be displayed on the BPO Application login screen and task bar when BPO is launched.
- **DBN0111306** - The title of the validation message box displayed ‘INput’ instead of ‘Input’ when trying to add a meter to a machine from the asset’s module, but the Part was not linked to any meters.
- **DBN0111835** - On the contracts screen, when ‘All Sites’ is selected, the status filter is not relevant and has been hidden to prevent confusion.
- **DBN0117959** - When exporting a report that was pivoted in the analysis tab to Excel, the data did not export correctly.
- **DBN0117334** – When reinstating a closed PO after completing a supplier return, BPO would prevent the user from re-receiving from the same PO, giving the error that the PO would be overfilled.
- **DBN0118146** – On the Supplier Invoice Maintain Screen, any manually entered exchange rate was being rounded off to 2 decimal places then used to calculate the Rand value.
- **DBN0118486** – Users were able to generate multiple Non-Stock GRNs from a PO for the same service.
- **DBN0116731** – In cases were an employee had the same craft in different sites, the quantity for each craft invoiced was duplicated in sp_bpoRPT_SALS_PartAnalysisData.
- **DBN0117564** - When declining a revaluation request, the stock was not sent back to the quarantine warehouse.

- **DBN0110138** – When a non-stock GRN was returned and the PO reopened, the line item did not appear when attempting to re-GRN from the PO.
- **DBN0122311** – On the Customer Maintain screen, the Statement Run tile had been duplicated.
- **DBN0122368** – On the Statement Run window, users were able to tick the check boxes for fldCallReport, fldWOReport, fldDeliveryNote, etc. by right clicking on a record and then selecting an option even though the fldIncludeInvoices check box was not selected.

Rollout Details

- Run the BPO2_v2.5.0.8_Upgrade, and check for errors in the results file
- Run the BPO2_v2.5.0.8_Validation, and check that there are no errors
- Install BPO_v2.5.0.8_x64_Setup
- Install BPOConfigurator_v2.4.0.3_x64_Setup

Version Specific Companion Applications

BPOConfigurator v2.4.0.3

2.4.0.17 - Official Release (25.02.2022 05:04 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.16

BPO2 v2.4.0.17 MODIFICATIONS

- **CR 168** - Introduction of two new triggers and history tables to track changes to Services and the Account Codes linked to these services. Update or delete operations against tblSALSServiceSites will be saved to the tblSALSHisServiceSites history table. Update or delete operations against tblSALSServices will be saved to the tblSALSHisServices history table.

- **DBN0119119** - When creating a project assignment in BPO, on a project that has more than 200 work orders and more than 900 time booking entries, a timeout error would occur preventing the user from creating the project assignment for that project. Trigger tr_bpoPMNGProjectAssigments has been optimised to fix this problem.
- **DBN0119294** - After reviewing SLA time, saving, and then unreviewing the time, the SLA balance did not update correctly on the time review and contract balances screens. Trigger tr_bpoWKORLabourServiceTrx has been modified to fix this issue.
- **DBN0112157** - When creating a partial credit note for a portion of the quantity of a part issued and invoiced, and the "Return Items to Store" option was not selected, the full quantity was incorrectly displayed in the WIP screen (Service > WIP) in BPO.
- DBN0125415: Users were not able to return an internal asset on contract that was on a different site to the contract site.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.16 - Official Release (01.10.2021 4:58 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.15

BPO2 v2.4.0.16 MODIFICATIONS

- DBN0116027: Invoices on a work order will prevent users from adding Parts, Labour, Expenses and Sub-Contracts that have not been processed on the related work order. The item type will be reset to SERV.
- DBN0116261: Modification of tr_bpoWKORWorkOrderDetail v1.0.0.2 to remove obsolete functionality related to tblWKORCostHierarchy.
- DBN0116260: Purchase Requisitions created from a work order for Third Party Services and Part Requests will now populate correctly in tblPRCHRequisitionSourceLink. Purchase Requisitions created when performing a buy back when deleting contracts will also correctly populate in tblPRCHRequisitionSourceLink. Purchase Requisitions created via the Procurement and Inventory modules will not populate tblPRCHRequisitionSourceLink as this is intended functionality.
- DBN0116963: BPO will now prevent the closure of a work order, whether it is linked to a call or not, if there is an unprinted invoice linked to the work order.
- DBN0117284: Modification to sp_bpoSALSStatementQueue v1.0.0.4 to prevent duplicate records being added to tblSALSStatementQueue while the current records are unprocessed.
- DBN0117283: Modification to sp_bpoGetGNRCMailQueue v1.0.0.1 so that the statement emails are ignored by Mail Service and processed only through the Open Items Manager application.
- DBN0117812: Resolved an object reference error that occurred when attempting to edit the customer data from the call screen via the ellipsis button.
- Modified triggers tr_bpoSALSCall_CompleteAssocWO v2.0.0.1 and tr_bpoWKORWorkOrder v1.0.0.4, so that more meaningful comments are used as the rectification comment on a work order

after completing a call. The rectification comment will be taken from the latest entry in tblWKORLabourDetail for the work order (e.g., Time Booking). If there is an existing rectification comment on the work order, it will not be replaced when the call is completed.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.15 - Mod Pack 01 (27.08.2021 4:09 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.15

BPO2 v2.4.0.15 MODIFICATIONS

- CR153: Removing an A class part from a sales invoice before the invoice was printed did not “delinked” the item from the customer. When attempting to return the item to the warehouse from WIP, only the customer warehouse was available to receive the item.
- DBN0115635: In very specific cases, a 1c variance would occur in the Contact Credit Note posting to Evo. The account driver for Contract Credit Notes has been modified to prevent this.
- The database objects used in the Contract Escalation functionality have been optimised to reduce loading times and prevent timeouts from occurring on large data sets.

2.4.0.15 - Official Release (02.07.2021 4:23 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.14

BPO2 v2.4.0.15 MODIFICATIONS

- DBN0103896 and DBN0107871: When Customer ageing is set to "Month from Statement" and Customer terms are 30 (or 60, 90 etc.) days, invoice balances were being flagged as overdue on the last day of the applicable month (and for some months a day earlier). The calculation has been modified so that these balances will now always be due on the first day of the next month.

  The check for overdue amounts and the popup message appears when creating the following:
    - Sales Quotes
    - Sales Orders
    - Sales Invoices
    - Call Requests
    - Calls

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.14 - Official Release (11.06.2021 3:41 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.13

BPO2 v2.4.0.14 MODIFICATIONS

- DBN0111322: Users could not attach documents to Supplier Invoices due to an error in the file path used when saving the file. This has been resolved.
- DBN0111127: If an SLA item was removed from a contract and that item still had a positive balance, the item was not visible on the Service Account Balances screen. Now, deleted items with a

positive balance are still shown and can be adjusted until the balance reaches zero.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.13 - Official Release (28.05.2021 4:57 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.12

BPO2 v2.4.0.13 MODIFICATIONS

- DBN0092538: Issue whereby revaluation of internal assets on contract would error when the asset value had decimal places. This was due to an incorrect data type conversion and has been resolved.
    - Please also note that the two config flags that must be enabled for the revaluation of contract assets to work are: 'fldEnableDepreciation' AND 'fldAutoDispose'. If these flags are not enabled, the revaluation will occur, but the Carrying Value and Remaining Useful Life Value will not update accordingly.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.12 - Official Release (14.05.2021 7:34 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.12 MODIFICATIONS

- DBN0102717: Short Term Contracts - the list of assets would only open when clicking on the serial number ellipses if there were two or more assets in the assets warehouse. The auto selection when there was only one asset was not triggered. This has been corrected.
- DBN0102722: Short Term Contracts - BPO does not allow a work order to be created against an asset as well as a location and so was preventing the creation of the contracts. Short Term Contract processing has now been modified to create the work order against the location only. Assets will also be returned to the store when the contract is closed.
- DBN0108563: When substitute parts were received for the parts on an order, the substitute parts could not be returned to the supplier. This has been resolved.
- DBN0107169: For systems that do not have Time Review enabled, all time entries on work orders would be saved as non-billable even when the billable option was checked on the capture form. This has been corrected.

Version Specific Companion Applications

BPOConfigurator v2.3.0.1

2.4.0.11 - Mod Pack 05 (14.05.2021 7:33 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- CR72: As part of the ISO date format modification for CRM, columns fldCreateDate and fldAmendDate in tables tblINVNItemsSupplied and tblSite have been converted to DateTime datatypes. This is only critical where non-English SQL user logins are used.

- DBN0109040: When creating an invoice via the POS Lite module, typing in the Item Code would occasionally result in the incorrect item description being returned by the auto lookup functionality when the two item codes were very similar. This has been resolved.
- DBN0108411: Partially fulfilled inter-site warehouse part transfer requests were being automatically closed off before all items had been transferred. This has been corrected.
- DBN0106710: In cases where multiple crafts are added as SLA item inclusions to a contract, the system did not calculate the quantities correctly for each craft in the Service Account Balances window when the contract was invoiced or credited. This has been corrected.

2.4.0.11 - Mod Pack 04 (09.04.2021 7:21 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- DBN0104956: The Contract Credit Note Account Driver (sp_ bpoGetSALS_ACCTCTCNSegments) has been modified to use the due amount from table tblSALSContractCrNoteMeters and not from tblSALSContractInvMeters. The Contract Credit Note layout (sp_bpoRPT_CR_ContractCreditNote) has also been updated to reflect this.

- DBN0104677: In the Movement History for Equipment list, the Sales Invoice transaction details were not reflected correctly. sp_bpoGetGNRCMoveHistory has been updated to correct this.
- The Customer Statement open items (sp_bpoRPT_CR_CustomerStatement) and aging (sp_bpoRPT_CR_CustomerAging) have been modified to correctly calculate when the statement is back dated, and payment allocations exist that have been done after the selected date. The default layout has also been modified to show the outstanding balance per transaction.
- DBN0105518: An issue was found where a user could not log into BPO after WebPortal and InterConnect had been used. BPO would report that the user was already logged in. sp_bpoUSERGetLastUsed has been modified to prevent this.

2.4.0.11 - Mod Pack 03 Re-release (09.03.2021 5:10 PM)

- **Release Priority**: High
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- DBN0104076: sp_bpoGetSALS_ACCTCTINSegments v1.0.0.14 - The NVAL value returned was the same as the TAX value and not the DUE value. Resolved in v1.0.0.15.
- The following BPO Account Drivers have been modified to resolve the 1c variance that occurred in certain conditions:
    - DBN0101248: Supplier Invoice (SINV).
    - DBN0101249: Back-to-Back Supplier Invoice (SIBB).
    - DBN0101250: Supplier Invoice Variance (SIVA).
    - DBN0101251: Debit Note Variance (DNVA).
    - DBN0101402: Contract Invoice (CTIN).

- DBN0098313: For every approved partial Contract Credit Note done for contract fees, the fee line was repeated when generating another Contract Credit Note. This also resulted in an inflated Credit Note document total. Sproc sp_bpoGetSALSCtrtIn-vFeesForCrNote v2.0.0.5 modified to remove the duplication.
- DBN0099363: Where a GRN has multiple partial returns linked, the returns were duplicated in the "Select a Supplier Return to Debit" list on the Add Debit Note window. Sproc sp_bpoGetPRCHSRNsToDebit v2.0.0.2 now prevents this.

2.4.0.11 - Mod Pack 03 (12.02.2021 4:14 PM)

- **Release Priority**: High
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- The following BPO Account Drivers have been modified to resolve the 1c variance that occurred in certain conditions:
    - DBN0101248: Supplier Invoice (SINV).
    - DBN0101249: Back-to-Back Supplier Invoice (SIBB).
    - DBN0101250: Supplier Invoice Variance (SIVA).
    - DBN0101251: Debit Note Variance (DNVA).
    - DBN0101402: Contract Invoice (CTIN).
- DBN0098313: For every approved partial Contract Credit Note done for contract fees, the fee line was repeated when generating another Contract Credit Note. This also resulted in an inflated Credit Note document total. Sproc sp_bpoGetSALSCtrtIn-vFeesForCrNote v2.0.0.5 modified to remove the duplication.
- DBN0099363: Where a GRN has multiple partial returns linked, the returns were duplicated in the "Select a Supplier Return to

Debit” list on the Add Debit Note window. Sproc sp_bpoGetPRCHSRNsToDebit v2.0.0.2 now prevents this.

2.4.0.11 - EXE Release (22.01.2021 4:44 PM)

- **Release Priority**: Low
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 EXE MODIFICATIONS

- DBN0101252: Resolves a minor issue where the Save button on the Sales Order maintain window remained disabled after a trigger rolled back the transaction when saving.

2.4.0.11 - Mod Pack 02 (11.12.2020 4:53 PM)

- **Release Priority**: Low
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- DBN0097938: Stock Take Maintain form – ‘From Bin’ and ‘To Bin’ drop-downs. The list of bins was not always ordered alphabetically. For warehouses with many bins, users have mistakenly excluded bins because of this. Procedure sp_bpoGetINVNWhseBins modified to force alphabetical order, v1.0.0.1.
- DBN0098070: In cases where a single Back-to-Back Supplier Invoice was created for a supplier for a billing period, and the invoice was then declined, the billing period was no longer in the list of open billing periods for the supplier. Sproc sp_bpoGetSALSOpenBToBPeriods v2.0.0.1 modified to exclude declined invoices.

- DBN0098420: The Back-to-Back Audit Trail Report has been modified to take into account aggregate functionality and partial Contract Credit Notes, sp_bpoRPT_CTRT_B2BAuditTrail v2.0.0.0.
- CR101: The Contract Item Fees Report has been modified to include aggregate contracts and functional locations, sp_bpoRPT_CTRT_ContractItemFees v1.0.0.2.
- CR103: The Service Balance Account listing now includes Customer Code and Customer Name to easily identify a customer's contracts, sp_bpoGetCTRTServiceAccBalances v1.0.0.3.
- CR109: The 'View Stock' functionality on Sales Quotes, Sales Orders and Sales Invoices has been modified to include the stock on hand for substitute parts as well, sp_bpoGetINVNPartStockStatus v1.0.0.4.

2.4.0.11 - Mod Pack 01 (27.11.2020 4:04 PM)

- **Release Priority:**Low
- **Database Prerequisites**: BPO v2.4.0.11

BPO2 v2.4.0.11 MODIFICATIONS

- DBN0098241: A condition was found where both a serial number and a location was linked to a Call. This resulted in the asset ID and location ID being set on additional Work Orders only when a user did not specifically select one or the other when creating the Work Order. This is an invalid data configuration. tr_bpoWKORWorkOrderDetail has been modified to prevent this, v1.0.0.1
- DBN0098440: Ticket Assignment Email. In the ticket history section, the ticket numbers were not reflected correctly - only the latest ticket number was shown. This has been resolved to display

each ticket number in the history list. tr_bpoWKORTicketAssignments modified, v2.0.0.12

2.4.0.11 - Official Release (13.11.2020 4:30 PM)

- **Release Priority**: Medium
- **Database Prerequisites**: BPO v2.4.0.10

BPO2 v2.4.0.11 MODIFICATIONS

Fixes:

- DBN0097146: When printing a Contract Credit Note, the date was not displayed on the report. Issue resolved by modifying 'dxContractCrNote.dll' file and versioning it up to v3.0.0.2.
- DBN0097816: Issue resolved where cReference2 column in the EVO GL table did not have the Work Order number populated when the part request warehouse was different to the warehouse that the part was issued from (Site Wide Selection of Parts enabled).

BPO CONFIGURATOR v2.3.0.1 MODIFICATIONS

Fixes:

- DBN0097146: When printing a Contract Credit Note, the date was not displayed on the report. Issue resolved by modifying 'dxContractCrNote.dll' file and versioning it up to v3.0.0.2.
- When creating custom reports, the layout xml was duplicated in the 'fldReportLayout' field in tblRPTSCustomLayout. This issue has been fixed.

Version Specific Companion Applications

- BPOConfigurator v2.3.0.1

2.4.0.10 - Official Release (30.10.2020 5:03 PM)

- **Release Priority:** Medium
- **Database Prerequisites**: BPO v2.4.0.2

BPO2 v2.4.0.10 MODIFICATIONS

Global:

- Listing screens which may retrieve large datasets have been modified to prevent the system from refreshing the full data list every time a single record is added, viewed, updated or deleted. The modified listing screens will now only refresh the affected data record in the list in order to improve performance for large datasets. This functionality can be toggled in the Company Configuration (fldAutoRefreshLists). By default, the listing screens will continue to auto-refresh as with previous versions of BPO. For more detail, please see the CR24 specification document.
- New User Rights introduced to control access to the Excel Export function on various screens (CR77).

Sales:

- The Report Designer DLLs for customer facing documents have been updated to make all customer related data fields available to be placed on the specific document template (CR28). This will provide more options for customisation of the customer sales related documents:
    - Contract Invoices and Contract Credit Notes.
    - Sales Invoices and Sales Credit Notes.
    - Quotes and Sales Orders.
- New report created called Functional Service Profitability for service profitability based on functional locations (CR29).

- Custom sales document templates linked to the billing customer (invoice delivery method) are now used for printing (CR30).
- Invoice Delivery Method screen now uses lookups to select the report templates instead of typing the template name (CR30).
- Sales Invoice listing screens include Credit Notes document number, value and status (CR33).
- The ability to have unique Customer Codes for each company/database in a group is provided for by defining a prefix in the Company Configuration (fldCustomerCodePrefix) screen in the BPO_Configurator. This prefix will be appended to the Customer Code when a customer is saved using the Customer Maintain screen in BPO and the Customer Code is blank (CR36).
- DBN0086959: Sales Credit Notes – The department field was not auto populating correctly (when only one department is available) and had to be selected again in order to save the document. This has been resolved.
- DBN0088724: When printing a Sales Quote, Sales Order or Sales Invoice, the UnitType column did not populate when the Unit of Measure data was defined. This has been resolved.

Contracts:

- The Period and Ad-Hoc Escalation screens now include billing customer, finance party, back to back charges and last escalated date (CR32).
- Contract Invoice listing screens include Credit Notes document number, value and status (CR33).
- Meter Usage screen has been modified to improve usability (CR39):
    - Ability to set meter reading to last WO reading.
    - Decimals against average usage, meter reading and usage needs are rounded up to nearest whole number.

- Introduction of colour configuration, similar to call centre colours. This allows the user to configure bands and colours of meter usage variations.
- Inclusion of customer code on the meter usage screen in concatenated field with customer name.

- DBN0087177: When closing a billing period and there is an outstanding billing batch, the alert message that pops up was cut off. This has been resolved.
- DBN0092056: When creating a new short-term contract, the Location drop-down was displaying duplicated data. This has been resolved.
- DBN0092058: Also, when creating a new short-term contract, the contact name did not display the list of contacts which prevented saving as this is a mandatory field. This has been resolved.
- DBN0094162: Meter Usage screen - the selected row counter was not updating correctly which was misleading. This has been resolved.

Purchasing:

- New functionality to create and maintain Purchase Requisition Templates to be used to prepopulate Purchase Requisitions (CR34).
- Purchase Requisitions that originated from the Stock Status screen can now be cloned (CR34).
- New functionality for generating Back to Back Supplier Invoices (CR35):
    - A new button added to the Supplier Invoice Maintain screen for Back to Back Invoices.
    - Ability to multi-select lines and apply one invoice number.
    - Ability to have multiple invoice numbers.

    - Resulting invoices are aggregates of line totals grouped on invoice number with matching line details.
    - A review of the selected invoices and items will be shown if there is more than one invoice header.
    - A separate maintain screen will be opened to save each invoice.
- DBN0094148: Supplier Invoice Maintain screen - Invoice Number field updated to limit input to 20 characters.

Inventory:

- DBN0088085: Parts Listing screen – the delete options are no longer used and have been removed.
- DBN0093906: Print buttons removed from the Goods Awaiting Delivery and Quarantine List screens as they served no purpose.
- DBN0094301: When Part Request approval is required and a part request was declined, a new record was created in tblINVNPartRequestApproval instead of updating the existing record. This has been resolved.
- DBN0094554: Also, when Part Request approval is required and a part request was declined, the email alert subject was stating that the part request was approved. This has been resolved.

BPO CONFIGURATOR v2.2.0.0 MODIFICATIONS

Company:

- New config options defined:
    - fldAutoRefreshLists – Used to toggle between auto refreshing of full data lists in the listing screens or only updating the affected record in the list (CR24).

    - fldCustomerCodePrefix – Used to generate unique customer codes per database. Please note this must be set before any customers are loaded in BPO (CR33).
- DBN0091220: When a user edits an existing site which they are part of, the Task Manager look up control was not populated with the relevant users to be selected for the field.

Contract:

- New Meter Usage screen to define colours by variance percentage to be used in the BPO Meter Usage screen.

Reporting:

- The Report Designer DLLs for customer facing documents have been updated to make all customer related data fields available to be placed on the specific document template (CR28). The data from the following tables will be available:
    - All 'Other Fields' (fldOther1 – fldOther10) from tblOtherFields that relate to the Billing Customer and the Shipping Customer.
    - All fields from tblSALSCustomers
    - All fields from tblSALSAddresses
    - All fields from tblSALSContacts
    - All fields from tblSALSCustomerCRM left joined onto tblEMPLEmployees
- DBN0088076: When sending a test email from the Email Designer, no email was sent if the user did not have a default site defined. This has been resolved.

Services:

- DBN0088223: When a user navigated to Services -> Service Manager -> Setup -> Back button -> Site drop-down list, the information in the sites drop-down list was displayed three times from left to right. This has been resolved.

Static Data:

- DBN0094130: Users could not delete static data from BPO Configurator where the CodeType = 'None'. This has been resolved.

Security:

- DBN0094142: User Management - When opening a user group in the user management screen and closing the window, an error message was displayed (Object reference not set to an instance of an object). This has been resolved.
- User and Group Security - New User Right of code ‘EXCEL’ has been added to the following screens:
    - Adhoc Escalations
    - Adjustment Requests
    - Asset Depreciation
    - Asset Main
    - Awaiting Delivery
    - Billing Preview
    - Billing Preview
    - BOM
    - Call requests
    - Categories
    - Contract Billing
    - Contract Cr Notes
    - Contract Invoices
    - Contract Notifications
    - Contract period Closure
    - Contract Service Account
    - Contracts

- Credit Notes
- Customers
- Debit Notes
- Document Search
- Employee Addresses
- Employee Banking
- Employee Custom
- Employee training
- Employees
- Escalations
- Functional Locations
- Goods Received Notes
- Instructions
- Inventory
- Inventory Transactions
- Items for Contract
- Loan Units
- Meter Processing
- My Tickets
- My Work
- Open Tickets
- Orders
- Part Requests
- PO Expediting
- PR Templates
- Production
- Production Products
- Projects
- Purchase Orders
- Quarantine
- Quotes

  - Requisitions
  - Return Requests
  - Revaluation Requests
  - Sales Commercials
  - Sales Contacts
  - Sales Invoices
  - Service Account Reset
  - Services
  - Shift Exceptions
  - Site Exceptions
  - Statement Run
  - Stock Status
  - Stock Take
  - Supplier Invoices
  - Supplier Returns
  - Suppliers
  - Task Generation
  - Task Radar
  - Tasks
  - Technicians
  - Time Bookings
  - Unprocessed Meters
  - Warranty Claims
  - WIP
  - WO Expenses
  - WO Instructions
  - WO Internal Services
  - WO Loans
  - WO sub contracts
  - WO Swap Outs
  - WO Travel

- WO Warranties
- Work Orders
- Work Requests

Version Specific Companion Applications

- BPOConfigurator v2.3.0.0

2.4.0.2 - Official Release (16.10.2020 4:06 PM)

- **Global Release Priority:** Low
- **Database Prerequisites**: BPO v2.4.0.1

BPO2 v2.4.0.2 MODIFICATIONS

Account Posting:

- DBN0095639 – In a case where account codes were very long and exceeded the expected length, BPO would throw an error: 'Cannot set column target ledger acc...' when posting transactions. A modification has been done to accommodate longer codes.

Contract Credit Notes:

- DBN0094138 – The recalculation of the document total was not automatically triggering when document lines were removed. This has been resolved.
- DBN0094138 - When editing a Contract Credit Note and altering the Due value, an object reference error was thrown when clicking out of the field. This has been resolved.

Version Specific Companion Applications

- **BPOConfigurator v2.2.0.0**

2.4.0.1 - Mod Pack 03 (09.10.2020 5:20 PM)

- **Global Release Priority:** High
- **Database Prerequisites**: BPO v2.4.0.1

BPO2 v2.4.0.1 MODIFICATIONS

Document Total Variances between BPO and Evolution:

- DBN0095312
  - Credit Note Account Driver. The calculated values for non-segmented accounts was not rounded the same as for segmented accounts. Now both cases are calculated and rounded identically - sp_bpoGetSALS_ACCTCTCNSegments v1.0.0.10.

- DBN0095031
  - There was an error in the script that updated the data reference of the Total Excluding field on the Credit Note report layout. This error would only have affected a specific version of the layout. This fix resolves the error if it was applied and has not already been manually fixed.

Next Reference Table:

- DBN0095042
  - There is a reference to an obsolete table (tblAltCodes) in tblCNFGNextReference which will be replaced with the correct table (tblASMNAltCodes).

Delivery Note:

- DBN0093696
  - The serial number was not displayed in the call status changed emails as it was not retrieved from the

database correctly. The trigger has been updated to get the serial number in all cases - tr_bpoSALSCalls v2.0.0.10.

2.4.0.1 - Mod Pack 02 (18.09.2020 4:45 PM)

Global Release Priority: High

Database Prerequisites: BPO v2.4.0.1

BPO2 v2.4.0.1 MODIFICATIONS

Document Total Variances between BPO and Evolution:

- DBN0089928
  - The document total calculations for Sales Invoice, Credit Note and Debit Note on the report layouts have been further modified so that the two systems report the same document value. This change is now only applicable from BPO v2.4.0.1 and requires installer dated 2020/09/15. Please Note: the value displayed in the BPO view of the documents (not the PRINTED view) may still show the variance, this is a separate issue.

User Login:

- DBN0091821
  - An issue was discovered where a user could not log into BPO after using SConnect for the first time as BPO would report that the user is still logged into SConnect. The user had to be manually logged off via SQL. This has been resolved in sp_ bpoUSERGetLastUsed v2.0.0.1.

Contract Billing:

- DBN0092199
    - The Billing Day drop-down would only display the billing days of contracts linked to the user's default site. This has been changed to show the billing days of contracts for the selected site on the ribbon. This requires the new BPO v2.4.0.1 installer dated 2020/09/15.
- DBN0093562
    - When a partial Credit Note was declined and a new Credit Note created, the meters on the declined Credit Note would not appear. This has been resolved in sp_bpoGetSALSCtrtInvMetersForCrNote v2.1.0.2. There are cases where meters invoiced with a zero-value due will not appear. This is because only meters that still have a value greater than zero due, after taking Credit Notes into account, will appear.

Internal Assets:

- DBN0092538
    - When attempting to revalue an internal asset on contract, BPO would halt the process with a message that it cannot be done as the item is still on contract. This has been modified in tr_bpoINVNReturnRequestValidCheck v1.0.0.1 to allow the process to continue.

2.4.0.1 - Mod Pack 01 (14.08.2020 4:47 PM)

Global Release Priority: High

Database Prerequisites: BPO v2.4.0.1

BPO2 v2.4.0.1 MODIFICATIONS

Customer Statement Aging:

- DBN0091294
  - Customer aging underlying stored procedure (sp_ bpoRPT_CR_CustomerAging) updated to fetch the customer aging method as configured in the Evolution client record, and return either aging by statement or aging by date of invoice based on the method configured in evo for that specific customer. Can be applied to BPO2 v2.3.0.3 and later. Please Note: the Outstanding Balance in both BPO and BPO's statement may vary from that of the Evolution front end and Evolution Statement, this is a separate issue.

Document Total Variances between BPO and Evolution:

- DBN0089928
  - The calculation of the GVAL value on the CINV, CRNT, PSIN and DBNT drivers as well as the VAT calculation on the report layouts have been modified so that the two systems report the same document value. This can be applied to BPO2 v2.3.0.3 and later. Please Note: the value displayed in the BPO view of the documents (not the PRINTED view) may still show the variance, this is a separate issue.

OTC Invoice Part Requests:

- DBN0090715
  - There was an issue that when part requests are not set to auto approve, saving an OTC invoice would create a new part request but not cancel the previous part

request record. These part requests were also not able to be approved. This has been resolved in the exe – dated 2020/08/13.

Sales Quotes and Orders:

- DBN0091415
    - A divide by zero error has been resolved where, in some cases, C class parts were added to a quote or an order and currently had zero stock on hand in the selected warehouse.

Sales Audit Trail Report:

- DCN0075957
    - Modification to use the contract credit note fee amount for contract credit notes and not the original invoice fee amount. This can be applied to BPO2 v2.3.0.3 and later.

2.4.0.1 - Official Release (31.07.2020 5:31 PM)

Global Release Priority: Medium

Functionality Specific Priority: High - for clients on BPO v2.4.0.0 who use part request authorization processing (Auto Approve Parts = ‘No’). Part Requests specific to Inter Warehouse and Manufacturing)

Database Prerequisites:BPO v2.4.0.0

BPO2 v2.4.0.1 MODIFICATIONS

Equipment / Locations:

- DBN0088710 – On saving new equipment without adding a Part Number which is a mandatory field, the validation did not trigger and the new equipment was saved. Resolved – prevent saving new equipment where the Part Number has not been populated.

Contract:

- DBN0088025 - When creating a new contract, it is no longer possible to add the same serial number multiple times.
- DBN0089211 - When removing (deleting) an internal asset from a contract and then saving the contract, the return request transaction was blocked with message: The equipment being returned is still on contract and cannot be removed. This has been resolved.

Inventory:

- DBN0088905 – When C Class parts are set to auto approve and a part is requested with no cost price, the system was attempting to enforce approval but the user is unable to complete the request as no approvers exist. This has been resolved.
- DBN0090049 – Modification to ensure all part requests are created with an approval record. Previously, where part requests required manual authorization, certain part requests were created without an approval record. This caused an issue where these part requests would not be updated to approved, when approval is attempted. This has been resolved. The part request types affected were: Inter Warehouse Transfer, Manufacturing.

Sales:

- DBN0089234 – Prevention of Sales Studio quotes being editable in BPO.

Service:

- DBN0089018 – Calls generated from a Call Request were not editable due to an incorrect validation check on the Call Request status. This has been resolved.

Version Specific Companion Applications

BPOConfigurator v2.2.0.0

2.4.0.0 - Mod Pack 02 (31.07.2020 5:29 PM)

Global Rollout Priority: Medium

Functionality Specific Priority: High

Database Prerequisites: BPO v2.4.0.0

BPO2 v2.4.0.0 MODIFICATIONS

Aggregate Contract Back-to-Backs:

- DBN0089845
    - When generating contract invoices that are related to aggregate contracts with a back-to-back meter charge, the system was allocating the full amount and not pro-rata allocating the amount to each meter. This has been resolved.
- DBN0089509
    - Supplier back-to-back fees set up on aggregate contracts were not appearing on the supplier invoice. This has been resolved.

Sales Quotes:

- DBN0089844
    - In some cases, a sales order created from a quote had a duplicate 'CALL' related ref with an unrelated id

which, at the point of invoicing, created a doubling of invoice lines. This was due to functionality related to Sales Studio. This has been resolved.

Part Requests:

- DBN0090049
  - Modification to ensure all part requests are created with an approval record. Previously, where part requests required manual authorization, certain part requests were created without an approval record. This caused an issue where these part requests would not be updated to approved, when approval is attempted. This has been resolved. The part request types affected were: Task Generation, apply Project Methodology to Projects.

Customers:

- DBN0088876
  - Customers in ‘Released’ status were syncing through to Evolution and the account was created again when the customer was approved. This has been resolved.

Company Config:

- DBN0089215
  - Modification to ‘fldAutoRefreshLists’ Company Configuration Flag to have ‘Yes / No’ toggle.

Global:

- BCP to fix default report errors in the following layouts:
  - Purchase Order
  - Contract Performance Notes

- Inserts for the following ribbon menu buttons if missing:
  - Statement Run
  - Service Account Balances
  - Loan Units
  - Call Requests
- Check that User Rights exist for email designer for administrator group, and insert if missing.
- Remove CNFGCode for Debit Note Status 'Printed' as it is not used.
- Remove User Rights to Sales Templates button on Sales Ribbon.

2.4.0.0 - Mod Pack 01 (03.07.2020 5:15 PM)

Rollout Priority:

- Medium
- Database Prerequisites: BPO v2.4.0.0

BPO2 v2.4.0.0 MODIFICATIONS

Call Listing:

- Issue where the Call Listing was showing the wrong Address due to incorrect input parameter by the following functions:
  - fn_bpoGet_SALSCalls.sql
  - fn_bpoGet_SALSCallsDate.sql
  - fn_bpoGet_SALSCallsEmpl.sql
  - fn_bpoGet_SALSCallsStatusDate.sql
  - fn_bpoGet_SALSCallsStatusEmpl.sql

Sales Quotes:

- fn_bpoSALSIsComplexQuote – Checks that table tblSTUDQuotePaymentOptions exists before trying to load Quote data. One instance of SQL Server was returning a false positive resulting in an error.

2.4.0.0 - Official Release (12.06.2020 5:41 PM)

Release Priority:

- Medium
- Database Prerequisites: BPO v2.3.0.7

BPO2 v2.3.0.7 MODIFICATIONS

Global:

- Grid data can now be copied when clicking on a cell that is read-only
- DBN0079746 - Inactive users are able to login on BPO front end. | System modified so that only users of the current database can log in.
- fn_MonthName - modified to prevent error “Conversion failed when converting the varchar value ‘January’ to data type int”.

Contract:

- Service account functionality for inclusion management
- Cost per copy trigger to move contract into (R) Released status when charge rates are modified
- Meter processing screen changed to improve select all check box when many records exist. Warning exists about speed issues when many records are being processed to BPO.

- Extra field added to escalations items to indicate that the item must not be escalated. Aggregate items are marked as not for escalation if any item on the contract is flagged as such. The fldIsExtra field on a contract item is used for this purpose.
- Contract Billing Run Summary Report - Fix to resolve the following results from sp_bpoRPT_SALS_BillingRunSummary. The issue was that the report was double counting the credit notes on fldFeeType. The credit notes should create a cancelling effect on the invoices not added back to it as is in the sproc
- Contract Listing - Contract Settlement Report - Fix to sp_bpoRPT_CR_CTRTMachineSettlementMeta. Resolves the following issue: Contract Settlement report is not returning the correct settlement value. when the contract is completed the contract settlement should be zero not the calculation of the negative months
- Contract Escalations - On filtering the escalations by Type, catch is now in place for data related issues where a contract item exists without a contract – which was previously causing an error “Index 0 is either negative or above rows count”. The user will now be presented with a message noting there is bad data, and the contract it relates to.
- DBN0079745 - The system does not credit line items on an invoice that only have a back-to-back amount. | System now includes lines that have a back-to-back line only.
- CR46 - Modification of the behaviour of filter boxes on the right-hand side of the Contract Billing Preview and Contract Billing screens. When users filter for customers, contract numbers or any other combination thereof on the right-hand pane of the preview / billing screen, the total count of contracts to preview / bill at the bottom should match the number of filtered lines on successful

marking. The successful marking must be achieved by using the header-filter marker to mark all filtered contracts on that pane.

- Manual Contract Invoice Maintain – ensure subtotal is correctly calculated when items are removed.
- tr_bpoSALSCtrtInvServiceTrx – modified to exclude fee amounts of R0.
- sp_bpoGetCTRTAggregateMeters - modified to remove error "Column fldMeterCode does not belong to table MeterDefs" when reinstating a closed aggregate contract.

Finance / HR:

- Marital status is no longer a mandatory input field

Inventory:

- Loan unit management screen has been added
- GRN Revaluations now support a user inputted destination whse and bin
- Part Meter definition restricts addition of meters to a machine
- Part request auto / manual approval configuration to support part approval limits and call type exclusions. The Exclusions and Limitations are configured globally in BPOConfigurator Purchasing Centre.
- Non primary site defaults will auto populate on GRN screen if alternate whse has been used
- The stock in the source whse can be viewed when transferring stock

Maintenance / Projects:

- Users can update work or progress from the project gantt

Procurement:

- Supplier invoice attachments are now supported.
- Purchase requisitions now require a comment when being removed from released
- Email to PR originator if PR is declined
- Email to PR originator if PR is removed from approval
- Email PR and PO number to originator when PR approved
- Purchase Requisition link table was not being populated. This has been resolved.
- Purchase Orders – Related Customer (where stock is procured via a part request) - Updated the fn_bpoGet_PRCHPRRelatedCustomerCode v2.0.0.1 and fn_bpoGet_PRCHPRRelatedCustomerName v2.0.0.1 to fetch customer name from requisition item link
- New trigger called tr_bpoPRCHSuppliersVAT for the Suppliers table to prevent users from associating output tax with a supplier. (For all versions of BPO2). tr_bpoPRCHSuppliersVAT v1.0.0.0.

Sales:

- Sales maintain user defined captions updated to utilize new form user code
- Copy a quote function added to the listing
- Sales Order and Sales Invoice Maintain screens - Performance Enhancement when typing in the Customer Name
- Credit terms functionality change to handle multiple statement credit terms above the standard 7 options (Code 0 through 6) – only for clients where more than 1 ageing method is used. An additional set of Credit Terms will need to be configured in BPO Configurator – (example set-up in screenshot below). The relevant Ageing method would need to be created in Evolution and linked to the relevant clients. Just a note to remember that when cre-

ating a new customer in BPO, the client is saved with the default ageing method as set in Evolution.

- When emailing a Sales Invoice, where the Billing Customer is different to the Shipping Customer, the Shipping Contact email address was being used in the 'To' field. This has been corrected to now use the Billing Contact email address.
- Quote listing – prevent editing quotes created in Sales Studio
- DCN0066956 - When doing a new deal sale process, the billing customer set on the quote and sales order changes to the shipping customer when the invoice is added. This should pull through the same billing customer that was specified on the quote and order. | Fix – change to application to pull through order billing customer
- Installer updated to include the correct SALESINVOICE.dll version – v3.0.0.3. A script is included in the upgrade that will remap the fields in the Default and Custom layouts to match the dll.

Service:

- Call Requests have been implemented where a customer is on hold
- Call Complete error code mandatory flag added to company config
- Call screen changed to show the model number of the part in the listing
- Call listing now shows the SLA percentage
- Call maintain supports filter when typing in related refs fields
- Serial no./ functional location is included in the customer call email
- Call Centre Maintain – SLAs - Ensure that the correct SLA quantity from the Contract's service balance for Labour Hours is displayed

- Call Centre Listing - Work Order and Call Assignments sub grids – grid captions were not being fetched.
- Call Centre Listing - Correctly display the call state where multiple assignments exist. sp_bpoGetSALSCalls v2.0.0.8
- Swap out fix to ensure that when the replacement item is swapped onto the contract item, the fees and meters are re-activated.
- DBN0079551 - Time Review listing - LabourComments filter box is a memo edit, click in it causes unhandled exception error - Unable to case object of type DevExpress.SxtraEditors.MemoEdit to type DevExpress.XtraEditors.MemoExEdit. | Fix – control is blocked in the filter row
- DBN0079674 - When IsReview is enabled the system does not allow labour records flagged as non billable to be accepted. | Change to block the Billable flag on the time maintain screen when Is Review is enabled.
- DBN0070442 - Work Order Time Entry Maintain - edit existing record where time has been reviewed - the maintain screen comes up as for a new time record, for that date. | updated exe to show detail and to hide save if record is reviewed.

Reporting:

- DBN0079518 - Reporting - System Reports - Run a Report - where the date format in comp config has slashes - results in and error that the file location cannot be found. | Fix – Forward slash is a prohibited character and is replaced with dash.
- Tech Connect Process Exceptions - Process Exception - Process Related and Process All - object reference not set to an instance of an object. | Resolved in v2.4.0.0 with updated objects.

BPO CONFIGURATOR v2.2.0.0 MODIFICATIONS

Global:

- BPOConfigurator now uses the same color scheme as BPO2, this is to provide consistency in look and feel between the applications.
- Setup now adds a desktop icon and an Add/Remove icon when searching for the application to be uninstalled.

Company:

- Site Maintain – ability to view and update transactional reference codes (for Work Orders, Work Requests, Calls and Call Requests)
- Purchasing Centre maintain – Call Type Exclusions and Part Type Limit configuration for Part Request Approval functionality.

Contract:

- DBN0079298 - Contract Types when unselecting a fee that has been discontinued i.e. set to inactive in static data won't allow it because the fee is associated on closed history contracts - This has been resolved.

Inventory:

- The In-Transit Warehouse can now be configured via Special Warehouses dock panel within the Inventory Warehouses screen.
- Inventory Warehouses – change to prevent users from updating the warehouse flag ("IsAsset", "IsStock", "IsQuarantine", "AutoIssue") if the warehouse has previously been saved, this is to prevent warehouse flags changing on warehouses that may have transactions processing against them.
    - Inventory Warehouses –
    - Warehouses are now saved if the user presses the "Save" button.

- Only new or edited items are saved to the database.
- Errors are now caught in the GUI instead of only being caught via database triggers.
- Warehouses and bins that have been added to the front end, but NOT saved to the database can be deleted.
- Users should experience a noticeable increase in performance and usability.

Reporting:

- Email Designer – HTML template editor that enables setting up the style and format of email notifications sent out from BPO. The email notification templates are as follows:
    - **Requisition Approval Required:** Notification that a Purchase Requisition has been released for approval. This email will be sent to all employees who have the security right to authorise a Purchase Requisition.
    - **CR Note Approval Required:** Notification that a Sales Credit Note has been released for approval. An email will be sent to all employees who have the security right to authorise a Sales Credit Note.
    - **Contract Approval Required:** Notification that a contract has been released for approval. This email will be sent to all employees who have the security right to authorise a contract.
    - **Supplier Invoice Authorisation Required:** Notification that a Supplier Invoice has been raised and requires Approval. This email will be sent to all employees who have the security right to authorise a supplier invoice.
    - **Part Request Goods Available Required:** Notification that stock has been received for an outstanding part

request. This email will be sent to employee who requested the part – 'RequestedBy' on the Part Request

- **Asset Conversion Required:** Notification that serialised stock item has been received, and must be converted from Stock to Asset in order to issue to a Part Request raised against the Asset Warehouse. This email will be sent to employee who requested the part – 'RequestedBy' on the Part Request
- **Stock Adjustment Authorisation Required:** Notification that a Stock Adjustment Request has been raised and requires Approval. This email will be sent to all employees who have the security right to authorise a Stock Adjustment.
- **CRM Activity Notification Required:** Activity Schedule Change Notification email will be sent to all Activity Attendees
- **CRM Activity Assignment Required:** Activity Update email will be sent to the Assigned Salesman, in order to be made aware that an Activity has been assigned or has changed. **Contract Critical Changes:** Notification of changes to the Contract Header, Items or Fees. This email will be sent to all employees who have the security right to authorise a contract.
- **Contract amendment notifications:** All of the following contract changes will result in the contract moving to the 'Released' status to be checked and approved. A notification email will be sent to users who have the rights to authorise contracts. These are the changes involved: Contract Type, Customer,

Aggregate Billing flag. If any contract item is added or removed, and any contract item fee is added or removed. Change of Billing Customer on a fee or meter. And these Contract Item Fee changes: Amount, Start Date, End Date, Escalation %, Account Code, COS Account Code, Invoice Description, Billing Period, Billing Cycle, Finance Party, and Finance Amount. Contract Item Meter Charge Level changes: UnitCharge, FinanceAmount, FromQuantity"

- **Work Request Raised:** Notification that a Work Request has been created. Will be emailed to the Work Request ‘AssignedTo’ person
- **New Call Email:** Notification that a new call has been created. This will be emailed to the customer primary contact
- **In Progress Call Email:** Notification that the call has been accepted and is in progress. This will be emailed to the customer primary contact.
- **On Hold Call Email:** Notification that the call has been placed on Hold. This will be emailed to the customer primary contact
- **Suspended Call Email:** Notification that the call has been placed in Pending status. This will be emailed to the customer primary contact
- **Completed Call Email:** Notification that the call has been Completed. This will be emailed to the customer primary contact
- **Closed Call Email:** Notification that the call has been Closed. This will be emailed to the customer primary contact

- **Technician Assignment Email:** Notification that a call or project has been assigned. This email will be sent to the Employee who was Assigned to the Call or Project.
- **Customer Released Email:** Notification that a New (CRM) customer has been Released and is awaiting Approval. This email will be sent to all employees who have the security right to authorise Customers.
- **Quote Status Change Email:** Notification that a quote has changed status to Accepted or Rejected - all the employees who have access rights where the salesman has no manager or he / she does not have access rights.
- **Ticket Assignment Email:** Notification that a ticket has been assigned. This email will be sent to the employee the ticket is assigned to.
- **Purchase Requisition Approval WorkFlow:** Notification that a Purchase Requisition has been released for approval. This email will be sent to all employees who have the security right to authorise a Purchase Requisition.
- **Contract Credit Note Approved:** Notification that a Contract Credit Note has been released for approval. An email will be sent to all employees who have the security right to authorise a Contract Credit Note.
- **Aggregate Meters on Contract Require Attention:** Notification that a meter charge level has changed and the contract requires approval. This email will be sent to all employees who have the security right to authorise a contract.

- **Item Fee Changes on Contract Require Attention:** Notification that a fee charge has changed and the contract requires approval. This email will be sent to all employees who have the security right to authorise a contract.
- **Meter Changes on Contract Require Attention:** Notification that a meter charge has changed and the contract requires approval. This email will be sent to all employees who have the security right to authorise a contract.
- **Item Changes on Contract Require Attention:** Notification that a contract item has changed and the contract requires approval. This email will be sent to all employees who have the security right to authorise a contract.
- **Part Request Awaiting Approval:** Notification that a Part Request has been raised and requires approval. Only applicable where the Company Configuration - Part Request Auto Approval is set to 'No'. This email will be sent to all employees who have the security right to authorise a Part Request.
- **Part Request Approved:** Notification that a part request has been approved (where part request approval is required). This email is sent to the employee who raised the part request.
- **Purchase Requisition Status Change Work Flow - New:** Email to PR originator if PR is removed from approval
- **Purchase Requisition Approved:** Email PR and PO number to originator when PR approved

  - **Purchase Requisition Declined:** Email to PR originator if PR is declined
  - **Tech Assignment Email with Comments:** Notification that a call or project has been assigned. This email will be sent to the Employee who was Assigned to the Call or Project.
  - **Project Assignment Change With Comments:** Notification of project assignment status change. This email will be sent to the Employee who was Assigned to the Project.
- 'Template' default layout added that can be used to add a page on an existing layout, e.g. add a Terms and Condition page at the end of a Sales Quote.

Security:

- Can no longer log in if there are no user details or if the user is inactive.
- User Listing form no longer fetches from the database on each row click
- User Maintain form now fetches the user details on form load.
- User Rights - Updated sproc – sp_bpoGetUserRights and cnfg codes.
- User Rights screen - Access level summary – to be greyed out when it is partially set for the child rows
- User Rights screen - Tooltip with enlarged image on the control type within the grid.
- User Rights screen – Dashboard layout image added.
- User Rights – security codes - the field fldCompanyID in tblCNFGCodes is used to determine if the code is saved in tblUserRights to access type 'SYST' or to the code type set for that code.

The company id is '-1' for access type 'SYST' or '999' for the code type.

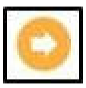
- User Rights – the security codes for the ribbon buttons on the menu for BPO2 are now included under each module.
- User Rights – all modules in BPO2 are now under the 'BPO' header.
- User Rights – System Report security codes can be found under BPO\REPT_MAIN\REPT\REVW\
- User Maintain – allows deletion of a user across all companies (databases)
- User Listing – allows a group to be cloned.
- User Listing – the adding of a user is blocked when the maximum licensed count for the users is reached. The number of licensed users and the number of licenses used is displayed at the bottom of the screen.
- User Maintain – upon deletion of a user, the user is also now deleted as a sql user from the database to ensure they cannot access it via SQL Server.
- User Maintain – the adding of an accounts user – the user has access to the sql objects in the Evolution database (need to run new script 'DBAllObjects_Permissions' on the Evolution database to give them necessary permissions).

Version Specific Companion Applications

BPOConfigurator v2.2.0.0

BPO_DriverConnect Suite

2.3.0.7 - Mod Pack 02 (12.06.2020 5:39 PM)



Rollout Priority / Requirement

- Medium global client rollout priority
- Database Prerequisites: BPO v2.3.0.7

BPO2 v2.3.0.7 MODIFICATIONS

Date Format Fix:

- Hardcoded date changed to correct date retrieval and conversion for the following stored procedures:
  - sp_bpoGetCTRTAggFees.sql
  - sp_bpoGetCTRTAggMeterCharges.sql
  - sp_bpoGetCTRTAggregateMeters.sql
  - sp_bpoSALSStatementQueue.sql

CTIN CTCN Performance Enhancement:

- CTIN CTCN Driver Performance Enhancement where segmentation is not used.

CTRT SLA Items Optimisation:

- A large performance gain by removing the BOM lists section of the data returned in the stored procedures and reworking the related functions.

Global:

- fn_MonthName - modified to prevent error “Conversion failed when converting the varchar value ‘January’ to data type int”.
- sp_bpoGetCTRTAggregateMeters - modified to remove error 'Column fldMeterCode does not belong to table MeterDefs' when reinstating a closed aggregate contract.
- sp_bpoRPT_CR_RevaluationRequest – modified to stop returning inactive revaluation request line items (items that were added to the revaluation and then later deleted before approval)

Remove Invalid triggers - Pre v2.4.0.0 (08.06.2020 5:29 PM)

Rollout Priority / Requirement

- High global client rollout priority

Application Version Compatibility

- BPO2 v2.3.0.3 on (pre v2.4.0.0)

Remove Contract Item Triggers

- tr_bpoCTRTAggMeterChargeLevelChange and tr_bpoCTRTItemMeterChargeLevelChange introduced in v2.3.0.3, but are invalid as they belong to BPO v2.4.0.0.

2.3.0.7 - Mod Pack 01 (01.05.2020 5:09 PM)

Rollout Priority / Requirement

- High global client rollout priority

Due to the contract billing calculation fix - where the client has aggregate billing contracts with meter charges as well as contracts linked to consolidated customers.

Application Version Compatibility

- Clients using BPO2 v2.3.0.7

BPO2 v2.3.0.7 Mod Pack 01

DBN0079177	BPO Configurator v2.0.0.3 - When saving a sproc that has parameters changed due to a mod or had legacy data the table tblRPTSSavedSprocParameters on configurator does not discard the unwanted parameter resulting in an error. | This has been resolved in BPOConfigurator v2.0.0.4 in conjuction with a new trigger tr_bpoRPTSSprocParameters (BPO2_v2307_ViewReportsFix_v1.0.0.0)
DBN0084081	Fix for sp_bpoCTRTCreatePreview and sp_bpoCTRTCreateInvoices - In the current version, it is possible to calculate the incorrect total for the meters on a consolidated contract if the immediately preceding contract is an aggregate contract.
	User Rights Fixes and Functionality modifications as per BPOConfigurator v2.0.0.4 release notes. (BPO2_v2307_on_UserRightsFix_v1.0.0.5 and BPO2_v2307_on_CR27_v1.0.0.0)

[Click on image to enlarge it]

BPO Configurator v2.0.0.4

Fixes:

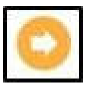
- Can no longer log in if there are no user details or if the user is inactive.
- User Listing form no longer fetches from the database on each row click.
- User Maintain form now fetches the user details on form load.
- User Rights - Updated sproc – sp_bpoGetUserRights and cnfg codes.

Changes:

- User Rights screen - Access level summary – to be greyed out when it is partially set for the child rows.
- User Rights screen - Tooltip with enlarged image on the control type within the grid.
- User Rights screen – Dashboard layout image added.
- User Rights – security codes - the field fldCompanyID in tblCNFGCodes is used to determine if the code is saved in tblUserRights to access type ‘SYST’ or to the code type set for that code.
- The company id is ‘-1’ for access type ‘SYST’ or ‘999’ for the code type.

- User Rights – the security codes for the ribbon buttons on the menu for BPO2 are now included under each module.
- User Rights – all modules in BPO2 are now under the ‘BPO’ header.
- User Rights – System Report security codes can be found under BPO\REPT_MAIN\REPT\REVW\
- User Maintain – allows deletion of a user across all companies (databases).
- User Listing – allows a group to be cloned.
- User Listing – the adding of a user is blocked when the maximum licensed count for the users is reached. The number of licensed users and the number of licenses used is displayed at the bottom of the screen.
- User Maintain – upon deletion of a user, the user is also now deleted as a sql user from the database to ensure they cannot access it via SQL Server.
- User Maintain – the adding of an accounts user – the user has access to the sql objects in the Evolution database (need to run new script ‘DBAllObjects_Permissions’ on the Evolution database to give them necessary permissions).
- Current user rights and associated user rights codes will be copied to tblUSERights_old and tblCNFGCodes_old respectively, as a safety measure, before applying the user right integration fix.

2.3.0.7 - Official Release (03.04.2020 5:40 PM)



Rollout Priority / Requirement

- Medium global client rollout priority
    - Only clients who segment the CDEP postings are affected

Application Version Compatibility

- Clients upgrading from BPO2 v2.3.0.6

Fixes:

- Fixes the issue where the site ID is not passed to the CDEP posting sproc when converting asset to stock.

2.3.0.6 - Mod Pack 01 - updated to v1.0.0.4 (03.04.2020 5:36 PM)

Mod Pack for Latest Fixes / Changes

- The main batch file has been modified for the CNFGCodesIndexUpdate modification – to ensure that the Alter Table script is run if no duplicate codes exist.

2.3.0.6 - Mod Pack 02 (20.03.2020 2:12 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- Clients currently on BPO2 v2.3.0.6
- Single upgrade to apply the latest modifications

Mod Pack for Latest Fixes / Changes

- This modification pack includes the following underlying modification scripts:
  - BPO2_all_AggregateBillingMod_v1.0.0.0
  - BPO2_v2306_SystemReportsFix

Modifications:

- BPO2_all_AggregateBillingMod_v1.0.0.0 - sp_bpoCTRTCalcAggManualBackToBack v1.0.0.8 which includes some optimisations, especially for a contract with many machines.
- BPO2_v2306_SystemReportsFix_v1.0.0.0 - DBN0079177, as partial resolution, a trigger is added called tr_bpoRPTSSprocParameters to remove saved sproc parameters when the base reports parameters are updated.

2.3.0.6 - Modification 01 (06.03.2020 12:40 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- Clients currently on BPO2 v2.3.0.6

Contract Billing Preview

- Prevent duplicate lines from displaying in the Contract Billing Preview screen where the customer is consolidated and the customer's contracts have different contract types configured.

Change Request 25 - Stock Status Performance Enhancement (28.02.2020 4:39 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- BPO2 v2.3.0.4 or later

Stock Status

- Improve performance by making use of rolling totals.
  - New table introduced tblPRCHStockOnOrder which is populated during the upgrade.
  - Updated sp_bpoGetINVNStockStatus
  - Additional new objects:
    - sp_bpoINVNRebuildStockOnOrder
    - tr_bpoINVNIssueReceiptItems_OpenOrder-Received
    - tr_bpoPRCHOrders_StockOnOrder

2.3.0.6 - Mod Pack 01 (28.02.2020 4:36 PM)

Rollout Priority / Requirement

- High global client rollout priority

Application Version Compatibility

- Clients currently on BPO2 v2.3.0.6
- Single upgrade to apply the latest modifications

Mod Pack for Latest Fixes / Changes

- This modification pack includes the following underlying modification scripts:
    - BPO2_all_CallsListPerfMod_v1.0.0.0
    - BPO2_all_CNFGCodesIndexUpdate_v1.0.0.0
    - BPO2_all_ReturnRequestMod_v1.0.0.0
    - BPO2_v2.3.0.3_on_RemoveIncorrectTriggers_v1.0.0.0
    - BPO2_v2.3.0.4_On_ChangeRequest_25
    - BPO2_v2.3.0.6_Modification_01_v1.0.0.1

CNFGCodes Table Constraint Modification - Email Text Correction

(28.02.2020 4:34 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- All Versions of BPO2

CNFGCodes

- To prevent duplicate static data codes from being inserted into tblCNFGCodes where all fields are identical except for fldCompanyID, fldCompanyID will be removed from the constraint.
- **Note:** In order to run this modification, no duplicates can exist in tblCNFGCodes. If duplicates exist, the list of duplicates will be

written to the log file. Manual intervention required to remove the duplicates, and then the modification can be run.

- If no duplicates are found - tblCNFGCodes will be modified as follows: fldCompanyID will be removed from the constraint.

Return Request Fix (28.02.2020 2:18 PM)

Rollout Priority / Requirement

- High global client rollout priority

Application Version Compatibility

- All versions of BPO2

Return Requests

- New trigger - tr_bpoINVNReturnRequestValidCheck v1.0.0.0 – to prevent loan unit returns from being processed where the loan unit is on a contract.

2.3.0.6 - Official Release (07.02.2020 4:58 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- Clients upgrading from BPO2 v2.3.0.5

DBN0079518	Reporting - System Reports - Run a Report - where the date format in comp config has slashes - results in and error that the file location cannot be found. Fix – Forward slash is a prohibited character and is replaced with -
DBN0079551	Time Review listing - LabourComments filter box is a memo edit, click in it causes unhandled exception error - Unable to case object of type DevExpress.SxtraEditors.MemoEdit to type DevExpress.XtraEditors.MemoExEdit Fix – control is blocked in the filter row
DCN0066956	When doing a new deal sale process, the billing customer set on the quote and sales order changes to the shipping customer when the invoice is added. This should pull through the same billing customer that was specified on the quote and order. Fix – change to application to pull through order billing customer
DBN0079674	When IsReview is enabled the system does not allow labour records flagged as non billable to be accepted. Change to block the Billable flag on the time maintain screen when Is Review is enabled
DBN0079745	The system does not credit line items on an invoice that only have a back-to-back amount. System now includes lines that have a back-to-back line only.
DBN0079746	Inactive users are able to login on BPO front end. System modified so that only users of the current database can log in.
DBN0079298	BPO Configurator v2.0.0.3 - Contract Types when unselecting a fee that has been discontinued ie set to inactive n static data wont allow it because the fee is associated on closed history contracts - This should not be the case. see notes

2.3.0.5 - Official Release (31.01.2020 3:00 PM)

Rollout Priority / Requirement

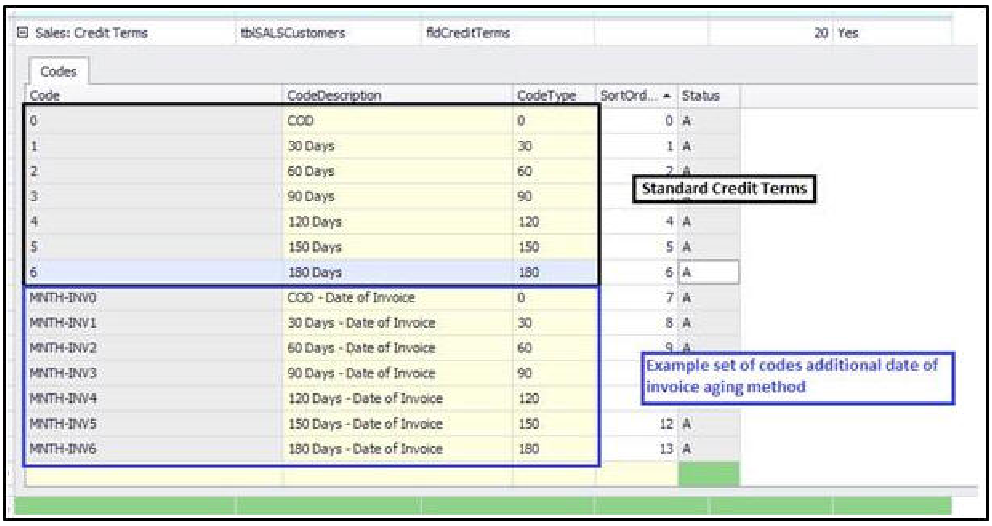
- Medium global client rollout priority

Application Version Compatibility

- Clients upgrading from BPO2 v2.3.0.4

Modification:

- Swap out fix to ensure that when the replacement item is swapped onto the contract item, the fees and meters are re-activated.
- Credit terms functionality change to handle multiple statement credit terms above the standard 7 options (Code 0 through 6) – <u>only for clients where more than 1 ageing method is used</u>. An additional set of Credit Terms will need to be configured in BPO Configurator – example setup in screenshot below. The relevant Ageing method would need to be created in Evolution and linked to the relevant clients. Just a note to remember that when creating a new customer in BPO, the client is saved with the default ageing method as set in Evolution.



Code	CodeDescription	CodeType	SortOrd...	Status
0	COD	0	0	A
1	30 Days	30	1	A
2	60 Days	60	2	A
3	90 Days	90		
4	120 Days	120	4	A
5	150 Days	150	5	A
6	180 Days	180	6	A
MNTH-INV0	COD - Date of Invoice	0	7	A
MNTH-INV1	30 Days - Date of Invoice	30	8	A
MNTH-INV2	60 Days - Date of Invoice	60	9	A
MNTH-INV3	90 Days - Date of Invoice	90		
MNTH-INV4	120 Days - Date of Invoice	120		
MNTH-INV5	150 Days - Date of Invoice	150	12	A
MNTH-INV6	180 Days - Date of Invoice	180	13	A

- When emailing a Sales Invoice, where the Billing Customer is different to the Shipping Customer, the Shipping Contact email address was being used in the 'To' field. This has been corrected to now use the Billing Contact email address.
- Quote listing – prevent editing quotes created in Sales Studio.
- Purchase Requisition link table was not being populated. This has been resolved.

2.3.0.4 Modification 06 (31.01.2020 12:05 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Modification:

- **Call Listing screen**
  - Correctly display the call state where multiple assignments exist.
    sp_bpoGetSALSCalls v2.0.0.8
- **Suppliers**
  - New trigger called tr_bpoPRCHSuppliersVAT for the Suppliers table to prevent users from associating output tax with a supplier. (For all versions of BPO2).
    tr_bpoPRCHSuppliersVAT v1.0.0.0.

2.3.0.4 Modification 05 (24.01.2020 1:31 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Modification:

- **BPOConfigurator – Add User**
  - Invalid syntax used for creating a user due to syntax change in SQL Server. This has now been resolved in sp_bpoUserAdmin v2.0.0.5.
- **Delivery Note**
  - On printing the Delivery Note, where underlying meter readings exist, an Object reference not set to an instance of an object error would come up. This has been resolved with an updated DNOTE default report layout.

2.3.0.x – Meter Usage Meter Reading Capture Tool (24.01.2020 11:42 AM)

Rollout Priority / Requirement

- Low global client rollout priority
  - For clients who require a load sheet to load month end billing run meter readings

Application Version Compatibility

- BPO2 v2.3.0.1 or later

Modification:

- MeterCapture sheet updated to include validation.

2.3.0.4 Modification 04 (17.01.2019)

Rollout Priority / Requirement

- Medium global client rollout priority
    - To upgrade client databases that are currently on BPO2 v2.3.0.4

Application Version Compatibility

- Compatible with BPO2 v2.3.0.4

Modification:

- **Time Log – Start Time**
    - Fix to resolve a truncation error that was occurring when starting time in BPO, which caused an unhandled exception error in the front end. The issue is related to the increase in length of the Call Type and Error Code descriptions, which was not accommodated in the sproc. This has now been resolved in sp_bpoGetSALSAllOpenCalls v2.0.0.6.
- **Contract Credit Notes**
    - In BPO you can now change the value of a contract fee that you are crediting, so you don't necessarily credit the whole fee amount that was originally charged. The credit note driver was using the contract invoice fee amount to post the transaction to Evolution and not the credit note fee amount. This has resulted in contract credit notes with different values in BPO and Evolution. sp_bpoGetSALS_ACCTCTCNSegments v1.0.0.8 now uses the contract credit note fee amount to post to Evolution.

2.3.0.4 - EXE Update (13.12.2019)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Fixes:

- Sales Processing – Credit Check
  - Fix for the credit check to ensure the terms are correctly calculated where the Debtors Aging Method is set to 'STATEMENT'.

2.3.0.4 - Modification 03 (29.11.2019 2:30 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Modification

- Contract Billing Summary Report
  - Fix to resolve the following results from sp_bpoRPT_SALS_BillingRunSummary. The issue was that the

report was double counting the credit notes on fldFeeType. The credit notes should create a cancelling effect on the invoices not added back to it as is in the current sproc.

- Contract Listing - Contract Settlement Report
    - Fix to sp_bpoRPT_CR_CTRTMachineSettlementMeta. Resolves the following issue: Contract Settlement report is not returning the correct settlement value. When the contract is completed the contract settlement should be zero not the calculation of the negative months.
- Purchase Orders – Related Customer (where stock is procured via a part request)
    - Updated the fn_bpoGet_PRCHPRRelatedCustomerCode v2.0.0.1 and the fn_bpoGet_PRCHPRRelatedCustomerName v2.0.0.1 to fetch the customer name from the requisition item link.

BPO Reports-Billing Run Summary Patch 01 (29.11.2019 1:32 PM)

Rollout Priority / Requirement

- High global client rollout priority

Application Version Compatibility

- All versions of BPO_RSI, BPO_TEL and BPO2

Modification:

- Contract Billing Run Summary Report
    - Fix to resolve the following results from sp_bpoRPT_SALS_BillingRunSummary. The issue was that the report was double counting the credit notes on fldFeeType. The credit notes should create a cancelling effect on the invoices not added back to it as is in the sproc.

2.3.0.4 - Modification 02 (22/11/2019 3.47 PM)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Modification:

- Contracts
    - Aggregate billing now supports different billing customers against aggregate Meters and Fees.
    - Performance enhancement for return requests – prevent sp_bpoGetINVNReturnRequestPart from timeout.
- Issue with multiple users simultaneously accessing Stock, e.g. Stock Status / Bill of Materials, View Stock on Sales doc maintain screens.
    - Scheduling - when moving the mouse over the scheduler under specific condition when there are more resources than appointments.

- Change in sp_bpoWKORNonBillableSerialsAreStock sproc to v1.0.0.1 to allow issues to be returned to another warehouse.

2.4.0.0 RC1 (Release Candidate 1)

The following changes are in **v2.4.0.0** (20/11/2019 11:40 AM combined with 13/11/2019 3:14 PM):

Rollout Priority / Requirement

- Release candidate 1

  For user acceptance testing

Application Version Compatibility

- To run on a BPO2 v2.3.0.4 database

BPO2 Modifications:

1. Call Requests have been implemented where a customer is on hold.
2. Call Complete error code mandatory flag added to company config.
3. Service account functionality for inclusion management.
4. Users can update work or progress from the project gantt.
5. Supplier invoice attachments are now supported.
6. Purchase requisitions now require a comment when being removed from released.
7. Sales maintain user defined captions updated to utilize new form user code.
8. Loan unit management screen has been added.
9. GRN Revaluations now support a user inputted destination warehouse and bin.

10. Cost per copy trigger to move contract into (R) Released status when charge rates are modified.
11. Email to PR originator if PR is declined.
12. Email to PR originator if PR is removed from approval.
13. Email PR and PO number to originator when PR approved.
14. Part Meter definition restricts addition of meters to a machine.
15. Part request auto/manual approval configuration to support part approval limits and call type exclusions.
16. Marital status is no longer a mandatory input field.
17. Call screen changed to show the model number of the part in the listing.
18. Call listing now shows the SLA percentage.
19. Grid data can now be copied when clicking on a cell that is read only.
20. Call maintain supports filter when typing in related refs fields.
21. Meter processing screen changed to improve select all checkbox when many records exist. Warning exists about speed issues when many records are being processed to BPO.
22. Copy a quote function added to the listing.
23. Extra field added to escalations items to indicate that the item must not be escalated. Aggregate items are marked as not for escalation if any item on the contract is flagged as such. The 'fldIsExtra' field on a contract item is used for this purpose.
24. Non primary site defaults will auto populate on GRN screen if alternate warehouse has been used.
25. Serial no./ functional location is included in the customer call email.
26. The stock in the source warehouse can be viewed when transferring stock.
27. One of our clients was battling to print a large sales invoice - sp_bpoRPT_CR_SalesInvoice updated.
28. Issue with multiple users simultaneously accessing Stock, e.g. Stock Status / Bill of Materials, View Stock on Sales doc maintain screens.

2.3.0.4 - Modification 01 (25.10.2019 2:20 PM)

Rollout Priority / Requirement

- Medium global rollout priority

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.4

Modification:

- **Unprocessed Meters**
  - There is a bug in the calculation of the billing amount on the unprocessed meters screen when a contract is changed from aggregate to non-aggregate. This does not affect preview and actual billing, only the unprocessed meters estimated billing. The sproc sp_bpoCTRTCalculateBillingAmount is modified to v1.0.0.11 to deal with this.
- **Contracts**
  - tr_bpoCTRTContracts and tr_bpoCTRTItemsUpdate were found were faulty for inactivating contract items, ie aggregate were left out. These have modified to v1.0.0.3 and v2.0.0.2 respectively to resolve this.
- **Loan Delivery Note**
  - On printing the Loan Delivery Note, where underlying meter readings exist, an Object reference not set to an instance of an object error would come up. This has been resolved with an updated LOANDNOTE default report layout.

2.3.0.4 (11.10.2019)

Rollout Priority / Requirement

- High global client rollout priority

  If the client is currently on BPO2 v2.3.0.3

Application Version Compatibility

- To upgrade client databases that are currently on BPO2 v2.3.0.3

Modification:

- **Sales**
  - If a Customer record is open in Edit mode, whilst another user releases the customer from hold, and the original user attempts to save the customer, the user will receive a notification that the customer details have changed and the customer details need to be reloaded (close and reopen the customer maintain screen).
  - Sales Invoices and Contract Invoices that are in status 'New'– Send to Print Queue button is not available. This prevents the issue where the invoices are printed without being processed in Evolution.
- **Service**
  - Invoices created on a call – the shipping address is now auto-populated in the invoice maintain screen. Note that the address must be selected on the under-lying call.

2.3.0.3

BPO2 v2.3.0.3 Modification **03** and **04** Release (11/10/2019)

PLEASE RUN BEFORE v2.3.0.4 INSTALLATION

CO3 SOFTWARE MODIFICATION **04** RELEASE

Rollout Priority / Requirement

- High global client rollout priority

  Due to the Contract Billing Date Time fix

Application Version Compatibility

- Contract Billing objects only compatible with BPO2 v2.3.0.3

Modification:

- **Service**
  - Work Order Meter Reading List: the prior reading date and time is no longer presented to the user (users were incorrectly using those values to save against other documents).
  - Call meter list performance tweak.
  - Check to prevent loan units from being swapped out.
- **Contract Billing**
  - The contracts to bill sproc does not pick up aggregate contract fees with a different billing customer and as such these fees are not invoiced. This has been fixed.
  - Contract Billing DateTime fix.

CO3 SOFTWARE MODIFICATION **03** RELEASE

Rollout Priority / Requirement

- Low global client rollout priority
- Required for clients who:
  1. are using BPO2 any version
  2. use DRS Reporting

Application Version Compatibility

- Compatible with BPO2 all versions.

Modification:

- **DRS Reporting**
  - Ensure that the records in tblDRSSReportDistribution and tblDRSSSprocParameters are deleted when a DRS report is deleted.

BPO2 v2.3.0.3 Modification 02 Release (27/09/2019)

Rollout Priority / Requirement

- Low global client rollout priority
- Required for clients who:
  1. are using BPO2 v2.3.0.2 or later
  2. use the CDPT (Contract Department) segment for contract billing

Modification Requirement Check

- If you are not sure if the modification is required on the database, and you would like to check, you can run the BPOv2_v2.3.0.3_

Mod02_CheckIfRequired batch file. This will give you feedback in the console window and a log file.

Application Version Compatibility

- Compatible with BPO2 v2.3.0.2 or later

Modification:

- Contract Credit Note
    - Pick up the segment on a contract credit note for an aggregate fee where CDPT (Contract Department) segment (for BPO v2.3.0.2 or later)

Additional:

- Reports
    - Core compatible Insight reports for BPO2 2.2.0.1 or later:
        - sp_bpoRPT_INSI_SALS_CustomerNoActivity
        - sp_bpoRPT_INSI_SALS_NewCustomers

BPO2 v2.3.0.3 Modification **01** Release (20/09/2019)

Application Version Compatibility

- Compatible with all BPO2 versions

Modification:

- **Assets**
    - Prevent deletion of an Asset Meter if that meter is linked to a contract.

Combined Release (16/09/2019)

Application Version Compatibility

- Database to be upgraded must be BPO2 v2.3.0.2

Functionality Changes \ Fixes:

- **Contracts**
  - A meaningful message is displayed to a user if they attempt to add an aggregate meter - that has no related machine meter - to a contract.
- **Contract Billing**
  - User was unable to set the invoice date to the period desired when more than 1 financial period was open, Open financial period check is now correct.
  - Contract billing – Aggregate billing now posting to EVO.
  - Meter Processing - Reading email requests - returning error with invalid date/time, unprocessed meter entity modified to take no date into account.
  - Unprocessed Meters fix to calculate the average billing (sp_bpoGetMTRMPeriodUsage).
  - Adjustment of functions for billing to support 41 characters in the account code field.
    - sp_bpoGetSALSCtrtInvoiceFees – updated so that Aggregate fees are displayed in the Manual Contract Invoice in View Mode
    - sp_bpoGetSALSContractCrNoteFees v2.0.0.1 added aggregate fees
    - sp_bpoGetSALSCtrtInvFeesForCrNote v2.0.0.1 added aggregate fees

        - sp_bpoRPT_CR_ContractCreditNote – modified so that Aggregate Fees display on the Contract Credit Note report
        - sp_bpoRPT_CR_ContractInvoice – fix to ensure rounding on aggregate billing items is done consistently

- **Short Term Contracts**
    - Ensure the print documents appear for the first row when opening Short Term contracts.
- **Projects**
    - Project Parts Listing - Project picking slip can be printed.
- **Inventory / Stock**
    - Transfer Screen – if a part request originates the transfer – users were adding extra parts at the bottom causing these items to be stuck in-transit – this is now prevented.
    - Parts Listing - does not include inactive Parts.
    - Stock Status - Duplicate columns were appearing in the warehouse lookup control when changing the site – now fixed.
    - Stock Take - Inactive Warehouses and Bins are no longer included.
    - Return Requests - Return request listing – can print return request document.
    - Part Requests Listing - Project picking slip can be printed from part request screen.
    - Inventory Warehouses - trigger modification for inactive warehouses - removes user rights associated with the warehouse that is inactivated.

    - The exe has been updated to prevent site 0 stock takes from being added.
    - Fix for stock issues where the 'Site Wide Selection of Parts' flag is set on Purchasing Centres. Previously this was incorrectly using the PSIN driver for the financial postings, but now uses the PSWO driver as it should.
        - sp_bpoRPT_CR_PickingSlip – change to support picking slip on project work orders
- **Projects and Calls**
    - Assignments - Users are force accepting calls when TechConnect is in use, FORCEACC right has now been added.
    - When Call/WO or Project Invoices are performed, users are adding extra parts to the invoice, the system fails to post the ICOS and ICON driver, system now checks if COS exists on the invoice and posts accordingly.
- **Calls**
    - The credit term info is now added to the info textbox on the customer panel.
    - Prior calls can be viewed when adding a call.
    - Adjustment of call listing sproc and associated functions to support more than 50 characters in the call type description and the error code description fields.
    - Call Listing screen – Closed Calls – underlying work orders removed to improve performance
    - sp_bpoGetSALSCallsByCustomer – Call Description and Error Code Description field lengths increased to 255 characters – to prevent errors when navigating to the call listing via the customer

- **Sales**
  - Customers - Statement can be viewed for the customer selected.
  - Sales Quotes - Credit Check – the system will consider the current transaction when determining if the clients credit limit will be exceeded.
  - Sales Quotes – On reselecting a sales commercial, if the item listed is not in the selected commercial, the price will not be changed. Previously this value was being set to the unit cost of the item.
  - Sales Quotes - On save, zero value lines are no longer set to inactive.
  - Sales Orders – Department is restricted to the site
  - Sales Orders - Credit Check – the system will consider the current transaction when determining if the clients credit limit will be exceeded.
  - Invoices sent to the Print Queue – Status now changed from N to P.
  - Invoices - Credit Check – the system will consider the current transaction when determining if the clients credit limit will be exceeded.
  - Invoices - Department is restricted to the site.
  - Credit Notes - Comment can now be viewed after saving.
  - Credit Notes - Department is restricted to the site.
  - Fix to the sales document processing (quotes/orders/invoices and credit notes) screens so that if the commercial is changed then the change is applied to the items in the screen as per BPO 1

    - Navigating to the sales order listing from the customer only presents the user with New orders and not the full list, this is now resolved and also implemented for quotes and sales invoices. Contract Invoices/Ctrt Cr Notes and Sales Cr Notes still require the Status selection box.
    - Credit Note linked to an OTC invoice with no parts issued loads random serial nos for A Class parts on loading invoice lines. If the user selects to return the parts, BPO creates returns and for C class parts creates qty in BPO that should not be there.
        - sp_bpoGetSALSCrNoteItems v1.0.0.1 WITh (NOLOCK) added
- **Statement Run**
    - Statement Run functionality is added, user rights RIB_STAT for the ribbon and STAT for the form.
    - Flag included to select whether or not to process zero value statements for the statement run.
    - Ability to select all customer records for the statement run.
    - Ability to include invoices for all (via right click).
    - Additional company configuration flag for customer statements - Print negative statements – which is a global flag and is set to No by default.
- **Tech Map**
    - Previous Street Map website used stopped working, updated to load working Street Map website.
- **Department Association**
    - The Department Association SiteID (tblDEPTAssociation) does not need to be set as the site is

determined by the DepartmentSite (tblDEPTSites). Stored Procedure bpoDEPTAssociation has been updated to set the Department Association SiteID to 0.

- **Evolution**
    - Get aging method by customer.
    - The following driver sprocs updated to handle posting 6 decimal places for the VAT amount to ensure correct rounding to the 4th decimal place:
        - sp_bpoGetSALS_ACCTCINVSegments,
        - sp_bpoGetSALS_ACCTCRNTSegments,
        - sp_bpoGetSALS_ACCTCTCNSegments,
        - sp_bpoGetSALS_ACCTCTINSegments.
    - sp_bpoGetPRCH_ACCTSINVSegments – performance enhancement to allow a supplier invoice with 8268 line items to be processed successfully
    - sp_bpoGetSALS_ACCTCTINSegments – fix to enable the contract department on aggregate fees to be determined
- **Report dlls**
    - Report dlls updated to DevExpress version v18.2.3.0.
- **Reports**
    - Report updates:
        - sp_bpoRPT_CALL_OpenOutSLA
        - sp_bpoRPT_SALS_ContractFeePerMonth,
        - sp_bpoRPT_PMNG_OpenProjectNoWOs

Associated Applications:

These applications are specifically linked to BPO2 v2.3.0.3 or later, and must be installed (and scripts run where applicable) as part of this upgrade.

- BPO_Configurator v2.0.0.2
    - Report dlls updated to DevExpress version v18.2.3.0
    - Fix for duplicate IDX error that occurred on save after changing parameter values for reports.
- BPO_PrintService v5.0.0.2
    - Report dlls updated to DevExpress version v18.2.3.0
- BPO_CompletedWork v2.0.0.1
    - Report dlls updated to DevExpress version v18.2.3.0
- BPO_NotificationService v4.1.0.1
    - Report dlls updated to DevExpress version v18.2.3.0
- BPO_PickingSlip v3.0.0.2
    - Report dlls updated to DevExpress version v18.2.3.0
    - Object Refresh to ensure all Picking Slip related objects have been rolled out.
- BPO_ServiceLimiter v3.0.0.1
    - Report dlls updated to DevExpress version v18.2.3.0
- BPO_OpenItemsManager v1.0.0.4
    - This console application monitors the statement queue (processed from the Statement Run screen in BPO2 v2.3.0.3 or later) via a scheduled task
    - The application emails or prints the statement/invoices, as per BPO delivery Method, to the customers based on the statement queue.
    - Option to send invoices with the statement to be available and have them zipped in a single zip file.

BPO2 v2.3.0.3 Release Folder:

The upgrade release folder includes the following:

- **BPO2_v2.3.0.3_BaseDatabase**
    - BPO2_BASE_2303_OfficialRelease.7z
    - EVO_CO3_BASE_v7.10.0.23_20190906.7z (StatementRun Evo Specific sprocs applied)
- **BPO2_v2.3.0.3_Installer**
    - BPO_V2.3.0.3_x64_Setup_OfficialRelease (12/09/2019 10:04)
- **BPO2_v2.3.0.3_LoadTool**
    - LoadSheetTool_Code_PostBPOv2.3.0.x_v1.0.0.6
- **BPO2_v2.3.0.3_RelatedApplications**
    - BPO_CompletedWork_v2.0.0.1
    - BPO_Configurator_v2.0.0.2
    - BPO_NotificationService_v4.1.0.1
    - BPO_OpenItemsManager_v1.0.0.4
    - BPO_PickingSlip_v3.0.0.2
    - BPO_PrintService_v5.0.0.2
    - BPO_ServiceLimiter_v3.0.0.1

- **BPO2_v2.3.0.3_Scripts**
    - BPO2_v2.3.0.3_Upgrade_OfficialRelease

Note: that any fixes or functionality changes released after this, that are deemed part of v2.3.0.3, will be released as HotFixes.

- **BPO2_v2.3.0.3_TableVersioningTool**
    - BPO_v2.3.0.3_TableVersioningTool (30/08/2019)
- BPO2_v2.3.0.3_Validation
    - BPO_v2.3.0.3_Validation_OfficialRelease

Upgrade Notes:

1. Ensure a test upgrade is run first.
2. Ensure that you have a backup of the database before upgrading.

3. Run the upgrade script: **BPO2_v2.3.0.3_Upgrade** (Please note that there are 2 Evolution stored procedures that need to be run manually, and run the upgrade as normal).
4. In the **Log** folder – review the logs for any errors. Send these logs to QA and the relevant Team Manager for review.
5. Run the **BPO_v2.3.0.3_TableVersioningTool**, review the Error Log. Save the file and send to QA and relevant Team Manager for review. (**Note:** that this table versioning tool only needs to be run once, and won't need to be run again in future versions).
6. Run the **BPO_v2.3.0.3_Validation_OfficialRelease** tool, review the Error Log. Save the file and send to QA and relevant Team Manager for review. (**Note:** that each upgrade from now on should have a validation tool which should be run to ensure the correct version of the objects have been applied).
7. Install: **BPO_V2.3.0.3**
8. Install Related Applications and relevant upgrade scripts:
    - **BPO_CompletedWork_v2.0.0.1**
    -
        - Install BPO_CompletedWork_v2.0.0.1_x64_Setup
    - **BPO_Configurator_v2.0.0.1**
        - Install BPOConfigurator_v2.0.0.1_x64_Setup
    - **BPO_NotificationService_v4.1.0.1**
        - Install RSI_NotificationService_v4.1.0.1_x64_Setup
    - **BPO_OpenItemsManager_v1.0.0.4**
        - Run BPOOpenItemsManager_v1.0.0.4_Upgrade_v1.0.0.0
        - Install BPO OpenItemsManager_v1.0.0.4_x64_Setup
    - **BPO_PickingSlip_v3.0.0.2**

- Run BPOPickingSlip_v3.0.0.2_Refresh_v1.0.0.0
- Install BPO_PickingSlip_v3.0.0.2_x64_Setup

- **BPO_PrintService_v5.0.0.2**
  - Install BPO_RSI_PrintService_v5.0.0.2_x64_Setup
- BPO_ServiceLimiter_v3.0.0.1
  - Install BPO_RSI_ServiceLimiter_v3.0.0.1_x64_Setup

BPO2 - v2.3.0.3 Release Notes for the Official Release:

- BPO2_v2.3.0.3_ReleaseNotes_OfficialRelease.pdf

\Implementations\CO3_Releases\Applications\BPO_V2\BPO2_UpgradesAndInstallers\v2.3.0.3

BPO Help File

- BPOHelp.chm (v2.0.0.56 – dated: 2019/09/13) has been updated to include the BPO2_v2.3.0.3 Official Release – Release Notes -

\Implementations\CO3_Releases\Applications\BPO_V2\BPO2_Documentation

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2.3.0.2

Functionality Fixes:

- **Inventory Definition** now includes fields for capturing Duty Cycle and Life Cycle.
- Change to **Contracts** for **Aggregate Fees**. The fee is added once to the contract as a global fee, not linked to an individual contract item, but to the contract itself.

- Change to **Contracts** for **Aggregate Meters**. Global configuration on the contract for meters and meter charges, linked to the contract itself. However, each contract item meter should still be marked as active and have a start reading configured.
- Change to **Contracts** to include **Life Based Meters**, with the ability to set a Rebate amount.
- Ability to set multiple time review items to **SLA Time**.
- Ability to set multiple time review items to **SLA Time**.
- User defined fields can now be configured on **Assets** and **Inventory** definitions.

2.2.0.1

Functionality Fixes:

- Migrated to VS 2017 and Devexpress v18.2
- Implemented rounding when retrieving the net of debit and credit from EVO, also round the transaction value before performing a credit check.
- Implemented custom definable **Priority levels**.
- Implemented an association on the **Call Maintain** screen when selecting a call type to see if the CodeType holds an association to the priority. If so priority is applied as per call type. No association means the default as configured at the company level is applied.
- **Security rights** to control the ribbon bar have been implemented, the security rights across the forms have been rationalized and made unique to allow for additional security rights as required.

- New **Security rights** added to the **Call Note maintain** screen to prevent editing of the date/time.
- **Contract Billing** and **Billing Preview** – Fees and meters can be split across invoices. Example: Mono meters can be billed independently from colour.
- The grid layout has been standardized across all screens to use the GridVIEW NAME AND NOT THE DATAGRID NAME, affects the **Assets** screen, the **Customers** screen, the **OTC Invoice** listing.
- The CTRL-F grid feature now searches the grid and highlights items in the scroll bar that match.
- **Quarantine GRNs** , the user right SETCOST has been added and allows an authorized user to change the cost of specific lines.
- **Quarantine GRNs**, the user right SETCOST has been added and allows an authorized user to change the cost of specific lines.
- Debit Note validates the line items using the SRNItemID and not the part as duplicate parts are not handled.
- On Hold **contracts** are now blocked from saving a **Call**.
- **Swap outs** - and **Assets** - **Buy Backs** -sp_ bpoPRCHRequisitionItemDetails is being supplied with value 0 for fldTaxRate, which means the purchase order also has a TaxRate of 0. The Supplier Invoice does have the correct TaxRate for the supplier.
- **Contract Listing** - controls directly on the form for the following maintain screens - Release Contract, Place Contract on Hold, Suspend Contract.

- **CallCentrePerformance** to incorporate the time review changes in v2.2.0.0.
- **Ticket Maintain** - **Time Entry** - **Start Work** - message to be change - currently says the Call has been released, should say that work has started.
- **Service Maintain** screen - Notes and Substitute tiles are not valid and should be removed.
- **Gantt Chart Print Preview** – for the project corrected.
- **Delivery Items Maintain** - can we enable the Cure Date field.
- Added **User Right** to the script for ADDDEBTOR.
- Prevent a lower reading being entered on the **Meter Usage** screen.
- Modified partial **Contract Credit Note** maintain so that changes to the Due amount reflect in the total, if the invoice is not current then a New closing reading cannot be entered.
- Excluded the ribbon in the workspace so that the Save button etc. does not get hidden.
- Changed the caption of the Save button in the **Depreciation** screen to say Process.
- Fixed error on retrieving the site default warehouse so that a blank message is not displayed on the **Quote Maintain** screen.
- Fixed error relating to the fldCodeType field on the **Billing** and **Billing Preview** screen.
- Fixed the trigger tr_bpoSALSOrderDetails to set the correct **Quote Status** field to I to indicate that the quote is closed.

- Fixed the trigger tr_bpoSALSInvoiceDetails to allow **Third Party** sub-contracts to be invoiced, the system currently says that the items have already been invoiced.
- Updated the **Billing** screen and the **Billing preview** screen to enable faster processing.
- Updated create invoices sproc to process the data correctly for the new functionality of allowing individual fee type and meters types to be billed on separate **Contract Invoices**.
- Fixed the auto yield billing functionality to show the correct price as the current system is overridden by the commercial.
- Fixed the bug which causes BPO to crash when the underlying report object is missing from the database and the report is run from one of the entity screens and the screen is maximised.
- Ability to set **Contract Item Inclusion Quantity** and link the related Fee Type that covers the inclusion
- **Time review** functionality included – time can be reviewed marked as SLA Inclusion hours or Non Billable hours and flagged as reviewed. Use of this functionality is dependent on configuration of the following Company Configuration flag – Time Review (fldReviewedProcess).
- **Rental Information**, including Interest Method, Rate and Rental factor can be captured against the **Contract** by either selecting the originating sales order, or capturing the data manually, in order to calculate the applied rental.

2.2.0.0

BPO v2.0.0.0 Implementation of the **BPOCORE** database, which is a central database to manage users. If the client has multiple v2.2.x.x (or later) databases, all these databases will point to BPOCORE in order to access the User records. Licensing is then based on the active users in the BPOCORE database.

2.1.0.72

Functionality Fixes:

- **Credit Check**
  - The system will consider the current transaction when determining if the clients credit limit will be exceeded.
- **Call/WO or Project Invoices**
  - When Call/WO or Project Invoices are performed, users are adding extra parts to the invoice, the system fails to post the ICOS and ICON driver, system now checks if COS exists on the invoice and posts accordingly

2.1.0.71 (06.06.2019)

Upgrade Notes:

The client database must be BPO v**2.1.0.69** in order to run this upgrade.

Functionality Fixes:

- **Technician Map**
  - New map tile site used for the Tech Map in BPO, as site previously used stopped working.
- **Contract Billing**
  - Contract Billing – fix to enable users to select the invoice date for any open financial period.

2.1.0.69

3rd Release / EXE Fix Releaser (14th May 2019)

Functionality Fixes:

- **Credit Notes**
  - Resolves an issue where a credit note could be created against a closed work order.

Files Required:

BPO_V2.1.0.69_x64_Setup (14 May 2019 12:27)

2nd Release / EXE Fix Releaser (18th Dec 2018)

Functionality Fixes:

- **Customers**
  - Customer Contact Listing – On adding or changing the DEBTOR contact - the update to the Evolution client table is not committed. This means the change is not saved to Evolution, and causes time out issues until that user closes BPO.

Files Required:

BPO2 V2.1.0.69 (dated: 2018/12/10)

<u>**1st Release**</u> (20th Nov 2018)

Functionality Fixes:

- **Sales**
  - Customer Contact Listing - On adding or changing the DEBTOR contact - the update to the Evolution client table is not commited. This means the change is not saved to Evolution, and causes time out issues until that user closes BPO.
- **Evolution/Credit Check**
  - Implemented rounding when retrieving the net of debit and credit from EVO, also round the transaction value before performing a credit check.
- **Debit Notes**
  - Debit Note validates the line items using the SRNItemID and not the part as duplicate parts are not handled.
- **Calls/Contracts**
  - On Hold contracts are now blocked from saving a Call.
- **Supplier Invoice**
  - Swap outs - and Assets - Buy Backs - sp_ bpoPRCHRequisitionItemDetails is being supplied with value 0 for fldTaxRate, which means the purchase order also has a TaxRate of 0. The Supplier Invoice does have the correct TaxRate for the supplier.
- **Supplier Return**
  - Supplier Return Maintain – on saving a new supplier return with duplicate parts – Input string was not in a correct format. Issue resolved.

2.1.0.68

Functionality Fixes:

- **Contract**
  - On closing a contract, the amend user was not populating.
- **Calls**
  - Call Maintain screen - Prior Call List – double clicking on a line will open the corresponding call.
- **Revaluation Request**
  - Revaluation Request document underlying stored procedure updated to remove 0 user id records.
  - Revaluation Request maintain - resolved BinID error.
- **Stock Status** and **Part Listing**
  - Both screens – now included a column displaying the average unit cost.
- **Manual Contract Invoice**
  - Maintain screen updated to resolve a date time issue.
- **Non-stock GRN**
  - Maintain screen updated to resolve a date time issue.
- **User Rights**
  - User rights for Call Assign, Call Hold and Call Pending separated from Call Assignments Listing, Hold History and Pending History. (Requires BPOConfigurator v1.1.0.1)

2.1.0.67

Functionality Fixes:

- **Unprocessed Meters**
  - Unprocessed Meters (Junior Meter Capture screen) – meter reading field is no longer time based when capturing the reading. The reading is saved in the field when the user moves away from the field, by pressing enter, tab or clicking away
- **Company Configuration**
  - Company Configuration flag static data refresh and insert where flags are missing.

2.1.0.66

Functionality Fixes:

- **Calls**
  - Adding Labour and Internal Service Requests against a call linked to an item on contract, where the selected labour and service are marked as inclusions - Billable flag is marked.
- **WIP**
  - WIP Listing screen - filter the records by the EventDate field, and then click on any record - error - Cannot perform Like operation on System.DateTime and System.String.
- **Project Methodology**
  - when navigating via the Gantt chart - edit a subproject that has dependency and when trying to put in the control (completion or start etc.), the top box for Project methodology gives an Object not set to a Reference error.

- On navigating to the Project Methodology maintain from the Gantt chart - cannot add BOMs, External Resources or Internal Labour - error object reference not set to an instance of an object.

- **Projects**
    - Apply a project methodology - error String or Binary data would be truncated. P_bpoPMMEApplyToWO. sp_bpoPMMEApplyToWO to be updated - fldPartDescription in the creation of the Parts temp table - on line 510 - to be set to 255 characters.
- **Meter Usage**
    - Meter Usage Screen - when the first meter reading line has been released to billing, then the meter usage field is not editable for non-released readings.

2.1.0.65

Functionality Fixes:

- **Calls**
    - Call Maintain - view prior call list
- **Contracts**
    - Contract Credit Notes - When auto generating the invoice, the system is not getting the correct exchange rate due to a bug in the stored procedure.
    - Contract Credit Notes - Approve a Credit Note - Typo in the Credit Note Authorisation message box header - reads as - Credit Note Authorisation - should be Credit Note Authorisation.

- Contract maintain - Item Meters sub grid - un-select one or more meters and save - the meters are not marked as inactive.

- **Customers**
    - Customer Maintain screen - allow the forward slash special character in the Customer Name and Customer Registration Number fields.
- **Assets**
    - Buy Back - No error message is displayed when a user is attempting to buy back an asset that is already in the stock warehouse. Fix to the Issue receipt items trigger so that it fetches the transaction number correctly.
- **OTC Invoice**
    - Where invoice added via Sales Invoices - part requests created have fldCreateUser set to 0.
- **Project Methodology**
    - Project Methodology dependencies are maintained and viewed on a Gannt chart. Methodologies can be added, edited and timing changed from the Gantt. Print out of the Gantt is also possible.
    - Project Methodology Instructions are added via drag and drop on the PM Instruction Maintain screen.
    - Project Methodology Maintain has been modified to allow the resource and instructions to be made on the maintain form.
- **Quotes**
    - Quote Maintain - The Tax Rate does not populate for line item type OTHER.
- **Sales Orders**

- Sale Order Listing - select a sales order and Add Items to WO - for Third Party Service Requests - when the record is created in tblWKORServiceRequests - fldRequiredDate and fldAssignedTo are set to 0.

- **Third Party Service Request**
  - Third Party Service Request Maintain - Comment field has an asterisk, but the field is not currently mandatory.
- **Buy Back**
  - Under conditions where the company and site are supplied to retrieve the purchasing centre for buy backs, no data is returned, fix made to the stored procedure.
- **Warehouses**
  - Warehouse trigger has been modified to ensure that only 1 site default whse is set.
- **Warranties**
  - Warranty Claim listing - Print Claim - error - The ConnectionString property has not been initialized.
- **Generic**
  - When a user is linked to a default site, and they have access to more than one site - on navigating to another screen, the site defaults to the user default instead of the site originally selected.
- **Supplier Returns**
  - When performing a supplier return, the system will now prompt the user if the PO must be re-opened if it is already closed.

2.1.0.64

Functionality Fixes:

- **Calls**
  - Call Maintain screen - on adding a call - the fldRequestorID for tblWKORWorkOrder and fldAssignedBy for tblWKORWorkSchedule are being set to 0.

2.1.0.63

Functionality Fixes:

- **General**
  - BPO Login – ensure that the login screen recognises whether the first environment in the list is a 'Trust Connection' login and sets the login for the relevant method. Previously the user would need to first de-select and then re-select the environment.
  - Re-Register BPO - Ensure that the Number of Seats field will accept a value greater than 100.
  - Ensure that when a user resets the BPO login password, that the old password does not remain cached. This would previously cause a login error and force the user to log out and back in again.
  - Ensure that the Edit button is unavailable if no records exist in the following screens:
    - Functional Location Maintenance Methodology listing
    - My Work Orders listing
  - Craft Maintain and Part Category Maintain screens updated to align fields at the top of the screen when the screen is maximised.
- **Assets**

- On Adding or Editing a Client Asset from the Asset Listing screen – the Customer lookup list has been restricted to not include Customers in status 'New' and 'Released'.
- On Deleting a linked Parts Bill of Material – ensure that the linked BOM is deleted instead of the Bill of Material definition.
- Asset Maintenance Methodology – set the default Factor 1 and set the field to non-editable. The factor is only used for Scheduled Tasks on Functional Locations.

- **Contracts**
    - Awaiting Contract Screen – resolve an 'Object Reference not set to an Instance of an Object' error message, where multiple lines are selected in the Available Equipment List, using the Shift Key between selections.
    - The default contract type period is incorrectly mapping to the escalation and billing period fields when creating a new contract from the items for contract screen. This is corrected to pick up the current period as per the Contract Maintain form functionality.
- **Short Term Contracts**
    - Short Term Document Print or Email options now clearly indicate that the options are for the Contract, Contract Return or Invoice.
    - Short Term Document Email options – ensure that the Email Maintain screen comes up, so that the selected document can be emailed.
- **Inventory**

- Stock Transfer Maintain screen – ensure that the Reference field is mandatory.
- Stock Transfer Maintain screen – prevent an “Object Reference not set to an Instance of an Object” error when clicking in the Quantity field for a new unpopulated line.

- **Procurement**
  - Purchase Requisition maintain screen - removed the function to right click an Add a new line. This would cause an “Object Reference not set to an Instance of an Object” error, if the user clicked anywhere except on the PartCode column. New lines should be added via in-line editing.
  - Purchase Requisition maintain screen – ensure that the part primary supplier is automatically populated when adding a new part to the requisition.
  - Suppliers – ensure that the Functions tiles (Items Supplied, Notes, Addresses) display the relevant listing for the selected supplier.
- **Projects**
  - Prevent the addition of the following Item Types on a Project Invoice: CRFT - Craft, INVN - Inventory, EXPS - Expenses and CTRT - Subcontract (Third Party) Services. These items should first be logged on the underlying work order.
  - Where the Company Configuration is set to not automatically set the Project Reference numbers - ensure that the Project Reference field is mandatory and editable, so that project numbers must be input on project

created, or can be assigned to Projects after the following auto generation features:

- New Deal Sale\Rental Project
- Apply Project Methodology
- Work Order Allocation – Auto Create Projects
- Maintenance Planning – Generate Tasks \ Maintenance Radar

- Project Listing screen – resolved a “StartIndex cannot be less than zero. Parameter name startIndex” error when in the Hierarchy View and clicking in the Reference filter field.
- Ensure that changes made to columns are saved on selecting Save Layout in the following screens:
  - Work Order Allocation
  - Technician Allocation

- **Sales**
  - Customer Contacts history table introduced to capture all historical changes made.
  - On converting a Sales Order to a New Deal - where the Call Type or Work Order Type are not correctly configured – a system notification message to select a call type came up twice with the same message. The duplicate message has been removed.
- **Service Centre**
  - Prevent the addition of the following Item Types on a Call Invoice: CRFT - Craft, INVN - Inventory, EXPS - Expenses and CTRT - Subcontract (Third Party) Services. These items should first be logged on the underlying work order.

    - Ensure that the Call Assignment Listing screen refreshes after saving a new assignment.
    - My Work Listing screen – prevent a “Can’t find property” error when filtering by the WODescription and clicking Edit or double clicking on the work order record.
    - Work Order WIP listing screen – resolve an ‘Object Reference not set to an Instance of an Object’ error message, where multiple lines are selected in the Available Equipment List, using the Shift Key between selections.
    - Work Order Third Party Service Requests listing – ensure that the right-click Create Requisition option is not available if a Requisition has already been created.
- **Warranties**
    - Warranty Definitions – resolve an “Object Reference not set to an Instance of an Object” error when attempting to save a definition that does not have a Meter Unit Type defined.
    - Warranty Definitions – ensure that definitions can be saved for Time-based periods only, Meter-based conditions only, or a combination of both.
    - On the Warranty Claim maintain screen – the following fields have been set to ‘SpinEdit’: Quantity, Unit Cost, Discount and UnitSellingPrice.

2.1.0.62

Functionality Fixes:

- **General**
    - Removal of Inactive customer contacts from the following maintain screens:
        - Call
        - Quote
        - Order
        - Invoice
        - Credit Note
        - Contract Invoice
        - Contract Credit Note
        - Work Request
        - Emails
        - Project
        - Contract
        - Short Term Contract
        - New Deal
        - New Deal Project
- **Assets**
    - On adding a new asset – the processing tiles now bring up a Process Validation message saying: The equipment must be saved before accessing this function.
- **Sales**
    - Trigger to prevent a non-employee user from approving a sales credit note.
    - Change to sp_bpoGetSALSCustomerInvoiceMethod so that the name of the configured contact for the invoice delivery method is shown in the listing.
    - Credit Note Maintain - on deleting a line item, the Sub Total, VAT and Grand Total fields need to be refreshed. This has been resolved.

- Change New Deal and New Deal Project to pick up configured call types for New Deal Rental and New Deal Sales from the configured codes
- **Service Centre**
    - Call screen listing:
        - Moved Closed calls to their own node.
        - Detail is excluded from closed calls (Department, Call State, Technician).
        - All calls only show non-closed calls.
    - If the Call List is filtered, and the user double clicks on the call, the first call in the un-filtered list is sometimes displayed instead of the selected call. This has been resolved.
    - Trigger to prevent non-billable part requests when no contract is linked to the call and it is not a New Deal Rental.
    - Improved the SLA calculation on the call maintain screen to show the SLA value which is currently not populating.
    - Prevent loan unit requests being added to project WOs and stand-alone WOs.
    - If the loan unit is returned then the request disappears from the loans screen, this is confusing, the stored procedure allows it to be visible so the user can see it is processed.
- **Inventory**
    - Prevent receipt of a serialized part with no serial number.
    - Part Request Maintain screen - if the user attempts to select the warehouse before the part code has been

selected - error - Object reference not set to an instance of an object. This has been resolved.
  - Part Request maintain – ensure a quantity greater than 3 digits can be requested.
  - Stock Issue Maintain - line items that are removed are still processed in the stock issue if stock exists. This has been resolved.
- **Procurement**
  - Goods Received Notes Listing - select Stock GRN - View GRN - object reference not set to an instance of an object. This has been resolved.
  - Debit Note maintain - before the supplier is selected - click in Tax Rate field then click away - unhandled exception error - input string was not in a correct format.
  - Debit Note maintain - click in the Item Code search field - unhandled exception error - Unable to cast object of type DevExpress.XtraEditors.TextEdit to type.
  - Supplier Return Maintain - click in the Quantity line item field for new line - unhandled exception error - object reference not set to an instance of an object. This has been resolved.
- **Contracts**
  - Change to Contract Maintain to allow the user to remove Billing Customer and Back to Back Part by adding the ability to type into the textbox grid (then press enter to ensure the Customer Third Party Supplier description is removed).

- Contract Notes and Document maintain screens updated to align fields at the top of the screen when the screen is maximised.
- Contract Hold History Listing and Suspend History Listing screens - Add button removed.
- Allow Loan units to be removed from the contract.

2.1.0.61

3rd Release / Fixes (20th June 2018 12.36 PM)

Functionality Fixes:

- **Sales Invoices**
  - User was able to open the Sales Invoice in edit mode, then print from that screen, and then edit the invoice and save it. This has been resolved.
- **Quarantine**
  - List of GRNs to revalue has been modified to include complete GRNs.

Upgrade Notes:

- Run the fixes upgrade script: **BPO2_Fixes_v2.1.0.61** (to be run if the database has already been upgraded to v2.1.0.61 – otherwise run the updated BPO2_Upgrade_v2.1.0.61 – which includes these fixes).
- Install: **BPO_V2.1.0.61** (2018/06/20)

2nd Release / Fixes (20th June 2018 10.50 AM)

Functionality Fixes:

- **General**
    - Datagrid Captions - Refresh to insert any missing captions, hide ID fields, remove 'fld' from the caption description, and update to ensure all 'Marked' columns exist for Period Escalation and Adhoc Escalation processing screens
    - User Rights - Refresh to insert any missing user rights.
- **Sales**
    - Customer Maintain screen: On saving a customer where the Company Config flag 'fldAccountPosts' is set to "No" – an incorrect message came up on new customer validation stating: 'The account code is not valid, because it does not relate to an existing debtor'. This has been resolved.
    - Customer Listing screen: Enable the Add button if no customer exists in the list for the selected site.
    - Sales Invoices and Credit Notes: When editing and saving a Sales Invoice or Credit Note – the Shipping customer would save to the database as the Billing Customer, instead of the selected Billing Customer. The selected Billing and Shipping Customers are now saved and fetched correctly.
- **Contracts**
    - Contract Maintain screen - Meter charges grid now saves without having to click away from the focused column.
    - Meter Usage screen - Calculation of Meter Reading percentage corrected.
    - Manual Contract Invoice Maintain screen - The Meter Reading date would default to 1900/01/01 instead of

    the selected Billing Date. The Meter Reading date now populates correctly.
  - Manual Contract Invoice Maintain screen - Clicking on Calculate Aggregate button would not run the aggregate billing calculations. This has been resolved.
  - Manual Contract Invoice Maintain screen - On saving Manual Contract Invoice for an Aggregate Billing Contract, where the Aggregate Billing calculation has not been done – was missing the validation to check whether the calculation has been done. This is now in place.
  - Manual Contract Invoice - On saving a manual contract invoice, where meters are to be billed, the Contract Invoice Meter Charges were only saved where a back to back existed. This has now been resolved.
- **Functional Locations**
  - Various Functional Location screens updated to align fields at the top of the screen when the screen is maximised.
- **Inventory**
  - Delivery Items Listing - Ensure that only outstanding items to be received display in the list.
  - Stock Take Listing - Ensure that a stock take batch can be approved where no variances exist.
- **Service Centre**
  - Call Maintain - Serial Number enforced check now done correctly.
  - Call Assignment Maintain: Employee Listing restricted to Technicians only, where Technicians are configured.

Otherwise the full list of active Employees will be returned.

- **Projects**
    - Project Assignment Maintain: Employee Listing restricted to Technicians only, where Technicians are configured. Otherwise the full list of active Employees will be returned.

Upgrade Notes:

- Run upgrade script: **BPO2_Fixes_v2.1.0.61** (to be run if the database has already been upgraded to v2.1.0.61 – otherwise run the updated **BPO2_Upgrade_v2.1.0.61** – which includes these fixes).
- Install: **BPO_V2.1.0.61** (2018/06/19)

1st Release (14th June 2018)

Functionality Fixes:

- **Contract Escalations**
    - Escalation Notification - now also shows the fees linked to the contract. Escalation screen – fixed so that if the Close Period flag is selected, the items are deselected.
    - Escalation screen - fixed so that if the Close Period flag is selected, the items are deselected.
- **Sales**
    - Customer Invoice Delivery Method - Ensure that the ‘PREM’ (Print and Email) method is synced to evolution.
    - Sales Orders - On creating a New Deal Call from a Sales Order – the New Deal functional location will be set in the Call Related References. This is dependent

on where the environment is set to RSI or TEL (via the 'B Class Part acts as Service. 'Yes' for TEL environments).

- Sales Orders - When creating a New Deal from a Sales Order – resolved Object Reference error on save if the Contact Type is not selected.
- Sales Quotes: Prevent the Unhandled Exception Error when selecting the 'SuppressOnPrint' option where the line has not yet been populated.
- OTC Credit Note: Ensure that a stock return is created for INVN items that are marked as 'ReturnToStore' on the credit note.

- **Stock**
  - Part Requests - Performance enhancement for high volume environments.
- **Procurement**
  - Requisition Maintain: set the 'Warehouse Name' field to non-editable for Service Requisitions.
  - NonStock Receiving: fix for the 'Input String was not recognised as a valid DateTime' error on save.
- **My Tickets**
  - The right click – 'Clear Filter' function was not working – now fixed.
- **User Rights**
  - Code Definitions refresh to ensure all codes exist for BPO2 User Rights.

2.1.0.60

Functionality Fixes:

- **Goods Receiving**
    - For Part Definitions with a UOP greater than 1, and partial receipts are done - ensure that the PO remains open until the full quantity has been received.
    - Receiving Alternates – Alternate can be specified on the receipt grid. PO lines acts as the default, but the detail grid is used to drive the GRN and the values of the GRN.
- **My Work**
    - Service History report fixed to display details where the work order is linked to an asset.
- **Projects**
    - Various Project related screens updated to indicate mandatory fields, and align fields at the top of the screen when the screen is maximised.
    - Project Hierarchy view – Ensure that right click options are available and that if a sub-project is selected – that selected project is used for the Project Maintenance and Processing options.
    - All Project Wide Listings now included – only the Project Wide Part Listing was available – now includes: Third Party, Time, Expenses, Travel and Services.
    - Fix for creating a new work order where navigating to the work order listing via the project – object reference error resolved.
    - Project Progress Chart fixed.
    - Project Reports now included.
    - Customer Notes included in the Project Maintain screen.

- Project Finance Analysis – Ensure that the Invoiced column takes Crediting and Re-invoicing into account.

- **Sales Processing**
  - Sales Quotes, Orders and Invoices – on changing an INVN item quantity, where the part selected has commercial tiers configured - the notification of price difference with option to apply, has been included.

2.1.0.59 (23.05.2018)

Functionality Fixes:

- **Contracts**
  - **Contract Maintain** – fix to enable setting the billing customer for item meters.
  - **Manual Contract Invoice** – List of contracts returned in the Manual Contract Invoice maintain screen updated to include contracts where the selected customer is set up as a billing customer on the contract item fee or contract item meter.
  - **Contract Billing** and **Billing Preview** – additional performance benefits.
- **Part Requests**
  - Prevent the user from changing the billable flag on a partly invoice part request.
- **Goods Receiving**
  - New way of partially receiving serialised items. Instead of the user individually removing the lines for the items not being received – the user can now set the quantity to be received – and the system will then present the user with the number of lines required for

serial number input.
- Prevent users from entering duplicate serial numbers within the same GRN (users were previously only prevented from saving duplicates where the serial number already exists in the database).

- **Work In Progress**
  - Internal Assets included on the WIP list so that a return request can be raised to return the item to the Asset warehouse.
- **Supplier Invoice Back to Back**
  - Underlying stored procedure corrected to prevent error issues when the Item Target Account is set to Yes.
- **Supplier Invoices**
  - Fix to prevent error when clicking in the filter row for Item Code.

2.1.0.58 (16.05.2018)

Functionality Fixes:

- **General** - Multiple updates to various screens within BPO to indicate mandatory fields, align fields at the top of the screen when the screen is maximised and ensure data grid filters are working as expected.
- **Contracts**
  - **Contract Credit Note** fix – on saving a Contract Credit Note – the Status field is now correctly updated to ‘A’. Please check the data to make sure all contract credit notes have a status.

    - **Meter Usage** screen - updated to clearly display items where the usage is 20% beyond normal. The line will be highlighted in red, with an information indicator in the row selector – on click will bring up a tooltip telling the user that the usage varies by more than 20% from average.
    - **Contract Billing** and **Billing Preview** - Performance enhancement for high volume billing.
    - **Period Escalations** and **Adhoc Escalations** - Performance enhancement for high volume escalations (Note – that grid captions need to be redone to show fldMarked column on each grid as the first column. Workspace must be reset).
- **Maintenance Planning**
    - **Tasks** - Prevent the same task from being linked as a Related or Shadow task.
    - **Tasks** - Allow adding a craft that has previously been deleted.
- **Manufacturing**
    - On creating a new production batch – fix to ensure that the EmployeeID is set in tblPRODProductionBatches.
    - On creating a new production batch – the Actual quantity fixed to be set to zero (instead of equal to the planned Qty). The actual quantity should only be set when completing the production run.
- **Service Centre**
    - **Ticketing Work Order Notes** – fix to prevent error when adding multiple notes.

    - **Work Orders** – Prevent editing of an inactive Internal Service.
    - **Work Orders** – Validation put in place to ensure a work order can't be closed off where a Third Party Service procurement process is in progress at the Purchase Requisition level.
- Stock
    - **Inventory Adjustment Maintain** screen – Line Cost and Adjustment Total values updated to correctly reflect the cost difference
    - On Receiving a stock delivery where the company configuration is set to process Shipping Costs, but the Supplier is set to not include shipping costs – the validation message is no longer cut off, so the user knows what configuration to set. And preceding error that occurred when clicking Ok for this validation message has been corrected
    - On Receiving a stock delivery for items configured with a Unit of Purchase and Unit of Purchase Quantity – error resolved on attempting to save the GRN. Note that receiving of this stock works differently on BPO2 than it did in BPO1. If the UOP Qty is set to 2 and the quantity purchased is 1, the user will be receiving 2 items into store.
    - **Inventory Definition** – on saving an Inventory definition – duplicate part site defaults for the same site will be prevented.
- Procurement

    Purchase Orders

- PURCHASEORDER default layout report updated to correctly reflect the UOP, UOP Qty and Unit Cost – based on the way receiving items with UOP configured now works in BPOv2 (updated via the DefaultReportBCP_v2.20.0 upgrade script).
- Emailing the Purchase Order report – email maintain screen: From field populated with the employee sending the email.
- To field is populated with the Supplier's email address if configured in the Supplier's 'EMAIL' order method, and search will bring up the supplier's ordering details.
- CC field is blank by default, and search will bring up the supplier's ordering details.

Supplier Returns

- Delete option available for line items.
- Quantity field can now be edited.
- Removed duplicate lines on Supplier Return Listing and Supplier Return report by removing inactive supplier address records. Duplicate occurred due to multiple addresses of the same address type.

2.1.0.57 (30.04.2018)

Functionality Fixes:

- **Assets**
  - Fixed add reading option on asset meter list, so reading can be added when none exists.
  - **Document Maintain** screen - controls directly on the form.

  - **Notes Maintain** screen - controls are directly on the form.
- **Calls**
  - Space in contact name when adding a contact.
  - Refresh when My Calls selected on call screen.
- **Contracts**
  - Fix on meter charges grid where user changes new charge level to start at 0 when a zero level already exists.
- **Customers**
  - If you add a customer and type in an existing code and then click save, you get an error, then change the code, it adds new customer in BPO but changes the code of the EVO customer, this effectively makes the EVO trxs look like they belong to the new customer.
- **Generic**
  - Added error trapping on all screens when writing xml file to the ProgramData folder.
- **GRN**
  - Goods receiving - fix for outstanding items where duplicate part numbers are listed.
- **Instructions**
  - Instruction craft table fix.
- **Meter Usage**
  - Fixed speed issue on meter capturing screen.
- **Project Methodology**
  - **Instruction and Document Maintain** screen - controls are directly on the form.
  - **Project Methodology Maintain** screen - controls are directly on the form.

- **Projects**
  - **Project Baseline Adjustment Maintain** - controls are directly on the form.
- **Sales**
  - Added right click line item delete on quotes / order and invoice maintain.
  - Defaults salesman department when adding items on sales documents.
- **Sales Invoices**
  - Restrict invoice list on credit note screen when customer is selected.
- **Sales Quotes**
  - **Sales Quote Maintain** - edit control issue - ensure only SERV item type lines can have a negative selling price, regardless how the user moves the cursor within the data grid.
  - **Sales Quotes** and **Sales Orders** - 75 percent discount limit set.
- **Services**
  - **Service Items Supplied Maintain** screen - controls are directly on the form.
- **Stock Adjustments**
  - **Inventory Adjustments Maintain** screen - LineCost corrected to display the cost of the stock difference as it does in BPO1
  - **Stock Adjustment** - on authorising a stock adjustment request, in BPO1 the user was asked whether to print the Stock Adjustment document, which is missing from BPO2.
- **Unprocessed Meters**

- **Unprocessed Meter Maintain** screen - controls are directly on the form.

2.1.0.56 (20.04.2018)

Functionality Fixes:

- **Functionality:**
  - Additional Performance and Screen Enhancements.
  - Customer Sync to Evolution fix for Account Contact and Address details.
  - Asset on Contract Revaluation functionality fixed.
  - BPO expiry fix.
- **Fixes**
  - **Customer Maintain** - screen performance enhancement.
  - **Work Management** - remove duplicates in listing.
  - **View Reports** - on edit - prevent duplicate sproc parameter records.

2.1.0.55

Functionality Fixes:

- **Calls**
  - **Swap Out Maintain Screen** - On save - error - cannot find column fldMeterDefCode - sp_ bpoGetMTRMMetersByItem is returning results.
  - **Call Maintain Screen** - Prior Calls are not displayed in the Prior Call Reference when you click on the search icon. Sproc corrected.
- **Contract Credit Notes**

- **Contract Credit Notes** Listing Screen - right click and select delete - on confirmation that you would like to delete the credit note - error - object reference is not set to an instance of an object is displayed.
- Customers
    - **Customer Contact Maintain** screen - click on the Address Ellipsis button - message - Need to enable edit of address. Ellipsis button removed.
    - **Customer Contact Maintain** screen - First Name and Last Name are mandatory fields, they require asterisks (*).
    - **Commercial Exceptions Maintain** screen - Fixed Price - negative values can be saved.
    - **Sales Customers** Customer SyncSaving customer - does not post contact or address details to the client table in Evolution.
- Part Requests
    - **Part Requests** listing - OTC Invoice - cannot issue. Issue Maintain - on Save - nothing appears to happen.
- Purchase Orders
    - **Purchase Order Listing** screen - Printed - you can receive the same service twice for the same PO as the screen does not refresh after a service is received the first time unless the Refresh button is clicked.
- Sales Orders
    - **Sales** - On an environment where only one department exists, the department does not default on Sales Orders and Invoice line items. Added to Orders and Invoices.

- **Sales Order Maintain** screen - on edit, Shipping address field is being set to the customers first address instead of the address supplied by sp_ bpoGetSALSOrderDetail.
- Stock Status
  - **Ad hoc stock transfer** - Enforce Transit Enabled - If the warehouse is not selected, the record does not display in the Parts Intransit listing. The destination type is enforced when the reference type is ADHOC.

2.1.0.54

Functionality Fixes:

- Generic
  - **Installation** - Please include the BPO.exe.config file in the installer.
  - **Installation** - Default install path should be C:\Program Files\CO3 Technologies (Pty) LTD\BPO_V2
  - **Document Preview** - on attempting to preview and process document (quote, invoice, etc.) error - 'Unhandled exception' - could not load file or assembly Net Reports version 2.20.0.0 or one of its dependencies. The system cannot find the file specified.
- Sales Credit Note
  - Need validation to check whether an invoice related reference has been selected. If so, the tax rate lookup control should be hidden.
- Sales Invoice
  - **Sales Invoice** and **Credit Note Maintain** on Edit - the Lookup control gets the tax rate from the customer

when it should get the tax rate from the saved document.

- Ability to select the Tax Rate on Sales Invoices and Unlinked Sales Credit Notes.

- **Sales Order**
  - On converting to a New Deal Sale or New Deal Rental - 'Object reference not set to an instance of an object' (database specific).
  - Fix for Object Reference not set to an instance of an object error when attempting to create a New Deal from a Sales Order where only one Functional Location exists.

2.1.0.53

Functionality Fixes:

- **Generic**
  - **Installation** Please include the BPO.exe.config file in the installer.
- **Goods Receiving**
  - **GRN Maintain** screen - on save - duplicate serial number validation not run as it was in BPO1. Used to check by running sp_bpoASMNDuplicateSerialNo.
- **Requisitions**
  - **Purchase Requisition Listing** screen - to include the PR total - excluding VAT - in the listing to make approval easier.
  - **Purchase Requisition Listing** screen - if you do not have a selected supplier on each requisition item then

the Supplier Exists should be set to 'No'. Done to check that all lines have a selected supplier.

- **Work In Progress**
    - **Work In Progress** listing - requires Customer Name and Customer Code where possible and ability to right click on invoice items in WIP.

BPO.RSI.030