BPO RSI

VERSION RELEASE NOTES

RSI Version List

[BPO_RSI, BPO_TEL, BPO2 – all versions - CNFGCode Entry Type Patch - for Document Search - Docs not printing] [BPO_RSI v1.27.0.1 exe fix - Supplier Status Changes] [BPO_RSI, BPO_TEL and BPO2 - Default Report v3.0.7 Release] [...] [...] [...] [...] [BPO_RSI and BPO_TEL Version Patch - Part Request Listing Screen Performance Enhancement] [BPO_RSI and BPO_TEL - Work Order Report - calculated field ClientName added] [BPO_RSI and BPO_TEL - Prevent Linking User to Multiple Employees] [BPO_RSI EXE Update - Swap Out and Buy Back Auto Processing - Ensure PO is auto closed Fix] [BPO_RSI EXE Update - Site Wide Selection of Parts] [BPO_RSI and BPO_TEL - Prevent Double Approval or Approval then Rejection of a Sales Credit Note] [BPO_RSI v1.26.0.1 and BPO_TEL v1.3.0.1 - Upgrade Pack] [RSI 1.27.0.0 and TEL 1.4.0.0] [1.27.0.0] [1.26.0.1] [1.26.0.0] [1.25.0.3] [1.25.0.1]

BPO_RSI, BPO_TEL, BPO2 – all versions - CNFGCode Entry Type Patch - for Document Search - Docs not printing (11.04.2019 3:53 PM)

Previously released patch to trim the spaces from the Entry Types, which was causing documents to not print from the Document Search screen.

Older versions of SQL Server do not recognise the 'TRIM' function. Here are alternate trim functions that work on any version of SQLServer – please note that both lines need to be run:

--Ensure there are no spaces around the Entry Type Codes

UPDATE tblCNFGCodes SET fldCode = LTRIM(fldCode) WHERE fldTableName = 'GENERIC' and fldFieldName = 'fldEntryType'

UPDATE tblCNFGCodes SET fldCode = RTRIM(fldCode) WHERE fldTableName = 'GENERIC' and fldFieldName = 'fldEntryType'

BPO_RSI v1.27.0.1 exe fix - Supplier Status Changes (12.02.2019 11:34 AM)

- Issues: When you edit a supplier in BPO and save, the exe is setting the status of the supplier to on hold in Evolution. This has been resolved in the updated exe.
- Work Around: For clients using BPO_TEL or BPO_RSI prior v1.27.0.1 – Synchronizing the Suppliers will correctly set the status of the supplier in Evolution.

RSI Files in:

- Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.1

BPO_RSI, BPO_TEL and BPO2 - Default Report v3.0.7 Release (08.02.2019 2:34 PM)

- Version Compatibility:
  - BPO_RSI: v1.24.0.5 or later
  - BPO_TEL: all versions
  - BPO2: all versions
- Issues:
  - Work Order: Change to sp_bpoRPT_CR_WorkOrder sproc so that the last technician assigned to the WO appears on the report.
- Fix: Updated DefaultReportRollout:

- Implementations\CO3_Releases\Applications\BPO_DefaultReports

[Versions to be added........]

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[Versions to be added........]

[Versions to be added........]

BPO_RSI and BPO_TEL Version Patch - Part Request Listing Screen Performance Enhancement (28.11.2017 4:43 PM)

- Version Compatibility: RSI v1.26.0.1 and on | TEL v1.3.0.1 and on
    - **Note**: For clients that are experiencing time-outs due to a high volume of part request data.
    - Updated database objects to improve performance and
    - Part Requests will be set to Closed under the following conditions:
        - Where stock has been fully issued to an OTC Invoice.
        - Where stock has been fully issued to an Inter-Warehouse Transfer request.

RSI Files in:

- Implementations\CO3_Releases\Applications\BPORSI\v1.26.0.1\BPO_RSI_V1.26.0.1_Patches:

BPO_RSI_V1.26.0.1_PartRequestPerformanceEnhancement.7z
- Implementations\CO3_Releases\Applications\BPORSI\v1.27.0.0\BPO_RSI_V1.27.0.0_Patches: BPO_RSI_V1.27.0.0_PartRequestPerformanceEnhancement.7z

TEL Files in:

- Implementations\CO3_Releases\Applications\BPOTEL\v1.3.0.1\BPO_TEL_V1.3.0.1_Patches: BPO_TEL_V1.3.0.1_PartRequestPerformanceEnhancement.7z
- Implementations\CO3_Releases\Applications\BPOTEL\v1.4.0.0\BPO_TEL_V1.4.0.0_Patches: BPO_RSI_V1.4.0.0_PartRequestPerformanceEnhancement.7z

Also included in RSI v1.26.0.1, 1.27.0.0 and TEL v1.3.0.1, v1.4.0.0 Full Upgrade Pack and Fixes script

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BPO_RSI and BPO_TEL - Work Order Report - calculated field ClientName added (24.11.2017 09:28 AM)

- Version Compatibility: RSI v1.27.0.0 and on | TEL v1.4.0.0 and on
- Issues:
  - **Work Order Default Layout**: Client Name typed in via TechConnect not visible on the Work Order report.
- Fix: A calculated field has been added named ‘ClientName’ which will get the client name from the Comments field of the

underlying sproc. The field has been added to the sign off section of the report:

- **RSI**:
    - Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0: BPO_RSI_V1.27.0.0_UpgradePack
    - Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0\BPO_RSI_V1.27.0.0_Reporting: DefaultReportBCP_v2.17.0
- **TEL**:
    - Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0: BPO_TEL_V1.4.0.0_UpgradePack
    - Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0\BPO_TEL_V1.4.0.0_Reporting: DefaultReportBCP_v2.17.0

BPO-RSI and BPO_TEL - Prevent Linking User to Multiple Employees

(24.11.2017 09:21 AM)

- Version Compatibility: All versions of RSI and TEL
- Issues:
    - **Employee User link**: Prevent a user from being linked to multiple employees - on adding or editing and employee.
- Fix: tr_bpoEMPLEmployees.sql:
    - **RSI:**
        - Implementations\CO3_Releases\Applications\BPO_RSI\z_UrgentFixes

- Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0 BPO_RSI_V1.27.0.0_UpgradePack BPO_RSI_V1.27.0.0_Fixes
- **TEL:**
    - Implementations\CO3_Releases\Applications\BPO_TEL\z_UrgentFixes
    - Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0 BPO_TEL_V1.4.0.0_UpgradePack
        - BPO_TEL_V1.4.0.0_Fixes

BPO_RSI EXE Update - Swap Out and Buy Back Auto Processing - Ensure PO is auto closed Fix (10.11.2017)

- Applicable to: RSI v1.26.0.1 and v1.27.0.0
- Issue:
    - Purchase Orders were left in Status 'P' during Swap Out and Buy Back auto processing.
- EXE Fix: Ensure that Purchase Orders are Closed during Auto Processing for Swap Outs and Buy Backs (regardless of the status of the Company Configuration > Purchasing Centre > Parts Processing > Goods Received Configuration – PO Status)
- RSI Files in:
    - **v1.26.0.1:** Implementations\CO3_Releases\Applications\BPORSI\v1.26.0.1 BPO_RSI_v1.26.0.1_exe.7z

- **v1.27.0.0:**
  Implementations\CO3_Releases\Applications\BPORSI\v1.27.0.0
  BPO_RSI_v1.27.0.0_exe.7z

BPO_RSI EXE Update - Site Wide Selection of Parts (02.11.2017)

- **Applicable to:** RSI v1.26.0.1 and v1.27.0.0
- EXE Fix – Relevant to clients where the company configuration is set to use 'Site Wide Selection of Parts' and the current financial period is not open. When processing a stock issue from the Parts Request screen and the stock is not available in the requested warehouse – the stock transfer that occurs will now have the transaction date related to the open financial period, and not the current financial period.
- RSI Files in:
  - **v1.26.0.1:**
    Implementations\CO3_Releases\Applications\BPORSI\v1.26.0.1: BPO_RSI_v1.26.0.1_exe.7z
    BPO_RSI_v1.26.0.1_exe.7z
  - **v1.27.0.0:**
    Implementations\CO3_Releases\Applications\BPORSI\v1.27.0.0
    BPO_RSI_v1.27.0.0_exe.7z

BPO_RSI and BPO_TEL - Default Report Layout BCP update (30.10.2017)

- Version Compatibility: BPO_RSI V1.27.0.0 or later | BPO_TEL v1.3.0.0 or later

- Issues:
    - **Purchase Requisition:** report layout updated to handle foreign currency.
    - **Supplier Return:** tax values removed (as no vat entries are processed for SRNs)
- Fix: Updated DefaultReportBCP:
    - **RSI:**

      Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0\BPO_RSI_V1.27.0.0_Reporting

      TEL:

      Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0\BPO_TEL_V1.4.0.0_Reporting
- Added to the UpgradePacks for:
    - **BPO_RSI v1.27.0.0:** Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0
    - **BPO_TEL v1.4.0.0:** Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0

BPO_RSI and BPO_TEL - Prevent Double Approval or Approval then Rejection of a Sales Credit Note (24.10.2017)

- Version Compatibility: BPO_RSI V1.26.0.0 or later | BPO_TEL v1.3.0.0 or later
- Issue:
    - Prevent Double Approval or Approval then Rejection of a Sales Credit Note.
- Fix: Updated trigger: **tr_bpoSALSCrNotes**
- Added to the UpgradePack and Fixes for:

- BPO_RSI v1.26.0.0, v1.26.0.1, v1.27.0.0
- BPO_TEL v1.3.0.0, v1.3.0.1, v1.4.0.0

BPO_RSI v1.26.0.1 and BPO_TEL v1.3.0.1 - Upgrade Pack (16.10.2017)

BPO_RSI v1.26.0.1 and **BPO_TEL v1.3.0.1** - **Upgrade Pack** - outdated tr_ bpoSALSCrNoteApproval

- Related to: Upgrade packs – zip file dated: 2017/08/29
- The tr_bpoSALSCrNoteApproval trigger in these pack existed in 2 places, the older trigger overriding the newer one.
- If you have used these packs to upgrade to RSI v1.26.0.1 or TEL v1.3.0.1 – please ensure that you run the latest tr_ bpoSALSCrNoteApproval trigger: dated: 2017/08/29 (available in the full upgrade, fix or CreditNoteFix2.
- If you have used a base database from that time, please roll out the trigger.
- If you have upgraded to RSI v1.27.0.0 or TEL v1.4.0.0 (or have used these Base databases) – the trigger would have be corrected by the prior version fixes section of the upgrade pack.

Files in:

Implementations\CO3_Releases\Applications\BPORSI\v1.26.0.1

- BPO_RSI_V1.26.0.1_UpgradePack | BPO_RSI_V1.26.0.1_Fixes |
- BPO_RSI_V1.26.0.1_CreditNoteFix2

Files in:

Implementations\CO3_Releases\Applications\BPOTEL\v1.3.0.1

- BPO_TEL_V1.3.0.1_UpgradePack | BPO_TEL_V1.3.0.1_Fixes | BPO_TEL_V1.3.0.1_CreditNoteFix2

RSI 1.27.0.0 and TEL 1.4.0.0 (03.10.2017 12:42 PM)

BPO_RSI v1.27.0.0 and **BPO_TEL v1.4.0.0** Release - Updated Release Notes

The release notes have been amended to include the updated Sales Template Functionality.

Sales

- Ability to suppress lines (hide the selected line on the printed document) on Sales Quotes, Sales Orders, Sales Credit Notes.
- This is intended to be used for items that have a R0 value selling price (where one main item is set to the full sale price of all the included items). If the ‘Suppress on Print’ flag is set to Yes for an item that has a selling price, a warning message will come up, because even though the line is hidden, the selling price will still be included in the document totals.
- This functionality has been built into Sales Templates, with the ‘Suppress on Print’ flag, and another new flag has been included to mark one of the items on the list as the Default. This default item will then be added to the commercial details (as ItemType: TMPI) and the selling price needs to be set as the full price of all items on the template. This price will be used for the default item when applying the template to a quote, and the remaining items for that template will be set to selling price R0.
- The Sales Quotes and Sales Order Default Report Layouts have been updated to enable suppressing a line on print, by setting a Formatting Rule on the Detail band with the following ‘Behavior’ (Condition: [fldSuppressOnPrint]='Yes', Visible: No)

The updated release notes and helpfile are available on the server:

RSI: Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0\BPO_RSI_V1.27.0.0_Documentation

TEL: Implementations\CO3_Releases\Applications\BPO_TEL\v1.4.0.0\BPO_TEL_V1.4.0.0_Documentation

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1.27.0.0 (29-09-2017 4:00 PM)

Financial Transactions

- Change to ensure the correct tax type is used for financial postings to the Accounts Receivable and Accounts Payable ledgers in Sage Evolution, especially relating to version 7 and onwards where the tax type codes have changed.
- ***Important***: A new field has been added to BPO's tax rate table, and this field must be updated with the relevant tax type code from Sage Evolution, in order to map it to BPO's tax type.

Sales

- Ability to suppress lines (hide the selected line on the printed document) on Sales Quotes, Sales Orders, Sales Credit Notes.
- This is intended to be used for items that have a R0 value selling price. If the 'Suppress On Print' flag is set to Yes for an item that has a selling price, a warning message will come up, because even though the line is hidden, the selling price will still be included in the document totals.
- The Sales Quotes and Sales Order Default Report Layouts have been updated to enable suppressing a line on print, by setting a Formatting Rule on the Detail band with the following 'Behaviour' (Condition: [fldSuppressOnPrint]='Yes', Visible: No)

Goods Receiving with Shipping Costs

- Ability to revalue incoming stock with the shipping costs. Stock will be received into a quarantine warehouse, where one or more non-stock purchase order(s) can be applied to one or more stock goods received note(s). This will auto create a stock revaluation to update the unit cost of the stock and an auto stock transfer to move the stock from the quarantine warehouse to the warehouse and bin configured on the stock item's part site default. A non-stock goods received note will be auto created for the non-stock purchase order. A new account driver called 'REVB' needs to be configured – which will clear the applied cost amount from Revaluation Suspense account and the Non-Stock Work in Progress account.

- To use this functionality the 'Include Shipping' flag must be set in Company Configuration – Purchasing Centre - Parts Processing.
- A Quarantine Warehouse and Bin must be configured. Ensure that only one bin exists in the quarantine warehouse. Only one quarantine warehouse should exist per site, and be linked to only one site. Warehouse flag selection as follows:
    - Is Stock = 'No'
    - Is Asset = 'No'
    - Auto Issue = 'No'
    - Quarantine Location = 'Yes'
- For stock to be received into quarantine, the Supplier must be configured to not include shipping costs (Shipping Costs Included = 'No'). Stock received from suppliers that are configured to include shipping costs will be received into the part site default warehouse as normal.
- If stock has been received into quarantine that should have gone directly to store instead, can be released

from quarantine by doing a revaluation without applying a non-stock purchase order.

  - Stock can be returned to supplier from the quarantine warehouse.
  - If stock has been received into quarantine and then moved to the part site default warehouse, it cannot be returned to the supplier.
  - The Quarantine warehouse has no average pricing.
  - Non-Stock purchase orders must be printed and not yet received, in order to be available to apply costs to the selected goods received note(s).

Upgrade Notes:

- BPO_RSI_V1.27.0.0_UpgradePack
  - One batch file to update that will run the following:
    - Prior version fixes
    - V1.27.0.0 upgrade
    - Report Rollout
    - Default Report BCP
    - Post Upgrade Refresh
    - Post Upgrade Version checks

  - BPO_RSI_v1.27.0.0 EXE
  - Install Net Reports v2.17.0.0
  - Install any additional compatible applications that are in use. Refer to the notes below.

Associated Installers:

- Ensure the following compatible version of this application is installed:
    - Net Reports v2.17.0.0
- If one of the following applications are being used - please ensure that these compatible versions are installed:
    - BPO Report Designer v2.11.0.0
    - BPO CRM v3.5.2.0
    - BPO Web Portal v1.4.2.0

Files in:

Implementations\CO3_Releases\Applications\BPO_RSI\v1.27.0.0

1.26.0.1

Accounts

- Employee department association added to Contract Credit Note segments.

Assets

- Ability to *revalue a contract asset* while in the field.

Calls

- A Work Order Type will automatically be created when a new *Call Type is added*.
- Now have the ability to find a customer, when adding a new call, by *searching for the telephone number*.
- Fix to correctly display the Call State (Work Event) where a technician started travel on a work order, but then rejected the work. The Call State will now display as it should, instead of displaying the last work event for the prior Technician.

Contracts

- Performance improvement for high volume *Adhoc Escalations *.
- *Contract notes *screen updated to allow more characters (8000 characters as per table).
- Prevent a loan unit from being returned via contract closure. The *loan unit return* must be initiated via the call screen, and then returned to the asset store in Return Requests.
- Charge Amount and VAT Inclusive Charge Amount fields added to the customer contract list in the Customer screen.
- Charge amount field added to the contract current fees list in the customer screen.
- Fix to the Back to Back Supplier Invoice screen where one exchange rate was being applied across the full list of items which include local and foreign currency – where a Back to Back supplier invoice is created across multiple contract invoices.
- Fix to Back to Back Supplier Invoice screen to only display the specified supplier items – where multiple currencies exist on a single contract for Back to Back items.

Contract Billing

- Ensure that customers with no account manager linked, are visible on the *Unprocessed Meters* screen.
- Fix to ensure Customer Order numbers are saved to the Meter History table when a meters are captured and released to billing in batches (i.e. capture a few readings with comments, and release to billing, then capture a few more readings with comments and release to billing).
- Customer Account Validation check included when processing the Print Queue, which will notify the user which Invoice reference(s) cannot be processed for Customer Accounts that do not exist in Evolution.

- The user can de-select the relevant invoices, in order to process the bulk of the billing run and then do the relevant correction on the contract / process a customer sync, before trying to print those invoices.
- Ability to view all prior readings on the Unprocessed Meters screen (Basic Meter Capture screen)
- Meters capture in the meter screen – for multiple meter updates to the same meter, prior to billing run, the meter reading date will be updated to the date of capture – instead of keeping the capture date of the initial reading.
- Fix for Print Queue screen – to prevent the error message that comes up if there are no Contract Invoices to print.

Customers

- *Customer assets can now be deleted* from the customer screen - where they are not on contract.
- Allow *billing address to be copied to the shipping address* , in the customer maintain screen.
- Ability to invoice a foreign exchange customer with a Tax Rate configured.

Finances / Financial Postings

- The system will auto create the following year's periods when the current year ends. This applies to Billing, Escalation and Depreciation periods.
- The serial number has now been included in the description for TRIN / TROU financial transactions.
- BPO will now check whether an Evolution general ledger account is Active before posting the transaction. If the account is not active, the transaction will post to Suspense, and will need to be

actioned from there. The relevant item target will need to updated to ensure the transaction posts to an active GL account.

Procurement

- If the user attempts to release a Purchase Requisition with a R0.00 cost, a notification message will come up to notify the user to set the prices before proceeding.
- When a Goods Received Note is raised, the system will validate that no Alternate (Substitute) Part Codes exist on the Purchase Order. If there are, the system will bring up a notification message with the Alternate Part Codes. These will need to be unlinked as Alternates before the GRN can be done.
- Ensure that a Subcontractor Non Stock purchase cannot be returned if the item has been invoiced to the client.

Projects

- A *Customer Contact and Delivery Address can now be linked to a Project Work Order*. This means that the contact and address will now display on TechConnect.

Sales

- Specific *commercials* can now be set for Services.
- Check put in place to ensure a Sales Quote cannot be saved without linking a Salesman.
- Prevent deleting a credit note, once is has been approved.
- Ability to edit Unprinted Sales Invoice – only where billable items have been logged on a work order, Project underlying Work Order or Call Underlying Work Order.

Scheduling

- A *Work Scheduling* screen has been added within the BPO_V2 application interface, and is designed for company's using TechConnect and need to schedule Installations some time in advance. This is not for every day service calls.
- Users can easily see their list of Technicians and Unscheduled Work
- Technician calendars can be viewed across multiple / a filtered list of Technicians, within a variety of calendar view options.
- An Unscheduled Work Order can be dragged onto a Technician's calendar - this will create the Call or Project Assignment.
- Assignments can be rescheduled or moved to another Technician if the assignment has not yet been accepted.
- Ended work will no longer display on the calendar.

BPO Registration

- The activation warning message to re-register BPO will now only display from 5 days before expiry of BPO license key.

Reporting

- An updated Reporting screen has been added within the BPO_V2 application interface, lets you view *AllReports* as you would in *BPO > ViewReports* or *BPO_Explorer* .
- Users can search for reports by ‘Report Name’ or ‘Report Description’, view ‘Recently Used’ and ‘Most Used’.
- Users can select which columns to view, in which order they want to view them, and save these settings.
- When viewing the reports in the report tree, the description is also displayed.
- When hovering on the reports in ‘Recently used’ and ‘Most Used’, the user can see the description of the report via a tool tip text.

- Security rights to be configured per group that requires access (AccessType: SYST, AccessLevel: REPT)

Transaction Document REPX Updates

- **UnbilledItems** report: 'Manual Invoice' field added to indicate whether one of the component of a contract has already been billed via a manual contract invoice.
- **ContractInvoice** : Billing and Shipping address lines 4 and 5 added to the underlying stored procedure – fields available to add via BPO_ReportDesigner.
- DetailID added to **SalesBackOrder**, **SalesQuote**, **SalesOrder**, **SalesInvoice** and **SalesCreditNote**. SalesBackOrder has previously been configured to order line items by PartID. The other sales documents have now been configured so that line items order by DetailID (i.e. the order they were captured on the system.
- **Machine Profitability by Customer** report re-instated as a CustomReport named: 'MACHINEPROFITABILITYBYCUST'
- **PickingSlip** updated to correctly display the ProcessedBy employee name, and Available stock grouping where a part is requested multiple times against the same work order.

Workflow Email Notification Configuration Flags

- Created a new table to store existing Email Notification Flags (the ability to select whether an email notification is emailed or not). The company's current configuration will be used when this new table is created.
    - 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)

- 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.)
- 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.)
- Credit Note Approval Required (Notification that a Credit Note has been released for approval. Sales Credit Note : an email will be sent to all employees who have the security right to authorise a Sales Credit Note. Contract Credit Note : an email will be sent to all employees who have the security right to authorise a Contract Credit Note.)
- Part Request Approval Required (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 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)
- Purchase 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.)

- 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.)
- 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.)
- Work Request Raised (Notification that a Work Request has been created. Will be emailed to the Work Request 'AssignedTo' person)
- Call Status Change : (Notification that a call has just been created, or has changed status. This will be emailed to the customer primary contact).
    - New Call Email (Notification that a new call has been created)
    - In Progress Call Email (Notification that the call has been accepted and is in progress)
    - On Hold Call Email (Notification that the call has been placed on Hold)
    - Suspended Call Email (Notification that the call has been placed in Pending status)
    - Completed Call Email (Notification that the call has been Completed)
    - Closed Call Email (Notification that the call has been Closed)

- 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.

Fixes:

- Minor work order CraftID fix.
- Prevent issue and return transactions on a closed work order.
- Fix when deselecting a meter yield item in part maintain screen (previously raised an error).
- Fix for Long serial number - currently prevents a convert to asset or back to stock.
- Fix to ensure inactive warehouses do not display in warehouse lookups in the following screens: Stock Take, Stock Adjustment, Stock Report, Change Warehouse on Part request, Convert Asset to Stock, Bin selection on Stock Issues and Receipts.
- Fix done to ensure contract fee types are correctly Inserted, Updated or Deleted when editing and saving Contract Types.

1.26.0.0

Simple Customer Capture Screen

- The new Customer Capture screen allows the addition of base addresses and the primary and accounts contact.

Short Term Rentals

- New contract type – *Short Term Rental* (for Hour, Day or Week period) – for internal assets only .
- The contract and underlying contract details are auto created .
- The system auto creates the work order, part request and auto issues the internal asset .

- If a deposit is set at contract creation, the system auto creates the deposit invoice
- A *short term contract invoice* can be raised from the short term contract screen
- On *contract closure*:
    - Where a final Short Term Invoice with Meter Reading is created – the meter reading is saved to meter history
    - A Return Request is auto created
    - Internal asset is auto returned to the asset warehouse
- Note: Configuration Required
    - *Contract Type Configuration*
        - fldShortTerm – identifies these contracts as short term
        - fldAuthorise – Allows the contracts to auto approve (only used for short term contracts)
        - fldReportTemplate – the custom template of the CONTRACTREPORT to use for the short term contract
        - fldCtrtReturnTemplate – a custom template of the CONTRACTREPORT to return the items on the contract
    - *Short term Products*
        - Short term standard charges to be configured for the time periods (Hour, Day, Week)

Prepaid Contracts

- This *Prepaid Contract* type is to be used where a set meter charge was paid ahead of contract creation, and meters are not billed until the usage limit is reached .

- The prepaid contract usage limit is configured as the initial Meter Minimum Billing Quantity .
- Only meters are considered to be prepaid
- F ees continue to bill based on billing cycle
- Meters still appear in monthly usage for reading capture. This reading needs to be captured correctly, as the prepaid meter usage will determine whether the limit has been reached (regard-less of meter resets) .
- When the meter usage limit is reached, the contract is placed on hold (by BPO_PrepaidContractManager - which runs nightly via a Windows Scheduled Task) and an email is sent to the customer account manager.
- It is up to the contract manager to review the contract, update the meter min billing information, change the contract type and release the contract from hold to continue with standard contract billing .
- Note: Configuration Required.
- New *Contract Type* – Prepaid Contracts. A 'Prepaid' flag on the contract type will identify these contracts as prepaid .
- BPO_PrePaidContractManager application to be installed on server and run via a scheduled task. Ensure that the Configuration and StaticData xml files are correctly configured.

Short Yield Instant Billing

- New functionality has been added for Inventory *Yield Control*. If a meter short yield exists, the system places a billable service (as defined on the yield controlled part) on the work order for the amount relating to the short yield.
- **Note**: Configuration Required:

- New *company configuration* flags (BatchBillYields = No and EnableYieldTracking = Yes)
- Additional part meter yield configuration (*Short Fall Internal Service*)
- Prior configuration requirements for Yield Controlled Parts:
  - *Part meter yield configuration*.
  - Part to be linked to a meter yield *Bill of Material* (a Bill of Material for each meter type configured with BOMType: 'YIELD').
  - *Meter reading to be logged* on call each time the yield controlled part is requested.

Auto Apply Task to Work Order

- The system auto applies the Part Requests / Internal Service Requests / External Service Requests and Instructions configured on the Task to the underlying Work Order
- This applies to any work order created on the system that has the same WOType as the Task. Whether it is a stand-alone work order or Call/Project underlying work order
- T his is meant for use in a simplified planned maintenance environment where Project Methodology is not used. These two functionalities cannot be used together.
- **Note**: Configuration Required:
  - A *task must be configured* with the same WOType as the Call being created.
  - Ensure only one Task is configured with the relevant WOType.

OTC Auto Issue

- A simplified *Over the Counter Invoice* screen , for clients with a Shop Sales environment – within the new BPO_V2 application interface.
- A Cash Sale Customer specific information is saved in an additional table against the invoice and is used when printing the invoice.
- **Note**: Configuration Required:
    - A new *company configuration* flag – AutoSaleIssue – enables auto sale stock issuing.
    - Identification of a customer as a cash sales account to be configured on the *Sales Office*.
    - An OTC specific auto issue *warehouse* must be configured per site (AutoIssue flag on the warehouse). Only a single auto issue warehouse is expected per site.
    - The default site of the user is used to determine the auto issue warehouse and the cash sales account
    - For a multi-site environment, users must be in a site specific group (configured in user rights).
- BPO_V2 application installation required on workstation.

Technician Map

- *Technician map* for clients using TechConnect – within the new BPO_V2 application interface
- Allows technicians last location to be viewed on a map
- Shows other calls in new on the map
- Calls are coloured according to the call type colouring
- Filters supported:
    - Technician associated with the call
    - Department of the customer

  - Call Type
  - Call Date
- **Note**: Configuration Required
  - Map Zoom Level
  - ‘Home’ GPS Co-ordinates
- BPO_V2 application installation required on workstation

1.25.0.3

New Functionality

- BPO Credit Check functionality can now be configured based on which Ageing Method the client uses: by Date of Statement / Date of Invoice. There is configuration that must be done in BPO and in Pastel Evolution.
- Ability to configure Meter Reading Request Email - example text inserted into the Contract Configuration table.
- Contract billing performance enhancement.
- Ability to procure the same part multiple times on the same requisition when buying from part requests.
- Project service request status field added.

Default Report BCP

- Contract Invoice and Contract Credit Note document underlying stored procedures now included the contract fee type (Ensure the latest associated applications are installed – refer to the Upgrade Notes section).

Report Rollout

- Stock Adjustments and StockAdjustmentHis_ContraAcc reports updated to include stock adjustment reason code.

1.25.0.1

Projects

- 'My Projects' flag in the project screen will enable you to see all projects where you are the project manager.
- Finance tab introduced to Projects created via New Deal, that will list items based on the originating Sales Order, including the Planned, Actual and Invoiced amounts.
- Projects Work Order List now includes the Rectification and Delay comments and the Technician who completed the work.
- Project Progress report – all Projects / by 'My Projects'. This will export a report to Excel that gives you a list of projects with status and progress, and a second tab of underlying work orders with status and progress.

Work

- On completing a work order – a Rectification Comments box will come up, in order to log 'closure comments' for the work done.
- Work Order Rectification Comments need to be at least 20 characters.
- Call and Project Numbers have been merged in the My Work list.

Contracts

- 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.

- Ability to set Fee Types as a 'RESET'. When closing the Billing Period – all fee charges linked to those fee types will be set to R0.
- Allow contract invoices with zero value fee to process back to back transactions.
- Contract credit note auto re-invoice flag un-ticked by default.

Part Requests

- Project Part Requests – ability to set a flag in company configuration to enable single part requests to be raised for new deal projects (so that individual requests can be approved and issued where required).
- Project Part Requests display Request Age based on the day the request was authorised and not when it was raised.
- Part Request Screen - List now displays the Part Request Number.

Additional Enhancements

- Monthly asset depreciation posted as a sum instead of by individual machine.
- Department association saved for customers where a department is selected. And the department will be displayed in the listing grids within the following screens: Customers, Contracts, Calls, Projects, Part Request Approval, Part Requests.
- Security rights available to configure whether the user can edit the Unit Selling Price on Sales Quotes, Sales Orders and Sales Invoices.
- Approve customer from CRM – validate information before approval.

1.25.0.0

1.1 Commercial Tiers

- It is now possible to set up Customer Commercial Tiers in order to facilitate Volume Discounts.
- These tiers only apply to inventory items / part categories.
- These tiers can be used for Pricing by Item and / or Pricing by Type / Class commercial types.
- Commercial tiers will need to be populated in BPO via a load-sheet.
- The customer default commercial will populate on the sales documents, but can be amended if another commercial is required for a specific sale. This is managed with Security Rights.

1.2 Security Rights

- Ability to select the Customer Commercial on the Sales Quote, Sales Order and Sales Invoice screens.

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