

BCS v7.10m

May 15, 2015

General

- Sentinel-specific changes from v6.20s1 have been incorporated in this version
- when attempting to run a report to which you do not have access, the error message will now specifically cite the report number (so that the BCS user can communicate this to their BCS administrator)

Buttons at top of screen

- Find button
 - new search criterion: *E-Mail*
 - new search option: *Last Name or First Name or E-Mail or Phone No. or Company*
- Log button
 - can now specify multiple employees at once when creating employee date log records

My World

- Jobs tab
 - bug fix: jobs classified Master Projects no longer appear listed on this tab

Jobs

- Main tab
 - new Quick filter option: Master projects
 - Quote Printer button
 - if job's underlying quote is a master quote, the master quote report is now shown rather than a traditional quote report
 - Estimate Printer button
 - if job's underlying estimate is a master estimate, the master estimate report is now shown rather than a traditional estimate report
- Inv From PO tab
 - Create PO's for unordered Estimate items
 - the PO line items are now in the same order as they appear on the estimate (estimate line items are ordered base on Sort Order, if specified, and if not, the order in which the estimate line items were entered)
- Costing tab
 - for master projects:
 - blue arrow has been replaced with a green arrow; this accurately reflects that the user is staying in the same module and just navigating to a different record (rather than navigating to a record in a different module altogether)
 - when the green arrow is used to navigate to a job within the master project, the user now lands on the Main tab rather than staying on the Costing tab
- Close tab
 - for master projects:
 - a red message appears reminding the user that they do not need to invoice the master project for it to become inactive; they can simply uncheck the Active checkbox (displayed to the right of the message)

Time Sheets

- Add Many button

- time sheets generated via this module are now flagged as manufacturing for employees whose time defaults to manufacturing (per their Employee record)

Administration

- Employees
 - for the BCS users at Clintar London, newly added employees are automatically placed into Security Group 8
- Security
 - Report Security
 - items in leftmost box (in red) now show “My World” in the first column for the My World reports
 - items in rightmost box (in green) now show “My World” in the first column for the My World reports
 - By Report
 - yellow dropdown now shows My World reports prefixed as “(My World)”

Reports

- Phone List
 - Profit by Customer (#181)
 - bug fix: for some customers, two lines of data was appearing rather than just one; the aggregation rules have been corrected to deal with this
 - Expenses by Customer – Detail (#240)
 - user can now select a specific salesman
 - Expenses by Salesman – Detail (#241)
 - new option to show all active employees who can sell, even if they have no expenses in the specified date range
- Jobs
 - Job Material With Time Sheet Links (#287)
 - new report
- Time Sheet
 - Activity Report – Detailed (#268)
 - time sheets with blank activities are now reflected on report
 - Activity Report – Summary (#269)
 - time sheets with blank activities are now reflected on report
 - Job/Activity Report – Summary (#270)
 - time sheets with blank activities are now reflected on report
 - Activity Report 2 – Summary (#282)
 - time sheets with blank activities are now reflected on report
 - Payroll Data Form (#285)
 - bug fix: when report is exported, fields in spreadsheet now correspond to fields on report
 - Payroll Summary (#286)
 - bug fix: when report is exported, fields in spreadsheet now correspond to fields on report

My World

- *Your Task List* button
 - on resulting report (#134), if a multi-day job has been completed, only show one line on the report for the first day of the job (with Action = "Completed") and no longer show the subsequent days for that job (e.g., 2/4, 3/4, 4/4)

Jobs

- *Filter* button
 - when setting a *GST/HST* rate to filter by on the Costing tab, automatically set the checkbox *HST Applies* appropriately on the Details tab based on the value entered for *GST/HST*

Estimates/Quotes/Jobs

- steps have been taken to hopefully mitigate the situation where jobs are sometimes created that are flagged as requiring GST at 5% rather than HST at 13% (the scenarios whereby these occasional jobs get created could not be replicated)
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BCS v7.10k

May 22, 2014

Reports

- Time Sheets
 - new report: Payroll Data Form (#285)
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BCS v7.10j

May 10, 2014

My World

- Jobs tab
 - Job recommendations, no action taken
 - the Preview This Tab button now displays report #278
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BCS v7.10i

May 5, 2014

Reports

- Time Sheets
 - new report: Payroll Summary (#286)

BCS v7.10h

Apr 16, 2014

Reports

- Estimates
 - Estimates vs. Actuals (#160)
 - bug fix: report now runs even if specific job types are selected (rather than just all)

BCS v7.10g

Mar 12, 2014

Log

- Create e-mail section
 - if “External” is chosen, inactive contacts now no longer appear (it is already the case that inactive employees do not appear when “Internal” is chosen)

Phone List

- when filtering via the yellow fields, new syntax can be applied to specify a list of items:
 - e.g., 1 #OR# 2 #OR# 3 (spaces are optional) will return all records where the code in question is 1 or 2 or 3

Reports

- reports #78, 181, 198, 262, and 263 have all been brought into line so that their numbers match
 - all offer the option to suppress “zero lines” (report lines with no activity but with estimated annual revenue do not qualify as zero lines)
 - in all cases, by choosing a salesman you are choosing his customers (whether he is salesman 1, 2 or 3) and all visits, quotes and jobs (whether he is salesman 1, 2 or 3) of his, regardless of whether the visits, quotes and jobs were for his clients
 - estimated revenue is only shown for active customers

BCS v7.10f

Mar 3, 2014

Log

- Create e-mail section
 - if “External” is chosen, contacts are listed in their sort order in the Phone List

Phone List

- General tab
 - if *Company* is changed, a phone list log entry is now auto-generated

Time Sheets

- Add Many button
 - bug fix: user is no longer possible to enter a time sheet where an overlap exists for the Lead Man with a time sheet already in the database
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BCS v7.10e

Feb 13, 2014

Reports

- Job
 - Month-End Summary (#198)
 - bug fix: in section 14, the *Annual Forecast*, *Monthly Forecast* and *YTD Forecast* are now calculated correctly
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BCS v7.10d

Feb 12, 2014

My World

- Your Task List button (launches report #134)
 - bug fix: jobs with *No. of Days* filled in and that both started and completed during the specified timeframe, now have Action “Completed” rather than showing “1 of no-of-days”

Phone List

- Mailers tab
 - Send Mailer button
 - “Send To” section
 - the “This company” option no longer shows inactive companies
 - the “Many companies” option no longer shows inactive companies

Jobs

- if Master Proj is checked:
 - new field on Main tab: *Scheduled Date*
 - Details tab is now shown

Sales Calls

- Details tab
 - when adding a new sales call record, *Sales Call Date* either defaults to today or yesterday based on the new global system setting
 - bug fix: the *Job*, *Quote* and *Estimate* dropdown fields are now continually refreshed to display records corresponding to the current Sales Call’s *Company*

Administration

- System Info
 - Global System Settings
 - Sales Calls tab
 - new field: 2. *When entering sales calls...*
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BCS v7.10c

Dec 11, 2013

My World

- Task List button (launches report #134)
 - *Previously Active Jobs* is now computed as follows:
 - jobs that were scheduled before the specified date range and are either (a) not yet completed or (b) were completed prior to the start of the specified date range but are not yet invoiced
 - Jobs can now have two different Action codes:
 - Completed: job completed on the date in question (but has not yet been invoiced)
 - Scheduled: job scheduled for the date in question (but has not yet completed)

Administration

- Validation Tables
 - Phone List tab
 - Mailer Groups button
 - Add Many button
 - when specifying one salesman, all customers where that salesman is Salesman 1, Salesman 2 or Salesman 3 are now listed
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BCS v7.10b

Dec 9, 2013

Reports

- Phone List
 - Profit by Customer (#181)
 - bug fix: Estimated Annual Revenue for salesmen 2 and 3 is now being looked at properly
 - Job
 - Profit by Salesman (#263)
 - bug fix: Estimated Annual Revenue for salesmen 2 and 3 is now being looked at properly
 - Month-End Summary (#198)
 - section 14 now reflects forecasts specific to Salesman 2 and Salesman 3 in the Phone List
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BCS v7.10a

Dec 8, 2013

General

- salesman dropdown now shows active salesmen first

My World

- several My World reports converted from portrait to landscape
 - Jobs (#114)
 - Estimates (#182)
 - Quotes (#112)
 - Sales Calls (#113)
 - Phone List (#115)

Reports

- if user is Dilbert, report names are prefixed with requesting company code
- Phone List
 - Profit by Customer (#181)
 - Area and City tab no longer shows “suppress report rows where all amounts are \$0” since this report only shows rows with customer activity
- Job
 - Profit by Salesman (#263)
 - Area and City tab no longer shows “suppress report rows where all amounts are \$0” for the first two options on the Aggregation tab
 - if the third option on the Aggregation tab is selected:
 - if “suppress report rows where all amounts are \$0” is not checked, report will show rows for customers with no activity
 - section 14 now reflects forecasts specific to Salesman 2 and Salesman 3 in the Phone List

Utilities

- Phone List – Investigate
 - Global Substitution tab
 - when substituting one customer for another, all related tables are now updated (rather than just the main tables)

BCS v7.10

Nov 16, 2013

Phone List

- Sales tab
 - three new fields for salesman-specific *Estimated Annual Revenue*

My World

- *Your Task List* button

- bug fix: report was not showing jobs (note, report had been correctly showing quotes and sales calls)
- Jobs tab
 - *Jobs Invoice* radio button option
 - *Sales* column now shows employee's *Sales %* x job's *Total Sell Subtotal Discounted*, rather than the job's entire *Total Sell Subtotal Discounted*
 - *Profit* column now shows employee's *Sales %* x job's *Profit*, rather than the job's entire *Profit*

Administration

- Employees
 - Rates tab
 - new field: *Hourly/Salary/Contract*

Reports

- Phone List
 - Profit by Customer (#181)
 - *Estimated Annual Revenue* column now shows salesman-specific estimate (rather than grand total estimate for the customer)
- Job
 - Total Dollars by Salesman (#262)
 - bug fix: report contents can now be exported
 - *Estimated Annual Revenue* column now shows salesman-specific estimate (rather than grand total estimate for the customer)
 - Profit by Salesman (#263)
 - *Estimated Annual Revenue* column now shows salesman-specific estimate (rather than grand total estimate for the customer)
- Sales Call
 - Monthly Sales Review (#81)
 - bug fix: when using *Previous Month* or *Previous Year* buttons to set the date range, the contents of the *Total* column were not always accurate
- Purchase Orders
 - Purchases by Supplier (#284)
 - new report