



Business Cloud Essentials

1.8.2

Release Notes

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INTRODUCTION

This document contains an overview of the new features, fixes and changes included in version 1.8.2 of Business Cloud Essentials.

The key features and enhancements are:

- Addition of New domain CRM
- CRM Dashboard
- Sample Report – Current Stock valuation
- Additional fields added to Domains

FEATURES

CUSTOM REPORTS – ADDITION OF CRM DOMAIN

A new CRM reporting domain has been introduced. This extends the range of data domains in BCE and is accessible relative to the BCE user permissions.

The following data sets are included in the CRM domain to allow users to create and build their own custom reports.

- Support Ticket Set – Includes fields for Support ticket document and includes:
 - Billing Details
 - Repair Order
- Contacts – Lists all contacts details
- Opportunity – Includes opportunity and custom fields
- Complaint – Lists all complaints details
- Events – Lists all events details

CRM DASHBOARD

Sample CRM dashboards containing four 'dashlets' are included on 'My Dashboards' > CRM Dashboard. The CRM dashboard displays data for the calendar year.

- **Opportunity Chance** – This shows a count of opportunities falling within the range of opportunity conversion. There are options from this dashlet to show 'Opportunity by status'. Clicking any range updates the 'Opportunity by Status' to opportunity counts by their status within the respective range
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- **Opportunity by Status** – This shows a count of opportunities belonging to the respective status. A drill through is available from this dashlet to open the ‘Opportunity Summary Report’ in separate tab
- **Opportunity Value Status wise** – This is represented in cross tab and displays the status and range of opportunities with opportunity value
- **Priority Complaints** – This shows a count of complaints by month distributed within the respective priority. A drill through report is available from this dashlet to show more detailed complaint information

SAMPLE REPORTS

A ‘Current Stock Valuation’ report is provided as sample repository report. This report is created from the stock domain using the stock and stock location data sets.

This report shows the current valuation of stock by location.

The report includes additional fields to the standard BCE stock valuation report, for example, ‘Stock code’ and stock ‘Last moved date’.

ADDITIONAL DOMAIN FIELDS

The following domains have been extended to include the additional fields:

Domain	Reporting Set	Field Name	Details
Purchase	Purchase Order	PO Sent	To separate PO's which are sent and not sent.
	Purchase Invoice	Accounting Date	Accounting date of Purchase Invoice
	Purchase Credit Note	Accounting Date	Accounting date of Purchase credit note
Sales	Sales Order	Outstanding to Dispatch	This shows quantity against Sales order still outstanding to dispatched.
	Sales Delivery Note	Accounting Date	Shows Accounting date for sales delivery transaction
Stock	Stock Locations	Financial Year	It shows Financial year in correspondence to accounting date for stock transactions.
		Last Moved Date	This shows when the stock last moved against respected location.
		Stock Valuation	Calculated field shows stock valuation for stock items as held in location. Stock Valuation is calculated as Current stock * Cost Price

DEFECTS

JIRA ID	TITLE
HBCE-12072	System Error when running Turnover Report
Problem:	Recent application changes caused the Turnover report to return an error.
Solution:	Modifications have been made and the report now runs without returning an error.
HBCE-11739	Sales Invoice – Missing lines
Problem:	Sales invoices containing line items with no description were found to be missing when performing a quick edit.
Solution:	This issue has been corrected and line items remain visible irrespective of whether they have a description.
HBCE-11593	Sales Credit Notes - Returning Stock
Problem:	Where sales credit notes returned stock, the credit was found to credit Cost of Sales but incorrectly debit Sales Delivered Not Yet Invoiced (Goods in Transit).
Solution:	This has been corrected so that credits returning stock correctly credit Cost of Sales and debit Material Stock.
HBCE-11547	Supplier Items not displaying on Supply Orders
Problem:	For 'ACC' configured BCE editions, when creating back to back supply orders from a sales order the purchase order was not retrieving all the supplier details correctly and was returning an error.
Solution:	Corrected to retrieve the supplier details correctly.
HBCE-11308 HBCE-10782	Creation of Recurring Invoices - System Error
Problem:	Recent application changes impacted the creation of recurring invoices that were found to return a system error.
Solution:	Modified the application changes to resolve this problem.

<p>HBCE-10874</p> <p>Problem:</p> <p>Solution:</p>	<p>Email - Documents not formatted correctly</p> <p>Several reported instances of where emailed documents were not formatted correctly with misaligned layouts.</p> <p>Corrected formatting to ensure the emailed content is correctly alligned.</p>
<p>HBCE-10858</p> <p>Problem:</p> <p>Solution:</p>	<p>Sales Delivery Note – Invoice totals on Customer Copy</p> <p>With Custom Documents enabled and where the setting of 'Show VAT on sales quotes and orders?' was set, when printing and sending sales delivery notes the delivery notes were found to display the invoice values.</p> <p>Corrected to remove the invoice values from displaying on sales delivery notes.</p>
<p>HBCE-10665</p> <p>Problem:</p> <p>Solution:</p>	<p>Sales Invoices created from Sales Delivery Notes – Print Preview Values</p> <p>Where sales invoices were created from sales delivery notes, the print preview was incorrectly displaying zero 'Net' and 'Vat' values.</p> <p>This has been corrected and sales invoice correctly display their Net and VAT values from the print preview.</p>
<p>HBCE-10660</p> <p>Problem:</p> <p>Solution:</p>	<p>Payroll FPS Submission – Incorrect Taxable Pay Calculation</p> <p>When generating the FPS submission, the taxable pay for 'This period' and 'Figures to date' was found to be incorrectly deducting the employees tax allowance.</p> <p>This has been modified to calculate the taxable pay correctly on the FPS submission.</p> <p>For the current tax year the FPS submission will submit the correct cumulative values following the next payroll run.</p> <p>For FY20/21, a routine will be run by Advanced to create a late reason submission FPS to correct the end of year figures.</p>
<p>HBCE-10601</p> <p>Problem:</p> <p>Solution:</p>	<p>Sales Order Import – Incorrect Sales Revenue code</p> <p>Where the system settings are set to inherit the default sales account from the customer. When importing sales orders the system ignored the sales account set on the customer and continued to use the system default sales account.</p> <p>The import routine has been modified to respect the sales account set on the customer account.</p>