# Business Cloud Essentials 1.5.4

# Release Notes

## Version Control

### Version History

| Date | Version | Issued by | Changes |
|---|---|---|---|
| 11-Jun-19 | 1 | Komal | Initial version |
| 26-Jun-19 | 2 | Bhavik | Reviewed & Updated |
| 27-Jun-19 | 3 | Bhavik | Added Custom Document Design |
| 10-July-19 | 4 | David | Reviewed content.<br>Changed Custom Documents to summary description and made reference to separate User Documentation |

## INTRODUCTION

This document contains an overview of the new features, fixes and changes made to version 1.5.4 of Business Cloud Essentials. Below are key Features/Enhancements which were deployed as a part of R1.5.4

## FEATURES

### CUSTOM DOCUMENTS – MANAGEMENT

Custom Documents is introduced permitting users to design and create their own customised document templates for printing documents from BCE.

A set of standard templates is provided by Advanced and these can be used or copied as required.

New templates can be created from scratch or copies of the standard templates can be modified using a document editor to create new template forms to your required format and corporate branding requirements.

An introductory video and supporting documentation is available describing how to enable and access Custom Documents from BCE and providing general guidance on the creation of templates using the document editor features.

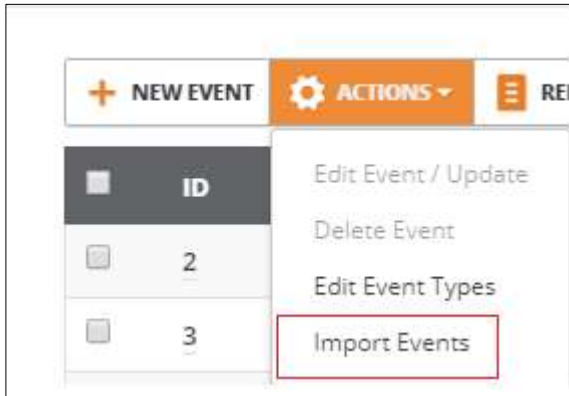BCE Custom Documents – User Notes

Custom Documents overview video:      https://www.screencast.com/t/3qI50fRkN

The following template documents are provided:

| Template Name | Record Type |
| --- | --- |
| Standard Sales Order | Sales Order (Standard) |
| Standard Payment Application | Payment Application Invoice (Standard) |
| Standard Sales Quote Pro Forma Invoice | Sales Quote Pro Forma (Standard) |
| Standard Sales Order Pro Forma Invoice | Sales Order Pro Forma (Standard) |
| Standard Delivery Note (Customer Copy) | Delivery Note (Customer Copy) (Standard) |
| Standard Delivery Note (Supplier Copy) | Delivery Note (Supplier Copy) (Standard) |
| Standard Sales Invoice | Sales Invoice (Standard) |
| Standard Sales Quote | Sales Quote (Standard) |
| Standard Payment Stage Invoice | Payment Stage Invoice (Standard) |
| Standard Sales Credit Note | Sales Credit Note (Standard) |
| Standard Purchase Quote | Purchase Quote (Standard) |
| Standard Purchase Order | Purchase Order (Standard) |
| Standard GRN Goods Received Note | GRN Labels (Standard) |
| Standard Job card | Job Card (Standard) |

The Custom Document templates supplied closely resemble the design and layout of the original BCE forms.

## IMPORTING EVENTS WITH CUSTOM FIELDS

Events can be imported from the Events "Actions" button and the option to import Events has been extended to support custom fields.



Import Preview

Any Custom Fields that have been defined for Events will be included on the import template header when clicking on the 'DOWNLOAD TEMPLATE CSV' button.

Before importing an opportunity file, a preview screen will be displayed showing the status of the records to be imported.



Any exceptions for new or updated records are displayed on the preview screen permitting users to validate the details to be imported.

EXPORT COLUMNS FOR SUPPLIER & CUSTOMER

When exporting Customer and Supplier account records the 'Country Code' and 'Country Name' which were previously exported as a combined fields are now exported as two separate columns using the following headings:

Country Code (Values are Country Codes -ISO 3166, Alpha-2 code)

Country Name