Business Cloud Essentials 1.5.3.1
Release Notes

Version Control

Version History

Date	Version	Issued by	Changes
04 – Jun-19	1	Bhavik	Initial version
14-Jun-19	2	Bhavik	Updated Import preview for Estimates & Project Planned section
14-Jun-19	3	David Rustell	Reviewed content
17-Jun-19	4	Ben Buck	Reviewed
17-Jun-19	5	David Rustell	Revised content for clarity

INTRODUCTION

This document describes the features, enhancement and fixes made in version 1.5.3.1 of Business Cloud Essentials. This version adds the following to the software:

FEATURES

ADDING CUSTOM FIELDS IN DOCUMENTS

Custom Fields are extended to additional entities and documents.

Users with permissions to configure Custom Fields can now create and edit the following Custom Fields for the following document types:

Opportunities

Projects

Events

Contacts
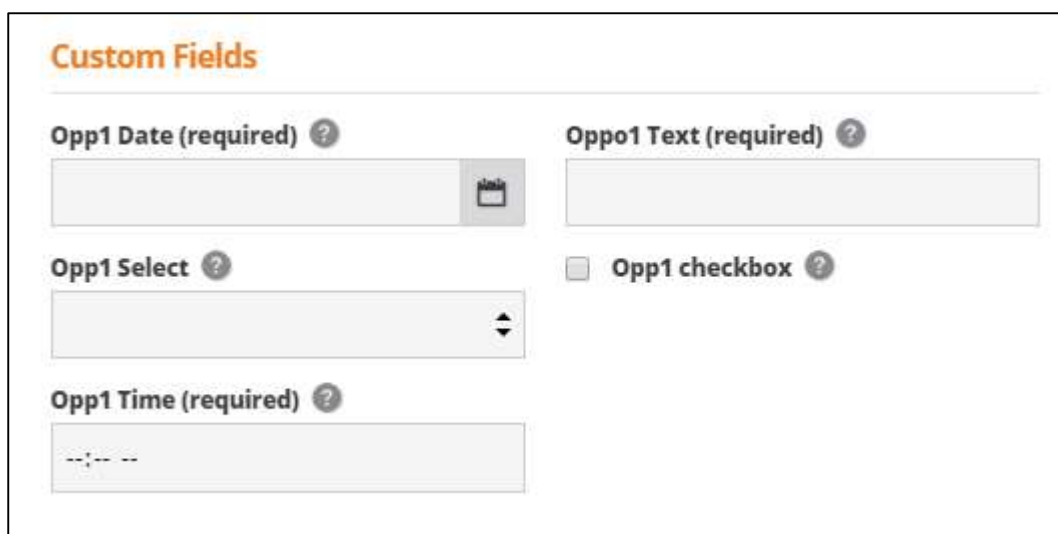
Estimates

Sales Quotes

Sales Orders

ADDING CUSTOM FIELDS FOR OPPORTUNITIES

Custom Fields can be created for Opportunities.

IMPORTING OPPORTUNITY WITH CUSTOM FIELD

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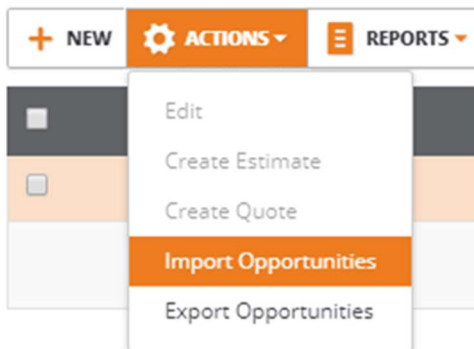
Any Custom Fields that have been defined for Opportunities will be included on the import template header when clicking on the 'DOWNLOAD TEMPLATE CSV' button.

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.
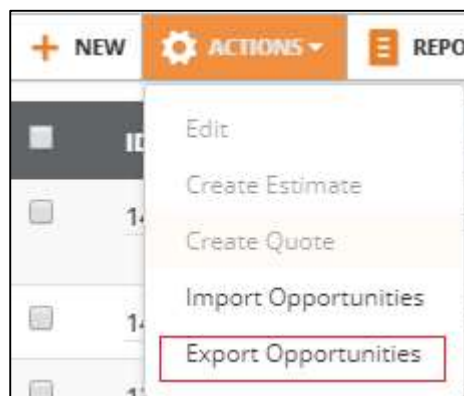
EXPORTING OPPORTUNITY

Opportunities can be exported using the 'Export Opportunities' option from 'Actions'.

It is possible to restrict the number of Opportunities exported by selecting the Opportunities to be exported.

Any Custom Fields that have been defined for Opportunities are included within the import template. This provides the facility to update existing Opportunities by first exporting them, updating the values in the export file reimporting the Opportunities with the new values.

Existing Opportunities are indicated by an 'Opportunity ID' in the import file. To update an existing record the first column of the import template requires the record ID to be entered. If no ID is entered, a new opportunity will be created.

The ID can be found on the Opportunity listing page

ADDING CUSTOM FIELDS FOR PROJECTS

Custom Fields can now be added to Projects.

ENHANCEMENT IN PROJECT

A new field for 'Project Code' has been added to Projects. This is a mandatory field (maximum length 9 characters) that will require a unique code.

The 'Project Name' field has now been changed to a mandatory field.

After upgrading to v1.5.3.1 all existing Project IDs for all Projects will be copied to the new 'Project Code' field. The 'Project Code' can then be edited changed as required.

IMPORTING PROJECTS WITH CUSTOM FIELDS

Projects can be imported from the 'Actions' button.
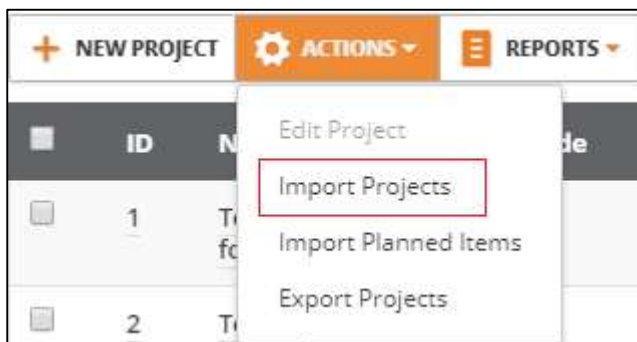
Any Custom Fields that have been defined for Projects will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.

Before importing a Projects file, a preview screen will be displayed showing the status of the records to be imported. Any exceptions are displayed in the preview screen permitting users to check the import details.

IMPORTING PLANNED ITEMS

Planned Items can be imported from the 'Actions' button.
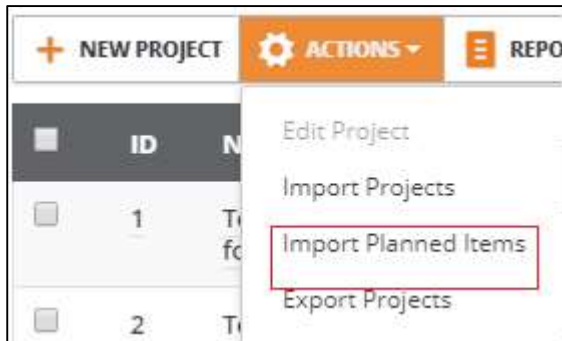
Before importing Planned Items, a preview screen will be displayed showing the status of the records to be imported. Any import exceptions for new or updated records are displayed in the preview screen permitting users to check the import details.
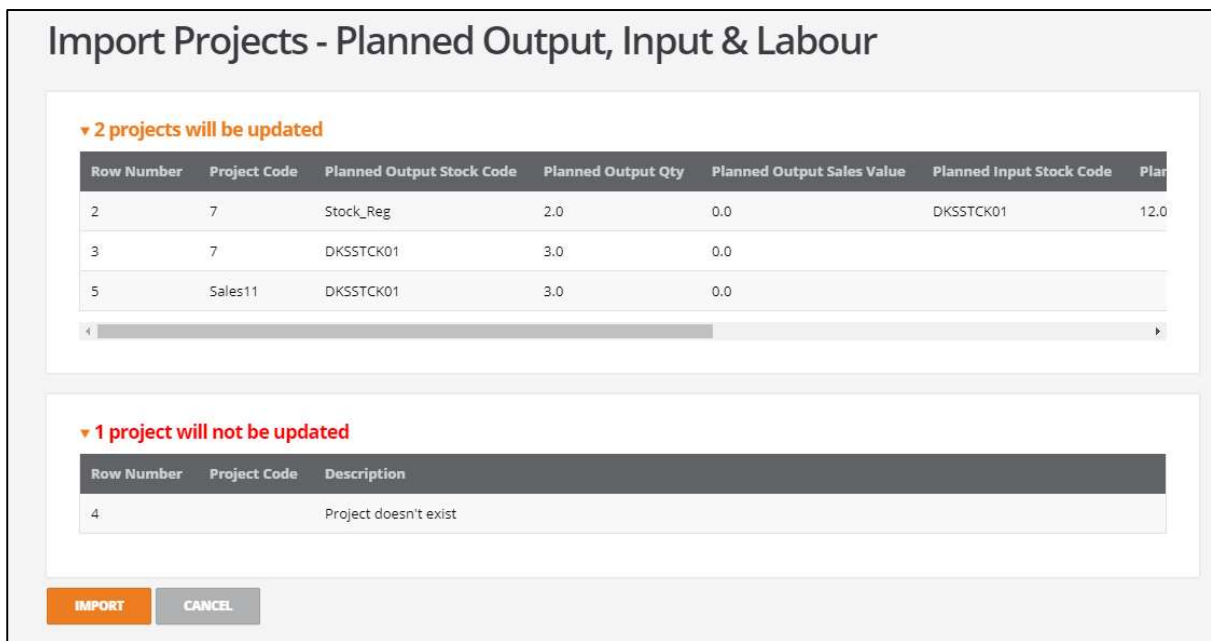
EXPORTING PROJECTS

Projects can also be exported using the 'Export Projects' option from 'Actions'.
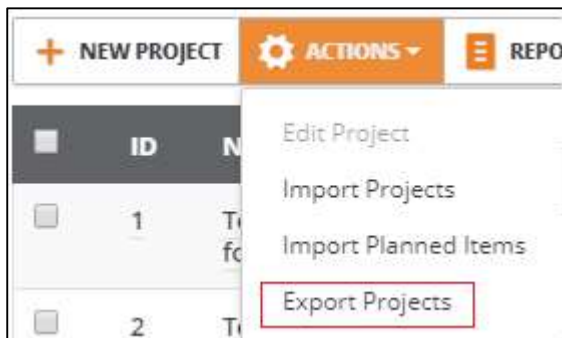
Any Custom Fields that have been defined for Projects will be included in the import template header. This provides the facility to update existing Projects by first exporting them, updating the values in the export file reimporting the Projects with the new values.

Custom Fields can now be added to Events.

IMPORTING CONTACTS WITH CUSTOM FIELDS

Opportunities can be imported from the 'Actions' button.
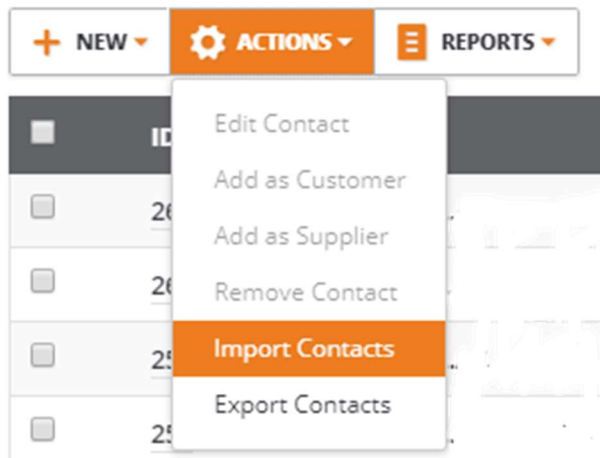
Any Custom Fields that have been defined for Contacts will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.

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

ADDING CUSTOM FIELDS FOR ESTIMATES/ESTIMATE LINE ITEMS

Custom Fields can now be added to Estimates headers and line.

'Estimate' to define custom fields at header level

'Estimate Line Item' to define custom fields at line level

IMPORTING ESTIMATES WITH CUSTOM FIELD

Estimates can be imported from the 'More' button.

Any Custom Fields that have been defined for Estimates will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.

Before importing an Estimates file, a preview screen will be displayed showing the status of the records to be imported. Any import exceptions for new or updated records are displayed in the preview screen permitting users to check the import details.
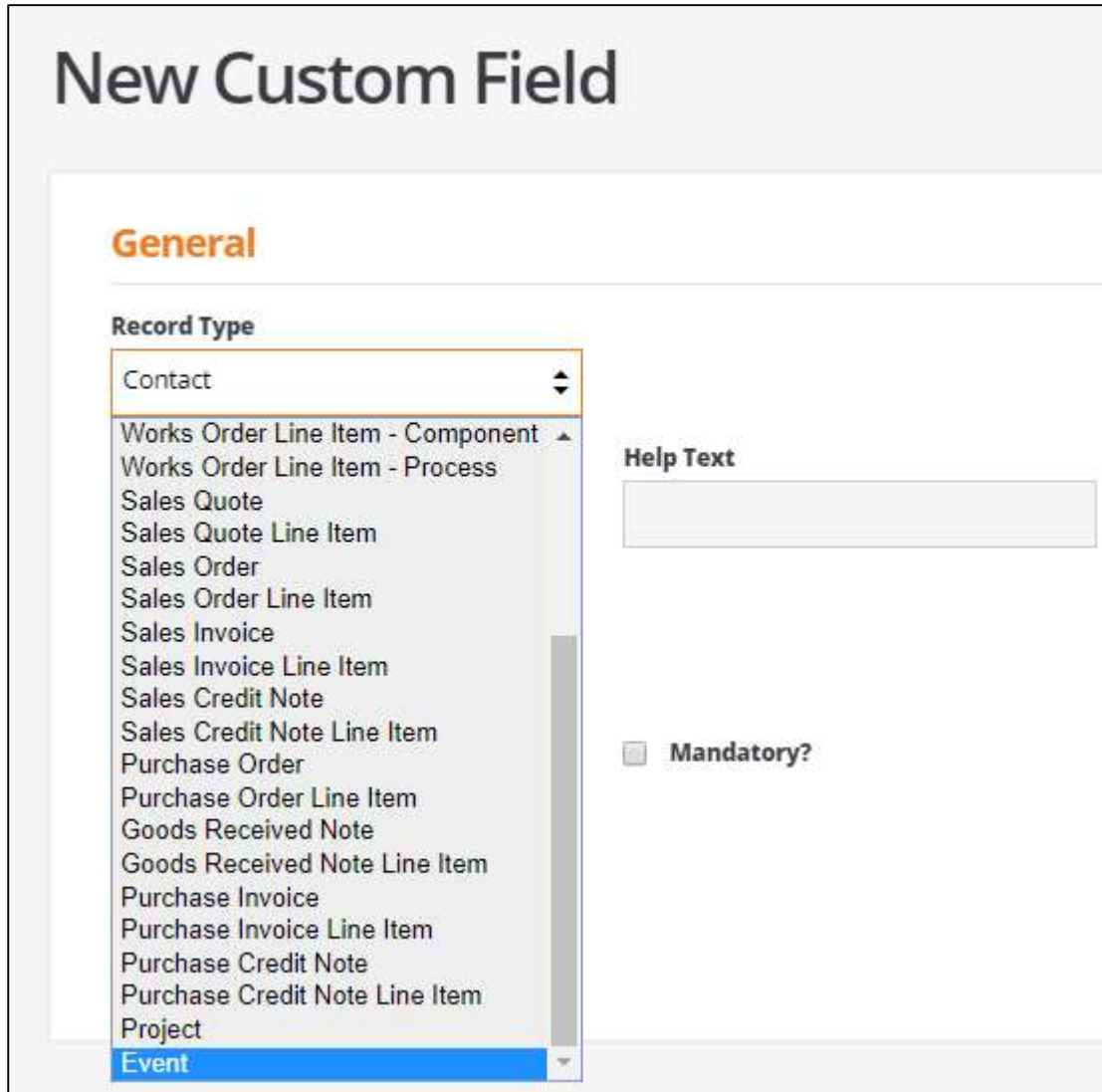
EXPORTING ESTIMATES

Estimates can also be exported using the 'Export Estimates' option from 'Actions'.

Any Custom Fields that have been defined for Estimates will be included in the import template header. This provides the facility to update existing Estimates by first exporting them, updating the values in the export file reimporting the Estimates with the new values.

IMPORTING CUSTOMERS WITH CUSTOM FIELDS

Customers can be imported from the 'Actions' button.
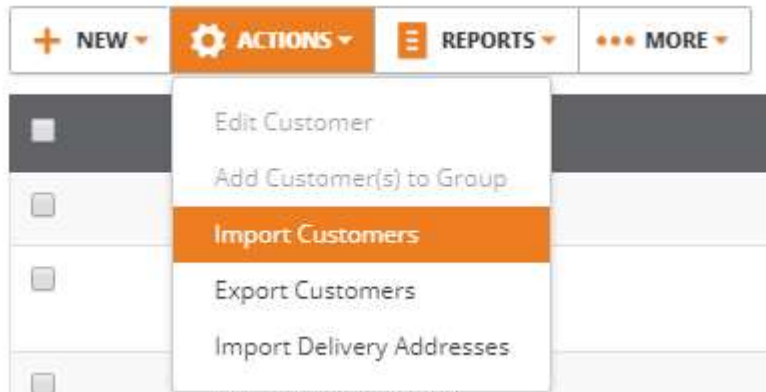
Any Custom Fields that have been defined for Customers will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.
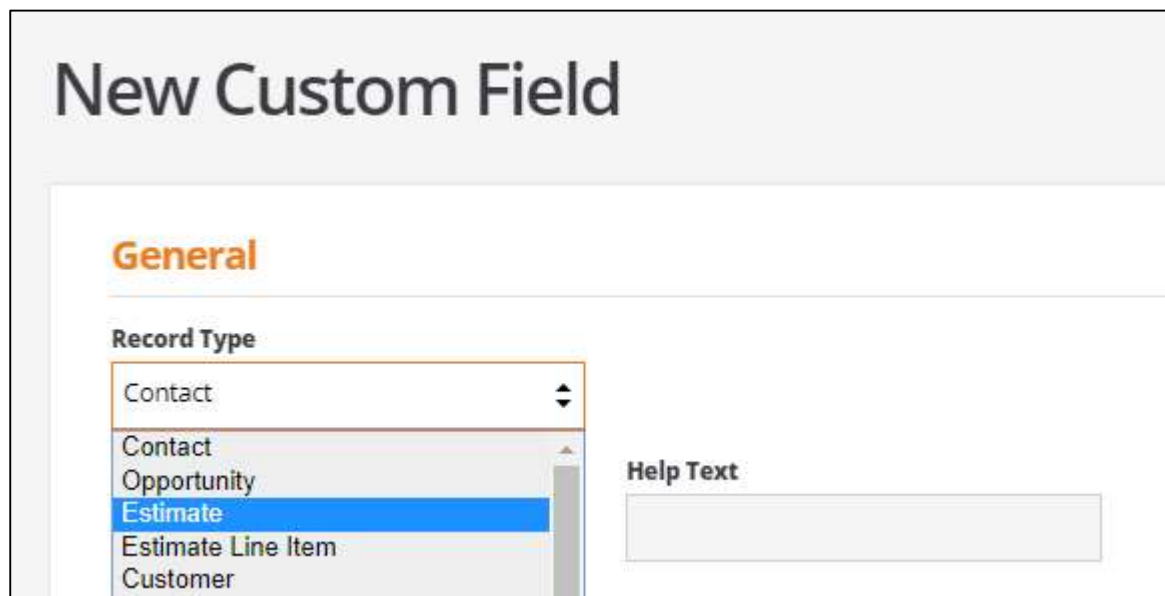
Before importing a Customer file, a preview screen will be displayed showing the status of the records to be imported. Any import exceptions for new or updated records are displayed in the preview screen permitting users to check the import details.

EXPORTING CUSTOMERS

Customers can also be exported using the 'Export Customers' option from 'Actions'.
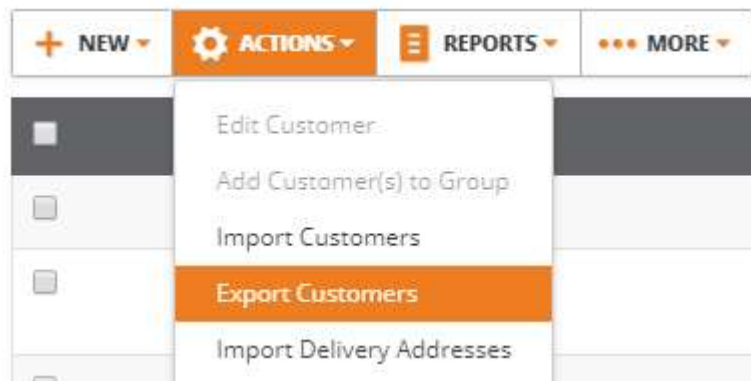
Any Custom Fields that have been defined for Customers will be included in the import template header. This provides the facility to update existing Customers by first exporting them, updating the values in the export file reimporting the Customers with the new values.

ADDING CUSTOM FIELDS FOR SALES QUOTES/SALES QUOTE LINES

Custom Fields can now be added to Sales Quotes and Sales Quote Lines.

When adding Sales Quote documents an option has been introduced to expand or hide the Custom Fields sections as required.
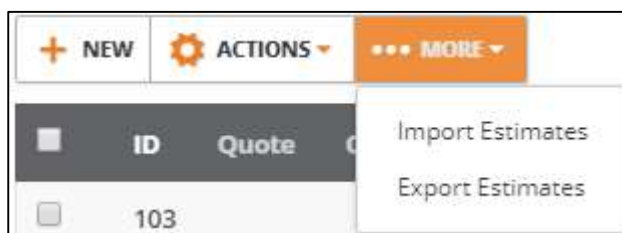
IMPORTING SALES QUOTE WITH CUSTOM FIELDS

Sales Quotes can be imported from the 'More' button.
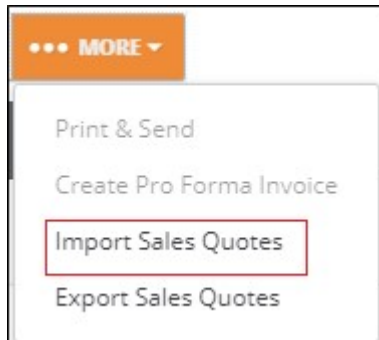
Any Custom Fields that have been defined for Sales Quotes will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.

Sales Quote header and line Custom Fields are identified as follows:

CF:H   Header

CF:LI'   Line

SQ1 Date (Format - DD/MM/YYYY. SQ Date) [CF:H]	SQ1 Time (Format - HH:MM. SQ Time) [CF:H]	SQ 1 Select Box(2) (Values: Samsung, Nokia.) [CF:H]	SQ 1 Text Box(2) [CF:H]	d1 (Format - DD/MM/YYYY.) [CF:H]	SQ line item- Textbox (Required. Help text) [CF:LI]

When importing Sales Quotes which have multiple lines, the lines must share the same import reference number to be created as a single Sales Quote.

Import Reference (Required. This is required to group items to the sales quote)	Quote Reference (If kept blank, then system generated quote reference will be taken)

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

Any import exceptions for new or updated records are displayed in the preview screen permitting users to check the import details.

Sales Quotes cannot be partially imported, For example, when a 'Sales Quote' with multiple many lines is imported, identified by a common import reference, if in the event one or more lines fail to import the document will not be created.

EXPORTING SALES QUOTES

Sales Quotes can also be exported using the 'Export Sales Quotes' option from the 'More' button.
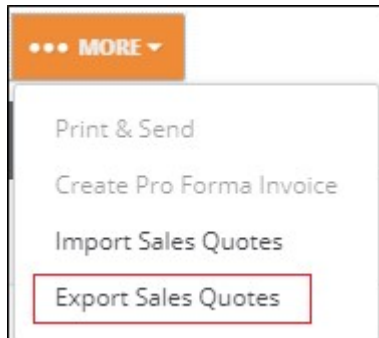
ADDING CUSTOM FIELDS FOR SALES ORDERS

Custom Fields can now be added to Sales Orders and Sales Order Lines.
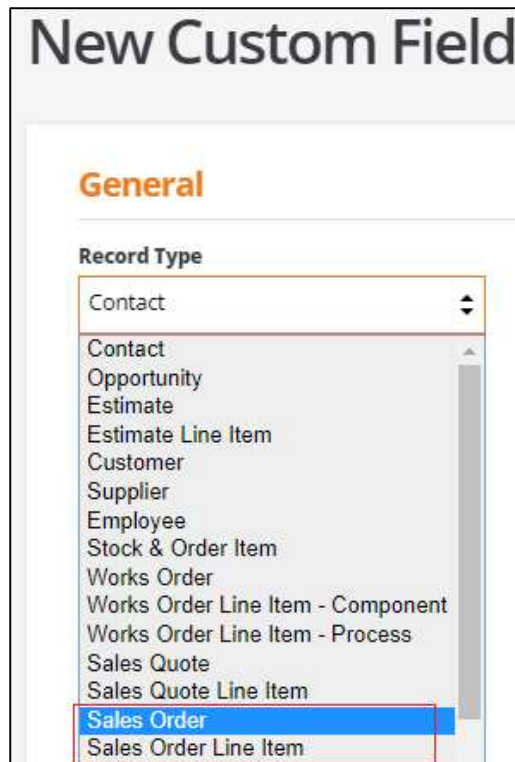
When adding Sales Order documents an option has been introduced to expand or hide the Custom Fields sections as required.

IMPORTING SALES ORDERS WITH CUSTOM FIELDS

Sales Orders can be imported from the 'More' button.
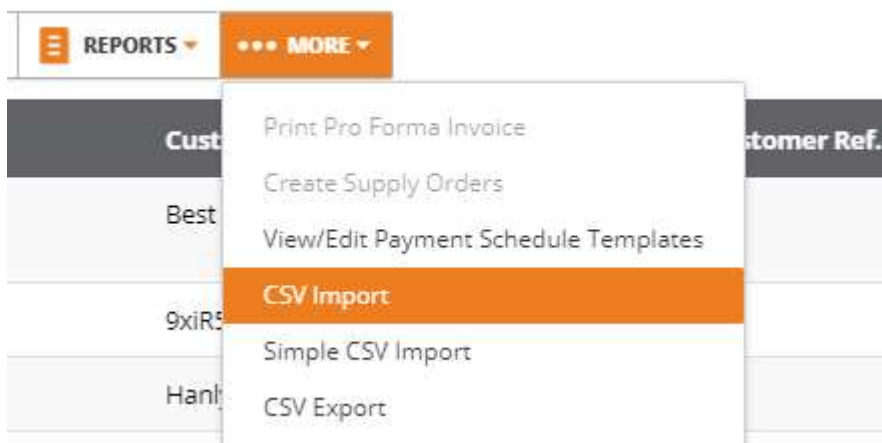
Any Custom Fields that have been defined for Sales Orders will be included in the template header when clicking the DOWNLOAD TEMPLATE CSV button.

Sales Order header and line Custom Fields are identified as follows:

CF:H   Header

CF:LI'   Line

When importing Sales Orders which have multiple lines, the lines must share the same import reference number to be created as a single Sales Order.

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

Any import exceptions for new or updated records are displayed in the preview screen permitting users to check the import details.

Sales Orders cannot be partially imported, For example, when a 'Sales Order' with multiple many lines is imported, identified by a common import reference, if in the event one or more lines fail to import the document will not be created.

EXPORTING SALES ORDERS

Sales Orders can also be exported using the 'Export Sales Quotes' option from the 'More' button.
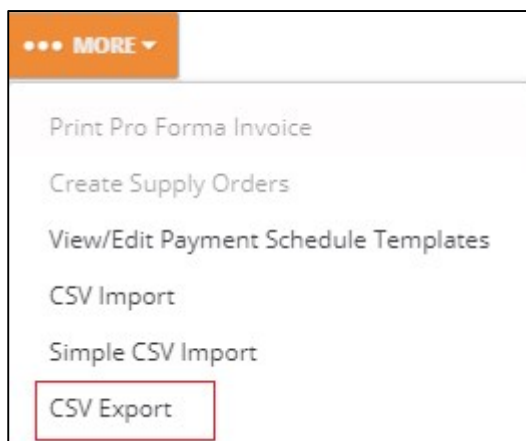
LINKED CUSTOM FIELDS

Custom Fields can now be linked between corresponding documents.

Using the 'Linked to' or 'Linked from' feature removes the need to repeatedly enter the content of Custom Fields when processing Sales type documents.

The Linked functionality can be used for header and line type Custom Fields and is available for the following documents:

- Opportunity to Sales Quote
- Sales Quote to Sales Order
- Sales Order to Sales Invoice

LINKED CUSTOM FIELDS - OPPORTUNITY TO SALES QUOTE

Opportunity Custom Fields can now be linked to Sales Quotes.

When selecting an 'Opportunity', the option 'Linked to Sales Quote' field is available.

This lists all enabled and available Sales Quote Custom Fields based on their input type.
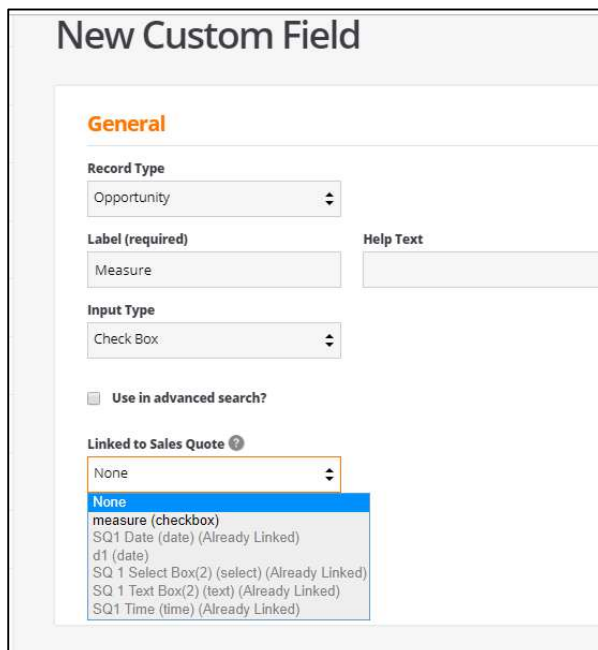
Once selected, values entered in an Opportunity Custom Field will be passed to the selected Sales Quote Custom Field of the same input type.
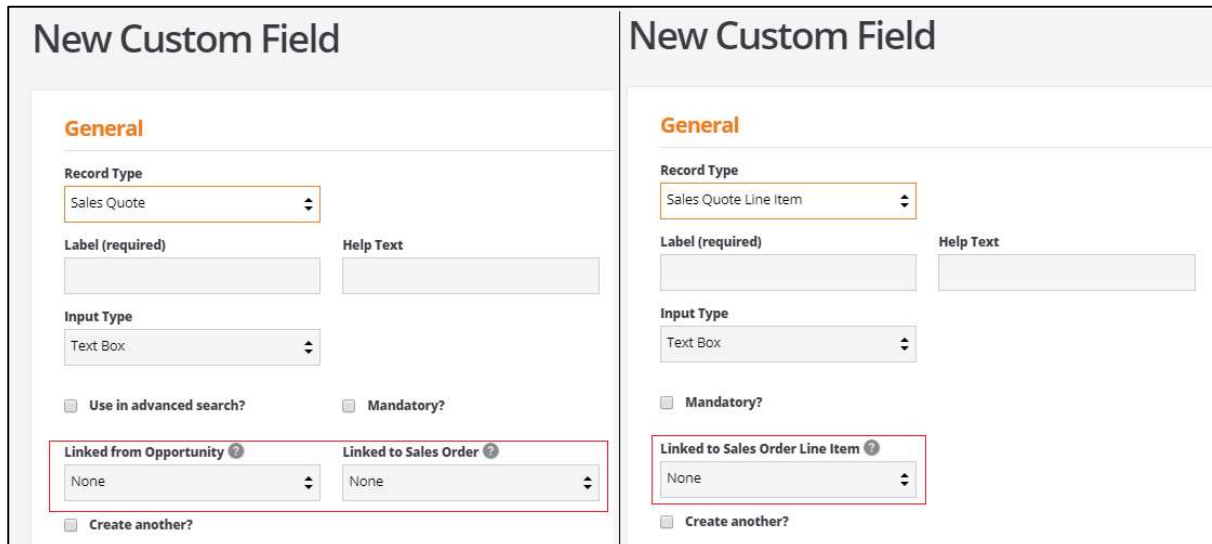
LINKED CUSTOM FIELDS – FROM OPPORTUNITY TO SALES QUOTE TO SALES ORDER

Sales Quote Custom Fields can now be linked from Opportunities and linked to Sales Quotes.

When selecting a 'Sales Quote, two options, 'Linked from Opportunity' and 'Linked to Sales Order' become available.

This lists all enabled and available Opportunity and Sales Order Custom Fields based on their input type.

Once selected, values entered in an Opportunity Custom Field are passed to the selected Sales Quote Custom Field and values entered in a Sales Quote Custom Field are passed to the selected Sales Order Custom Field of the same input type.

LINKED FROM OPPORTUNITY

Lists all Opportunity Custom Fields which are available for linking

Any existing Custom Fields which have been linked are displayed as 'Already linked' and will not be available for selection

Custom Fields of different input types will be displayed but are not available for selection

Selecting available Custom Fields of the same Input Type, the values entered in the Opportunity Custom Fields will be carried forward to the selected Sales Quote Custom Fields

LINKED TO SALES ORDER/SALES ORDER LINE ITEM

Lists all Sales Order Custom Fields which are available for linking

Any existing Custom Fields which have been linked are displayed as 'Already linked' and will not be available for selection

Selecting available Custom Fields of the same Input Type, values entered in the Sales Quote Custom Fields will be carried forward to the selected Sales Order Custom Fields

LINKED CUSTOM FIELDS - SALES ORDER TO SALES INVOICES

Sales Order Custom Fields can now be linked to Sales Invoice documents.

When selecting a 'Sales Order, two options, 'Linked from Sales Quote' and 'Linked to Sales Invoice' become available.

This lists all enabled and available Sales Quote and Sales Invoice Custom Fields based on their input type.

Once selected, values entered in a Sale Quote Custom Field are passed to the selected Sales Order Custom Field and values entered in a Sales Order Custom Field are passed to the selected Sales Invoice Custom Field of the same input type.

LINKED FROM SALES QUOTE

Lists all Sales Quote Custom Fields which are available for linking

Any existing Custom Fields which are linked will be displayed as 'Already linked' and will not be available for user selection

Any Custom Fields of different input types are displayed and will not be available for user selection

By selecting available Custom Fields of the same Input Type, values entered in the Sales Quote Custom Fields will be carried forward to the selected Sales Order Custom Field.

LINKED TO SALES INVOICE

Lists all Sales Invoice Custom Fields which are available for linking

Any existing Custom Fields which have been linked are displayed as 'Already linked' and will not be available for selection

Selecting available Custom Fields of the same Input Type, values entered in the Sales Order Custom Fields will be carried forward to the selected Sales Invoice Custom Fields

FIXES

JIRA ID	TITLE	RESOLUTION
HBCE-3199	Trial Balance Import account code drop down not searching.	Fixed