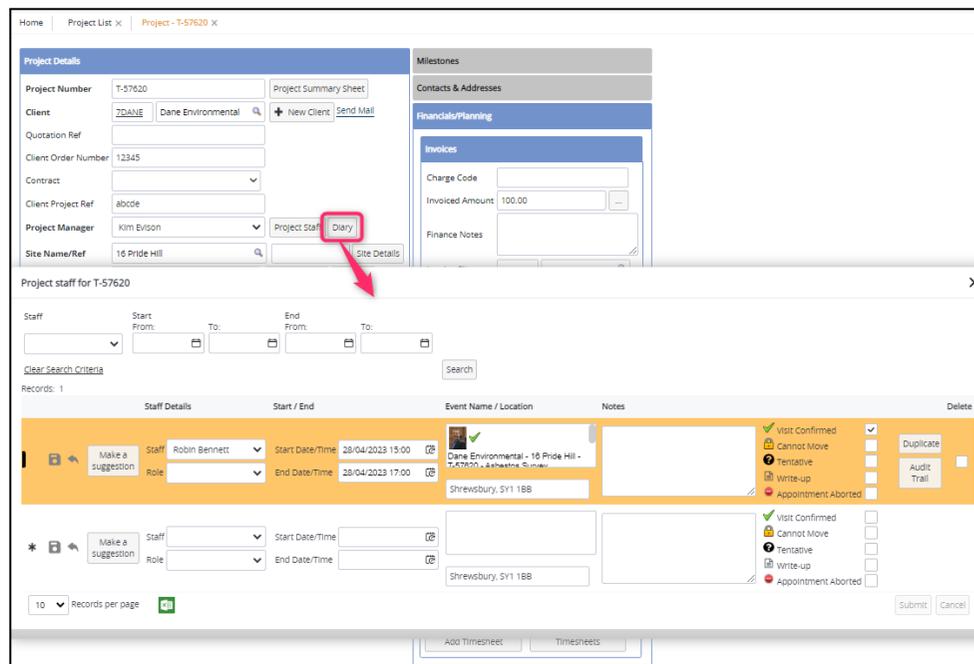


Release 39 - Alpha Tracker Release Notes

New Features / Changes (from SVN7131 to SVN8080)

1. Work has continued on the Water Hygiene module with many new screens and an offline app for data collection. If you would like information on the Water Hygiene module, please contact sales@start-software.com.
2. Performance improvements have been made throughout the system.
3. In this release there are new ways to access and make diary appointments from the Projects screen.
 - (a) If you want to quickly see the list of appointments made for a project, you can click the **Diary** button that is now very easy to access to the right of the **Project Manager** field. You can add an appointment here too - it is the same screen that you used to access from the **Diary Appointments** button on the Financials/Planning tab.



- (b) You can also use the row expander on the Project Staff screen to display and make appointments. Display the Project Staff screen by clicking the **Project Staff** button next to the **Project Manager** field.

Project staff for T-57639

Records: 1

Staff Name: Kim Evison Role: Bulk Analyst

Start From: To: End From: To:

Clear Search Criteria Search

Records: 1

Start / End	Event Name / Location	Notes	Delete
25/05/2023 13:00 - 25/05/2023 14:00	ARL Analytical Reference Laboratory - Squirrel Trees - T-57639 - Re... Brownsea Island	Take the extra long tape measures	<input checked="" type="checkbox"/> Visit Confirmed <input type="checkbox"/> Cannot Move <input type="checkbox"/> Tentative <input type="checkbox"/> Write-up <input type="checkbox"/> Appointment Aborted Duplicate Audit Trail
* Make a suggestion	ARL Analytical Reference Laboratory - Squirrel Trees - T-57639 - Re... Brownsea Island		<input type="checkbox"/> Visit Confirmed <input type="checkbox"/> Cannot Move <input type="checkbox"/> Tentative <input type="checkbox"/> Write-up <input type="checkbox"/> Appointment Aborted

10 Records per page Submit Cancel

- (c) If you have a project for which you want to book multiple regular appointments, for example weekly appointments for three months, then try using the Schedule screen which is the new screen accessed by clicking the **Diary Appointments** button in the Diary section of the Financials/Planning tab. To set a schedule:

- Specify the start and end date for the range of appointments you want to create and the frequency of the appointments, eg Weekly, in the **Schedule** dropdown field before you click the **Diary Appointments** button. It is located right next to the button.

- Click the **Diary Appointments** button to display the Schedule screen and fill in the Add Appointments section to define the appointments to be made. This includes the staff member, the number of appointments to be made, how long each is to be, the date of the first appointment and its starting time.
- Click **Create Schedule** to display the suggested schedule of appointments in the Schedules section. These aren't appointments yet, just suggestions.
- Tick the **Create appointments** box, then click the **Confirm** or **Tentative** button next to each appointment in turn to create the appointments with either the Visit Confirmed or Tentative flag as appropriate. You could also do them all at once by using the **Confirm All** or **Mark All as Tentative** buttons. As the appointments are created they are listed in the Appointments List section.
- Note that there is an optional tickbox that allows you to choose not only to create an appointment but also to create a separate project for each of the appointments - useful if you require individual visits, eg for temperature monitoring, to have separate project numbers.

This screen lists appointments for the project however they have been created. Appointments are displayed from the current date forwards by default. You can alter this by changing the date in the Start Date & Schedule section at the top of the screen. You can also focus on individual months by clicking on the initial letter of the month in the Number of Appointments / Month section. If you prefer to see the old view, simply click the **Quick Edit** button that is located below the Appointments List - you may have to scroll down to see the button.

4. The Invoicing screen, which lets you follow an invoice through from Projects Ready To Invoice to Issued Invoices, has some new **Jotter** notes to help you find information when invoicing. The four screens that list details of invoices rather than projects (Draft, Locked, Exported and Issued) have an additional **Jotter** icon next to the list of project numbers included on the invoice.

The screenshot shows the 'Draft Invoices' section of the Alpha Tracker software. A 'Jotter for Project(s) T-57575, T-57576' popup window is open, displaying a table of notes. The table has the following data:

Name	Created Time	Note Type	Note Text
T-57575			
Kim Evison	11/04/2023 16:52	Phone Call	AAA
T-57576			
Kim Evison	11/04/2023 16:53	Remote Meeting	BBB

The background interface shows a progress bar at the top with stages: Ready (866), Draft (205), Locked (247), Exported (82), and Issued (14). Below the progress bar, there are search filters for Invoice No, Issuing Office, Invoice Date, Client ID, Client Name, Project Number, Due Date, Status, and Created By. A table of draft invoices is visible, with a red box around a 'Jotter' icon in the first row, which is pointed to by a red arrow from the popup window.

Clicking this button displays all the **Jotter** notes for all the projects that are included on the invoice. These notes are read only.

5. The criteria for displaying projects on Projects Ready for Invoicing have been amended to ensure projects are not missed. They are now:

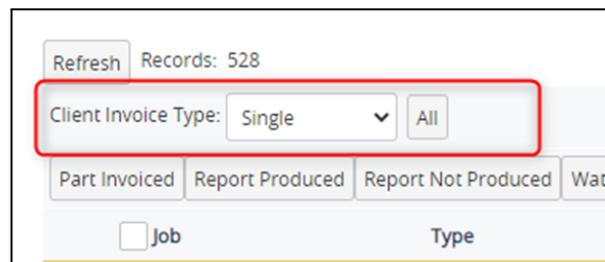
- the project must have a valid Client ID
- the project must have a valid Project Type
- the project must not be a “U” project
- the project must not be a closed project
- the project is a Fixed Price Job AND the Invoiced Amount IS LESS THAN the Estimated Project Value, AND the Report Produced Date IS NOT NULL, OR the Project Status is a “ready to invoice” type, OR it has an Appointment AFTER OR EQUAL TO the last invoice date, OR it has a Timesheet AFTER OR EQUAL TO the last invoice date.
- the project IS NOT a Fixed Price Job AND has an Appointment AFTER OR EQUAL TO the last invoice date, OR it has a Timesheet AFTER OR EQUAL TO the last invoice date.

In addition, there are two settings which can change which projects are displayed. These are: “Show Closed Projects on Projects Ready to Invoice” and “Show Projects With No Invoice Date on Projects Ready to Invoice”. Also, an Export to Excel button allows you to download the list if required.

Note that the standalone “Projects Ready For Invoicing” as well as the tab of the same name on the Invoicing screen work in the same way.

- The Projects Ready for Invoicing section of the Invoicing screen has some new filter buttons. These include buttons to show projects where a report has been produced (**Report Produced** milestone completed) and part-invoiced jobs (fixed price jobs which have an invoiced amount less than the job value).

There is also a new filter for **Client Invoice Type**, which can then be combined with the other filters. The default is to show all Invoice Types.



- The Sage imports have been added to the Export options on the Invoicing screen. These include Sage 50, Sage 50 Detailed and Sage 500.
- Part invoicing, or interim invoicing, is now smarter in that it will prompt you to invoice the remaining amount. For example, if you have a project with a fixed price value of £100 and raise an invoice for £60, then the next invoice raised for that project will be for £40 (not £100 as previously).

However, if you have the setting “UseCostbreakDownForInvoices” set to “yes”, then any invoices raised where a cost breakdown exists will include exactly the lines from the cost breakdown. In this case, if you part invoice, you will have to amend the amounts manually.

- The Invoicing screens now include a **Created By** column, which you can also search by, to identify who generated an invoice.
- A new **Status** dropdown field on Invoice Details lets you apply a status to an invoice. This feature is aimed especially at users who want to mark invoices as “Cancelled” if raised in error rather than deleting the invoice, but can be used for any status you choose. Set the values to appear on the dropdown list by using Setup>General>Lookups and setting the **Category** to “Invoice Status”. Apply a status by opening the invoice details and selecting from the dropdown.

Home | Lookups x

Search

Category: Invoice Status Value:

Clear Search Criteria

Records: 4

ID	Value	Category	Value Number	Sort Position	Delete
208	Cancelled	Invoice Status	0	0	<input type="checkbox"/>
209	New	Invoice Status	0	0	<input type="checkbox"/>
210	On Hold	Invoice Status	0	0	<input type="checkbox"/>
211	Closed	Invoice Status	0	0	<input type="checkbox"/>
<Auto>					
<Auto>					
<Auto>					

10 Records per page

Invoice/Credit Note

Invoice Date: 11/12/2014 Invoice No: 137

Client: TESTNOV Test November Office: Testing

Your Ref: Type: Invoice

Account No: TESTNOV Date Locked: Date Exported: Date Issued:

Cost Category: Status: **Cancelled** (highlighted in red box)

Cost Centre: Draft

Payment Terms: Due: Payments

Exported Issued

Invoice To: Coach House Test Place Inv. FOA: Bob

Deliver To: Test November HQ Address here TF13 6FB Del. FOA:

Items

Line	Item	Qty	Price	VAT Code	Net	VAT	Total	Project Number	Project Type	Nominal Code
1	Report T-00348/Dan Darkin	1	50.00	S	50.00	10.00	60.00	T-00348	Asbestos Surv	

The **Status** field can also be seen on the four tabs of the Invoicing screen that list details of invoices rather than projects (Draft, Approved/Locked, Exported and Issued). Note that if the status of an invoice is “Cancelled”, then the invoice will not show on these tabs.

- When using the tabs on the Invoicing screen, you can send invoices directly to your client. These invoices would be at the Locked stage. Select the invoices that you want to send by ticking them on the Locked Invoices tab of the Invoicing screen, then click the **Email PDF** button. The email is sent to the email address held on the Client Details, in the **Accounts Email** field.

Home | Invoicing | X

Ready (866) | Draft (206) | Locked (247) | Exported (82) | Issued (14)

966 — 206 — 247 — 82 — 14

Locked Invoices

Search

Invoice No. Issuing Office Invoice Date From: To: Client ID Client Name Project Number Status Created By

Clear Search Criteria

Refresh Records: 247

	Invoice No	Issuing Office	Type	Invoice Date	Status	Client	Account No	Your Ref	Invoice To	Net	Project Numbers
<input type="checkbox"/>	584	N	I	09/12/2022	2CLIENT	The Next Client	2CLIENT		The Next Client 9 Woods Street Norwood Adelaide	31430.00	A-00150, A-00151, A-00214, Y
<input type="checkbox"/>	582	T	I	09/12/2022	ABCD	A B C D Company	ABCD		A B C D Company 6 Hill View Stafford	25000.00	T-56539
<input type="checkbox"/>	571	N	I	07/10/2022	0002	Sept Test	0002		579 7LB Sept Test Sept Test House etc	200.00	N-00435
<input checked="" type="checkbox"/>	534	N	I	28/07/2022	CLIENT	The Client Company	CLIENT	123213	The Client Company AS above	451.25	N-00180
<input checked="" type="checkbox"/>	533	N	I	28/07/2022	CLIENT	The Client Company	CLIENT	123213	The Client Company AS above	451.25	N-00179
<input type="checkbox"/>	527	T	I	27/07/2022	TDANE	Dane Environmental	TDANE	po 010514	Dane Environmental Copenhagen House The Quay Poole Dorset BH15 8BN	800.00	T-00051, T-56147
<input type="checkbox"/>	522	N	I	12/07/2022	Porter	Zak Porter Housing	Porter		The Housing Trust Down the road just left of the post office WWW 111	100.00	N-00131
<input checked="" type="checkbox"/>	521	N	I	12/07/2022	CLIENT	The Client Company	CLIENT	123213	The Client Company AS above	451.25	N-00128
<input type="checkbox"/>	440	T	I	13/05/2019	VIRGIN	Virgin Media	VIRGIN	PO999	Virgin Media Head Office London	771.00	T-56226
<input type="checkbox"/>	341	T	I	09/11/2016	EG1	Example One	EG1		Example One Head Office Droghda Road Worcester	100.00	T-55609

First Prev 1 2 3 4 5 6 7 8 9 10 of 25 Next Last

Records per page: 10

Export Email PDF

Client Details

Client ID: 7DANE

Name: Dane Environmental

+ Site - Quote - Project - User

General Details

Contacts/Emails

Classification

Finance/Credit Details

Account Code: Enter the account code from Sage, Xero, Quickb

Cost Centre:

Cost Code:

Xero Contact ID: Enter the Xero Contact ID for this Client

Quote Multiplier: 1

Accounts Email: **jason.dane@test.dane.com**

Invoice Recipient: Jason Dane

Invoice Address: Copenhagen House
The Quay
Poole
Dorset

Consolidate Invoices:

Payment Terms:

If you select multiple invoices, then they should all be for the same client. One email is sent with the invoice(s) attached.

- Quotation numbers are now five digits, allowing you to enter even more quotations in a year!
- The staff dropdowns (Assigned To, Account Manager and Produced By) on the Quotation List are now restricted to active staff in the Sales permission group only. Other staff will only be displayed if already selected (this is the same behaviour as on the Project screen).
- There is a new tickbox on enquiries/quotations that lets you flag them as a **Tender**. The tickbox is located next to the **Type** field.
- A ticketing system is now available in Alpha Tracker - based on the one we use ourselves to track your tickets. Get in touch if you would like a licence to use the Ticketing module. Once activated, a Tickets menu is visible, with options for New Tickets, All Tickets and My Tickets. You will also find a Tickets submenu under Setup>General to help you set the values on your Ticket screen.

Home | New Ticket X

Ticket Setup

Raised When

Client

Contact Type Email Microsoft Teams Phone Verbal Web portal

Raised By

Telephone

Email

Ticket type

System

Sub-system

Ticket
Enter the ticket details from the client

Ticket Type Problem Bugs

Has this happened before? Yes No

Photo

Prioritisation

Priority Critical - 10 minutes High - 1 hour Medium - 4 hours Low - 16 hours

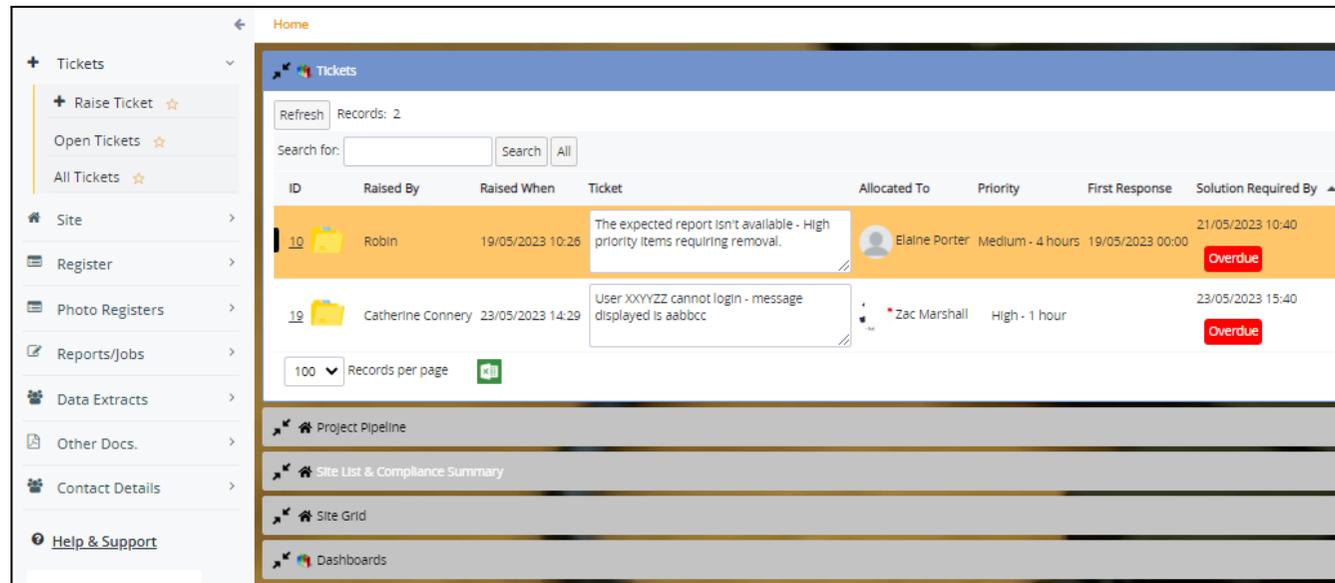
Solution Required By

Allocated To

First Response Timestamp

Solution

Ticketing can also be displayed on the Client Portal, so that your clients can see their open tickets, raise tickets and search their tickets.



16. Alpha Tracker can now be integrated with Fast Lean Smart (FLS) for optimised scheduling of high volume, low value jobs.

17. A change to Alpha Tracker Document Maker (ATDM) means that we can now add Google static maps into reports based on the latitude and longitude on the Site and/or Project record. As long as the site/project is geocoded properly, so that its longitude and latitude are stored, it is simply a matter of inserted a tag into a report template where the map is to be displayed. A Google Maps API key is needed to use this function in the "ATDM Google Static Maps API Key" setting. Map properties can be set for zoom, size, type and marker pin colour.



18. A range of improvements have been made to the Client Portal, including performance improvements. As part of this, you will notice the different elements of the Home screen loading differently as each now loads in turn.

The Site List and Compliance Summary has had a few changes:

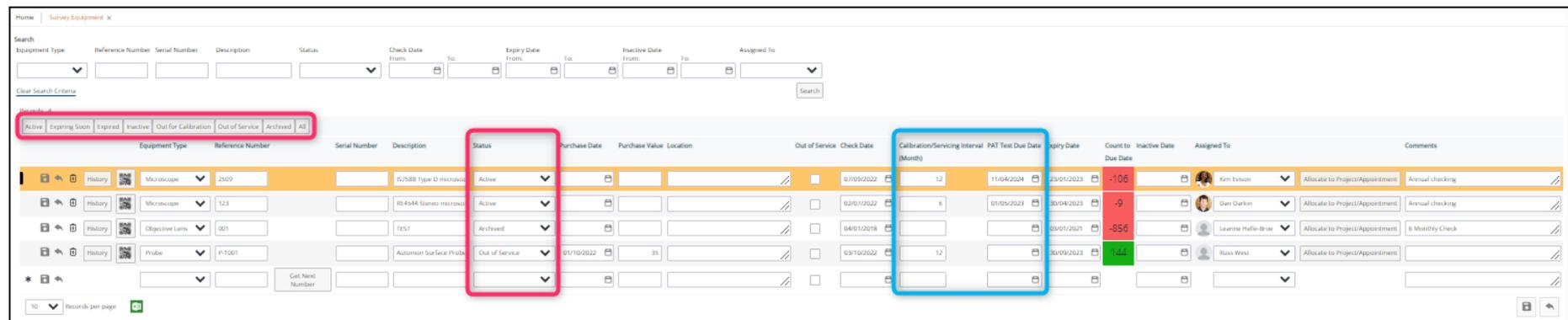
- All sites for a client will now be displayed - whether or not there is a project marked as Show On Web for that site. This is to enable your clients to manage their whole property portfolio, including the sites that have not yet had a survey. Should you wish to hide a site from the Site List and Compliance Summary then you will need to change the **Status** on the Site Details to "Hidden from portal".
- The "quick search" has been removed and single field searches have been added (on the Site List and Compliance Summary and also on the Report List and Site Grid View). The search fields displayed should match the columns displayed.
- Site List and Compliance Summary now showing the Asbestos Summary charts, both by score and by category as per settings.

- There are new search buttons on the Site List and Compliance Summary. These are now: No Asbestos Survey, Asbestos Reinspection Upcoming, Asbestos Reinspection Overdue and All.
- Fewer columns are available for display to streamline the screen.

19. Both the Analytical Equipment and the Survey Equipment screens have had some new fields added to help you control your equipment. These are:
- a new column for "**PAT Test Due Date**"
 - a new column for "**Calibration/Service Interval**".

Updating the **Calibration/Service Interval** calculates the **PAT Test Due Date**.

20. Other changes to Equipment include a new **Status** drop down on equipment with fixed options of "Archived", "Active", "Out for Calibration" and "Out of Service". There are pre-set filter buttons for each of these **Status** values.

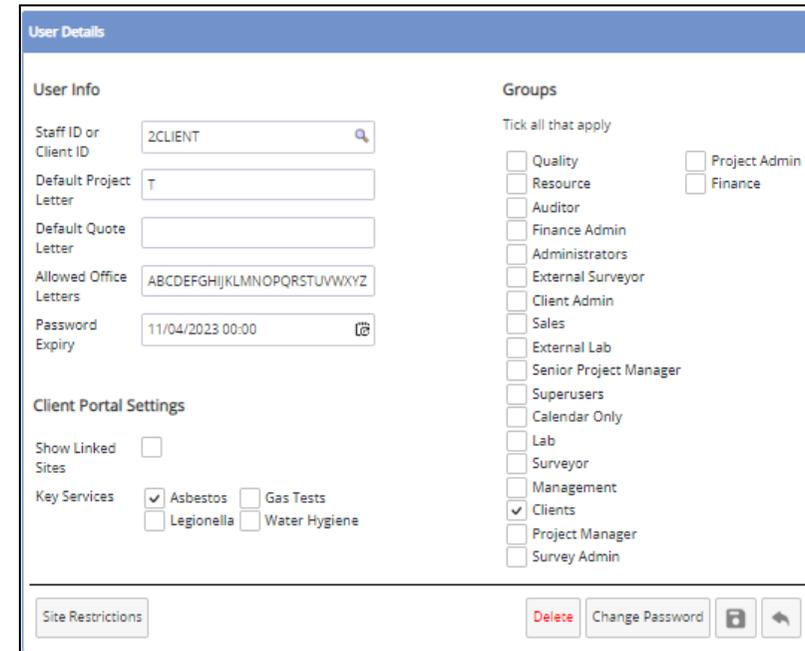
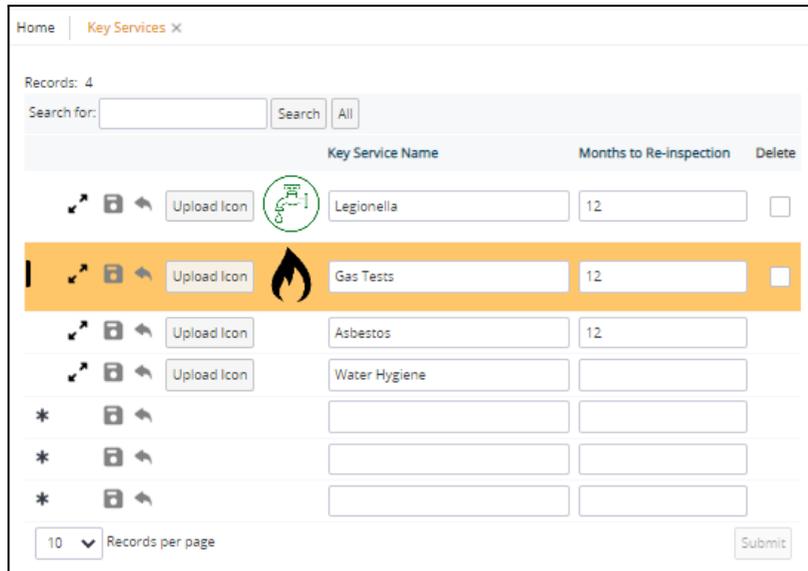


If equipment has the **Status** "Archived", then the history associated with the item is locked (ie is read-only) and cannot be deleted.

There are two new settings that you can also use to control who can add, edit and delete equipment history. These are "Equipment History - Users Add and Edit Record" and "Equipment History - Users Delete Record".

21. If you are using the **Equipment** button from an appointment to link equipment to an appointment, you might find the new **Assigned** button useful. Click the magnifying glass to search for a piece of equipment, then click the **Assigned** pre-set filter button to reduce the displayed list of equipment to those pieces that have been assigned to you.

22. The Key Services menu option is now visible to all Alpha Tracker systems on the Setup>General menu. Asbestos and Water Hygiene will display as Key Services by default and cannot be deleted. When adding a new user to the Clients or Client Admin group on systems, a Key Services section is displayed. The "Asbestos" key service is selected by default, as long as no other key services have already been selected. The key services determine what information is displayed on the Client Portal.



The Data Extract reports on the Client Portal can also be tailored according to the key services. The category "Water Clients" is used to set up reports for water Client Portal users.

23. If you use the Alpha Tracker Mobile App, and enter quotation details this way, you can now also generate the quotation document from the app. Just as in the Alpha Tracker desktop, you can select the template, Ts&Cs, and generate the quotation document while out and about. This feature works with the Document Requests method of document generation.

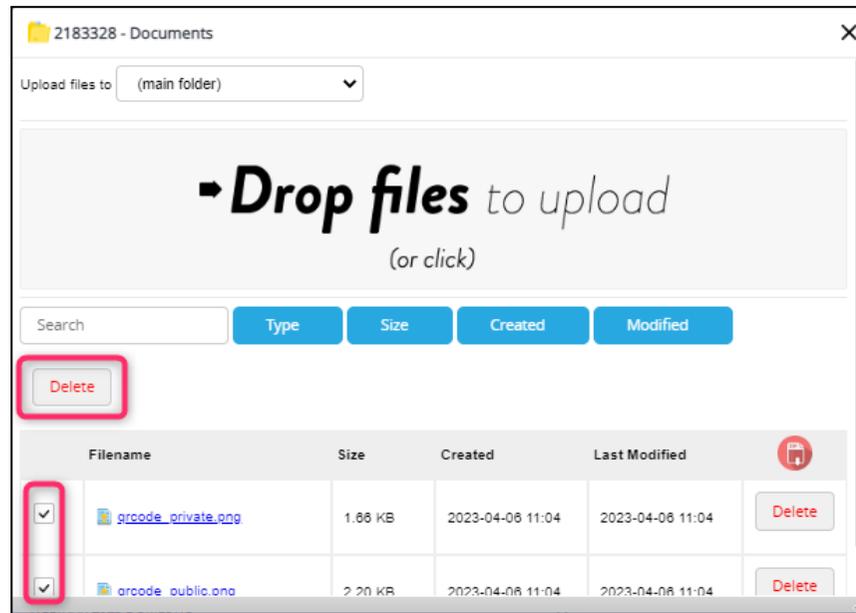
Simply create or open the quotation in the app, then display the menu from the ... button and select **Generate Document**. You can then select the template and tap **Create Document** to request the document. The finished document is emailed to you. **Generate Document** has also been added to "New Project", "My Projects" and "View Projects".

24. Also on the Alpha Tracker Mobile app, you will find a new Forms menu so that you can complete Forms on the go. The three menu options are "Form Details", "Questions" and "Sign Off".
- "Form Details" takes you to a panel with the completed by, date and front page photo buttons.
 - "Questions" is where you will find the questions to be answered for the Form.
 - "Sign Off" lets you enter your signature, collect the client's signature and generate the report.
25. The Staff screen includes a new tab that lets you list a member of staff's qualifications and experience for the different Project Categories. The Project Categories group together different Project Types, eg Asbestos Survey, Water Hygiene etc. For each type, you can enter free text descriptions of qualifications and experience. These descriptions could be included in reports if required.

To enter the details, first search for the member of staff then expand the row and select the Qualifications And Experience tab.

The screenshot shows the 'Staff' screen in the Alpha Tracker mobile app. At the top, there are tabs for 'Home' and 'Staff X'. Below this, there are 'Grid View' and 'Map' buttons. A search bar contains 'Jack' and a 'Search' button. Below the search bar, there are filters for 'Current staff only', 'Ex-staff only', and 'All staff'. A table header lists columns: Staff ID, Inactive (Yes/No), Photo, Name, Email Address, Mobile Number, Group, and Sub Group. The table shows one record for Jack Byrne with email Jack.byrne@start-software.com. Below the table, there are tabs for 'Staff Training', 'Working Weekends', 'Non Working Weekdays', and 'Qualifications And Experience'. The 'Qualifications And Experience' tab is active, showing a table with columns: Project Category, Qualifications, Experience, and Delete. The first row shows 'Asbestos Survey' as the Project Category, 'Asbestos P405' as Qualifications, and '10 years experience as an asbestos surveyor' as Experience. There are three empty rows below it. A 'Submit' button is at the bottom right.

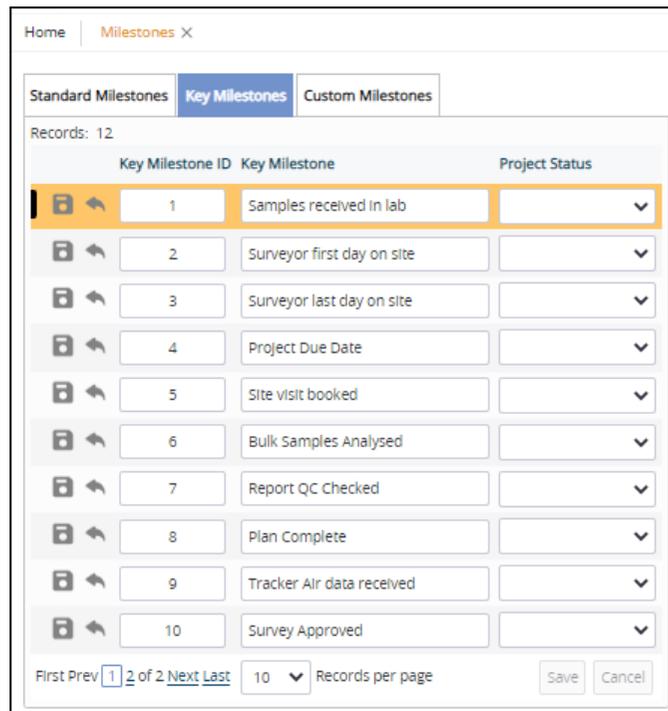
26. If you sometimes take new samples when carrying out re-inspections, and you have your own lab to analyse samples, then you will now find that the Lab Project List will display re-inspection projects when they include samples.
27. There is a new setting called "AirMonitoringUpdateReportProduced" which will initially be created with the same value as "UpdateReportProduced". This setting allows the Report Produced milestone to be automatically updated when Air certificates are requested.
28. A bulk delete facility is available from the Document folders on Clients, Quotations, Sites and Tickets. Simply tick the box against the files to delete, and then click the **Delete** button.



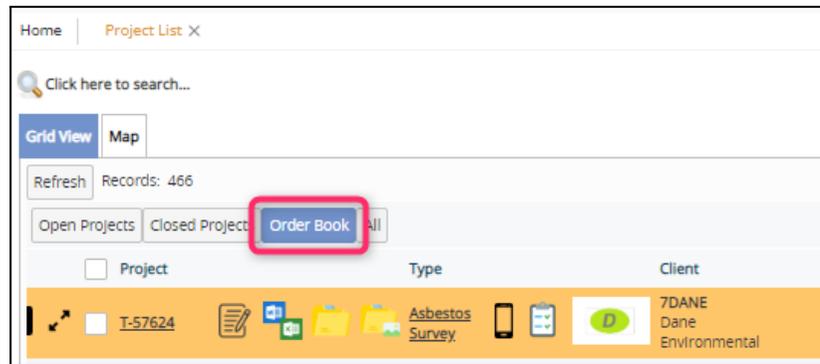
29. New repository settings let you control how the calculation of 5% underlimit samples for checking function. The settings are:
 - "Start date for 5% underlimit samples" – to specify when the system should start calculating and displaying 5% of under-limit samples, eg 2021/04/14 or 2022/02/01. Before that date no under-limit samples will show as being required. The default is "2022/02/01"
 - "Start date for 5% underlimit samples rounding up" – this will be set automatically to the release date of Release 38.5, so that the figures before that date are rounded down and after that date are rounded up, or you can specify the required date.

30. It is now possible to change the **Status** of a project automatically when a key milestone is completed. This means that you can use the Status to track progress on projects alongside the automated milestones.

Specify the Status to be applied when a key milestone is completed on the Key Milestone tab of the Milestones screen.



31. A new key milestone is available: "Draft Report Produced". Any milestone linked to this key milestone will be automatically updated when the DRAFT survey report is produced for the project.
32. There is also a new tickbox on the milestone templates called "Close Project On Complete". If a milestone has this tickbox ticked, then when that milestone is completed, the project will be automatically closed.
33. To help you see work booked in and not yet completed, there is a new "Order Book" custom search button on the Project List. Click this preset filter button to filter the Project List to just open jobs that are not fully invoiced.



- 34. Wallboard users will see a big improvement in the display of projects. There are now views available for Weekly, Monthly, Quarterly and 6-Monthly. You can also now search by Offices, Clients, Projects and Project Types.
- 35. When using the reports that are available under the Reports menu, you will see a change to how the report results are displayed on screen. Pagination and searching are available in the new report output. The styling has changed so that you will now see odd and even row colours and row highlighting. As an additional benefit, when the report is produced, it will now auto scroll into view.

Report Parameters				
Enter client name (type for options) Dane Environmental				
Show 10 entries				Search: <input type="text"/>
Project Number	Name	Project Type	Date Opened	
N-00085	Dane Environmental	Bulk Sample	03/03/2014	
T-55989	Dane Environmental	Asbestos Survey	16/11/2017	
T-56311	Dane Environmental	Asbestos Survey	03/12/2019	
T-56312	Dane Environmental	Asbestos Survey	03/12/2019	
T-56313	Dane Environmental	Asbestos Survey	03/12/2019	
T-56314	Dane Environmental	Asbestos Survey	03/12/2019	
T-56315	Dane Environmental	Asbestos Survey	03/12/2019	
T-56338	Dane Environmental	Asbestos Survey	18/03/2020	
T-56359	Dane Environmental	Re-inspection	06/05/2020	
T-56363	Dane Environmental	Re-inspection	14/05/2020	

Report Generated @ 10/05/2023 12:21 by the Start Software Alpha Tracker Report Generator

Showing 1 to 10 of 25 entries Previous 1 2 3 Next

36. There is a new 15-minute Apdex count shown on the Performance Dashboard which is on the Home page. The original Apdex score is still displayed (labelled “24 hours”). The new one is labelled “Now”. The Apdex score gives an indication of how your system is performing.
37. If you need to enter more than one contact for a project, then you can now do this by using the **Additional Contacts** button on the Contacts & Addresses tab. Here you can add new or select from existing contacts. They are then displayed on the Contacts & Addresses tab, with the email as a hyperlink.

The screenshot displays the Alpha Tracker software interface for a project. The top navigation bar shows 'Home' and 'Project - T-57626'. The main content is divided into two panels: 'Project Details' on the left and 'Contacts & Addresses' on the right.

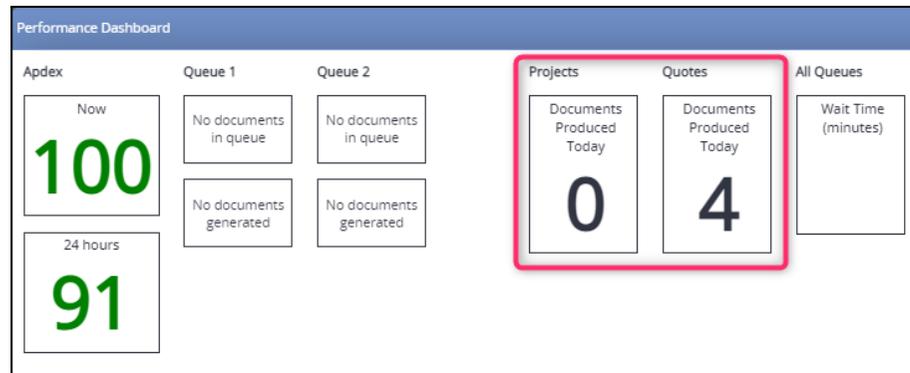
Project Details Panel:

- Project Number:** T-57626
- Client:** START Start Software (with '+ New Client' and 'Send Mail' buttons)
- Office:** (dropdown menu)
- Quotation Ref:** (input field)
- Client Order Number:** (input field)
- Client Project Ref:** (input field)
- Project Manager:** Kim Evison (dropdown menu) with 'Project Staff' and 'Diary' buttons
- Site Name/Ref:** 25 Ivor Road (input field) with '1234567890' (input field) and 'Site Details' button
- Project Type:** Asbestos Survey (dropdown menu) with 'Survey Details' and 'Buildings' buttons
- Estimated Total Project Value:** 0.00 (input field) with 'Fixed Price' checkbox
- Status:** New (dropdown menu)
- Status Notes:** (text area)

Contacts & Addresses Panel:

- Site:**
 - Contact Name:** Tanla
 - Contact Email:** tanla@gmail.com
 - Contact Number:** (input field)
 - Additional Contacts:** (button, highlighted with a red box)
 - Additional Contact List:**
 - Robin Bennett robin.bennett@start-software.co.uk
 - Corie Mullen
- Address:**
 - Wimborne
 - Dorset
 - Same as Client Address (button)
- Site Country:** (input field)
- Postcode:** BH21 3QF
- Lookup Address (button)
- Map (button)

38. Excel downloads from Alpha Tracker have been added to Document Requests which means that you now have visibility of who by and when data has been downloaded. The Started and Finished times are now range searches to help with queries.
39. The Performance Dashboard on the Home page now also includes figures on Quotes Produced Today and Projects Produced Today. These will update whichever document production method you are using.



40. An External ID field has been added to the Staff screen which you can use to cross refer to a Staff ID from another system.

The Staff screen form includes the following fields:

Default Lab	Payroll Number	External ID	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

41. Should you need a list of the costs on a project then you can use the new **Excel** download button on the Associated Costs screen to obtain these details.

Associated Costs - T-57639

Records: 3

Search for: Search All

Cost Category	Item	Item Code	Cost Groups	Date	Quantity	Cost	Unit	Total	Internal/External	Delete
Equipment	Cherry Picker	CHP	Equipment		1	40.00	1	40.00	External	<input type="checkbox"/>
Equipment	Generator	GEN	Equipment		1	35.00	2	35.00	Internal	<input type="checkbox"/>
Transport	Mileage	MIL	Survey		500	0.79		395.00	Internal	<input type="checkbox"/>
*					1	0.00		0.00		
*					1	0.00		0.00		
*					1	0.00		0.00		

Total 470.00

10 Records per page 

Key Service Risk Rating

Costs

Total Current Costs 75.79 

Diary

Estimated Man Days 1 Estimated Man Days (Write Up) 1

Default Appt. Length (hours) 2 [Change Log](#)

42. If you have been looking for a way to record multiple office addresses for clients, then you may want to use the new "Clients can have multiple offices (no/yes)" setting. When this is enabled, you will see a checkbox on the Site List tab on the Client Details to mark a site as an office branch address.

It can then be selected on the project, storing the Site ID, and can be used in reports if required.

43. A new feature in "Open Quotations - By Month", "- By Client", "- By Type" and "- By Manager" lets you mark old quotes as Lost (or Won) really easily by changing the Status dropdown field. Like "Projects Easy Close", this screen is now very useful when tidying old data.

Fixes/Minor Changes

There have also been some fixes/minor changes in this release, including:

- Users in the Lab permission group can now access the Calendar.
- Users in the Resource group can now access the Master Project Import.
- In Forms, an issue with the display of actions after saving has been resolved, front-page photos can be uploaded and displayed in Alpha Tracker, and ticks are displaying correctly. Further work has been done on recording Scorable and Failure flags and displaying their icons. The Form folder button is now available on the Project Forms screen. Standard comments have been added to the questionnaire details.
- Form list refreshes have been improved. Forms are only available on the forms list for open projects where no report has been produced. List virtualisation has been enabled to only show 50 rows of data at once.
- The **Sync** button is displayed in the top right if there are changes that require syncing.
- Company Documents have been moved to the main menu tiles.
- A change has been made to the trigger on the Samples table to ensure Barcodes link correctly.
- There has been a minor change to the ordering of sites on the Client Portal key services dashboard.
- A problem with the creation of additional user information records when users are imported has been fixed.
- The **Screen Type** field is displayed on the Recommendations screen for selection if the recommendation applies to data other than asbestos data.
- The All Calls/Tasks List now has an improved sorting ability.
- Manually typing in a report **Reissue reason** is now easier. This is on the **Issue Reason/Log** on the Project Details screen.
- Milestones that have been manually added and are not part of the milestone template for a project will now be displayed on the Project Pipeline.
- The **Project Closed** date has been removed from the Lab Project List screen as this only displayed open projects.

- Invoicing now uses a new stored procedure in all locations.
- Key services are now respected when the user has site restrictions.
- A problem with the **Add More Projects** button on an invoice has been fixed.
- A minor change has been made to the edit combo list for NPL Test Slide in Australian Air Monitoring. Other changes include new checkboxes on Microscopes, an update to the “calculate” process.
- A fix has been applied to ensure survey records are created even if **Project Category** is missing from the project record.
- New milestone template entries now save more cleanly.
- The Site PDF template will be displayed by default if no custom document templates have been set up on the Client Portal.
- “Cancelled” Invoice Status will now be added to the Lookups table by default if it doesn't exist.
- The language tags on the Barcode screen have been updated.
- Accessing the Site Folder now automatically creates the Client Uploads\Current Plan subfolder so that users can upload into it. Previously the folder would only be created if the Client Portal user accessed the site.
- Performance and filtering fixes have been applied to the SM2 registers.
- SM2 users can now use Alpha Tracker Mobile to access/view registers.
- Links to the licence agreement at login have been improved.
- There has been a range of minor changes to show additional fields in various locations. Eg:
 - the **Account Support** field has been added onto the Account Management screens
 - the **Client Order Number** field has been added onto the Projects tab on the Client Details
 - the **Site Category** is now displayed on the Allocation Dashboard

- the **Client Name** is a hyperlink on the Allocation Dashboard
- the **Jotter** has been added to the Allocation Dashboard
- the **Master Project Number** column has been added to the Allocation Dashboard and the search
- the **Jotter** has been added to Projects on Hold
- the Supplier list screen has been tidied.
- The **Client Order Ref** and **Estimated Total Project Value** have been added to the Master Project Import.
- An issue with recommendation actions and recommendation comments on Hazmat screens has been fixed.
- Extra Info dropdowns have been extended to 500 characters.
- If you are using the Forms feature, then you will find that you can now copy Form templates. In addition, when a Form report is generated, the Report Produced date on the project is updated. The format of the name of the generated report has also changed.
- Some field lengths on the Survey items Import have been extended.
- The JSS (Job Summary Sheet) which is in use on some systems has added contact information.
- Changes to the project number will now trigger changes to the project number on survey records. The following records are also updated: Project Staff, Buildings, Cost Breakdown, Associated Costs, Milestones, Extra Info, Appointments, Invoice Lines, External Invoices, Timesheets, CRM Tasks and Fibre Analysis.
- The Invoicing screen has the **Due Date** added. In addition, the net, VAT and total in the invoice header are recalculated after projects are added.
- There have been some small changes to how deleting invoice lines works, with a new delete icon added on each row.
- For users of the Staff Training module, the Staff Training Expired will no longer show expired records where the training name is the same as a current record.
- All morphology fields on the Fibre Analysis are now nvarchar(150) to match the size of the field on the Fibre Analysis Lookups.

- Changes to SQL reports now allow the handling of linked/restricted sites and client filtering in data extracts.
- An issue with the remediation details folder not opening on a manually updated survey item on the site has been fixed.
- Risk Assessment Type B now populates Yes, No, N/A answers, instead of just Yes and No.
- The login process on the Alpha Tracker Mobile app has been improved, as has the quotation process.
- The **Site Reference** and **Site Address** have been added to the Project Pipeline on the Client Portal, and also to the Report List. There have also been some performance improvements.
- The document folder has been added to Supplier records, allowing you to file documents against your suppliers. The folder is shown on the Supplier detail screen and also on the list screen.
- Extra logging occurs when a Client Portal user has shared sites via the client.
- The "Auto Update Show on Web Re-inspection Items" setting has been removed from the repository.
- The **Category** field on Sites now uses the Lookups rather than being a free-type/auto-learn field. Go to Setup>General>Lookups and search for the Category "Site Category" to set the values for this dropdown.
- A new trigger manages the ShowOnWeb of Survey Items and Hazmat Items.
- The footer on the login page now uses settings for the displayed details: "Start Software Support Email" and "Start Software Support Website". The help email and website on the About Alpha Tracker option use the same settings. About Alpha Tracker has been removed from Client Portal logins.
- A new setting lets you specify the score to use on the Asbestos Summary Graph on the Client Portal. Values are "Material Score" or "Total Score". The graph now also uses the risk's min/max numbers from settings. The max counter for the Material Score is 12, the max counter for Total Score is 24.
- Minor changes have been made to the Copy Data and Move Data options on the Choose Task menu on Survey Details so that they work in the same way.
- An issue with Review Dates on projects has been fixed.
- If you wish, you can hide the Lab Warnings menu via a new setting.

- A blank option has been added to the **Approach** dropdown on the Survey Items screen so users can deselect an approach.
- Project staff will no longer pull through to the appointment.
- If you are using Alpha Tracker for your invoicing then you will see some improvements on the Invoice Details screen when adding more jobs. There are alphabet buttons at the top with different filters to help with your selections:
 - Jobs ready to invoice (current list)
 - All jobs (all jobs for that client, where Invoiced Value < Job Value)
- In addition, the master project has been added to the list and search part of Ready To Invoice. And you can send the invoice document to the client direct, as you can with the quotation document (PDF). The text of the email is controlled by settings.
- An issue with refreshing milestones has been fixed.
- Invoice lines generated from the cost breakdown are now inserted in the same order as shown on screen so that the invoice matches.
- There have been minor security fixes to Finance Admin and Client Portal users.
- An issue with line numbers and nominal codes when adding projects to an invoice has been fixed.
- The invoicing screen includes an option to show 1000 records per page which will help if you need to add large numbers of projects to invoices.
- The **QR code agreement text** field on the Client has been extended to allow for more text.
- Minor changes have been made to the downloading of project level and site level QR codes.
- The **Reference** search on the Quotation List no longer requires an exact match. It will now search for any references that contain the search text.
- Nominal codes on the Xero export now take the invoice line nominal code in preference to the project type nominal code.
- Closed projects are now excluded from the suggested project number when creating re-inspections.
- If the setting “Auto populate Project Special Instructions from Project Type” is set to “yes” then insert the default **Special Instructions** from the Project Type into the project record if the **Special Instructions** on the project record is empty. This will ensure that the default **Special Instructions** are always present, regardless of where the record is created from.

- If the "ShowLandlord" setting is enabled then the **Landlord** field is displayed on the Site List and search part.
- The Site List now exports all records when using the **Excel** button. Previously it was limited to 10,000 rows.
- You can now open multiple projects from the Project List via a tickbox.
- If the "Show Contracts" setting is enabled, then the **Contract** field is displayed on the Project List and as a filter.
- If the "ShowSalesContact" setting is enabled, then the **Sales Contact** is displayed on the Project List and as a filter.
- New settings let you control the values that are displayed on the Account Management and Key Accounts screens.
- Superusers and Administrators have the ability to delete calls/tasks from the All Call/Task(s) screen.
- Improvements have been made for SM2 users to how the **Print/PDF** button works on the Client Portal.
- A layout issue on Invoice Type C has been fixed.
- It is now possible to change where the "by person" details on the Sales Dashboard pull from. Valid values are "Assigned To" and "Account Manager".
- The heading on the Home Page News frame has been changed from "Latest News" to "Latest News from Alpha Tracker" following feedback from clients.
- Renaming of the **RI Fluid Equip No** field is now respected on the Staff List. So if you have renamed this field using the setting, then the new name is also displayed on the Staff screen where you can enter default values per member of staff.
- A fix has been applied to Alpha Tracker Mobile to correct the styling of the header and footer on iPhones.
- The Alpha Tracker Mobile images have been updated.