Alpha Tracker Release Notes - June 2014

In the June 2014 release of Alpha Tracker (SVN496) you will find a lot of new features to help you work with Alpha Tracker more efficiently and some bug fixes too.

New features

- There is a new option to create a Re-inspection project from an existing survey and send the items to be re-inspected to a specific handset.
    - The Site Reference copies to the new project, as do the Buildings.
    - The following fields are not copied to the new project: Project Opened, Order Received, Client Order Number, Client Project Ref, Estimated Total Project Value, Status, Project Notes, standard and additional milestones, Quotation ID, project's Special Instructions.
- Buttons on the Clients screen let you create a site, quote and project without having to return to the menu.
    - The Site tab auto-refreshes to show new sites added.
- New fields on the Clients screen enable you to record an Account Manager and Account Support, selecting the name from your current members of staff.
- You can now record a mobile number for Client and Site Contacts as well as a landline telephone number.
- Buttons on the Sites screen let you create a project or a quotation with one click.
- You can now create multi-type and multi-site quotations, entering full details of sites, project types and costs.
    - Prices are continued into the price builder/total price
- When producing your survey reports there is a new option to "Produce DRAFT Report" which produces the report as normal but with "DRAFT" at the front of the filename so that it is clear it is not a final or authorised report AND it doesn't appear on Tracker Web Server by mistake.
- There are also settings that let you include the site name and / or the project type in the filename of your survey reports.
- There is a new setting to update or not update the report produced milestone.
- NAG items are now highlighted in pink on Survey Items, just like the No Access records.
- Selecting a Site Name on a Quotation now pulls through the landlord and the postcode to the quotation, and the display of the Site Name dropdown is improved.
- The Other Info button is available on the Quotations screen as soon as the quotation is given an ID.
- Figures on Invoicing screens are all displayed Net, without VAT.
- There are new additions to the range of standard reports.
- The Client Portal is fully available, giving your clients their own login to view their data.
    - The whole of the Bulk Samples menu can be hidden in the Client Portal by using a new repository setting.
    - There is an "Other Documents" button on the client portal allowing upload and download of documents for policies/procedures, training and approved contractors.
    - The Client Portal includes fully searchable registers.

Bug fixes

- Exporting data from View Survey Data to an Excel spreadsheet
- When an enquiry is saved then changed to a quotation it no longer changes back to an enquiry.
- The correct Home Page should now be displayed for all users.
- The Edit/View Photos option displays the photographs for the survey.
- Recommendations are updatable in the survey data.

- Fixed errors encountered when creating projects from quotations.
- Fixed errors encountered when deleting drawings from Documents.
- Fixed errors encountered when adding appointments to the Calendar.
- Documents containing an ampersand (&) in their filename can now be uploaded to the Documents folder.