

Release 36 - Alpha Tracker Release Notes

New Features / Changes (from SVN5191 to SVN5391)

1. To add to Alpha Tracker's range of Customer Relationship Management (CRM) features there is now an additional option for Account Management, to keep track of your key clients and the contact you have with them. (Note that the CRM menu option needs to be switched on for these features to be visible.)

Although Alpha Tracker is typically used by environmental consultancies and organisations with an asbestos problem to solve, it is also used by other types of company to manage day-to-day operations. We have now added specific features and screens to help all users of Alpha Tracker manage their key accounts. A few more spreadsheets will be able to go to the Recycle Bin!

The new Account Management screen lists your clients, showing details of year to date and total invoice values, your Account Manager and email address(es) of the key contacts at the client, and most importantly it displays the number of contacts you have made generally in the last 30 days with the client and also the number made with key contacts at the client.

The screenshot shows the Alpha Tracker Account Management interface. The sidebar on the left includes a search menu and navigation options for Survey Quick Start, Enquiries/Quotes, Clients, CRM, and Account Management (which is highlighted). The main content area displays a table of client accounts. The table has the following columns: Key Account, Client, Year Value, Contacts Made (< 30 days), Key People Contacted (< 30 days), Total Value, Account Manager, and Key Contacts. The data rows are as follows:

Key Account	Client	Year Value	Contacts Made (< 30 days)	Key People Contacted (< 30 days)	Total Value	Account Manager	Key Contacts
+	Tuesday	£0	0	0	£5.3K	Judy Key	Log Call/Task
+	Wednesday	£0	3	3	£2.5K	Judy Key	Log Call/Task kim.evison@startsoftware.com
+	Mactastic	£0	0	0	£2.7K	647	Log Call/Task
+	Won Ton Chinese	£0	0	0	£1.2K	0	Log Call/Task
+	Elaine test	£0	0	0	£450	Dan Darkin	Log Call/Task

At the bottom of the screen, there is a footer with copyright information: © Start Software, 2013-2021. Software Version: SVN5391. 2021/08/19 15:44:55 [DSVR018488]. For help email: support@startsoftware.com or visit: startsoftware.com/support. There is also an Alpha Software Certified logo.

Click on an underlined entry to drill down to the details, eg to see a list of invoices making up the total, or a list of recent contact with the client. The icon next to the contact figures shows you the forms of contact made, eg phone call, Teams call, email etc. (You can change these icons under *Setup> General> CRM Action Types*.)

Preset filter buttons for “Key”, “No Contact” and “All” let you quickly see only those clients you have marked as key accounts or only those with whom you have had no recent communication. There is also a Key Accounts menu option if you want to concentrate on key accounts only - it automatically has the “Key” filter applied. You can identify key accounts by the star:

Key Account	Client	Year Value	Contacts Made (< 30 days)	Key People Contacted (< 30 days)	Total Value	Account Manager	Key Contacts
<input checked="" type="checkbox"/> ★	Dane Environmental	£3.4K	0	0	£8.8K	Robin Bennett	Log Call/Task dan@client.com, elaine@client.com
<i>Air Monitoring, Asbestos Survey, Bulk Sample, Day Sheet Licensed Removals, Estimators Project Risk Assessment, Fire Risk Assessment, Legionella Survey (C), Re-inspection, Removal, Scheduling, Survey</i>							
<input type="checkbox"/>	Dan Engineering	£0	0	0	£0	0	Log Call/Task
<i>Re-Inspection</i>							

25 Records per page Send Bulk Email

To mark a client as a key account, simply open their Client Details and tick the **Key Account** box on the Classification tab.

General Details	
Contacts/Emails	
Classification	
Prospect	<input type="checkbox"/>
Key Account	<input checked="" type="checkbox"/>
Client Type	<input type="text"/>
Industry Type	<input type="text"/>
Finance/Credit Details	

See a list of all your contacts in the Address Book for a client, simply click on the + button on the far left of the row on the Account Management of Key Accounts screen.

To log contacts made with a client, you have two options, they can be recorded manually by using the **Log Call/Task** button on the Account Management or Key Accounts screen, or automatically by using Tracker Filer:

- **Log Call/Task button** - On the displayed screen select the type of contact, link it to a specific quotation, project or contract if required, and specify who the contact was with. Then type the details in Call/Task Details and save.

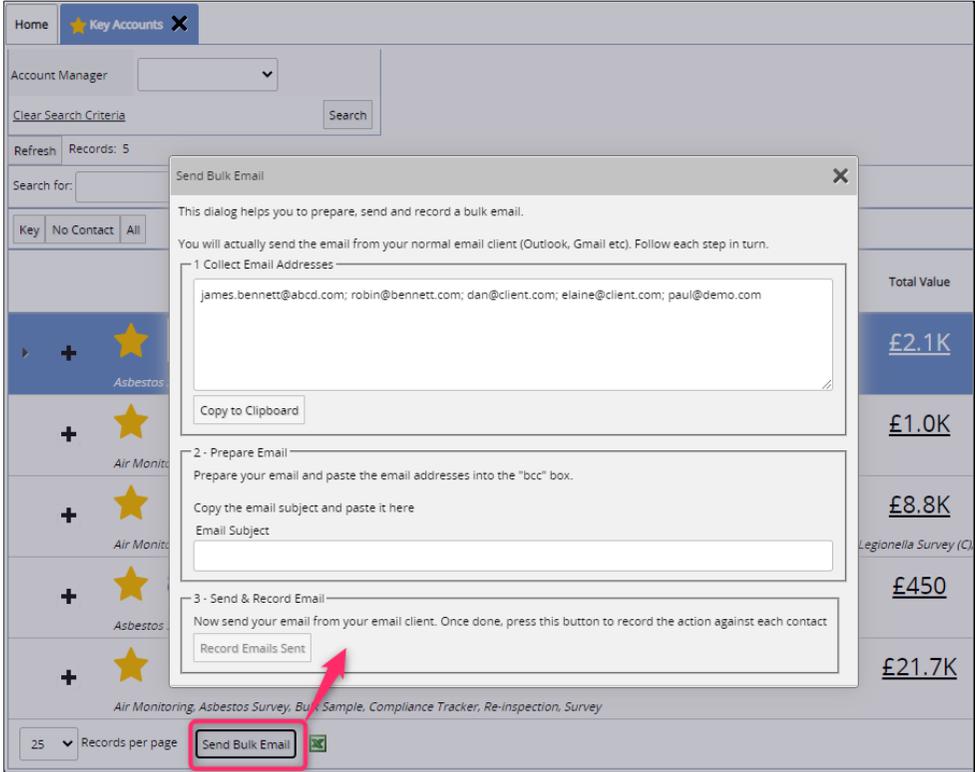
The screenshot shows the 'Log Call/Task' form for 'Dane Environmental'. The form is divided into several sections:

- Setup:** Includes 'Date Logged' (25/08/2021) and 'Logged By' (Dan Darkin).
- Action Type:** Radio buttons for Call, Email, LinkedIn, Problem, Review (face-to-face), Review (virtual), Skype, Task, and WhatsApp.
- Linked To:** Fields for Client (Dane Environmental), Quotation, Project, and Contract ID.
- Contact Details:** Fields for Contact Name, Contact Phone, and Contact Email.
- Call/Task Details:** A rich text editor for notes.
- Completed:** Fields for Date Done (25/08/2021) and Done By (Dan Darkin).

The background shows a table of key accounts with columns for 'Value', 'Account Manager', and 'Key Contacts'. The 'Log Call/Task' button for the 'Dane Environmental' row is highlighted with a red box and a red arrow.

- **Tracker Filer** - “CC” Tracker Filer at your organisation when you email a client (you don't need to specifically mention a quote or project number) and Tracker Filer will look at the email address(es) you have sent or cc'd the email to, and then save the emails as records in the Alpha Tracker CRM module. If you don't currently use Tracker Filer, contact Support to arrange to have it installed.

A further feature on Key Accounts is “Send Bulk Email”. It is particularly useful if you are sending something like a newsletter or other bulk email to your key accounts. This feature gathers the email addresses of the key contacts at the key accounts and lets you copy them to the clipboard. You can then prepare the email using these addresses and send it. If you copy and paste the subject line into the box at step 2, and then click the **Record Emails Sent** button at step 3, a record is made in the CRM module of the email communication with each contact.



2. Document Requests has been rewritten to produce records faster and thereby improve document production. This has also made it possible to generate documents on the completion of a milestone. The documents are emailed out as usual - the emails can be sent to project staff based on group/role and also to a specified email address. It is also possible to specify a time delay so that the document is not generated immediately, eg in case the milestone is completed in error. Set up the milestone documents by using these fields on the Milestone Templates tab under the required Project Type:

Document when Complete	Document Email to Group/Role	Document Email to	Document Delay (seconds)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Requesting documents in this way will also update the appropriate Version Number, Report Produced, Milestone, Issue Log etc, just as happens when you click the Draft and Final buttons on surveys or generate bulk certificates.

3. You can now use QR codes on equipment listed in Alpha Tracker. The Resources>Equipment menu options help you to keep track of your equipment and now also give you the ability to generate and download a QR code. Simply click the QR code button to generate a (public) QR code if one doesn't already exist and download it. Print the QR code and affix it to the item. By scanning the QR code you can access the equipment details.
4. There have been some changes and additions to Australian air monitoring, including some minor fixes and also:
 - graticule diameter on microscope screen is now up to 5dp
 - there is a new menu: Air Monitoring Settings
 - there are new settings to choose the layout type (form/list), defaulted to list
 - Australian Air Monitoring and Clearances documents can be produced via Milestone
 - you are prevented from switching tabs, closing screens, or navigating between records if data has not been saved
 - an update to sample calculation
 - an extension of the lock screen features to samples, fibre count, diagrams, and photos
 - changes to control document version numbering.
5. It is now possible to use default document version numbers on surveys when using manual version numbering. The new settings that control this are:
 - Default Project Bulk Certificate Version Number
 - Default Survey Bulk Certificate Version Number
 - Default Survey Document Version Number.
6. Enhancements to the Lab Dashboard mean that:
 - the Lab Dashboard counts produce more quickly
 - the Lab Check Dashboard outputs Analysed By as a label rather than a read-only dropdown
 - "Samples Analysed Yesterday" on the Lab Dashboard searches better and the dropdowns are now labels.

7. Lab users now have the option to show or hide the Lab dropdown on the Bulk Sample screen. A setting controls whether the field is displayed.

The screenshot shows the 'Sample Setup - T-56564' interface. At the top, there are tabs for 'Home', 'Project - T-56564', and 'Sample Setup - T-56564'. Below the tabs is a navigation bar with six steps: '1. Overview', '2. Sample Setup', '3. Enter Fibre Analysis', '4. Lab Analysis Check', '5. Results', and '6. Register'. The main content area is divided into two sections: '1. Project Setup' and '2. Project Complete'. In the '1. Project Setup' section, the 'Lab:' dropdown menu is highlighted with a red rectangle. Other fields in this section include 'Date Samples' (Received, 23/06/2021), 'Booked In By' (Dan Darkin), 'Sampled By' (Client), and 'Client Staff Name'. The '2. Project Complete' section includes 'Date Analysed' (23/06/2021), 'Analysed By' (Dan Darkin), 'Date Approved', and 'Approved By'. At the bottom right of the form, there are two buttons: a save icon and a refresh icon.

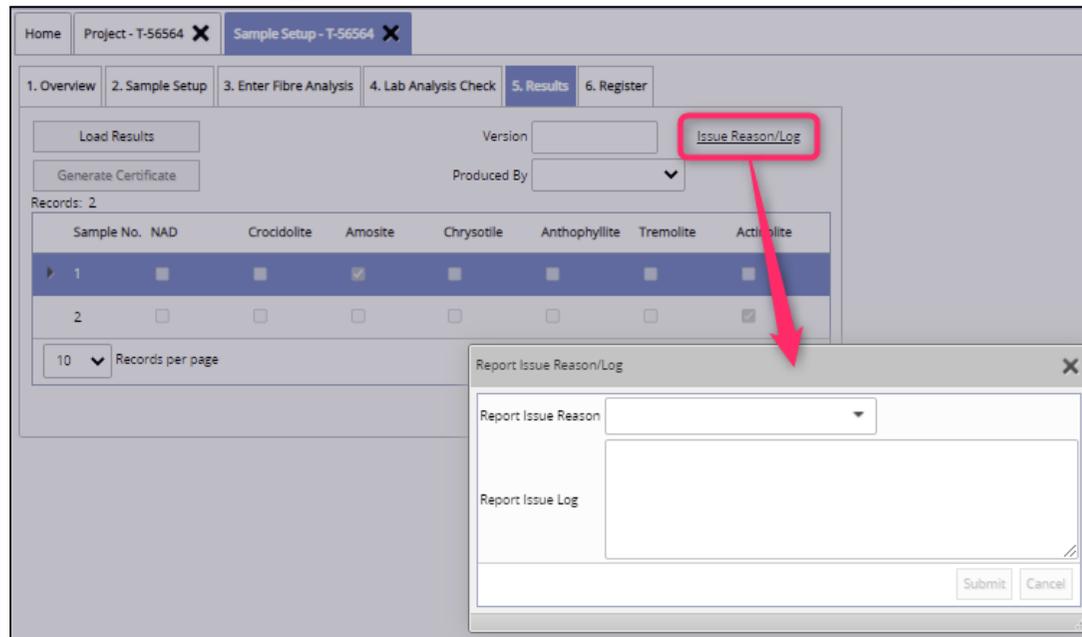
8. On the Fibre Analysis screen, Lab users can choose whether or not to hide the Lab Used and Sub Contracted fields by using two new settings: “Hide Lab on Fibre Analysis” and “Hide Sub Contracted on Fibre Analysis”.

The screenshot displays the Fibre Analysis form with the following elements:

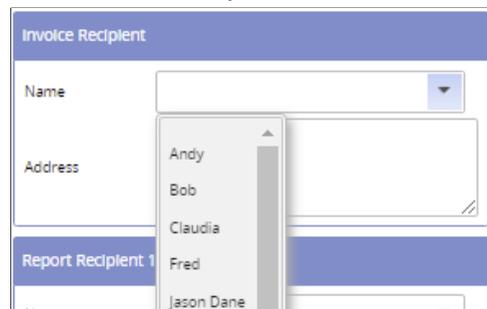
- Original Analysis:** Text input field containing "Amosite".
- Re-check Analysis:** Empty text input field.
- Correct Analysis:** Radio buttons for "Original" (selected), "Re-Check", and "Dispute".
- Full Analysis:** Yellow highlighted text input field containing "Amosite".
- Standard Reported Comments:** Dropdown menu.
- Reported Comment:** Text area.
- Non Reported Comment:** Text area.
- Analysis Time:** Dropdown menu.
- Analysed By:** Dropdown menu containing "Dan Darkin".
- Analysed Date:** Date input field containing "23/06/2021".
- Lab Used:** Dropdown menu, highlighted with a red box.
- Checked By:** Dropdown menu.
- Checked Date:** Date input field.
- Sub Contracted:** Checkbox, highlighted with a red box.

9. On Bulk Sample, the Produced By on the Lab Results tab can now be restricted to only Lab users and Superusers. This is controlled by a setting. This setting also disables the "Generate Certificate" button for everyone other than Lab users (and Superusers).
10. If the analysis on a Bulk Sample has been approved, then the entries on the Sample Setup screen can now be locked by using a new setting.

11. A new "Issue Reason/Log" has been added onto the Bulk Sample Results screen (where Bulk Certificates can be generated).



12. A new "Latest News" section has been added to the top of the Homepage. This displays our latest Alpha Tracker-related blogs to highlight them and ensure you are aware of new features and releases. The section can be closed and reopened simply by clicking on its header bar.
13. A new setting lets you show all client contacts on the selection list for the Invoice Recipients field on the Projects screen. Normally, only those contacts specifically marked as having a financial role appear in the list. If you want to use this feature, the setting "Show all client contacts as invoice recipients" needs to be set to yes.



14. A Download to Excel button has been added to the Invoice List screen so you can now download invoice details. Use the search boxes at the top of the screen to filter the Invoice List so that it shows only the set of invoices you are interested in, then simply click the Download to Excel button. This button is also available on the Invoices (External) screen.

Home Invoice List X

Search

Invoice No Issuing Office Invoice Date From: 01/05/2021 To: Client ID Client Name Project Number Date Printed From: To:

Clear Search Criteria Search

Records: 3

Locked Unlocked Printed Not Printed All

Invoice No	Issuing Office	Type	Invoice Date	Client	Account No	Your Ref	Invoice To	Net	Project Numbers	Accounts Software Ref	Delete
481	TDANE	T	18/05/2021	Dane Environmental	7DANE	789	Dane Environmental Copenhagen House The Quay Poole Dorset BH15 6BN	1000.00	T-56520		
482	TDANE	T	19/05/2021	Dane Environmental	7DANE	789	Dane Environmental Copenhagen House The Quay Poole Dorset BH15 6BN	1000.00	T-56520		
483	TDRIVE	T	27/07/2021	Drive Limited	7DRIVE	888	Drive Limited 123 High Street Bridgnorth	100.00	T-56568		

10 Records per page Print Batch of Invoices Submit

15. New fields have been added to the Equipment screens, along with a Get Next Number button, to extend the use of these screens for managing Equipment:
- Purchase date
 - Purchase value
 - Location field (where the equipment is, a free text field)
 - In/Out of service tick box (different to the Inactive Date as the item could be active but just out of service and needing calibration).

There are also new settings to control how the Equipment screens can be used, including: "Equipment - Reference Number Automation Prefix", "Equipment - Users Add and Edit Record" and "Equipment - Users Delete Record". The latter two settings allow a list of user IDs so that you can specify exactly who can perform these functions - if they are blank then the current validation (ie specific security groups) is used.

16. "Other Equipment" on the menu can now be renamed via a setting.
17. There is a new setting to show or hide the Equipment option under Staff/Training. The default is "show".
18. The Projects Dashboard, which is used to track progress on projects, can now show the "Report Checked" column. To show the column, the "Show Report Checked on Project Dashboard" setting needs to be set to yes. Another setting lets you name the "Report Checked" column as you wish. The information in

the column is based on Key Milestone 7, so project types will need to have a milestone included in the milestone template that is linked to Key Milestone 7.

Home Projects Dashboard X

Search

Project Number Client Type Client Order No. Project Status Site Site Completion Date From: To: Turnaround Due Date From: To: Reporting Days to Deadline Samples Analysed Plan Produced Report Checked Report Complete From: To: Invoiced Date From: To:

Clear Search Criteria Search

Records: 545

Search for: Search All

Reports Incomplete Reports Complete Incomplete Analysis Complete Analysis All

Project Number	Client	Type	Client Order No.	Site	Postcode	Site Completion Date	Turnaround	Due Date	Reporting Days to Deadline	Samples Analysed	Plan Produced	Report Checked	No. Samples	No. Fibres Analysed	Report Complete	Invoice Date	Project Status	Project Status Notes
T-56512	Start Software	Asbestos Survey		37 Orchard Drive	WV16 4PO			07/04/2021	OVERDUE	No	No	No	0	0/0			New	
T-56515	Start Software	Asbestos Survey / Example Management		Vivien Court	BH3 4GH	07/04/2021		13/05/2021	OVERDUE	No	No	No	12	0/12			New	Testing FA record creation
T-56518	Start Software	Asbestos Survey / Example Management		Vivien Court	BH3 4GH	07/04/2021		13/05/2021	OVERDUE	N/A	No	No	0	3/3			New	
T-56519	Start Software	Asbestos Survey		230 Cleington Road	DD2 1UB			09/04/2021	-	No	No	No	0	0/0	29/04/2021		New	
N-30177	Start Software	Asbestos Survey / Example Management	A123	25 Ivor Road	BH21 3QF			01/07/2021	OVERDUE	No	No	No	0	0/0			New	
T-56573	Start Software	Survey / Example Management		37 Orchard Drive	WV16 4PO	29/07/2021		06/08/2021	3	No	No	No	3	0/0			New	

First Prev 46 47 48 49 50 51 52 53 54 55 of 55 Next Last 10 Records per page

19. SM2 users will be able to use a new search for Building UPRNs on the Client Portal register screen.

20. When you create a late appointment in the Diary - late being within 24 hours - an email is sent to the person you have made the appointment for, alerting them to the change. This email now includes the time of the appointment, for example:

“Please check your diary. An appointment has been added for T-56572 at 7 Minster View on 05/08/2021 08:30”.

21. You now have more control over the Last Inspection Date on sites on the Client Portal. A new setting lets you choose which date is used when calculating the Last Inspection Date on a site. There have always been some performance changes to the display of the site data.

22. The “Move Survey Data” option that allows you to move data from one project to another is now available for SM1 and SM2 asbestos data and also all Hazmat types (if you have a valid licence for these). The screen displayed when you select this option from the Choose Task menu has been redesigned. It now includes a survey data type selection - if there is only one option it is auto-selected.

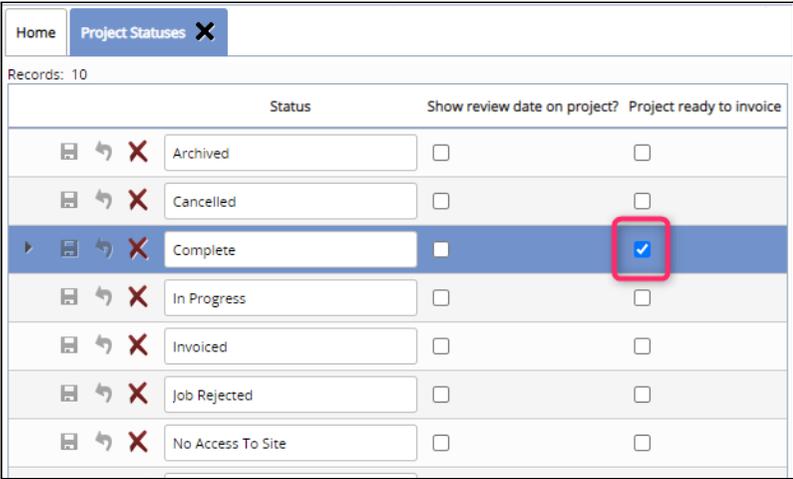
23. To reduce the steps when creating a new survey project, there is a new setting that lets you set a default value for the Survey Type on new projects. The setting is 'Name: Survey Details - Survey Type', and it defaults to 'Survey Type'.
24. Further validation has been added to the project number, to check its format, pattern and uniqueness.
25. A "Projects_Update" trigger change will now prevent old items being marked as IsLatest if the report produced date has been updated.
26. A new setting "Name: Project Notes" has been added to control the naming of the label on the Project Notes field.
27. Cost Breakdown templates can now include tags. Included tags are:
 - <Project Number>
 - <Quotation Number>
 - <Site Name>
 - <Site Address>
 - <Site Postcode>
 - <Project Category>
 - <Project Type Desc>
 - <Sample Count>.

28. A new setting lets you hide the Fibre Analysis Audit if you do not wish the feature to be available.
29. The character limit on Project Number search on the Project List has been increased from 10 characters to 200 characters. This enables you to make full use of the search facility, eg by typing in a comma-separated list of project numbers that you want to display.
30. If you use the milestones and are already double-clicking in the Date field to enter today's date and your logged-in user name, then you will now find this process even quicker. When you are closing a project this way, messages are displayed if:
- the total invoiced amount is less than the estimated project value
 - the Invoiced milestone is not completed.

In both cases, you have the option to continue and close the project if you wish. The same messages display from the Projects Easy-Close screen.

31. The Projects Ready to Invoice screen has been updated. This is the screen that shows projects that have a Report Produced date but are not yet Invoiced or Closed (based on the milestones). Working with this screen is now quicker as you have the ability to raise invoices directly from the screen, by using the new **Raise Invoice** button.

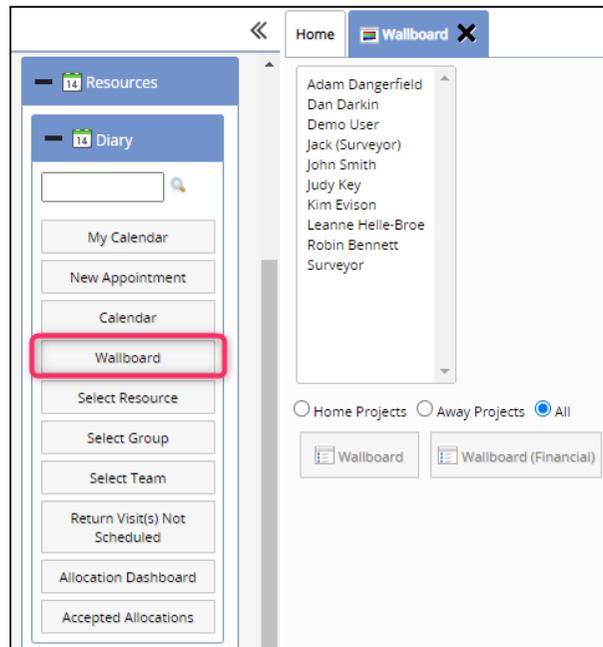
In addition, you can now choose to allow a project status to also add a project to the Projects Ready To Invoice screen. For example, you might want all projects that have the status of "Complete" to be displayed on the Projects Ready To Invoice screen. To do this, you simply tick the **Project ready to invoice** box against the status of "Complete" in Project Statuses. Once you have invoiced the project, you would need to change its status to remove it from the list.



Status	Show review date on project?	Project ready to invoice
Archived	<input type="checkbox"/>	<input type="checkbox"/>
Cancelled	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
In Progress	<input type="checkbox"/>	<input type="checkbox"/>
Invoiced	<input type="checkbox"/>	<input type="checkbox"/>
Job Rejected	<input type="checkbox"/>	<input type="checkbox"/>
No Access To Site	<input type="checkbox"/>	<input type="checkbox"/>

32. You can now access the Wallboard directly from its own menu option on the Resources Menu. This is the same as using the Select Resource menu option but is specifically aimed at opening the Wallboard for the selected individuals. The menu option is only visible in certain conditions, which are the same as

the Wallboard buttons on other screens, so you will only be able to see this menu option if you can already access the Wallboard.



33. The following menus are now available to surveyors/survey admin groups:

- Setup > Import/Export > Re-inspection
- Setup > Import/Export > Import Data
- Setup > Import/Export > Export XMLs
- Setup > Import/Export > Archived XMLs.

34. When Air Monitoring Documents are requested, the Report Produced milestone date will now populate automatically. In addition, All Air Monitoring screens now refresh the Project screen when closed, so you can see the Report Produced date populate.

35. Projects that do not have a value in the **Estimated Total Project Value** field will now also show on the "Projects Not In Diary" screen. "U-" projects are excluded.

36. Password validation has been improved. When setting up a new user or resetting a password, all symbols should now be accepted. Messages will also contain more helpful information.

Fixes/Minor Changes

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

- A fix has been applied to the filter on Multi Site Quotes when selecting Sites from the dropdown.
- Issues with the Diary Appointments screen when opened via a project created from the Client Details screen have been fixed.
- Issues with locking of data and buttons on the Quick Edit Survey Data screen have been fixed.
- The £ symbol will now display correctly and numbers will be correctly aligned on has been fixed.
- The "History" button now shows on the Client Portal Site Asbestos Register.
- There has been a change of method in the Identification code on the Suspect Survey Items screen.
- Some speed improvements have been made to the Client Portal Sit Grid view.
- Hazmat items will now update Key Milestones 2 and 3.
- Adding Samples to Hazmat data will now update the Sample Status to "Samples Received" on the Project List.
- The "View Jobs" option in Alpha Tracker Mobile now shows most recent projects at the top.
- Symbols are now allowed in filenames when viewing/downloading files via Document links in the Diary.
- Multiple records can now be handled by the Survey Insert Report Number trigger.
- An issue with QR Codes URL encoding values has been resolved.
- Some improvements have been made to the Survey Items Import to prevent problems.
- New quotes on the Alpha Tracker Mobile app now show the correct currency format rather than always showing £.
- A problem with sending email attachments to a client via the document folder when the email body is blank has been fixed.
- Commas can now be included in QR Code filenames and the QR Code .zips function correctly with these filenames.
- An issue downloading Building / Room based QR codes has been fixed.
- There have been some performance changes to the site grid view.
- Issues with exporting invoices to Xero, caused by changes to Xero, have been resolved.
- Filtering on the Timesheet List and Timesheets Ready to Invoice is now based on Allowed Office Letters.

- Project numbers are now populated on the screen when adding new hazmat records.
- Single quotes are now maintained as single quotes when included in the Survey Report filename.
- There has been further work on Hazmat re-inspections, including a setting to change the S approach to PS, and fields added to the XML.
- The length of the Identification field on re-inspection imports has been increased from 50 to 250 characters to match the Survey Items table.
- The Survey Quick Start options have added restrictions for allowed office letters.
- The size of the ID, Sample ID and Client Ref fields on the Bulk Samples screen has changed.
- Some minor changes have been made to the Enter Lab Results screen, including to hide columns that are not needed.
- Enhancements have been made to the working of security groups on Site Details.
- A display problem on the Edit/View Samples via Choose Task has been fixed.
- Decimals can now be entered into the Associated Cost Quantity column.
- A problem with wallboard calculations where Fixed Price projects have Shift Value Override appointments has been fixed.
- An issue with the display of entries on register PDF prints when using user site restrictions has been fixed.
- Multi-line addresses no longer cause a
- problem on the invoice recipient dropdown on projects.
- Displaying appointments on a map from the Select Resource option is now better and the project number and client name display when you hover over the pointer on the map.
- Minor issues with the “Favourite” reports have been resolved.
- In Bulk Sample projects, you will find that users in the Superuser and Lab Admin groups can always choose from the 'Approved By' dropdown box when the setting "Bulk Samples - Users can only select their own name for approved by" is set to "no" AND their user id is not listed in the setting "Bulk Samples - Approved By Allowed Users".
- The Telephone and Mobile fields under the Contacts/Address Book menu option are now wider.
- There have been performance changes to the SM2 Site Asbestos Register.
- Client IDs are now always saved as uppercase in the database.