What’s New in E-automate Version 8.7

E-automate 8.7 boasts several updates and new additions*
including:

- New Architecture of E-agent
- Avalara AvaTax Engine
- PSN Export Module
- SLA Codes
- E-info
- Remote Tech
- Remote Service Manager
- Packaged Deployment

*For a high-level look at specific components that have been updated or added to this release, please see the Table of Contents on the following page. For a sample screen shot and brief description of each component, follow to the corresponding page numbers.
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Accounts Payable

Item Association on AP Vendor Invoices
Support for item association to a contract has been added for contract profitability. The user can now choose either equipment or item to associate the cost with on a contract. When selecting an item, the customer functions as the location.

Inventory

Custom Properties Addition - Inventory Requests
You can now define Inventory Request Properties and assign them to New Inventory Requests you create which enables you to edit the inventory request instead of canceling the order and creating a new request when encountering a bad line entry.
PSN Integration - Item Stock Checks

A new export module for PSN vendors has been added in 8.7. You can now select the PSN export module on the Vendor record, and this export module will be reflected on the Purchase Order screen and will be sent to the export queue when the purchase order is created. You can batch send purchase orders to the export queue from the Inventory Logistics Console, and in the Vendor Document Queue you can approve the purchase orders.

In addition, you now have the option to queue the export process for a later time using the automated e-agent service. When you configure this task in e-agent you can also choose to require an approval step in the workflow.

The Item, Purchase Order, and Sales Order lists now have an option to query stock price and availability through a new e-automate process.
Serviceable Items with Distribution Code

You can now identify an item as serviceable to be added to a contract for recurring billing. What you select in the **Contract Base Distribution Code** field determines the default deferred and contract revenue distribution for the contract item. You can change, remove, or select another contract base distribution code on the contract if needed. The **Serviceable as item** checkbox is available once enabled in **Tool > Options**.
Service Contracts

Allow Items on Contracts Option
Users can now create and bill a contract for a customer without equipment. You can add non-equipment line items to a contract, which will function similar to Equipment. Once this option is enabled, the Item radio button is available, the Equipment tab becomes Equipment/Item tab, and a new icon indicates either item or equipment. You can only add items that are flagged as serviceable on the item record.
Equipmentless Contract Reports

The following reports are now available for equipmentless contracts:

- Contract Expiration Worksheet
- Contract Lease Amortization
- Contract Lease Revenue and Lease Balance Report
- Lease Termination
- Contract Principal Reconciliation
- Contract Deferred Revenue Reconciliation
- Contract Accrual Journal
- Contract List
SLA Codes

SLA codes have been created based on existing service hour codes and response hours from equipment on a contract. In addition to tracking the service hours and response time, these codes will also track the resolution time, all without storing information on the call. SLA codes can be assigned to contracts, contract details, location customer, customer, equipment, and branch.
Base Distribution Code on Service Contract

For installment based and deposit based billing contracts, a Base Distribution Code field has been added. This field pre-populates from the contract type and provides the functionality to override contract type base distribution code per individual contract. The selected code must have the same deferred account as the contract.
Service Dispatch

Unknown Equipment Automatically Added to Service Calls
In 8.7 there is no longer an [Add Unknown Equipment] and [Replace Equipment] button on the New Service Work Order, New Service Call, and Invoice Call windows. Now calls can simply be added without specifying an item or equipment record, and the referenced equipment or item record can be changed using the lookup control.

When the New Work Order Screen is launched, it will populate the service calls list with a new service call containing an Unknown Equipment. By selecting a Location the record will be automatically populated to match the equipment record for the customer. The user can select if the call is for an equipment or an item and then choose the specific equipment or item in the lookup control.

If the user does not know the equipment or item, he can use the new Search control, which will search for equipment and item records on contract for the given customer/location. It will search equipment number, item number, serial number, description, make, and model. Once a user starts typing, it will start searching and drop down a list of potential matches. A user can select a record from the list, and it will populate the equipment or item radio button, and populate the equipment or item lookup control, serial number, contract, and bill code. Additional service calls can be added by clicking [Add].

![New Service Work Order Screen](image-url)
On Hold Codes - Invoicing Calls
In 8.7, a Holds tab has been added to the Service Call window. You can use service on-hold codes to recalculate response time from the time a call is released from hold to arrival, instead of call received to arrival. This is especially needed when calls are on credit hold and you do not want these calls to adversely affect your response time. This On Hold Code can be set by technicians in the field. You also have the option to determine if the on-hold code can be released by technicians in the field.
Service Equipment

Additional Filter Options for Contract Equipment
The Related Equipment checkbox on Contract Equipment has been removed and replaced with additional filter options that allow you to filter equipment by customer, customer including locations, master host equipment and customer, and master host equipment and customer including locations.
Suppress Serialized Barcode Label
A new option to suppress the serialized bar code label when printing labels for serialized equipment has been added to the Print Barcode Labels window. The **Serialized item layout** tab is only available when the **Print serial number label** checkbox is checked.

![Print Barcode Labels Window](image)

People

Customer Number Validation
The new customer number and contact number fields are automatically validated when leaving the Customer Name field. If the customer number has been assigned to another customer e-automate will suggest an alternate number that is available.

![Customer Number Validation](image)
Amortizing Contract SubLeases
You can now use the amortizing lease functionality with items as well as equipment.

E-automate System

Encrypted Notes
You can now create a note type that can be encrypted to permit viewing for selected users. If a user does not have permission to view an encrypted note, the note details are hidden. This is helpful when storing user names, passwords, or other sensitive information. It also allows you to assign security levels to entire groups, for example, if you organize groups of technicians by level (level 1, 2, 3) to assign to key customers, you can create a note type that only Level 1 can see, or Level 2 and 3 can see but Level 1 cannot. If a user without sufficient permission tries to access or edit an encrypted note type, they will receive a warning message from e-automate stating that they do not have access to this encrypted note type.
**SQL 2014 Compatible**
E-automate 8.7 is compatible with SQL 2014. SQL 2005 and older are no longer supported.

**Avalara – AvaTax**
In addition to the built-in tax calculation engine, e-automate now supports Avalara tax calculation integration. You can configure and enable this new engine on the Tax Settings window under Tax Options. Avalara integration supports three consumption (sales) tax types: **Sales tax, Sales tax and VAT** or **VAT** only and six default tax types: Standard, Items, Freight, Labor, Travel, and Misc.

![Avalara Tax Calculation Engine Integration](image)

**E-agent**

**E-agent as a Service**
In 8.7, e-agent has experienced a complete overhaul in both infrastructure as well as design. E-agent has been repackaged as a service and runs in a browser that is launched from the e-automate tools menu. Synchronized task management for multiple server instances has been added, and you can install multiple task engines to distribute the task load.

![E-agent as a Service](image)
Add-on Utilities

Contact Import Utility Pro
The Contract Import Utility Pro is available at an additional cost and provides bulk import functionality which allows you to import information from contracts, equipment, meter groups, and meter details in bulk from an excel file or a tab-delimited text file such as Microsoft Notepad. This information is imported into a contract record within the Contract Import Utility Pro. You can then make changes or add additional information to the contract import record and submit the import record to e-automate to be created into a contract in your e-automate database. It also allows you to enter data into a contract, save it, and come back later to finish creating the contract.

Spreadsheet Utilities

DataImportExport Updates
The Branch field has been added to the following tabs: ARCustomers, SCEquipments, OBAccountsReceivable, OB AccountsPayable, and GLAssets. The serviceable checkbox and distribution code has been added to the ICItems tab.

CMContactsUtils Additions
The PropagateToLocation column has been added, which allows bulk updates of e-info user rights settings.
**InventoryItemUtil Additions**

The Tracking Configuration column has been added which allows items to be inserted with the tracking configuration assigned.

The following model creation fields have been added to the InventoryItemUtil spreadsheet: Model, Make, Model Description, ModelIsMetered, ModelIsHost, ModelIsAccessory, and ModelCategory. Users can now create a model and an item simultaneously.

<table>
<thead>
<tr>
<th>Model</th>
<th>Make</th>
<th>Model Description</th>
<th>ModelIsMetered</th>
<th>ModelIsHost</th>
<th>ModelIsAccessory</th>
<th>ModelCategory</th>
<th>Tracking Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>J720</td>
<td>Dell</td>
<td>Justin J720</td>
<td>FALSE</td>
<td>TRUE</td>
<td>FALSE</td>
<td>Default</td>
<td>DSC</td>
</tr>
</tbody>
</table>

**APIInvoiceImport Utility Updates**

The APIInvoiceImport utility has been updated to restrict the insertion of vendor invoices that have due dates prior to invoice posting dates.

**Merge Utility Enhancements**

The Merge Utility Spreadsheet allows you to easily and quickly merge customer records, contact records, or inventory items in bulk. Users validate the contacts, customers, and items in the e-automate database and determine if duplicates exist among the records. If there are duplicates, users can choose which record to merge into for each duplicate, click the [Merge] button, and all records will be merged at once, permanently deleting the ‘Merged From’ record.

**POReceiptBulkImport Utility**

The PO Receipt Import spreadsheet utility is now available which allows users to import large serialized and non-serialized receipts into e-automate.

**PO Receipt Bulk Import Utility**

<table>
<thead>
<tr>
<th>Export from e-automate</th>
<th>Validate</th>
<th>Import into e-automate</th>
<th>Clear</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Error message</th>
<th>Post Action</th>
<th>Item</th>
<th>SerialNumber</th>
<th>Quantity</th>
</tr>
</thead>
</table>