Changes in 1.1.8 (7/17/17)

1. Enhancements to the filtering capabilities for transactions and tickets: Some minor UX clean-ups as well as additional filters have been added to list views for transactions & tickets as follows:
    a. Ticket/PO/SO/SQ: The “Owner” filter has been changed to have the default be all owners instead of the currently logged in user. We also have a new no activity filter that will show all any items that have had no activity in 7 days or more. To make this easy to see, a new “Modified Date” column has also been added to the table view.
    b. PO only: There’s a new filter that shows PO’s that are past the shipping ETA.
2. Enhancements to Export Time Tracking report: Since this was called out as a report frequently used, spent some time doing a significant revamp of the experience and making it a lot easier to use. This enhancement took the bulk of the work done during this sprint. Here is the set of enhancements:
    a. Additional fields have been added to the list view to clearly indicate the following states: Billable, Billing status – billed or not, Ready to Bill status. The Ready-to-Bill status for the time entry follows the status of the ticket it’s contained in. If the ticket is marked ready-to-bill, the time entry will state the same. Right now, time entries can also be mapped to a project directly or just be mapped to a customer. In these cases, the time entry is always in the ready-to-bill state.
    b. New filters have been added to allow filtering for the Billable, Billing, and Ready to Bill states. The filtering behaviour is now consistent with what was done for transactions & tickets.
    c. Ability to mark exported records as billed has now been added. A new checkbox has been added next to the export buttons at top right of the UX. The idea is that when you’re ready to bill, you export the set of time entry records you plan to bill and mark them as billed while exporting them. That way, when the user comes back next time, they only need to look at time entries that haven’t been billed.
3. Improved handling of expired sales quotes:
    a. Expiration time period: The expiration time period has been increased from 30 days to 90 days.
    b. Changing state of expired items: Executives now have the ability to either close out an expired PO or reset it to a draft to enable continued work on it using the workflow state buttons that show up on the bottom bar.
4. UX improvement for closing out items: For PO/SQ/SO, the final state for the transaction is now called “Closed” (used to be “Completed”). There is a red button that shows up at the bottom with the label “Close Out <PO/SQ/SO>” depending on what type of transaction it is.

Changes in 1.1.7 (7/13/17)

1. Ticketing enhancements:
    a. List & Board views: The list and board views now have an enhanced experience with additional filters along the lines of what was provided for SQ/SO/PO in the last sprint.
    b. New ticket creation: The new ticket creation is a cleaner experience. Previously, you had to select the department in the department dropdown and the ticket type in order to bring up the new ticket UI. Now, you can just hit the "Add New" button to create a new ticket and enter all the information about the department and the ticket type in new ticket UI.
2. Time entry enhancements: When the user adds a new time entry, the user will have the ability to create a new customer, project, or ticket directly from within the time entry UI and then come back to the time entry UI to select it.
3. Enhanced experience for emails: The experience will be different based on whether the user has configured their email settings or not.
    a. Email settings configured: When they click on the button to send to customer or vendor, it will launch a new email compose window with the sender email and content filled out. The user can change the body of the message as well as the message header information. This email will then be sent using the user's email address.
    b. Email settings not configured: When the user clicks on the button to send to customer or vendor, the user will see a prompt with 3 options to select for the email address: Customer/Vendor, Self, Other. The email addresses are automatically populated for the Customer/Vendor & Self options and can't be edited. The Other option can be used to enter any email address to send the message to. In this situation, the user can't edit the body of the message, it will be sent with the default system generated content using the no-reply email account configured in TOSS.
4. Enhanced notifications experience: Here are the key changes:
    a. Enhanced Notify UX in TOSS: The notification UI is now implemented as a set of cards, just like the notification experience seen on mobile devices.
        I. The count on top is the total number of cards not yet dismissed.
        II. When the user clicks on the notification card to bring up the transaction the notification is for, the card is automatically dismissed.
        III. The user can individually delete each notification card by hitting the red "x" button or clear all of them using the "clear all" button at the bottom of the notify UI window.
    a. Email roll-up of notifications: Every day, each user will receive an email roll-up of notifications in the last 24 hours. This is purely for informational purpose and to serve as a reminder, they can't take any action on the notifications in the context of the email. They will need to go to TOSS to interact with them.

b. Enhanced set of notifications: The notifications primarily serve to inform people about important state changes, lack of activity, and overdue items. They have now implemented a rule-based mechanism that should make it easier to add new rules down the road. Each notification is triggered by a rule and sent to a defined audience.
   i. Audience: The audience is defined in the form of 5 user roles – the first three being automatically created based on a user's interactions with the transaction/ticket and the last two are specific administrative roles:
      1. Creator: The user who created the transaction or ticket.
      2. Owner: The user the ticket or transaction is currently assigned to.
      3. Follower: User(s) who have opted to follow specific tickets or transactions.
      4. Executive: These are users who have special permissions and approval capabilities within TOSS. (NOTE: The plan is to clean this up next sprint so every user doesn't need to have the Executive user role)
      5. Managers: This is a new role that can now be set for a specific set of users by the admin via the admin portal. These are users at the supervisory level who need to monitor employees' activity.
   ii. Rules: Each rule consists of 3 parts: (1) a trigger condition which when true results in a notification being sent (2) the audience the notification is sent to and (3) definition for handling repeat notifications of the same trigger condition. Three of the rules in the list below were previously implemented as indicated below. The rest are new. All the rules are listed in the context of the ticket or transaction type they apply to.
      - Applying to **Any Open Transaction or Ticket**
        - Trigger: When an existing open item is updated; Audience: Creator/Owner/Followers; Repeat: None. *(previously implemented, no change)*
        - Trigger: No activity on item for 7 days or greater; Audience: Creator/Owner/Followers/Managers; Repeat: At 7 day intervals stop when greater than 28 days of no activity.
      - Applying to **Tickets**
        - Trigger: 2 days before Due Date; Audience: Owner; Repeat: None.
        - Trigger: Past Due Date; Audience: Creator/Owner/Followers/Managers; Repeat: At 7 day intervals, stop when overdue past 28 days.
      - Applying to **Purchase Orders**
        - Trigger: Sent to Executive for approval; Audience: Creator/Owner/Follower/Executives; Repeat: Every day until it's approved. *(previously implemented, added repeat behaviour)*

        - Trigger: On Executive Approval; Audience: Creator/Owner/Follower/Executives *(already implemented)*
        - Trigger: State changes to Ready to Bill; Audience: Creator/Owner/Follower/Managers; Repeat: None.
        - Trigger: Shipping ETA date hit; Audience: Owner; Repeat: None.
        - Trigger: 3 days past shipping ETA; Audience: Creator/Owner/Followers/Managers; Repeat: Every 2 days, stop when more than 7 days overdue.
    - Applying to **Sales Quotes**
        - Trigger: State changes to Customer Approved; Audience: Creator/Owner/Followers/Managers; Repeat: None.
    - Applying to **Sales Orders**
        - Trigger: State changes to Customer Approved; Audience: Creator/Owner/Followers/Managers; Repeat: None.
        - Trigger: State changes to Ready to Bill; Audience: Creator/Owner/Followers/Managers; Repeat: None.

Changes in 1.1.6

1. Made changes to main Navigation panel, consolidating and adding new buttons.
2. Changed several Ticket module options:
    a. Search bar above both List & Board views with same filters. Added Ticket Type field.
    b. New Ticket creation button. Followed by ticket module popup.
    c. Added additional "Filter" dropdown items for: Department, Status, Type, Filter (All Not Closed), and Show My Tickets.
3. Added "Type" column to the table and rearranged columns in this order:
   Ticket No. | Priority | Customer | Title | Owner | Status | Type | Submitter | Modified Date.
4. Updated Ticket Status fields to: Open, WIP, Waiting, Ready to Bill, Resolved, Billed, Closed. Replaced Irreproducible &On Hold status with just the Waiting state.
5. Updated Board column statuses to: Open | In Progress | Waiting | Ready to Bill | Resolved | Closed.
6. Updated Ticket layouts and functionality to include:
    a. Essential ticket parameter topmost field values of: Title, Assignment (left side) | Ticket No., Status, Priority (right side). Moved Submitter and Due Date values to Details section.
    b. Central section values.
    i) Added Description Field under Details.
    ii) Placed Submitter and Due Date on right-hand side of Details
    iii) Added attachment numbers indicating how many attachments are uploaded.
    iv) Added "Change History" tabs to show ownership changes over time.

v) Added "Task" tabs to write and review tasks. Let's discuss what this could look like.
vi) Moved "Comments" section from Details to below the middle box under "Discussion".
vii) Removed chat tab.
viii) Moved Escalate feature to bottom control value section.

c. Restructured Comments section to include: Internal, External, and Notes for Accounting sections.
d. Added new Change History tab to log actions related changes in: Title, Assignment, Status, Priority, Description, Submitter, Due Date, Department, Ticket Type, Source, All Customer fields, Attachments, Escalate.
e. Moved Escalate button to bottom Ticket Control Section.

Changes in 1.1.5

1. Includes a standardized product list for Native Network and added a "Product Master Admin" permission to update this list.
2. Products can be mapped to specific transaction processes such as: Invoice, Sales Quote, Sales Order, and Purchase Order.
3. In PO, added payment method options to record amount and type of transaction.
4. Updated PO list with new abilities to:
   f. Clear filter box.
   g. Click thru PO numbers to view.
   h. Ability to search on "Status".
   i. Fixed sort functionality for missing column data.
5. When creating a new PO, Save buttons were added that when clicked would introduce other control buttons like "Add Related To", "Notes", and "Process Flow".
6. Under Masters, searches can query Product, Description, Type, Subtype and Additional Info fields. Carriage return on keyboard will initiate a search. "Clear Search" option will allow a user to quickly return to the main index page.
7. Reduced Login frequency

Changes in 1.1.4

1. Ticket can be opened via email for a particular department
2. Email
   j. Reply Email
   k. Forward Email
   l. Keeping reference email’s subject, body and attachment while replying/forwarding.
   m. Print Email

3. Added option “Externally Billed” in Time Entry Invoice. Added Invoice No field.
4. Added Export to excel in all list pages.
5. UI enhancement, added title and close icon in every pages of OSS.
6. Ticket page UI enhancement, added Jarvis widget tabs.
7. Added option to “Clear Notification” in home page.
8. Added option to copy the embedded code and steps which will be helpful to Customer websites.
9. Created Customer Facing Form.
10. In Circuit Quotation, added option to add Vendor. Now single vendor can be selected in Quote.
11. Report
    a. Stock Report with drilldown
    b. Fixed Asset Report
12. Chat Enhancement
    a. Saved Chat Read date
    b. Shown green icon when the chat is read by user at other end
13. Circuit page changes
    a. UI change of Circuit page
    b. Added map of locations and segments
    c. Added option to add Location, Panel and Port

Changes in 1.1.3

1. Email/Inbox Related Changes
    - Email Folder Move
    - Email Delete
    - Email Permanent Delete
    - Compose Email
    - Mark as Important Email
2. Ticket Department Board
    - Ticket Department wise Numbering
    - Department wise Board
    - Each Department has own related items
    - All old Ticket would be moved to Tech Dept
    - Auto Ticket opening by email
3. Introducing Chat Tools
    - Chat Tools
    - Chatting enhancement
    - Light a green bulb when user comes online with notification
    - Chat Notification enhancement
    - Sending emoji
    - deleting chatting

- Showing old chatting in paged manner

Changes in 1.1.2

1. KB Module
   - KB Module (List Page)
   - KB Module (Editing page)
   - KB Module (Search page)

2. Email and OSS Transactions
   - Create Ticket from Email
   - Create Project from Email
   - Add Email to Existing Ticket
   - Add Email to Existing Project
   - Email Attachment - auto attach to above transactions.

3. Circuit Tracker Module
   - Location Master
   - Panel Master
   - Adding Port
   - Beginning Phase – First pass - Designing a Circuit
   - Beginning Phase – First pass - Designing Circuit Segment

4. Other bug fixes:
   - Login screen & lock screen not working correctly – Fixed
   - Some spelling mistakes
   - Scrolling on the search tools not functioning like test – fixed.
   - Fixes in Email and Inbox

Changes in 1.1.1

1. Added IMAP Settings in User profile.
2. Added Inbox option in Left Menu
3. Fetched emails based on User's IMAP settings.
4. Fetched Email Folders and Emails with paging
5. Created "Follow" control and added it to all pages in OSS
6. Followed Transactions Change Notification would be delivered to User's "Notify" section on top left.
7. Shown User assigned Tasks on User's "Notify" section on top left.

8. Added “Save” and “Save and Close” option in all transaction and master pages.

Changes in 1.1.0

1. Shown Recent Sales Orders, Quotations, Purchase Orders and Tickets in Recent Work.
2. Solved some issues in Purchase Order in calculations of total and subtotal.
3. Service Location can be added and viewed in Ticket page.
4. As part of the service location “Show Address” option added in Ticket page.
5. When you generate a PO from SCQT, the cost of product will be fetched from SCQT instead of Product Master.
6. When you generate a PO from SCQT, the new generated PO and SCQT would be auto related to each other.
7. When building a PO, the Estimated Shipping box now becomes available for edit. (Note: this applies to POs that are generated without a quote).
8. Product Details in Purchase Order can be deleted.
9. We have taken some steps to make backups of all the documents hosted in system
    a. Scheduled an automatic backup of OSS files on daily basis (6:00 PM IST).
    b. These backups will be automatically deleted after 10 days.
    c. We will hold out one day a week for 3 months.
    d. Created a web page for file recovery where you can see the deleted files and re-upload those files.
    e. Corrected this issue in live/dev build definitions.