

Recent & Planned Changes

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PCR°360™

Recent Releases

- **2022.1**
 - 2022.1.3* (10-13-2022)
 - 2021.1.4 (12-19-2022)
 - 2021.1.5 (03-10-2023)
 - 2022.1.6 (06-26-2023)
- **2022.2**
 - 2022.2 (12-30-2022)
 - 2022.2.1 (03-10-2023)



2022.1.3 (Oct-13-22)

- 6 Bugs
- 1 Enhancement
- Expedited Release
 - Moved most of the scheduled issues from 2022.1.3 to 2022.1.4



Zero / Low Calls Report in CC

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Support Shopping Billing Reports D

Welcome to PCR-360 Customer

Quick Links

- Reports
- Adhocs
- Zero/Low Calls

Zero/Low Calls Report

* Date Range:

Thresholds

* Call Count:

* Duration (seconds):

* Email:

[Generate Report](#)



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2022.1.4 (Dec-19-22)

- 44 Bugs
- 10 Enhancements

- Revenue/Expense flags!!!
- Bookmarking Form Perspectives
- Optimized Custom Validations
- Added CSR to Actions Grid



Revenue & Expense Flags

Manage Account Number General Ledger Account Options ^ - + x

Status: ▾ Active Inactive *

* Account Number: 1234567890

Speed Code: Description: Status Date: Revenue: Expense: Bill: Ledger: Taxable:

Description: Sample GLA Status Date: 09/11/2023

Last Modified
User: Rob Alber
Date: 09/11/2023 13:13:04

Charges Contacts Addresses Activity/Remarks Billing Summary Attachments * User Defined Fields

Manage Account Number General Ledger Account Options ^ - + x

Status: ▾ Active Inactive *

* Account Number: 1234567891

Speed Code: Description: Status Date: Revenue: Expense: Bill: Ledger: Taxable:

Description: Sample GLA Status Date: 09/11/2023

Last Modified
User: Rob Alber
Date: 09/11/2023 13:27:28

Charges Contacts Addresses Activity/Remarks Billing Summary Attachments * User Defined Fields



Bookmarking Form Perspectives

The screenshot illustrates the steps to bookmark a form perspective. A context menu is open, and the 'View Perspectives' option is selected. The 'View Saved Perspectives' dialog displays a table of perspectives:

Perspective Name	Is Default	Is Shared	Subscribed From	Modified Date
Broken				

The 'Bookmark' button in the 'View Saved Perspectives' dialog is highlighted with a red box. The 'Perspective Bookmark' dialog is open, showing the system bookmark name 'QuickTick - Reset Password' and buttons for 'Save System Bookmark', 'Copy Browser Link', and 'Cancel'.

2022.2 (Dec-30-22)

- 2 Bugs
- 30 Enhancements & Features
 - PHP8.1 Required
 - Service Desk Charges API
 - Service Desk Inquires API
 - CustomerCenter GLA Splits (Percentage Only)
 - Duplicate Internal IP Ranges on Equipment
 - Assign to Me button on Service Desk Workflow
 - Contact UDFs on Services, Equipment, GLAs, Locations, Vendors

CustomerCenter GLA Splits

Billing Accounts

* Select Account to Add to Selection:

Add Account to Selection

10000 - 100.....

 %

10001 - 101.....

 %

Billing Account Total Allocation

100%



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Service Desk Workflow: Assign to Me

Manage Service Order

SD#: SO201800080 Due Date: May 12, 2018, 2:43 pm Description: Characters k

* SD Type: Service Order * Source: Web * Status: Pending * Service Rep: Sokolowski, Jeremiah

Contact Owner Owner - Department: Billing Group: Requestor: Associated Pro

Department Owner

Actions Equipment Workflow Contacts GLA Charges Labor Cabling Activity/Remarks Email Th

+ Add + Add from SDC Edit Selected Delete Selected Auto Schedule **Assign to me** Enter Labor

Action #	Action/Type	Action Status	WF#	WF Status	Workgroup	Wo
001	Add	Complete	10	Complete	Customer Service ...	Gra
001	Add	Complete	20	Complete	Inventory Manage...	Ber
001	Add	Complete	30	Complete	Technicians	Fry
001	Add	Complete	40	Complete	Quality Control	Fry
001	Add	Complete	100	Pending	IT Managers	



2022.1.5 & 2022.2.1 (Mar-10-23)

- 2022.1.5
 - 49 Bugs
 - 5 Enhancements
- 2022.2.1
 - 1 Bug
- **PHP8.1 Required**
- Charge Catalog specific Tax Rates
- GLA Import **Fixes**
- **Optimized** Contact Picker



Charge Catalog specific Tax Rates

Tax Rates Options ^ - ↗ ×

* Rate %: * Object Code: Billing Group:

Description:

Charge Catalogs

+ Add - Delete Selected Report Perspectives ⚙

Name	Description	Status
Basic Labor	Small charge for quick grunt work	Active



UDFs on General Requests

General Request

Manage Field Association Options ×

Options

* Association Table: Required:

Topic:

CustomerCenter:

Default Value

Type:

General Request

* Subject:

* Request Details:

Additional Information

Label:



2022.1.6 & 2022.2.2

- **2022.1.6**
 - 32 Bugs
 - 6 Enhancements
- **2022.2.2**
 - 4 Bugs
 - 2 Enhancements

New Grid Columns

- Charges grid: Quantity, Rate, Percent
- SD Actions grid: Project / Associated Item

Service Desk Links in Remarks



Master Charges Grid columns

1 of 4 Source Selected | Open Source | Report | Perspectives

Charge Descript...	GLA Percent	Charge Qua...	Quantity Rate	Amount
Aastra Analog	100			\$9.99
Example	100	10.00000	\$50.00	\$500.00
Avaya VOIP Monthly	100			\$49.99
Avaya VOIP Monthly	100			\$49.99
Avaya VOIP Monthly	100			\$49.99
349.	25			\$87.25
349.	75			\$261.75



Clickable SD Links

Associated Project:

Remarks | Email Thread | Attachments | User Defined Fields

Show Filters | Add | Log Approval | View Selected | Report | Perspectives

Author	Type	Remarks
Alber, Rob	Remark	SO201800092
Sokolowski, J...	Action Added	Service Desk Action Added without an SDC
Sokolowski, J...	Action Added	Service Desk Action Added without an SDC
Dixon, Brian	Created	Service Desk Item Created without an SDC
Dixon, Brian	Assigned	Service Desk Item Assigned



2023.1

- 7 Bugs
- 19 Enhancements/Features
- Features/Enhancements
 - Bulk Update for Contacts and Departments
 - CustomerCenter Approvals Phase 2
 - SR to SO conversion SDCs
 - Roles on Admin Perspectives
 - Remarks & Attachments on Imports
 - Import/Export Imports Formats
 - Grid: Get Total Rows icon, Editable Page
 - Official Barcode Release
 - Service Desk Equipment Import

CustomerCenter Approvals Phase 2

- Demo this Afternoon...



Bulk Update for Contacts/Departments

- Demo this Afternoon...

Contact Bulk Update Options

Directory:

Status: Active

Type: Customer, Coordinator

Type Removal: Remove all non-selected types from the contact.
This will also remove any associated data for the types removed.

COORDINATOR

Coordinators can be assigned to coordinate multiple Departmental Hierarchies using the picker in this section. The options selected are added along with the Departments the **Coordinator** already coordinates, unless explicitly requested to remove unselected options.

SR to SO Conversion SDCs

- Demo this Afternoon...

Choose a Service Desk Classification for Actions Options x

Are you sure you want to change this Service Request into a Service Order?

Selected SDC will be applied to the Action (optionally)

Action #	Action Type	SDC	
001	Add - Code Blue	<input checked="" type="checkbox"/>	
002	Add - Code Blue	<input type="checkbox"/>	



Roles on Admin Grid Perspectives

- Demo this Afternoon...

Manage Perspective Roles Options x

Perspective Identifier:
Application_Grid_EqpCatalog_EqpCatalog,default

Selected Perspective

Perspective Name: Barcode Roles: Select roles Priority:

✓ Check all ✕ Uncheck all ✕

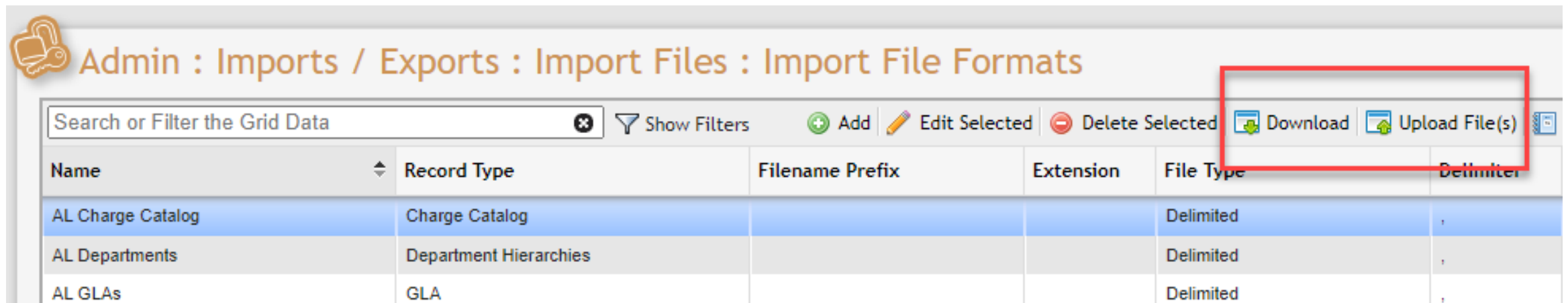
CSR

Customer Service Rep



Imports / Exports on Import Formats

- Demo this Afternoon...



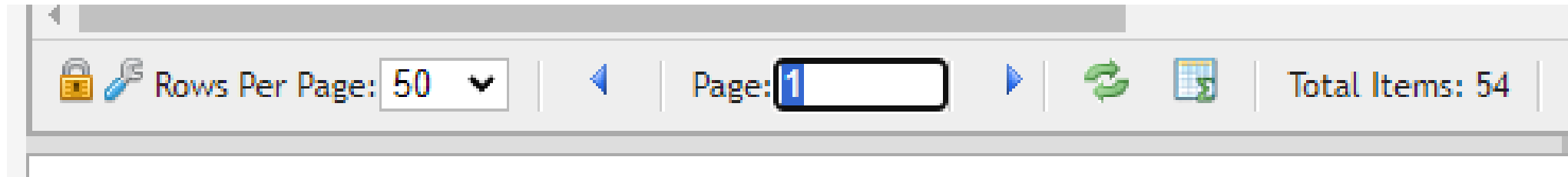
Admin : Imports / Exports : Import Files : Import File Formats

Search or Filter the Grid Data Show Filters + Add ✎ Edit Selected - Delete Selected ↓ Download ↑ Upload File(s)

Name	Record Type	Filename Prefix	Extension	File Type	Delimiter
AL Charge Catalog	Charge Catalog			Delimited	,
AL Departments	Department Hierarchies			Delimited	,
AL GLAs	GLA			Delimited	,



Grid: Total Rows icon / Editable Page



2024

- Custom Report Builder
- Purchase Order Price Pricing
- Batch/Background Complete & Finalize SD
- PHP8.3

