KX PROPOSALS

2015.0.1

Feature Release Notes

APRIL 18, 2017
VERSION 1.0

CONTENTS

PREREQUISITES

- Kx Core database must be upgraded to Kx2015.1
- .NET 4.5.2 or above installed on IIS server.
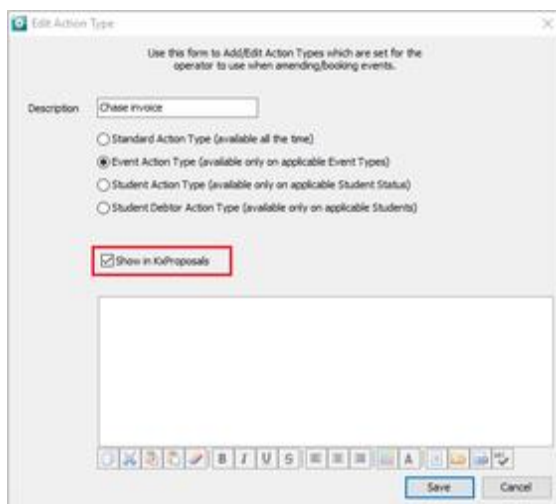
ACTION INTEGRATION

When a proposal is created, it will trigger the creation of actions that can be viewed and edited within the 'Actions' screen within KxConferencing and KxMarketing. For a user to view and edit actions, they will still need to use their existing processes and use the screens within KxConferencing and KxMarketing.

The trigger to create actions will be the emailing of a new proposal. When resending the proposal, the user is prompted that actions have already been created for the proposal, and whether they would like to create new ones.

CONFIGURATION

KxConfiguration > Lookups > Action Types

For action types to be selected within the admin section of KxProposals, a user will need to select the 'Action Types' from within KxConfiguration. An option has been added to the edit screen to 'Show in KxProposals'.
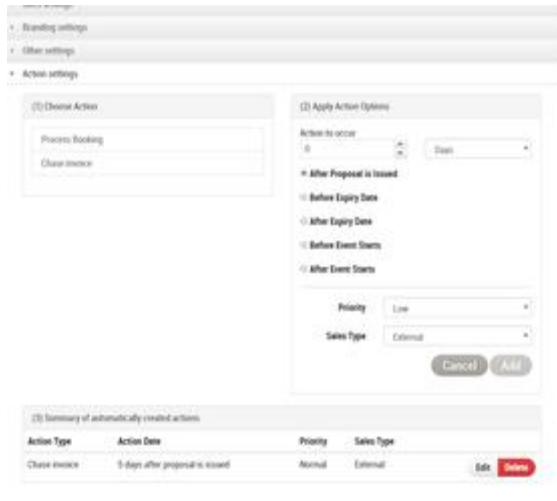

By default, all action types will not display in KxProposals.

KxProposals > Admin > Settings > Action Settings

The actions that have been selected to display in KxConfiguration will be available within KxProposals for you select how and when the action will be applied once a proposal has been sent:

ACTIONS

As mentioned, users are not able to view or interact with any created actions from within KxProposals, however they can see actions that have been raised and how many of those have been completed (see below):
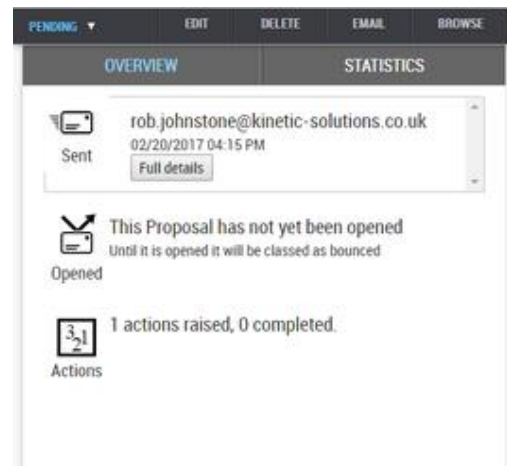
If a user attempts to send the same proposal again, they receive a prompt that asks them whether they would like to create additional actions:

New Actions - choose to create new actions

Your email has successfully been sent.

1 actions have been created for this proposal.

Would you like new actions to be created?

No   Yes
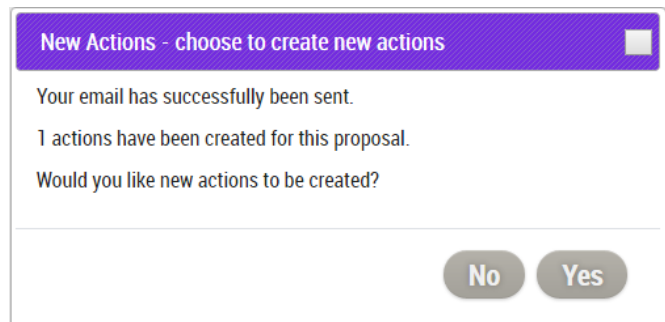
LINKING PROPOSALS TO EVENTS

When KxProposals was first designed, functionality would only allow you to link a proposal to an enquiry. KxProposals will now give you the opportunity to link proposals to an enquiry OR an event.

KxProposals > Admin > Proposals > New proposal

The title of the search field has been changed from 'Enquiry Reference' to 'Kinetic Reference Lookup' and will now return a list of both enquiries and events that contain the number entered.
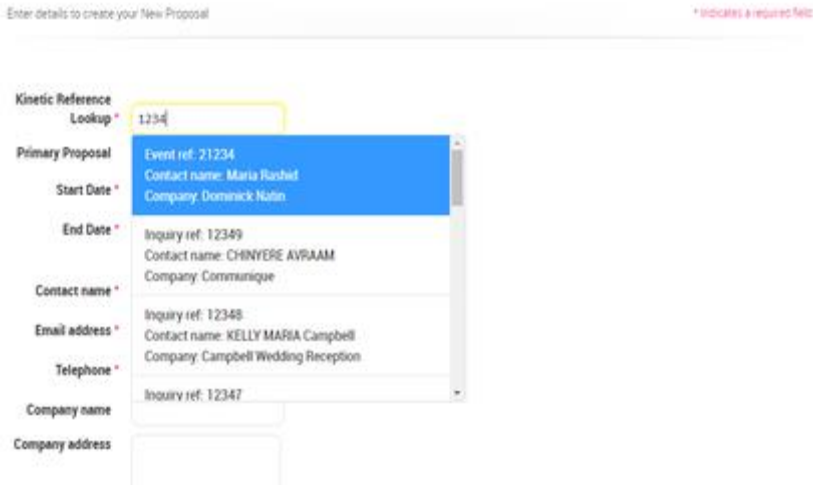
KxProposals > Admin > Proposals

To make it quick and easy to identify which proposals have been linked to an enquiry, an event or neither, an icon now prefixes the reference on all screens:

	Proposal not linked to an enquiry or an event.
	Proposal linked to an enquiry
	Proposal linked to an event.

KXCONFERENCING INTEGRATION

A user within KxConferencing is now able to see when a proposal has been raised and basic information about the proposal. They are also provided with the URL so that the user can view the proposal.

CONFIGURATION

KxConfiguration > Events > Event Types > ... Any Event Type > Event Screen 2.0

An additional screen option now exists when selecting an event type - the new screen is called 'KxProposals' and will need to be enabled against the required event types:
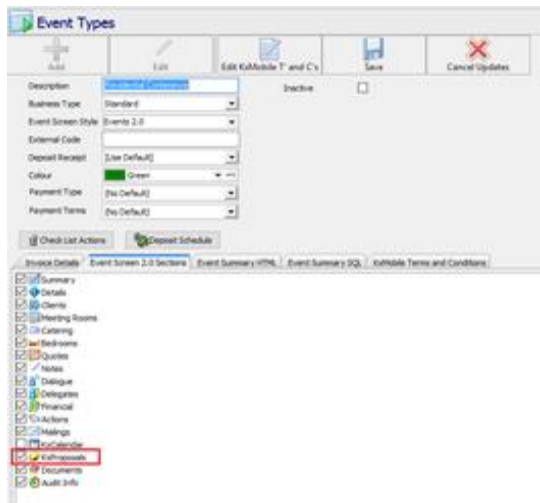
KxConfiguration > Admin > Users > Features

By default a user of Kx will not have access to the KxProposals screen on an event within KxConferencing. Feature access will control who can / can't access the screen which can be provided by user group or individual user.

ENQUIRIES

KxConferencing > Existing Enquiries

Within the existing enquiries screen, the bottom of the screen has a section called 'Enquiry Details'. This section has now been updated to include the Proposal URL if one exists.

KxConferencing > Existing Enquiries > Continue Enquiry

Within the existing enquiries screen, if a user continues an enquiry that is associated to a proposal, the proposal URL will now display in the enquiry screen.

EVENTS

KxConferencing > ... Edit Event

An event that was attached to a proposal when converted from an enquiry will display the proposal URL within the 'Details' screen of the event:

KxConferencing > ... Edit Event > KxProposals

An event will now display the new 'KxProposals' screen if the user has been granted the relevant feature access and the screen has been configured to display against the event type.

Within the screen, the user will be able to see all proposals raised against the event as well as details about each proposal (Proposal reference, date created, who created the proposal, the expiry date, the status and the URL).

RAISING PROPOSALS FROM KXCONFERENCING

Functionality has been added to KxConferencing to allow a user to raise a proposal from either an event or an enquiry.

NB. The user must have access to KxProposals.

KxConferencing > New Enquiry / KxConferencing > Existing Enquiries > ... Any Enquiry > Continue Enquiry

Once the enquiry form has been filled in, a user now has the option to 'Save And ... Create Proposal after saving as...'
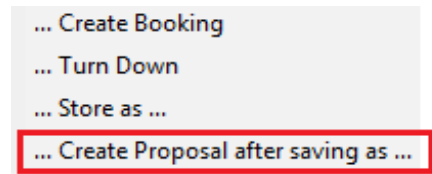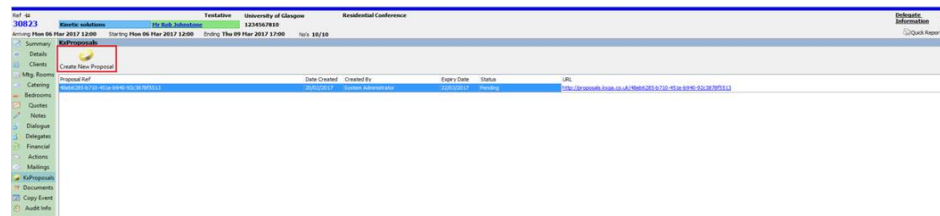

The user is then diverted to the KxProposals website and asked to login. On successful login, the user is then taken to the 'New Proposals' screen with all the information from the enquiry prepopulated:
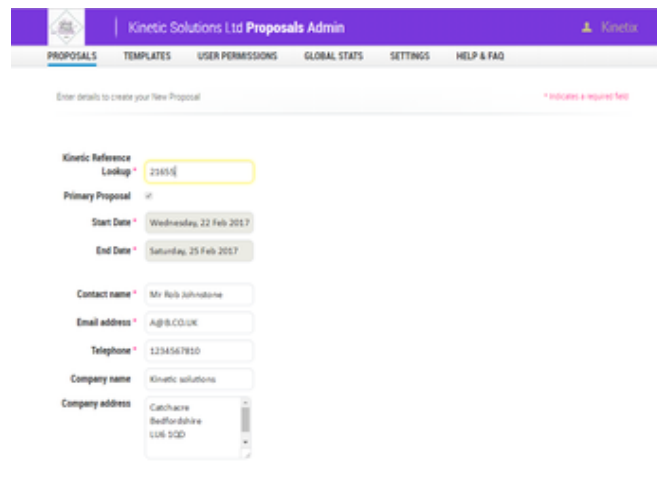
KxConferencing > ... Edit Event > KxProposals

A user now also has the option to create a proposal direct from the KxProposals screen within KxConferencing (the user must be granted access to this screen within feature access).

Clicking the 'Create New Proposal' button will divert the user to KxProposals website and prompted to login. One successful login, the user is then taken to the 'New Proposals' screen with all of the information from the event pre-populated:

If there is more than one contact associated to the event, the events primary contact details will be used.

FIXES WITHIN THIS RELEASE

PROPS-158 – Editing the title of a sub category occasionally updates the wrong sub category.

PROPS-159 – Adding new sub categories do not always save unless a page refresh is carried about before each one is edited.

PROPS-170 – When emailing a proposal, the client is not consistently provided indication that the email has been sent.

PROPS-172 – When a proposal is viewed in the admin section, the statistics displaying the pages viewed, number of visits etc. are not consistently displaying.

PROPS-264 – When creating a proposal, adding a finance item causes an error to appear when trying to re-visit the finance option page.

PROPS-290 – When attempting to edit a category on a proposal, clicking on the pencil icon has no effect resulting in the user being unable to edit the item.