



# PSQuote Release Notes

## Winter '23

Release: December 19, 2022

Version #: 1.7.0.8


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## New Features

### Quote Builder

#### Ability to re-order Quote Labor & respect role order on Tasks tab

You can now click and drag Quote Labor rows using the new  icon on the left side of the screen to re-order them in the Quote Builder tab.

Quote Builder															Tasks	LOE Schedule	Document Builder	Details	Related
										Revenue Total	Total Cost	Margin	Margin (%)						
										USD 63,800.00	USD 16,000.00	USD 47,800.00	75%						
Quote Offerings															EXPAND ALL	COLLAPSE ALL			
1	PS Quick Start																		
Revenue Total: \$63,800.00 Cost Total: \$16,000.00 Margin Amount: \$47,800.00 Margin Percent: 75%																			
Labor (\$63,800.00) Material (\$0.00)																			
Role	Billable?	Quote Hours	Scheduled Hours	Task Hours	Contractor?	Suggested Hourly Rate	Apply Discount	Hourly Rate	Discount (%)	Net Revenue	Cost Rate	Cost Total	Margin	Margin (%)					
Trainer	<input checked="" type="checkbox"/>	120.00	0	0	<input type="checkbox"/>	\$180.00	<input type="checkbox"/>	\$180.00	0%	\$21,600.00	\$45.00	\$5,400.00	\$16,200.00	75%					
Consultant	<input checked="" type="checkbox"/>	120.00	0	0	<input type="checkbox"/>	\$185.00	<input type="checkbox"/>	\$185.00	0%	\$22,200.00	\$45.00	\$5,400.00	\$16,800.00	76%					
Project Manager	<input checked="" type="checkbox"/>	80.00	0	0	<input type="checkbox"/>	\$250.00	<input type="checkbox"/>	\$250.00	0%	\$20,000.00	\$65.00	\$5,200.00	\$14,800.00	74%					
Add New Labor		320	0	0						\$63,800.00		\$16,000.00	\$47,800.00	75%					

As you make changes to the Labor Role order in the Quote Builder tab, the role order in the Tasks tab will also update.

Quote Builder **Tasks** LOE Schedule Document Builder Details Related


Task Revenue Total: USD 113,200.00    Task Total Cost: USD 28,900.00    Task Margin: USD 84,300.00    Task Margin (%): 74%

Choose an Offering to Schedule: PS Quick Start

Buttons: Gantt, Add Phase, Add Task, Delete, Save, Update Quote Hours, Update LOE Hours

Phase	Duration	Start Date	End Date	Predecessor	Total Hours	Trainer		Consultant		Project Manager	
						%	Hours	%	Hours	%	Hours
1 Design Phase	10	Nov 21, 2022	Dec 2, 2022		120			40		80	
1.1 Workshops	5	Nov 21, 2022	Nov 25, 2022		60		50%	20	100%	40	
1.2 Design Docs	5	Nov 28, 2022	Dec 2, 2022	1.1	60		50%	20	100%	40	
2 Build Phase	20	Dec 5, 2022	Dec 30, 2022		240			80		160	


## Ability to re-order Quote Materials

Similar to re-ordering Quote Labor, you can now reorder Quote Materials on your quote by clicking and dragging the Quote Materials using the new  icon on the left side of the screen.

Quote Builder **Tasks** LOE Schedule Document Builder Details Related



Revenue Total: USD 124,800.00

Quote Offerings

1  PS Quick Start

Revenue Total: \$124,800.00    Cost Total: \$46,500.00    Margin Amount: \$78,300.00    Margin Percent: 63%

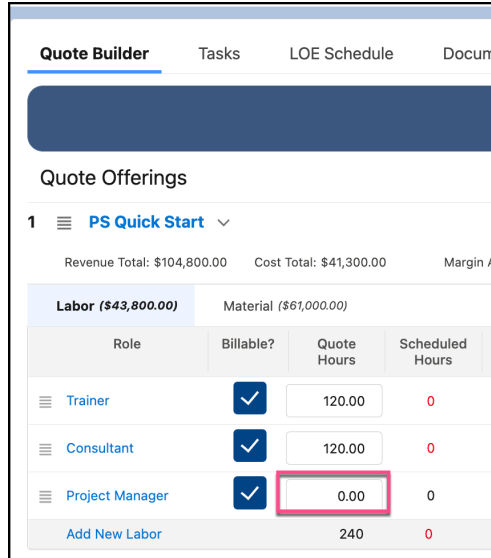
Labor (\$63,800.00)    **Material (\$61,000.00)**

Material	Material Type	Billable?	Is T&E	Unit Quantity	Unit Price Suggested	Apply Discount	Unit Price	Discount (%)
 Concierge 1x Month	Software	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.00	\$5,000.00	<input type="checkbox"/>	\$5,000.00	0%
 Expense T&E	T&E Expense	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1,000.00	\$1.00	<input type="checkbox"/>	\$1.00	0%

Add New Material

## Ability to save Quote Labor with 0 Quote Hours

You can now add Quote Labor with 0 hours and save, or update Quote Labor to have 0 hours. Previously you were required to enter a non-zero value.



The screenshot shows the 'Quote Builder' interface with a table of labor entries. The table has columns for Role, Billable?, Quote Hours, and Scheduled Hours. The 'Project Manager' role has a 'Quote Hours' value of 0.00, which is highlighted with a red box. The total labor cost is \$43,800.00 and the total material cost is \$61,000.00.

Role	Billable?	Quote Hours	Scheduled Hours
Trainer	<input checked="" type="checkbox"/>	120.00	0
Consultant	<input checked="" type="checkbox"/>	120.00	0
Project Manager	<input checked="" type="checkbox"/>	0.00	0
Add New Labor		240	0

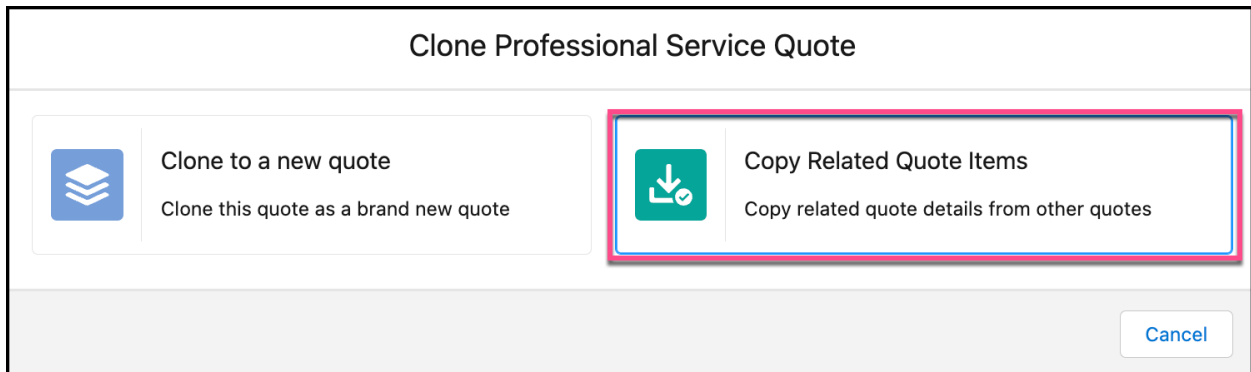
## Ability to hide Cost/Margin fields from View Only users

You can now hide Cost/Margin fields in the Quote Builder and Quote Margin Summary bar from PSQuote View Only users by removing Field Level Security (FLS) from the View Only users permission sets / profile.

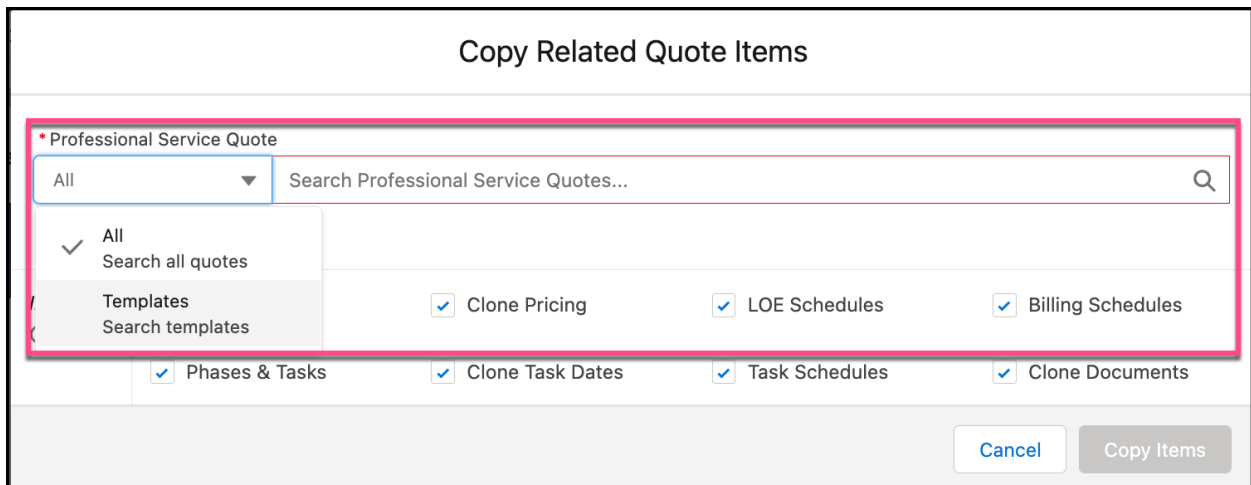
Please note: at this time PSQuote Full users will require FLS to the Cost Margin fields on Quote Labor, Material, Quote Lines and Quote Header so that they can create & edit quote data in the Quote Builder tab.

## Quote Clone

### Improvements to Search Experience when using 'Copy Related Quote Items' to copy to Existing Quote



You can now filter for Template Quotes only (Quotes where 'Is Template' = TRUE) or search all quotes.



There is also an improved 'Search All' pop-up search when cloning to an existing Quote.

Professional Service Quote						
<input type="text" value="shanto"/> <span>✕</span>					<input type="text" value="All"/> <span>▼</span>	<input type="button" value="Search"/>
Name	Opportunity Name	Description	Is Template		Date	
PSQ-0001	Shanto Opp					
PSQ-0000	Shanto Opp				Nov 30, 2022	

### Quote Clone - Ability to clone Quote Documents

There is a new 'Clone Documents' checkbox on the Clone Quote pop-up that will allow you to clone Quote Documents when cloning a Quote.

Clone Professional Service Quote					
Opportunity ⓘ	<input type="text" value="Project Frodo"/> <span>✕</span>		Dimension ⓘ	<input type="text"/>	
Engagement Start Date	<input type="text" value="Nov 21, 2022"/> <span>📅</span>		Status	<input type="text" value="Draft"/> <span>▼</span>	
Include ⓘ	<input checked="" type="checkbox"/> Offerings	<input checked="" type="checkbox"/> Clone Pricing	<input checked="" type="checkbox"/> LOE Schedules	<input checked="" type="checkbox"/> Billing Schedules	
	<input checked="" type="checkbox"/> Phases & Tasks	<input checked="" type="checkbox"/> Clone Task Dates	<input checked="" type="checkbox"/> Task Schedules	<input checked="" type="checkbox"/> Clone Documents	
			<input type="button" value="Cancel"/>	<input type="button" value="Clone Professional Service Quote"/>	

### Quote Clone - Ability to copy Pricing over to new Quote

There is a new checkbox 'Clone Pricing' on the 'Clone Quote' pop-up. This will copy the pricing from your quote to a new Quote. This is particularly helpful when cloning a Quote on the same Opportunity.

### Clone Professional Service Quote

Opportunity ⓘ  ×      Dimension ⓘ

Engagement Start Date  📅      Status  ▼

**Include** ⓘ

<input checked="" type="checkbox"/> Offerings	<input checked="" type="checkbox"/> Clone Pricing	<input checked="" type="checkbox"/> LOE Schedules	<input checked="" type="checkbox"/> Billing Schedules
<input checked="" type="checkbox"/> Phases & Tasks	<input checked="" type="checkbox"/> Clone Task Dates	<input checked="" type="checkbox"/> Task Schedules	<input checked="" type="checkbox"/> Clone Documents

If you change the 'Opportunity' or 'Dimension' field then you will see a warning telling you that cloned source quote's pricing may not match the destination (cloned) quote pricing.

This warning appears when you change the Dimension or Opportunity, because the new Quote's Dimension and Currency may differ from the source quote being cloned, and as a result the Rate Card / Material Pricing needs to be re-evaluated on the cloned quote.

### Clone Professional Service Quote

Opportunity ⓘ  ×      Dimension ⓘ

Engagement Start Date  📅      Status  ▼

**Warning** cloned pricing details may not match the destination pricing

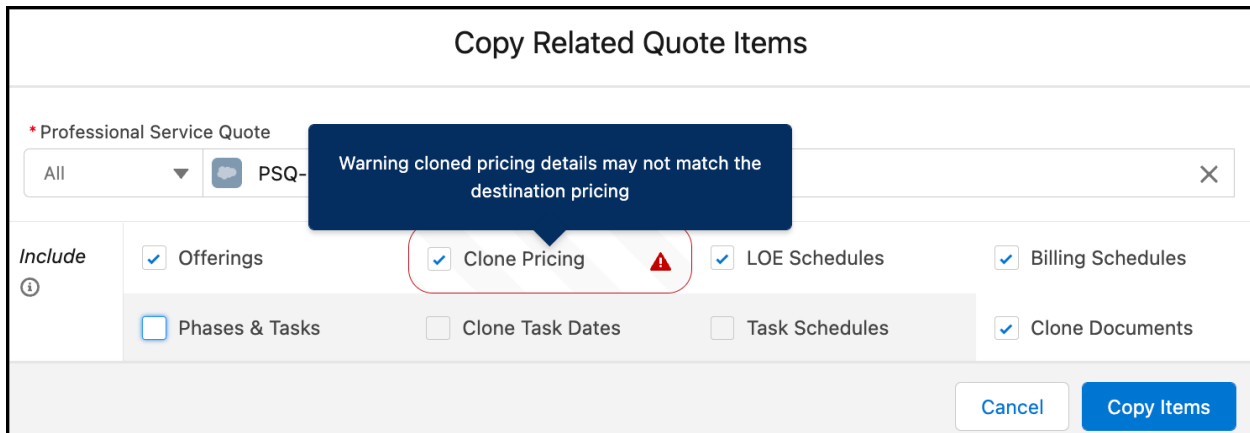
**Include** ⓘ

<input checked="" type="checkbox"/> Offerings	<input checked="" type="checkbox"/> Clone Pricing ⚠️	<input checked="" type="checkbox"/> LOE Schedules	<input checked="" type="checkbox"/> Billing Schedules
<input checked="" type="checkbox"/> Phases & Tasks	<input checked="" type="checkbox"/> Clone Task Dates	<input checked="" type="checkbox"/> Task Schedules	<input checked="" type="checkbox"/> Clone Documents

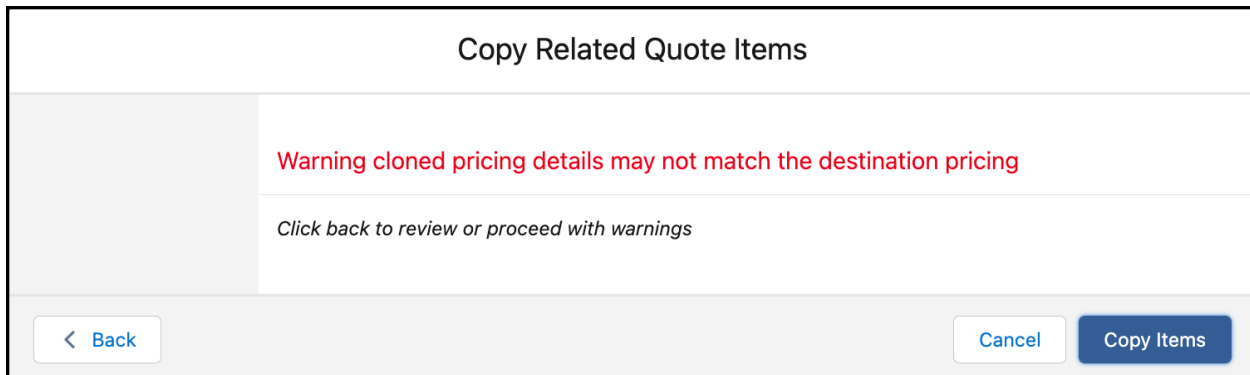


## Quote Clone - Display warning when cloning Price from a quote in a different Currency

If the new 'Clone Pricing' checkbox is checked and the source and destination Quotes have different currencies, you will see a warning message: *'Warning cloned pricing details may not match destination pricing'*.



The screenshot shows a dialog box titled "Copy Related Quote Items". At the top, it says "Professional Service Quote". Below that, there is a search bar with "All" and "PSQ-". A dark blue warning box is overlaid on the dialog, containing the text "Warning cloned pricing details may not match the destination pricing". Below the search bar, there are several checkboxes under the heading "Include": "Offerings" (checked), "Clone Pricing" (checked and circled in red with a warning triangle icon), "LOE Schedules" (checked), "Billing Schedules" (checked), "Phases & Tasks" (unchecked), "Clone Task Dates" (unchecked), "Task Schedules" (unchecked), and "Clone Documents" (checked). At the bottom right, there are "Cancel" and "Copy Items" buttons.



The screenshot shows the same dialog box, but now the warning message is displayed in red text: "Warning cloned pricing details may not match the destination pricing". Below the warning, there is a link that says "Click back to review or proceed with warnings". At the bottom left, there is a "< Back" button, and at the bottom right, there are "Cancel" and "Copy Items" buttons.

## LOE Schedule

### LOE Schedule - View Phases & Tasks on LOE schedule timeline


You can now view the Phases and/or Tasks on the weekly LOE Schedule view. This is helpful so you can see what activities are going on each week while reviewing/editing the weekly hours for your labor roles.

Quote Builder   Tasks   **LOE Schedule**   Document Builder   Details   Related

LOE Revenue Total: USD 113,200.00   LOE Total Cost: USD 28,900.00   LOE Margin: USD 84,300.00   LOE Margin (%): 74%

Spread Proposed Hours: Across All Weeks   Hours Per Week:   Range From: Nov 21, 2022   Range To: Jan 30, 2023   Apply Proposed Hours   Clear Hours   Update Quote Hours   Save

Role	Quote Hours	Scheduled Hours	Remaining Hours	Allocate	Design Phase		Build Phase			Testing Phase		Prod Rollout		
					November	December	January	January	January	January				
					1	2	3	4	5	6	7	8	9	10
					11/21/2022	11/28/2022	12/5/2022	12/12/2022	12/19/2022	12/26/2022	1/2/2023	1/9/2023	1/16/2023	1/23/2023
<input type="checkbox"/> PS Quick Start														
<input type="checkbox"/> Trainer	120	20	100	Allocate							20			
<input type="checkbox"/> Consultant	120	160	-40	Allocate	20	20	20	20	20	20	20	20		
<input type="checkbox"/> Project Manager	0	320	-320	Allocate	40	40	40	40	40	40	40	40		

You can select the  icon on the LOE Schedule to toggle between displaying Phase Only, Task Only, Phase and Task or Non.


Phase and Task Settings

Display Phase or Task?

Select Phase or Task Display

- Phase Only
- Task Only
- Phase and Task
- None

LOE Margin: USD 84,300.00   LOE Margin (%): 74%

Update Quote Hours   Save 

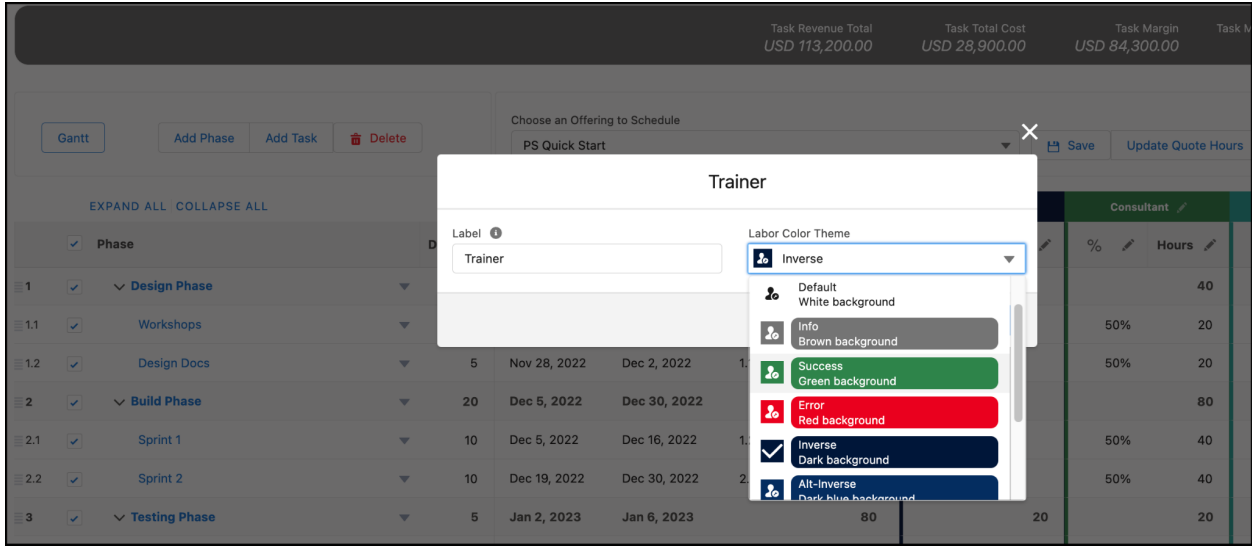
Role	Quote Hours	Scheduled Hours	Remaining Hours	Allocate	11/21/2022	11/28/2022	12/5/2022	12/12/2022	12/19/2022	12/26/2022	1/2/2023	1/9/2023	1/16/2023	1/23/2023
Trainer	120	20	100	Allocate							20			
Consultant	120	160	-40	Allocate	20	20	20	20	20	20	20	20		
Project Manager	0	320	-320	Allocate	40	40	40	40	40	40	40	40		

				Design Phase		Build Phase			Testing Phase		Prod Rollout
				Workshops	Design Docs	Sprint 1	Sprint 2	UAT Testing	Deploy		
				November	December			January			
Role	Quote Hours	Scheduled Hours	Remaining Hours	1	2	3	4	5	6	7	8
<input type="checkbox"/>				11/21/2022	11/28/2022	12/5/2022	12/12/2022	12/19/2022	12/26/2022	1/2/2023	1/9/2023
<input type="checkbox"/> PS Quick Start <input type="checkbox"/> Trainer											
	120	20	100	Allocate						20	
EXPAND ALL COLLAPSE ALL				20	20	20	20	20	20	20	20
<input type="checkbox"/> Phase	Duration	Start Date	End Date	40	40	40	40	40	40	40	40
1 <input type="checkbox"/> Design Phase	10	Nov 21, 2022	Dec 2, 2022								
1.1 <input type="checkbox"/> Workshops	5	Nov 21, 2022	Nov 25, 2022								
1.2 <input type="checkbox"/> Design Docs	5	Nov 28, 2022	Dec 2, 2022								
2 <input type="checkbox"/> Build Phase	20	Dec 5, 2022	Dec 30, 2022								
2.1 <input type="checkbox"/> Sprint 1	10	Dec 5, 2022	Dec 16, 2022								
2.2 <input type="checkbox"/> Sprint 2	10	Dec 19, 2022	Dec 30, 2022								
3 <input type="checkbox"/> Testing Phase	5	Jan 2, 2023	Jan 6, 2023								
3.1 <input type="checkbox"/> UAT Testing	5	Jan 2, 2023	Jan 6, 2023								
4 <input type="checkbox"/> Prod Rollout	5	Jan 9, 2023	Jan 13, 2023								
4.1 <input type="checkbox"/> Deploy	5	Jan 9, 2023	Jan 13, 2023								
<b>Total</b>	<b>40</b>	<b>Nov 21, 2022</b>	<b>Jan 13, 2023</b>								

# Task Quoting

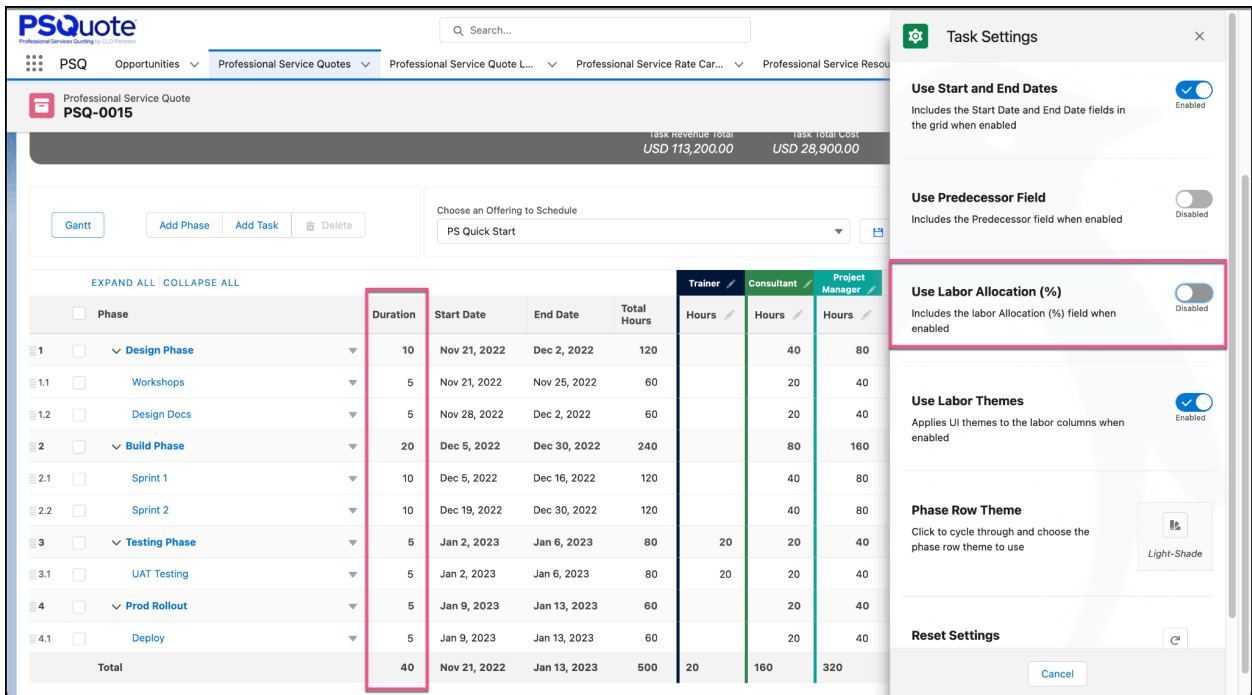
## New Color Picker for Task Labor - Labor Color Theme

On the Tasks tab, the Label Color Theme picker has been enhanced to show the color in addition to the name (previously the theme name was shown without the corresponding color).



## Task Quoting - Ability to Hold Hours constant when changing Duration

If you don't want a change in Task Duration to re-calculate the Hours on your tasks, you can now de-select the 'Use Labor Allocation (%)' option on the Tasks tab. This will allow the Task Hours to be held constant when the Task Duration value is changed.



In the example below, you can see that changing the Task 'Duration' value for a task caused the task dates to recalculate (because Predecessors were set), but did not re-calculate the Task Hours since the 'Use Labor Allocation (%)' option was de-selected.

EXPAND ALL COLLAPSE ALL							Trainer	Consultant	Project Manager
Phase	Duration	Start Date	End Date	Predecessor	Total Hours	Hours	Hours	Hours	
1 Design Phase	15	Nov 21, 2022	Dec 9, 2022		120		40	80	
1.1 Workshops	10	Nov 21, 2022	Dec 2, 2022		60		20	40	
1.2 Design Docs	5	Dec 5, 2022	Dec 9, 2022	1.1	60		20	40	
2 Build Phase	20	Dec 12, 2022	Jan 6, 2023		240		80	160	
2.1 Sprint 1	10	Dec 12, 2022	Dec 23, 2022	1.2	120		40	80	
2.2 Sprint 2	10	Dec 26, 2022	Jan 6, 2023	2.1	120		40	80	
3 Testing Phase	5	Jan 9, 2023	Jan 13, 2023		80	20	20	40	
3.1 UAT Testing	5	Jan 9, 2023	Jan 13, 2023	2.2	80	20	20	40	
4 Prod Rollout	5	Jan 16, 2023	Jan 20, 2023		60		20	40	
4.1 Deploy	5	Jan 16, 2023	Jan 20, 2023	3.1	60		20	40	
<b>Total</b>	<b>45</b>	<b>Nov 21, 2022</b>	<b>Jan 20, 2023</b>		<b>500</b>	<b>20</b>	<b>160</b>	<b>320</b>	

## Hover Detail on Labor Role on Tasks tab (compact layout)

If you hover over the Labor Role when Task Quoting, you will see the compact layout fields for the Quote Labor record, so you can see additional details for the Labor Role without leaving the Tasks tab.

Professional Service Quote  
**PSQ-0265**

[Add Offering](#) [Save Quote](#) [Refresh Quote](#) [Clone Quote](#) [Action: Sync to CPQ](#)

Is Primary  Billing Method: Hybrid Engagement Start Date: Dec 5, 2022 Engagement Weeks: 10

Quote Builder **Tasks / Scope Items** LOE Schedule Document Builder

[Gantt](#) [Add Phase](#) [Add Task](#) [Delete](#) Choose an Offering to Schedule: CS Onboarding

**Architect**

Professional Service Quote Labor Id: PSQ Labor-01789 Resource Role: TA

Hours: 88.00 Hourly Rate: USD 275.00

Discount Percent: 0.0000% Apply Discount:

Cost Rate: USD 100.00 Is Contractor:

Schedule Start Date: 12/5/2022 Schedule End Date: 2/12/2023

[Save](#) [Update Quote Hours](#)

EXPAND ALL COLLAPSE ALL

Phase	Quantity	Start Date	End Date	Predecessor	Total Hours	%	Hours	%	Hours
1 Design Phase	10	Dec 5, 2022	Dec 16, 2022		140		20		40
1.1 Workshops	5	Dec 5, 2022	Dec 9, 2022		70	25%	10	50%	20
1.2 Documentation	5	Dec 12, 2022	Dec 16, 2022	1.1	70	25%	10	50%	20

If you have system admin rights, you can change the fields in the hover layout by editing the default Compact Layout for the Professional Service Quote Labor object.

The screenshot shows the Salesforce Setup interface for editing the Compact Layout for the Professional Service Quote Labor object. The page title is "Professional Service Quote Labor" and the sub-header is "Edit Professional Service Quote Labor Compact Layout". The main content area is titled "Custom Compact Layout (Managed)". A yellow banner indicates: "This Compact Layout is managed, meaning that you may only edit certain attributes. [Display More Information](#)".

The "Compact Layout Edit" section includes:

- Enter Compact Layout Information:**
  - Label: Custom Compact Layout
  - Name: Custom\_Compact\_Layc
- Select Compact Layout Fields:**
  - Available Fields:** Contractor Account, Contractor Cost Rate, Cost Total, Created By, CRM Product, Currency, Discount [Calculated], Discount [Entered], Display Order, Hourly Rate [Suggested].
  - Selected Fields:** Professional Service Quote Labor Id, Resource Role, Hours, Hourly Rate, Discount Percent, Apply Discount, Cost Rate, Is Contractor, Schedule Start Date, Schedule End Date.
  - Buttons: Add, Remove, Top, Up, Down, Bottom.
  - Instructions: Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

## Support for additional Quote Phase fields to the 'Add Phase' and 'Edit Phase' pop-up modal

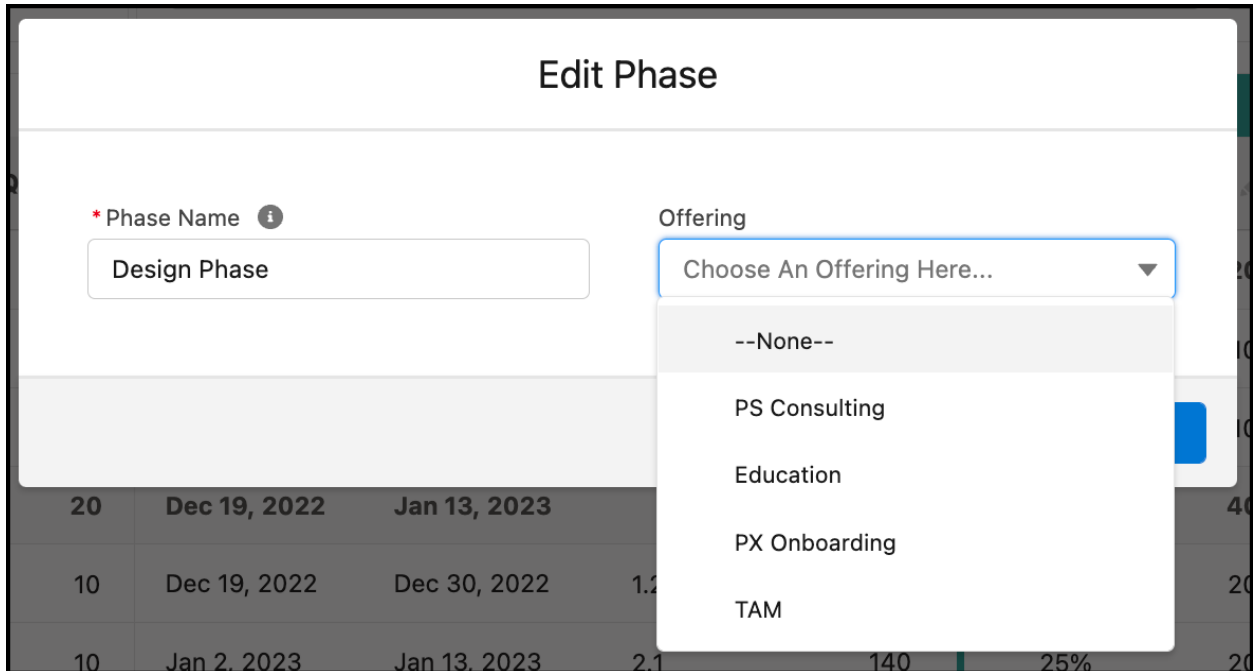
You can now add fields to the 'Add Phase' and 'Edit Phase' pop-up (modal).

The screenshot shows a Gantt chart interface with a table of phases. A red arrow points to a dropdown menu for the "Design Phase" row, which contains the following options:

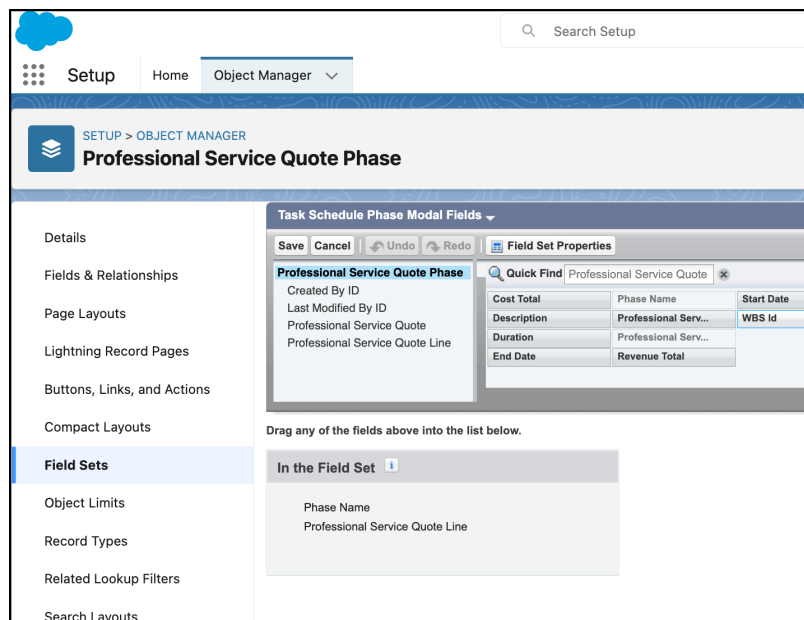
- Edit Phase
- Delete Phase
- + Add Task

Phase	Quantity	Start Date	End Date	Predecessor
1 Design Phase	10	Dec 5, 2022	Dec 16, 2022	
1.1 Workshops		Dec 5, 2022	Dec 9, 2022	
1.2 Documentation		Dec 12, 2022	Dec 16, 2022	1.1
2 Build Phase	20	Dec 19, 2022	Jan 13, 2023	
2.1 Sprint 1	10	Dec 19, 2022	Dec 30, 2022	1.2

For example, you can add the Professional Service Quote Line (Offering) lookup to the Add/Edit Phase pop-up.



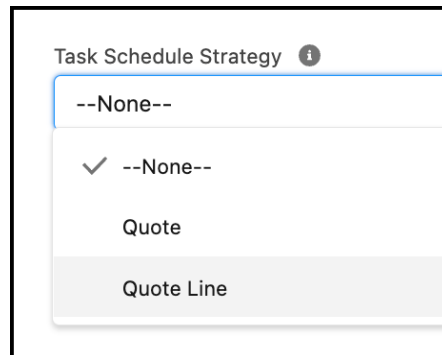
You can edit the fields in the 'Add/Edit Phase' pop-up by editing the 'Task Schedule Phase Modal Fields' field set (Setup > Object Manager > Professional Service Quote Phase > Task Schedule Phase Modal Fields > Edit).



## Ability to filter Tasks/Phases shown by selected Offering

You can now filter the Phases & Tasks visible in the Tasks quoting tab (if the Quote Line (Offering) lookup is set on the Quote Phase).

If you would like to filter Phases/Tasks by Quote Line (Offering), set the 'Task Schedule Strategy' picklist field = 'Quote Line' and set the Professional Service Quote Line (Offering) lookup on Phases in order to utilize the new filtering feature.



## Gantt

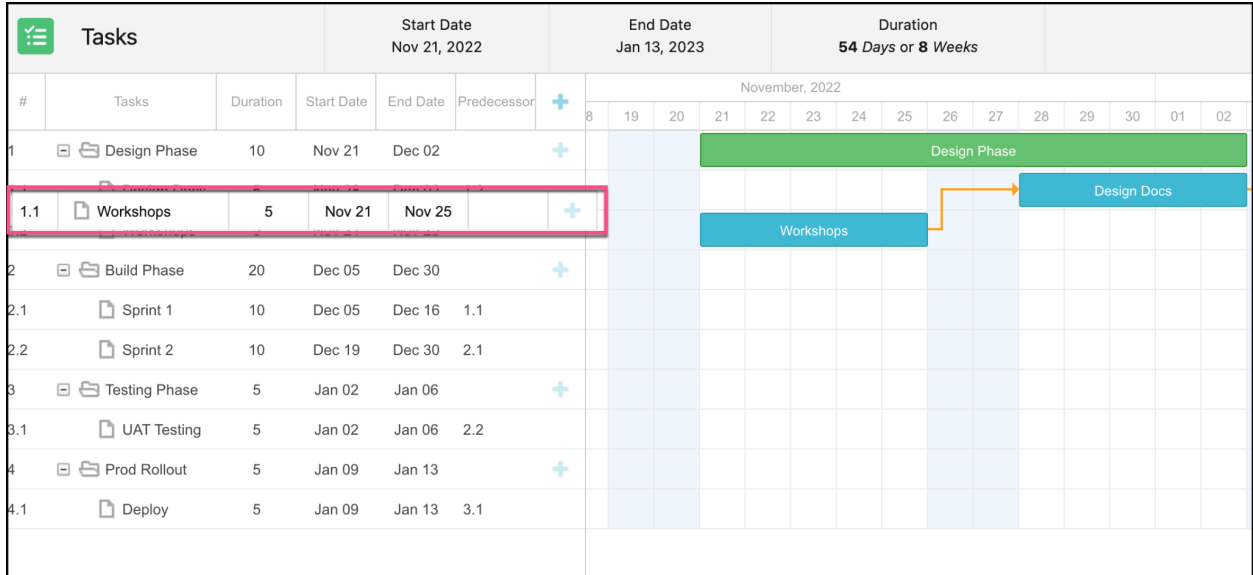
### Updating Task Duration in the Gantt now recalculates Task Labor Hrs & Revenue/Cost automatically

If you change the Duration of a Task in the Gantt, and if you have Task Labor Allocation % set for that task, the Task Labor Hours, Revenue & Cost are now automatically recalculated (similar to what occurs when changing the Duration in the Tasks tab).

### Gantt - Ability to click and drag tasks/Phases to re-order

You can now drag and drop tasks & phases in the Gantt to re-order.





Note: this task gantt functionality does not work as expected when Salesforce LWS (Lightning Web Security) session setting is enabled. If LWS is enabled in your Salesforce org, you can disable the drag-and-drop feature in Custom Metadata Types > Professional Service Quote Task Gantt > Edit > Order Branch > Set to False

**Professional Service Quote Task Gantt Edit** [Save] [Save & New] [Cancel]

**Information**

Label: Default

Professional Service Quote Task Gantt Name: Default [i]

**Task Gantt Configs**

Gantt Skin: Terrace (default) v

Gantt Columns: wbs, task\_name, duration, start\_date, end\_date, predecessors

Grid Date Format: %M %d

Task Date Format: %d %F %Y

**Task Gantt Grid Configs**

Order Branch: true v

Activates the 'branch' mode that allows vertically reordering tasks within the same tree level

Zoom Gantt: {"levels": [{"name": "day", "scale\_height": 27, "min\_column\_n\_width": 90, "scales":

If 'Order Branch' is set = False to disable drag-and-drop in Gantt, you can still drag & drop in the Tasks tab to re-order Tasks and Phases.

# Miscellaneous

## New PSQuote 'Platform Event' messaging for common event actions

The screenshot shows the Salesforce Setup interface for configuring a Platform Event. The left sidebar contains navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Platform Events' and shows the configuration details for a specific event.

**Platform Event Definition Detail**

Singular Label	Platform Event	Description	
Plural Label	Platform Events	Deployment Status	Deployed
Object Name	Platform_Event		
Namespace Prefix	PSQuote		
API Name	PSQuote__Platform_Event__e		
Event Type	High Volume		
Publish Behavior	Publish After Commit		
Created By	User User, 11/7/2022, 7:58 AM	Modified By	User User, 11/7/2022, 7:58 AM

**Standard Fields**

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

**Custom Fields & Relationships**

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Event Message	PSQuote__Event_Message__c	Long Text Area(32768)			User User, 11/7/2022, 7:58 AM
Edit   Del	Event Name	PSQuote__Event_Name__c	Text(255)			User User, 11/7/2022, 7:58 AM
Edit   Del	Record Id	PSQuote__Record_Id__c	Text(20)			User User, 11/7/2022, 7:58 AM

## Fixes - Winter '23

### Fixes in Winter '23

#### Fixed - Offering Document Content lookup not being set on Quote Line Text

On the Quote Line Text object, the 'Offering Document Content' lookup was not being set as expected.

## **Fixed - Task Quoting - WBS # cutoff if more than 3 digits**

The WBS # column in both the Tasks tab and in the Gantt view was too narrow to see full WBS number when more than 3 digits.

## **Fixed - Issue with WBS # when Deleting a Phase with Tasks in the Gantt**

Fixed an issue that occurred when deleting a Phase with tasks and dependencies in the Gantt wasn't resulting in the expected updates to WBS # in the Tasks tab

## **Fixed - Null Reference error when Updating LOE from Tasks tab (after cloning tasks)**

Fixed an Null Reference error that would occur when clicking 'Update LOE Hours' button on the Tasks tab in some cases after cloning tasks.

## **Fixed - Tasks Quoting - Tasks re-Ordering upon Refresh after deleting tasks**

Fixed an issue where task sort order was incorrect after deleting tasks and refreshing the page.

## **Fixed - Dragging Task to Different Phase caused Error**

Fixed an error that occurred when dragging Tasks to a different parent Phase in Tasks tab.

## **Fixed - Clone Quote - Copy Related Items should not be useable if no quote selected**

In order to use the 'Copy Related Items' from another Quote/Quote Template, you are required to populate the 'source' quote.

## **Fixed - Inaccessible Query if user doesn't have 'View Setup' access**

Fixed an issue where users were required to have 'View Setup' access to use PSQuote Lightning Web Components (LWCs). This error was due to a query checking the current user's profile to check Salesforce license type of the profile.

## **Fixed - Billing schedule buttons not visible on new offerings after using "Copy Related Quote"**

Fixed an issue where Billing Schedule button wasn't visible on newly added offerings after using the Copy Related Quote feature.

# **Fixes - Summer '22 SP2**

## **Fixes in Summer '22 SP2**

### **Fixed - Quote Billing Milestones not saved in Quote Currency**

Issue fixed where the Quote Billing Milestones were being saved in the User's currency not the Quote Currency.

### **Tasks not sorted correctly if WBS # was > 10**

Tasks were not being sorted correctly if the WBS was > 10. Example: WBS 1.11 was showing up out of order before WBS 1.2.

# Fixes & New Features - Summer '22 SP1

## New Features in Summer '22 SP1

### Task Quoting - Freeze Columns on Duration to help with horizontal scrolling

The Phases, Tasks & Duration are frozen columns so if you need to scroll to the right on smaller resolution monitors, you can see the Labor Roles and Tasks/Duration at the same time.

The screenshot shows a table with columns: Phase, Task, Duration, Processor, Total Hours, Trainer, Consultant, and Project Manager. The first three columns are highlighted with a red box to indicate they are frozen. The table data is as follows:

EXPAND ALL   COLLAPSE ALL					Trainer	Consultant	Project Manager	
<input type="checkbox"/>	Phase	Task	Duration	Processor	Total Hours	Hours	Hours	Hours
1	<input type="checkbox"/> <b>Design Phase</b>		10		120		40	80
1.1	<input type="checkbox"/>	Workshops	5		60		20	40
1.2	<input type="checkbox"/>	Design Docs	5		60		20	40
2	<input type="checkbox"/> <b>Build Phase</b>		20		240		80	160
2.1	<input type="checkbox"/>	Sprint 1	10		120		40	80
2.2	<input type="checkbox"/>	Sprint 2	10		120		40	80
3	<input type="checkbox"/> <b>Testing Phase</b>		5		80	20	20	40
3.1	<input type="checkbox"/>	UAT Testing	5		80	20	20	40
4	<input type="checkbox"/> <b>Prod Rollout</b>		5		60		20	40
<b>Total</b>			40		500	20	160	320

### Users with a Salesforce Platform License can now load Lightning Web Components (LWCs) in the PSQuote managed package

Users with a Salesforce Platform License can now load Lightning Web Components (LWCs) in the PSQuote managed package.

Please note that some actions in PSQuote still require a full Salesforce CRM (Sales Cloud) license, including:

- Sync to Opportunity
- Sync to CPQ
- Changing the 'Primary' quote (because this unchecks Primary on other Quotes for the same Opportunity)
- Using the Salesforce Price Book for Material pricing

## Task Quoting - New Grand Total Footer

There is a new grand total footer at the bottom of the Tasks component that shows the following:

- Start Date (Minimum of Task Start Dates)
- End Date (Maximum of Task End Dates)
- Total Hours
- Total Hours for each Labor Role

EXPAND ALL COLLAPSE ALL								Trainer	Consultant	Project Manager
<input type="checkbox"/> Phase	Duration	Start Date	End Date	Predecessor	Total Hours	Hours	Hours	Hours		
1 <input type="checkbox"/> Design Phase	10	Nov 21, 2022	Dec 2, 2022		120		40	80		
1.1 <input type="checkbox"/> Workshops	5	Nov 21, 2022	Nov 25, 2022		60		20	40		
1.2 <input type="checkbox"/> Design Docs	5	Nov 28, 2022	Dec 2, 2022	1.1	60		20	40		
2 <input type="checkbox"/> Build Phase	20	Dec 5, 2022	Dec 30, 2022		240		80	160		
2.1 <input type="checkbox"/> Sprint 1	10	Dec 5, 2022	Dec 16, 2022	1.2	120		40	80		
2.2 <input type="checkbox"/> Sprint 2	10	Dec 19, 2022	Dec 30, 2022	2.1	120		40	80		
3 <input type="checkbox"/> Testing Phase	5	Jan 2, 2023	Jan 6, 2023		80	20	20	40		
3.1 <input type="checkbox"/> UAT Testing	5	Jan 2, 2023	Jan 6, 2023	2.2	80	20	20	40		
4 <input type="checkbox"/> Prod Rollout	5	Jan 9, 2023	Jan 13, 2023		60		20	40		
4.1 <input type="checkbox"/> Deploy	5	Jan 9, 2023	Jan 13, 2023	3.1	60		20	40		
<b>Total</b>	<b>40</b>	<b>Nov 21, 2022</b>	<b>Jan 13, 2023</b>		<b>500</b>	<b>20</b>	<b>160</b>	<b>320</b>		

## Gantt - Changed 'Cancel' button at bottom to 'Close'

The Gantt 'Cancel' button label has been changed to 'Close'

## Bug Fixes in Summer '22 SP1

### **Fixed - Billing Schedule 'Quote Line' column showing ID instead of Name**

Fixed an issue in Billing Schedule pop-up where Quote Line was showing record ID instead of Quote Line Name

### **Fixed - Gantt Issue where the horizontal scroll bar was very small**

Fixed an issue on some monitor sizes (like Macbook 13inch) where the horizontal scroll was very narrow

### **Fixed - Issue in Task Quoting > Update LOE Hours rounding issue**

Fixed an issue in Task Quoting 'Update LOE Hours' button logic where LOE Schedule hours by week were being rounded incorrectly if the Task Dates spanned weekend dates.

### **Fix Field Label for Task Link Name**

Fixed typo in Task Like Name field