

Corporate Services Release Report

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PR 9841 Error when trying to authorize PO

APP:PO

Details:

Error when trying to authorize PO with master tag logic enabled. Get a conversion failed error trying to onvert nvarchar to int. See attached screen shots.

PR 9827 Unable to invoice some tickets

DLL:CMNOBJ

APP:RTMS

Details:

User receives the error below when creating some invoices. Research revealed an issue with code related to taxcodes on the deltickitem being empty string versus Null.

Error

While Checking line item taxcodes in module basInvoiceFunctions in function Invoice, the system reports error 94 - Invalid use of Null

OK

We should also investigate and correct the issue that sets the taxcodes to an empty string.

RFM 9786 Modify routesmith to support region references

APP:Batch

DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:RETURNAUTHORIZATION

Details:

Currently when a DT is submitted to RouteSmith the warehouse code is the office code from TQ.

This rfm will allow the flexibility to set the warehouse code from the lookup table tbl_locations_relations from the field region_ref

RFM 9538 Create Custom Ticket Styles for Greene's, Eagle, RMT, Wellhead Services

APP:RTMS

Details:

JAB 1/30: Create an option for the greenes ticket styles to have the ability to print totals or not. In the old system they had the checkbox option to print totals. Also we need to add a Recieved by and a delivered by with lines to the bottom of the invoice. Delivered by on the left hand side, recieved by on the right hand side (same line), Also include the copy tag functionality.

Create a custom style X ticket print out for Greene's Energy Group, based on the generic style X with the following modification:

Place the attached logo at the top of the printout.

the greens_logo will be the logo to use for the print out. The other picture (greens_header) is for the location phone number information. This should be hard coded into the style just like it looks in the picture.

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RFM 9608 Create two new custom Invoices

APP:ERMS

Details:

Provide two new custom invoice styles for Diamond Y and Hawg Hauling based on the attached mock-ups.

RFM 9373 Add static rig list to Maintain menu with pop up notes

DLL:REPORTS

APP:RTMS

DB:CS_SQL_SCRIPTS

DLL:PROFL

Details:

Add a preference to use a 'Static Rig List with Remarks'. When selected, provide the following: - DONE

1.) A new menu option to allow maintenance of the Rig List data. The menu option should be labeled "Maintain->Rig List & Remarks" and should only be visible when the delivery ticket tab is active. - DONE

- The maintenance form should allow editing the current rig list fields: 'Rig Number / Name' and 'Directions / Notes' - DONE

- The maintenance form should also provide a command button for each rig which would allow the user to enter additional 'Remarks' for that rig similar to the 'Reminders' functionality available for customer records. - DONE

2.) The Rig maintenance form and pick list should provide the ability to print the Rig List with the following options:

- Include Remarks - DONE

- Include only Rigs with Remarks - DONE

3.) On the Rig maintenance form and pick list, if there are additional remarks entered for a Rig, show the 'Remarks' command button in green. - Done

4.) On the Delivery Ticket header form, if the rig selected has associated additional remarks, show the rig field in green and provide a button next to the rig field which would allow the user to view the additional remarks. - DONE

5.) On the Delivery Ticket tab, provide a button near the invoice number (or "Never Billed") label which would allow the user to view the additional remarks for the rig on that ticket. This button should also be colored green when there are remarks associated with the rig on the ticket. - DONE

6.) On the form to edit and view additional remarks, provide a button to print the additional remarks. - DONE

7.) The form currently caps out at 1,767 rigs. This needs to be increased as the customer has about 1,720 rigs currently and plans on adding more.

RFM 8693 Custom location field enhancements

DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:GFRMS

DLL:LOGIN

DLL:PROFL

APP:RTMS

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RFM 8693 Custom location field enhancements

Details:

Customer Request:

Currently, via preference settings, the user can designate the use of a custom "header detail picklist" on any one custom location field for the job, ticket, and invoice header forms. The client would like to extend this functionality to all of the 7 custom location fields.

Proposed Solution:

- 1.) Add additional sets of "header detail" preferences, identical to the existing set of preferences, which will allow the user to set up the "header detail picklist" information for each of the 7 location fields. This should include 2 "header additional" fields, 5 "additional detail" fields, and the option to force the user to use the pick list for each location (rather than allowing free text).
- 2.) Add a new preference group to contain all preferences related to this functionality.
- 3.) Modify the "header detail picklist" maintenance form and database table (tbl_list_hdr) to allow the user to view and specify which location field each record should be associated with. When loading and browsing through the records, the field descriptions should be updated as appropriate for the referenced location.
- 4.) Modify the "header detail picklist" to load the field names and data associated with the selected location field.
- 5.) Provide the ability to "synchronize" these preference settings across multiple preference profiles with warnings that the settings on selected profiles will be replaced with the settings on the current profile.

PR 9794 Issue with Resizing on the Invoice tab

APP:RTMS

Details:

Franks has been reporting a resizing issue on the invoice tab, but we have never been able to reproduce it.

The following steps will reproduce it

Use Franks keyname

Turn General Preference 'Maximize Main Form' on and 'Default Selected TAB' set to Rental Contract.

Open RTMS, Add a ticket from a job, add items with prices, and post. Now switch to the invoice tab, and it is not maximized.

Also, these same steps will cause the SQL String form, the form will open without any of the bottom buttons.

PR 9551 Error when creating an invoice from a Rental Contract or saving an Invoice.

DLL:INVOICE

Details:

Customer is receiving an error, "While in Allocate Taxes, the system reports error-5 Invalid procedure call or argument" when creating an invoice from a rental contract and sometimes after clicking the save button on the invoice screen.

SAM : 1/13/09 : After more error logic was added, the new message is " While in allocated lines, picking line with highest tax: the system reports error-5 Invalid procedure call or argument"

SAM : 2/9/09 : Correct same bug from 1/13 but that existed in a different location

PR 9814 Error on cloning rental tickets

APP:ERMS

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PR 9814 Error on cloning rental tickets

Details:

When cloning rental tickets, a database error is received

PR 9775 Add a prompt to allow user to set stop and start dates

APP:ERMS

Details:

Currently there is a failsafe logic that keeps the user for setting the stop and start dates on transfer tickets before the date of last invoice date, to keep from double billing the customer.

Make sure that when we clone or do regular transfer we don't clone or set the renewal flag.

PR 9765 Partial pull logic on RA not working correctly

DLL:RETURNAUTHORIZATION

Details:

Partial pull logic applies only on category fence and it counts the number of deliveries vs the number of pick up's per job. If the number of pick up's exceed the allotted number for that particular job, it creates a ticket to bill the customer for a trip charge. This logic does work if you are generating an RA for full quantity on 1 line but nothing else. See attached for further details

PR 9777 Add logging to routesmith

APP:Batch

APP:ERMS

DLL:PROFL

DLL:RETURNAUTHORIZATION

Details:

We need to add the functionality to log the interaction with Routesmith.

Also add permission to control editing of Job Anniversary Date

PR 9720 Surcharge Item not expanding the GL Code

APP:Batch

APP:ERMS

Details:

There was a new surcharge logic added for Triangle to pull the customer surcharge percentage from the customer if populated. When using this preference a line item is added on the ticket with the surcharge amount.

If you are also using Expand GL code preference and expanding the GL code on a office basis the GL Code for the surcharge item is not being expanded.

I was able to replicate this locally in TQ_Triangle on Invoice 20408

PR 9723 Batch invoicing only updates anniversary date for last job encountered

APP:Batch

Details:

When running batch invoice for multiple jobs, the anniversary date is only updated on the last job invoiced.

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PR 9706 Unable to convert Bid to ticket if restricted from Cloning Rental Contracts

APP:ERMS

Details:

Please reference PR 9612. If a user is restricted from 'Cloning Rental Ticket', then the user cannot 'Convert bid to a rental contract'. The user is not being restricted from creating rental contracts so should be allowed to perform this action.

PR 9776 Initial Term should only apply to Type "D" tickets

APP:Batch

DLL:BILLG

APP:ERMS

Details:

Transfer tickets that are not contract renewal should not bill Initial Term rates on the first invoice.

PR 9756 Minimum charge item not being taxed correctly on Ticket or Invoice

APP:ERMS

DLL:BILLG

Details:

It appears that the minimum charge adjustments are not being taxed properly. If we have a fence job that does not meet the minimum, that adjustment to meet the minimum does not appear to be taxing properly (ie. using it's vertex references).

This happens when calculating the totals on tickets, and also on the line item created on the invoice.

PR 9747 Invoice Sales Report Error

APP:ERMS

DLL:LOGIN

Details:

TrakQuip's Invoice Sales Report is throwing the following error on several invoices. The error states:

"The invoice 33301 encountered an error retrieving the sales taxes!"

To reproduce, choose TQ_Grand_Rental_Station on CS-DEV.

Navigate to the invoice tab.

Select Reports from the Invoice Menu/Invoice/Sales Report.

Leave the filter options blank.

The report build will throw an error for invoices 33301, 68401, 72901, 38101. All four invoices have respective credit memos and/or re-bills.

PR 9822 Code unnecessarily excludes invoices without taxes

APP:Timb

Details:

Code unnecessarily excludes invoices without taxes

PR 9809 Dynamics SL Export File Needs Dashes Removed from GL Codes

APP:DynamicsSL

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PR 9809 Dynamics SL Export File Needs Dashes Removed from GL Codes

Details:

Modify Dynamics SL Export file:

1. Remove dashes from GL codes and GL sub-codes.
2. Is line is of tax type NONTAXABLE, send NULL in place of taxcode.

RFM 9466 User login is not updated when you clone a ticket

APP:ERMS

DLL:PROFL

Details:

Customer Request:

When cloning a rental ticket, the user_login is being copied from the original ticket. The customer would like this to be set to the user that is currently logged in and cloning the ticket.

Proposed Solution:

Add a preference setting to control how the user login field is cloned on Rental Tickets. Valid options should be the following:

- 1 - Always clone from original ticket
- 2 - Always use current user
- 3 - Prompt user

PR 9790 Error when trying to add collection note to Aging tab

DLL:GFRMS

Details:

When on the customer.vendor screen in TrakQuip on the Aging tab if you click "Add Collection Note" then right click in the "Contact" field to add a contact you get the following error message.

Error Opening Recordset

While attempting to open recordset, in ADO mode, the system reports error:-2147217900 [Microsoft][ODBC SQL Server Driver][SQL Server]Invalid column name 'contact_fullname'.
SQL->SELECT counter,contact_fullname FROM erms7_demo.dbo.contacts WHERE custnum = '10' AND type_cd = 'C' ORDER BY last_name, first_name

OK

Was able to reproduce this locally in TQ_DEMO.

PR 9847 Version 4.05 MAS is failing to import data

APP:Mas200

Details:

CS is failing to import data from MAS ver 4.05 from the following:

- Customer
- Customer Shipping.
- Tax codes.
- Terms.
- Ship Via.