

Corporate Services Release Report

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PR 9914 TQ-only permission exists in RTMS to view inventory adjustment report

DLL:PROFL

Release Notes:

Removed a TrakQuip only permission from RTMS.

PR 9896 Company Organization Code doesnt save

DLL:BILLG

Release Notes:

This case was entered to clear up some confusion about the Company Organization Code column. It should be hidden, however it was not. Code was added to fix that.

PR 9899 Sub-Total for office and Grand Total truncate on Sales Report

APP:ERMS

Release Notes:

This case was entered to modify the Invoice Sales Report. Previously when the sub-totals for the Office or the Grand Total of the report where greater than a billion the column would cut off the end of the number. This has been corrected and the column has been expanded to take into account totals greater than a billion.

PR 9885 Rig list with remarks malfunctions when rig location is changed from default.

APP:RTMS

Release Notes:

This case was entered to fix some abnormalities concerning the new Use Rig List with Remarks preference. This preference will now work properly regardless of the location it is set to.

PR 9906 Billing repair ticket shows wrong customer

APP:RTMS

Release Notes:

When a user attempted to bill a repair ticket using the Create Invoice from Rental Ticket option, the system was looking for a capital R in the type field. Code has been added to convert any lowercase letters entered in that field to uppercase.

PR 9904 Ticket appended to wrong invoice

APP:ERMS

Release Notes:

Invoices created through the Manager Approval Process seemed to be merging multiple tickets regardless of the customer account. The testing of this PR has resulted in no more instances of multiple tickets appearing on one invoice.

PR 9901 Modify Job Return to return to earliest start rent on tickets

APP:ERMS

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PR 9901 Modify Job Return to return to earliest start rent on tickets

Release Notes:

When doing a rental return using the Job Return, the system would do the return from the oldest first however; it did not do the return based on the oldest line on that ticket. This PR has corrected that issue as it now goes to the oldest line for that job and returns that line first. If the quantity for the return is greater than the oldest line on that job, it will then go to the next oldest line and so on.

PR 9920 Unable to build an item

APP:RTMS

Release Notes:

This case was entered to correct a data type overflow when building an inventory item. The data field has been changed from an integer to a long to allow for a larger number to be saved in the field.

PR 9922 Invoices created through Manager approval are not going to the approved table

DLL:INVOICE

DLL:MS_DYN

Release Notes:

When invoices were being approved and generated through the Manager Approval process, they were not being added to the approved table. This PR has corrected that issue as all invoices generated through the Manager Approval process are going to the approved table now.

PR 9925 Change the functionality of "Require Valid Customer Code" logic

APP:ERMS

Release Notes:

Previously a user could create a new account by editing the customer number field in the ticket header. If that customer number did not already exist the system would allow the user to create it on the fly. This PR corrected that issue as now the system will not allow the user to create a new account in this manner. The user can only pick an existing account while in the ticket/invoice header. However; with the same permissions set, the user can still Add/Edit customers using the Add/Edit button.

PR 9927 Issue with Surcharge tax amount

APP:Batch

Release Notes:

When using the preference "Default Item Surcharge Percentage" and "Surcharge Inventory Item" under the Invoice preference group, it was reported that the system was using the wrong taxcode on the surcharge item when the invoice was created using Batch Invoicing. This has been corrected.

RFM 9395 Modify QuickBooks 2006 export to return tax jurisdictions as line items

APP:ERMS

DLL:PROFL

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RFM 9395 Modify QuickBooks 2006 export to return tax jurisdictions as line items

Release Notes:

This request was entered to modify the QuickBooks export. Previously the QuickBooks export did not handle multi-tax Invoices. This request added a new preference to the Accounting preferences to take into multiple tax jurisdictions. When the preference is checked the tax is reported as line items in the export. Other minor modifications were made however are key named to a specific customer.

PR 9921 OLE DB error in AddEditGeocode

DLL:VRTX

Release Notes:

For one customer only, when the user entered a ticket or invoice, they received an OLEDB error during AddEditGeocode.

This happened when the data was too large to fit in the allocated database fields. Although trim logic is associated with the Vertex API calls, this PR served to add additional TRIM logic to the values retrieved from Vertex.

RFM 9711 Modify Dimensions functionality to add 5 more columns

DB:CS_SQL_SCRIPTS

APP:Dimension

APP:RTMS

Release Notes:

This case was entered to correct an issue with the Dimensions logic in RTMS this is key named logic. Five additional columns were added to store additional information in the dimensions table.

PR 9930 Primary Key Violation during GlobalTRACS info dump

DLL:GLBLTRCS

Release Notes:

While the daily GlobalTRACS update was performed there were several errors attributed to a Primary Key Violation, most notably: -2147217873 - [Microsoft][ODBC SQL Server Driver][SQL Server]Violation of PRIMARY KEY constraint PK_tbl_qlcmm_equipment . Cannot insert duplicate key in object dbo.tbl_qlcmm_equipment . This error indicated that an equipment ID had two terminals associated with it. There was a bug that resulted after this error that caused subsequent update failures. The original error will remain in place to alert the users when an equipment ID is associated with 2 more terminals. The bug that was causing the subsequent updates to fail had been fixed with this case.

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

DLL:INVOICE

DLL:BILLG

Release Notes:

When the customer saved an invoice or created one, they received an error concerning taxes. Due to the way the procedure was written the error could never be overcome. The procedure was completely rewritten to a more efficient manner.

PR 9897 Query for customers in frmHoldRelease do not have customer prefix values assigned.

APP:ERMS

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PR 9897 Query for customers in frmHoldRelease do not have customer prefix values assigned.

Release Notes:

When Approving Tickets for Billing using the 'Approve Rental Contracts (Office Manager) option, the form was not loading any data if the customer prefix defined for the database profile was different than the database being used. Code changes were made to add the table prefix for the customers table in frmHoldRelease.

PR 9908 Creation Date should not be copied

DLL:BILLG

Release Notes:

The creation date was being copied when cloning or creating credit memo and rebill. It should be assigned automatically and this case was entered to fix that.

RFM 9419 Modify Rental Surcharge Functionality

DLL:PROFL

DB:CS_SQL_SCRIPTS

APP:ERMS

APP:Batch

Release Notes:

The customer requests additional surcharge functionality that will work the same as the item surcharge preferences where the designation is made on the inventory record.

Implementation Details:

1. Add a preference to specify the inventory item to be used for surcharges.
 2. Add a preference to specify the surcharge percentage to be applied when invoicing.
 3. Add a second surchargeable checkbox to the inventory tab which, when checked, will indicate that the surcharge can be applied to the item.
 4. Add a second checkbox column to the rental ticket line item spreadsheet that will indicate that the surcharge should be applied. This should carry over from the inventory item.
 6. To avoid confusion, add two preferences to control the captions of the surchargeable checkbox on the inventory form. The preference value for the existing surchargeable flag should default to the current caption. The column names on the ticket spreadsheet will be set in the spreadsheet designer.
 5. Implement surcharge invoicing logic in both the Batch and manual invoicing methods, as follows:
 - a. Sum all charges for surcharge-able items on the invoice.
 - b. Calculate the surcharge as follows: (sum (surcharge-able item totals) * surcharge percentage)
 - c. Add a line item to the invoice with the calculated surcharge amount in the daily/sales rate and line total columns. Use the item number specified in preferences.
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RFM 9381 Customer List Report Modification

DLL:CustVend

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RFM 9381 Customer List Report Modification

Release Notes:

For one customer only, the Customer List Report was heavily modified. The report will print in a landscape style as well as

1.) In the 'Defined Defaults' column include only the following:

- Master Code (customers.master_acct)
- Terms Code (customers.terms)
- Price Level (customers.pricinglevel)
- Salesperson 1 (customers.sales_person)
- Salesperson 2 (customers.custom1) - use field name defined in the preference profile
- Contract Info - pull this information from the maintain customer/vender - then tools menu option - view contract, pull any contract number for customer (where there is more than one contract repeat only contract info only on the next line down)

2.) Provide an option to include invoice and aging data. When checked, under each customer record, include the following:

- Total Invoices (arbalance.total_invoices)
- Total YTD (arbalance.ytd_invoices)
- Total QTD (arbalance.qtd_invoices)
- Total MTD (arbalance.mtd_invoices)
- Cust. Balance (arbalance.age_current) - This is the balance of all outstanding invoices for this customer
- Current (arbalance.current_balance) - This is the sum of balances of invoices between 1 and 30 days
- Average Pay (arbalance.average_pay_days)

3.) Provide the ability to sort the report by dollar amount ranking.

4.) As done in the Customer List by Ranking Report, provide the ability to include the percent of current revenue. Display this under the customer number.

5.) Provide the ability to run a Customer list of only Inactive entries by adding a button above the check box "Include Inactives" that says "Include Actives" and is checked by default.

PR 9878 Invoice Line Item Total Doesn't Calculate Properly

DLL:BILLG

Release Notes:

Fixed an issue where the total would not calculate correctly if a rental item does not have a minimum charge but does have min days.

RFM 9905 Add object reporting tool to TrakQuip

APP:ERMS

Release Notes:

Added Object Reporting Tool to the Invoice menu of Trakquip. This tool will report on the information contained in the Invoice object.

PR 9895 Misc grammar spelling etc corrections needed

DLL:PROFL

APP:RTMS

Release Notes:

This case was entered to fix some spelling and grammar mistakes in RTMS.