

Corporate Services Release Report

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Release Date: 4/3/2009

PR 10059 Concurrency warning when editing Rental Tickets

APP:ERMS

Release Notes:

Fixed a situation where a user would receive a concurrency error even though he is the only person working on that ticket.

PR 10082 Failed invoice creation allows line items to append to existing invoice displayed invoice

APP:ERMS

Release Notes:

Data analysis indicates that if an invoice header creation fails after the header is created, but before all tax codes, Vertex Geocodes, etc have been applied, the line items can be added to a currently displayed ticket. This PR was designed to erase that possibility by erasing the currently displayed invoice prior to invoice creation.

RFM 9991 Rework Vertex Tax Logic For Address Verification

APP:ERMS

DLL:TICKET

DLL:VRTX

Release Notes:

This case modified the Vertex tax logic to verify the shipping address before the address is sent to Vertex. It also changed the "Order Acceptance" address from the Bill To, to the Ship To address of the customer.

PR 9884 Billing logic error using create invoice

DLL:BILLG

Release Notes:

Fixed an error when creating an invoice using only a monthly rate for a single day, the invoice would not trigger the monthly rate. A single day will now trigger the monthly rate.

RFM 10021 Vertex Data Issues

DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:MS_DYN

DLL:VRTX

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RFM 10021 Vertex Data Issues

Release Notes:

After investigation of the data located within Vertex, both via reports and "Return" functionality, the customer has discovered issues that need to be resolved.

Explanation: The 1st issue revolves around missing office information. During the initial development of the interface, the office was originally being used for the company name. This was revised in October and a preference was added to house the company name so that company exemptions would work correctly. We now know that the office is still required for reporting purposes.

Solution: Modify the TrakQuip-Vertex interface to pass the office information. The interface shall use the "Store" field to accomplish this. The "Division" field is still not needed at this time.

Explanation: The 2nd issue involves multiple entries for a single invoice or credit memo. Currently, when TrakQuip asks for a tax calculation, Vertex records the information in the Sales Tax Register because we set the flag to tell it to. If any changes occur to the invoice or the user clicks the "Save" button on the invoice tab, the invoice is recalculated thereby causing Vertex to record another instance of the invoice. We learned this week that Vertex treats these submissions as separate valid transactions rather than just using the latest as the valid copy.

Solution: Modify TrakQuip so that the "Save To Register" flag is set to FALSE when asking Vertex for a sales tax calculation for invoices. After the invoice has been sent to accounting, GP in this case, ask Vertex for the sales tax calculation again, this time with the "Save To Register" flag set to TRUE. This will reduce the amount of invoice versions on the Vertex side.

RFM 10030 ENERTIA INTERFACE

DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:PROFL

Release Notes:

Only for customers using the ENERTIA Accounting export. This request was entered to add a new flag to the inventory screen labeled "primary". It also added a preference in the rental ticket preferences to determine how the reference item on the ticket spreadsheet is determined.

RFM 9910 Add vendor to tax authority

DLL:BILLG

DB:CS_SQL_SCRIPTS

APP:ERMS

APP:RTMS

Release Notes:

QuickBooks requires the name of the tax authority (vendor) to be populated in the "name" column when a tax distribution is included for an invoice rather than the customer name. Previously there was no way for the customer to define this. This modification allows the user to define a vendor at the tax authority level. A new column has been added to the N-Tier Tax Authority spreadsheet and the standard tax code screen for each authority to specify the vendor. The QuickBooks closeout has also been modified to use the defined vendor name when exporting taxes.

PR 10036 Incorrect ticket date being used when printing new damage report

APP:Material

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PR 10036 Incorrect ticket date being used when printing new damage report

Release Notes:

When the user has the preference to add damages by job enabled, the ticket was being created with without a valid Reference DT. This was resulting in an inaccurate Delivery Date on the new style X Damage Report. Code was added to pull the latest ticket associated with that job so that date can be used as the ddate for the report.

PR 10035 OLEDB error while "processing ticket modifications"

APP:ERMS

Release Notes:

Discovered that the "Ship From" field allowed 255 characters but the database only allowed 16. This has been fixed.

PR 9764 Start Date is null when trying to calculate credit days in sub TransferJob

APP:RTMS

Release Notes:

When transferring a job to a new location, if the Credit Unused Min preference is turned on and the start rent date was not filled in (null), there was a chance that an error message would appear. The cause of this error message has been fixed, and the credit days will be calculated properly.

PR 9492 Update Test Database leaves pointer to live database

DLL:PROFL

Release Notes:

The table arinvoicehdr includes data indicating where the AR invoice was imported from (arinvoicehdr.orig_dbprofile). This pointer will now point to the test database when refreshing data in a test database when it is created or updated.

RFM 8779 Add Clone button to spreadsheet designer

DLL:PROFL

Release Notes:

The Spreadsheet Designer Application now has a 'Clone' button that will clone the currently loaded profile.

RFM 8479 Modifications to store customer contact id on tickets, invoices, etc.

APP:RTMS

DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:PROFL

Release Notes:

For reporting, we now store the contact ID in the tooltip of the ordered by field. There is also a new General preference, 'Force use of Contact / Ordered By Pick List' forcing users to select contacts through the pick list, which will autopopulate the contact ID.

RFM 9805 Non-serialized assets - Suppress message stating item exists on other open tickets

APP:ERMS

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RFM 9805	Non-serialized assets - Suppress message stating item exists on other open tickets
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Release Notes:

This case has modified the logic for the Warn if Unavailable preference and no longer pertains to non-serialized assets. If the preference is turned on and the serialized checkbox is checked, the message will appear. If the checkbox is not checked, the message will be suppressed regardless if the preference is turned on.

PR 10052	Invoice line total does not note the manual changes
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DLL:BILLG

APP:ERMS

Release Notes:

This PR was entered to fix several issues that used to work. Fixed code that added manual invoice adjustments to the detailed calculation. Also fixed the code that updated the tax calculation details.

PR 7121	Modify preference and permission descriptions and grouping to improve clarity
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DLL:PROFL

Release Notes:

Modified preference and permission descriptions and grouping to improve clarity

RFM 9608	Create two new custom Invoices
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APP:ERMS

DLL:INVOICE

Release Notes:

This case was re-opened to add a few more changes to a customer's custom invoice style.

RFM 10079	ENERTIA INTERFACE
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APP:ERMS

Release Notes:

Only for customers using the ENERTIA Accounting export. This request was entered to add a new flag to the inventory screen labeled "primary". It also added a preference in the rental ticket preferences to determine how the reference item on the ticket spreadsheet is determined.

PR 9797	Modifications needed to the Dump Services Form
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DB:CS_SQL_SCRIPTS

APP:ERMS

DLL:GFRMS

DLL:REPORTS

Release Notes:

This case was entered to make several modification to the Dump Services form.