

# Corporate Services Release Report

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## Release Date: 4/24/2009

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PR 10192            Unable to Partially Return Non-Inventory items

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APP:RTMS

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### **Release Notes:**

This case was entered to correct an issue when doing a partial return for non-inventory items.

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PR 10189            Subcategory Pick List malfunctions

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APP:PO

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### **Release Notes:**

Fixed the Category and Subcategory picklists in the PO module to bring them in line with other picklists.

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RFM 10151            Vertex Address Modifications

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DLL:INVOICE

DLL:TICKET

DLL:VRTX

APP:ERMS

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### **Release Notes:**

- 1) On invoices, no warnings will be displayed when a collector reviews the invoice. The subtotal will be displayed and if the correct taxes (from converted tickets) were stored on the line items, they will also be displayed. Warnings will only be issued when an invoice is edited.
- 2) When tickets are displayed with bad Tax Addresses, the user will only receive a warning of this issue if the ticket has never been billed. This will allow the user to fix the ticket and resolve the issue. If the ticket has already been billed, no warning will be issued to the user, but only the "sub total" of the ticket will be displayed. The taxes and total will not be displayed.
- 3) Add a quick address initialization routine to validate ticket address that are currently open. This will be made available under the Utilities menu option. Its purpose at this point is to loop through the open tickets and see if the addresses can be validated via Vertex and if so, save the Geocode in the appropriate tables.
- 4) Fixed the bug that allowed users to click the "X" on the Address Selection form and the code automatically picking the first address in the list.
- 5) Modified handling of Vertex errors. The number of errors seen by the user has been greatly reduced when trying to calculate the tax on tickets. These errors are now being sent to the log tables. If there are address problems on a ticket, the "Tax Total" field and the "Grand Total" field will become RED and the tooltip for "Tax Total" will be an indication as to the problem.
- 6) Added validation logic to the ticker header form. Users will no longer be able to save the header if an invalid or incomplete address exists for the "Ship To" address for the ticket or the "Mailing Address" for the office.
- 7) (Added 4/20/09) The majority of invalid addresses are being caused by an incomplete or misspelled city name. Add logic to the address lookup to clear the city name first if a valid address is not found.
- 8) (Added 4/20/09) The current address lookup form is being restricted to 100 entries. Remove the limit on this so the user may enter just the state and view a list of the valid address city/county/zip combinations in that state. For example, if the user enters just a state of "CA" they would see all 3121 combinations that match "CA"
- 9) Added 4/20/09) Fixed issue where taxes were being calculated on ticket print preview even though the customer was exempt in Vertex

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RFM 9867 Fleet Maintenance - Bin Location Logic

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APP:Fleet

DLL:PROFL

DB:CS\_SQL\_SCRIPTS

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### **Release Notes:**

This case was entered to add a new preference to the Fleet Module. This preference adds a field to the work order spreadsheet between 'W' and 'Vendor' to allow the user to choose (via right click) which bin to pull from when allocating parts to a work order. This bin should also be used when un-posting or returning items to stock.

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PR 10104 Issue with Batch Invoicing

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APP:Batch

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### **Release Notes:**

This case was entered to correct issue found with Batch Invoicing. Previously when creating an invoice via batch the market type was not being brought over to the Invoice.

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RFM 9381 Customer List Report Modification

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DLL:CustVend

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### **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 then 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.

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PR 10132 Invoice postal code does not allow non-numeric entries

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APP:ERMS

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**Release Notes:**

Changes were made to allow non-numeric values into the zip code field of the Invoice header

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PR 10083 Stand By charges not taking account the quantity

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APP:RTMS

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**Release Notes:**

For this case, code changes were made to take the quantity into account when adding a new line for standby charges when invoicing

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PR 9733 Correct function declarations where objects are being passed by value

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DLL:BILG

DLL:CustVend

APP:ERMS

DLL:GLBLTRCS

DLL:PRIMR

DLL:PROFL

DLL:REPORTS

APP:TREPAIR

DLL:VIEW

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**Release Notes:**

Changed several values to be passed in correctly, fixing one cause of automation errors.

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PR 9368 Batch Invoice Calculates Line Tax Without Applying Discount

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APP:Batch

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**Release Notes:**

Code changes were made to properly calculate tax with discounts when running batch with the advanced option of "Invoice all line items if one line item is billable" is checked. Also removed code that defaulted to use the header discount when line discount is zero.i

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PR 10184 Modifications to improve dropped database connection recovery

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DLL:DBMGR

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**Release Notes:**

This case was entered to improve connection performance with databases.

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PR 10162 Type Mismatch error on DTG when start date is blank

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APP:RTMS

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**Release Notes:**

Fixed a type mismatch error when no start date was supplied on delivery ticket G.

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RFM 9830                      New options for Fleet maintenance

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DLL:PROFL

APP:Fleet

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### **Release Notes:**

Added the following three modifications in relation to the manual entry of Fleet work orders:

1. A permission restriction to prevent a user from changing the cost on parts lines
  2. A preference option to require a valid unit number on a fleet maintenance work order
  3. A preference option to require a valid customer number on a fleet maintenance work order
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RFM 9740                      Add Approved Flag checkbox to Invoice Screen

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APP:ERMS

DLL:PROFL

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### **Release Notes:**

Added a preference that allows users to approve or unapprove an invoice for importing to AR via a checkbox in the invoice header. Additionally, the preference adds an Approved? status to the invoice tab.

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RFM 10055                    New custom style invoice X

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DLL:INVOICE

APP:RTMS

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### **Release Notes:**

Created a new custom Invoice style based on style 4.