

Corporate Services Release Report

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RFM 9376 Add preference to remove stop dates when cycle billing

DLL:PROFL

APP:RTMS

Release Notes:

For Review and Approve users only. This case added a preference controlled option to prompt for closing tickets when invoiced. When set, the program does the following:

- 1.) After an invoice is generated if the user selects 'No' to the prompt the advance the start dates (or the new prompt being added below), prompt the user "Would you like to mark this ticket as closed, no more invoices?"
- 2.) If the user selects 'Yes', mark the ticket as closed. If the user selects 'No', follow the current logic.

This case also added a preference controlled option to prompt for cycle billing. When set, the program does the following:

- 1.) After an invoice is generated, if there are rental items on the ticket that have not been returned, in place of the current prompt to advance start dates, prompt the user "Would you like to clear the stop date and advance the start rent date on all non-returned rental items? (for cycle billing)"
 - 2.) If the user selects 'Yes', clear the stop date and advance the start date on all non-returned rental items.
 - 3.) If the user selects 'No' follow the current logic with the addition of close logic above.
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RFM 10115 Modifications to require entry of cost codes on PO line items.

APP:PO

DLL:PROFL

Release Notes:

New Capability:

A request was made to require valid cost codes to be entered when saving purchase orders.

Resolution:

Two preferences were added under the purchase order preference group. The first new preference, 'Require Valid Cost Code' will require a valid cost code to be entered on all purchase order lines. The second new preference, 'Force Cost Code Pick List' will force the user to select a cost code from the right click pick list. No manual entry will be allowed in the cost code field.

Usage Statement:

This capability is available to all customers using the purchase order module.

RFM 9778 Job Maintenance Screen enhancements

DLL:GFRMS

DLL:PROFL

APP:RTMS

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RFM 9778 Job Maintenance Screen enhancements

Release Notes:

New Capability:

Two requests were made. The first request was to require valid tax codes on the job maintenance screen. A second request was made to add logic to set up picklists on all location fields on the job maintenance screen.

Resolution:

The preference 'Require Valid Tax Code on Job Maintenance Form' was added to the Rental Ticket preference group. With this preference set, the user will not be able to save the job without a valid tax code. An inactive tax code is considered valid.

The preferences under the Custom Location Fields preference group were enabled on the job maintenance form. By setting these preferences, the user will be able to set up custom picklists on each of the custom location fields. More information about this logic can be found in the help files.

Usage Statement:

This capability is available to all RTMS customers.

RFM 10298 Modifications to remove default DSN for MAS connections

APP:TRAKQUIP

APP:Mas200

APP:RTMS

Release Notes:

New Capability:

For one customer, the default DSN for the MAS interface was removed so that error messages would be thrown. This will enable users to confirm that they are using the correct DSN, instead of assuming they want to use the default DSN.

Resolution:

Code changes were made to RTMS, Trakquip, and the MAS interface to remove the default DSN.

Usage Statement:

This capability is limited only to this one customer. All other customers will still use the default DSN.

Caution Statement:

For this customer, error messages will now be thrown if a user does not have a DSN specified.

Additional Notes:

The accounting package is Visual Integrator. The interface is the MAS interface. This is for both RTMS and Trakquip.

Please refer to the Help Files for more information regarding these features.

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RFM 10284 Modify "Check-In' Interoffice Transfer types to Allow User to pick a destination bin

DLL:PROFL

APP:RTMS

Release Notes:

New Capability:

For check-in interoffice transfer types, added the capability for the user to select a destination bin on the check-in (return) screen for receiving items into the new office. The Location is populated with the default Location for the new office, and the user can select a new location by either typing it in or right clicking the field to bring up a pick list.

Usage Statement:

To turn it on, select the Rental Ticket preference 'Transfer Ticket Items to New Bin Location At Check-in.'

Caution Statement:

With this preference turned on, items must be checked in to a valid location.

Please refer to the "Help Files" for more information regarding these features.

PR 10385 While Creating Customer Statements system reports Ambiguous column name

APP:AR

Release Notes:

Symptoms:

The AR Customer Statements report was producing an ambiguous column name error when the report was generated for one customer.

Investigation Results:

Investigation revealed the customer number was not being fully qualified in the SQL query.

Resolution:

Code changes were made to the SQL query to correct the error.

PR 10369 Baseline needs fixed

DB:CS_SQL_SCRIPTS

DLL:LOGIN

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PR 10369 Baseline needs fixed

Release Notes:

Symptoms:

A foreign key constraint error was being thrown when saving tickets.

Investigation Results:

Investigation revealed a baseline fix was made to drop the foreign key constraint, however there was a problem with the fix.

Resolution:

A new baseline was created to drop the foreign key constraint.

PR 10378 Modify the Routesmith preferences (Username, Password) to be case sensitive

DLL:PROFL

Release Notes:

Issue Reported:

Currently the username and password preferences under Routesmith are automatically changed to uppercase.

Investigation:

Investigation locally revealed that we are changing the characters to uppercase

Result:

Code has been changed to keep the typed entry in its initial case form.

PR 10335 Meter Reading Being replaced when using Motor Assembly Logic

APP:RTMS

DLL:INVENTORY

Release Notes:

Symptoms:

Items imported into RTMS using CS_DataImport were not properly generating an entry into tblmeter_readings if they had meter values. Additionally, changing the meter value on the Inventory tab of RTMS would not generate an entry into tblmeter_readings.

Resolution:

Code was added to CS_DataImport and RTMS to properly generate an entry into tblmeter_readings when the meter value was changed in either location.

Please refer to the "Help Files" for more information regarding these features.

PR 10316 Printing cloned invoice does not show tax breakdown

DLL:INVOICE

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PR 10316 Printing cloned invoice does not show tax breakdown

Release Notes:

Reported Issue:

The tax breakdown that appears on a printed invoice does not appear when cloning that invoice to create a credit memo.

Investigation:

Investigation revealed that we are not populating the tax information on negative amounts.

Solution:

Code was added to populate tax under any circumstances.

PR 10371 Changes to Sage AccPac Export

APP:TRAKQUIP

Release Notes:

Symptoms:

The export for Sage Accpac 5.5 was not importing correctly due to named ranges for each worksheet of the Excel workbook not being created. This would cause the import to fail when it looked for the named ranges.

Investigation Result:

The template Excel workbook that the export was based on did have the named ranges. The workbooks that were failing to import properly were missing the named ranges.

Resolution:

Code changes were made to the export to correctly generate the named ranges upon creation. These changes will allow the Sage Accpac interface to correctly import the invoices exported from Trakquip.

Additional Notes:

This is for the Sage Accpac 5.5 accounting option.

Please refer to the Help Files for more information regarding these features.

PR 10360 Manager Approval process reports error

APP:TRAKQUIP

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PR 10360 Manager Approval process reports error

Release Notes:

Symptoms:

If the invoice created during the Manager Approval process errors out, there is a chance that the ticket will not be unapproved properly. Additionally, no log entry would be created to indicate what happened.

Investigation Results:

We confirmed that the error happened as a result of the invoice erroring out.

Resolution:

Added additional error handling during the Manager Approval process. The log entry will now be written sooner, to ensure that it will be created if the process errors out.

Please refer to the "Help Files" for more information regarding these features.

PR 10355 Utilization vs Cost report produce inconsistencies when run for certain itypes.

APP:TRAKQUIP

Release Notes:

Symptoms:

The Utilization vs Cost report was reporting anomalies when used for items with E Itypes.

Investigation Results:

Preliminary investigation has revealed that itypes that are not pro-rated will produce inconsistencies in the report detail.

Resolution:

Code changes were made to ensure that non pro-rated Itypes will still report correctly. (Note: In order for the report to report correctly, there needs to be a dollar value in the Daily Rent(min charge) column on the delivery ticket for the non-prorated items.)

Please refer to the "Help Files" for more information regarding these features.

PR 10401 QuickBooks 2006 Export is not breaking the tax authorities down

APP:TRAKQUIP

DLL:INVOICE

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PR 10401 QuickBooks 2006 Export is not breaking the tax authorities down

Release Notes:

Symptoms:

QuickBooks 2006 Export is not breaking the tax authorities down on all invoices. The export returned the correct tax amount, however the entire tax amount was included in one tax authority.

Investigation Results:

Investigation revealed a problem with our tax allocation logic. This logic allocates the tax amount across all of the jurisdictions and corrects any rounding errors.

Resolution:

Code changes were made to correct the problem in the allocation logic. All problem invoices will need to be re-saved on the invoice tab before running the export.

PR 10399 When some users use the Item NEW prefix and others do not, the code can create duplicate item

APP:RTMS

Release Notes:

Symptoms:

When some users use the Item NEW prefix and others do not, the code can create duplicate items

Investigation:

Code exists to prevent users from adding new items where the item number with or without the New Item Prefix would conflict.

However, it has been determined that if some users do not have this prefix then the code does not prevent them from creating an item that has already been used with the prefix.

Example: If an item has been cloned with the item number NEWQRT0100 then if another user attempted to create an item using QRT0100, it would be allowed if the New Item Prefix was not turned on.

Solution:

Code has been added to ensure that any new item added tests for the New Item Prefix even if it is not set.

PR 10382 Partial Payments are not displayed on Aging Screen when source is MS Dynamics GP

DLL:MS_DYN

Release Notes:

Symptoms:

Partial Payments are not displayed on Aging Screen when source is MS Dynamics GP

Investigation:

Investigation revealed that both To and From documents numbers must be searched to include partially applied payments.

Solution:

Update query with revised query provided by MS Dynamics GP development team

PR 10315 Date formatting issues with VI closeout

DB:CS_SQL_SCRIPTS

DLL:PURCHASING

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PR 10315 Date formatting issues with VI closeout

Release Notes:

Originally Released on 6/12/09
The 2nd Release on 6/19/09 included the update of the tblapproved_po_line table which was omitted from the 1st release.

Issue Reported:

Currently, when exporting invoices via the VI closeout, all dates are stored in text fields. This causes problems with international companies where multiple date formats are being used.

Investigation Results:

Modify these tables and any necessary associated logic to ensure that international date formats are stored properly.

Result of this report:

Modified the following date fields from nvarchar to smalldatetime

tblapproved_inv_hdr
 INVOICE_DATE
 INVOICE_DUE_DATE
 INVOICE_DTICKET_DATE
 INVOICE_DATE_PAID
 INVOICE_MIN_START_DATE
 INVOICE_MAX_RETURN_DATE
 INVOICE_RETURN_DATE
 INVOICE_EXCHANGE_DATE
 INVOICE_LAST_INVOICE_DATE

tblapproved_inv_line
 LINE_ITEM_DATE_IN
 LINE_ITEM_START_DATE
 LINE_ITEM_RETURN_DATE
 LINE_ITEM_STOP_DATE
 LINE_ITEM_ORIGINAL_START_RENT
 LINE_ITEM_PROJECTED_RETURN_DATE

tblapproved_po_hdr
 PO_DATE
 PO_LATEST_DATE

tblapproved_po_line
 POITEM_RECEIVE_DATE
 POITEM_REQUEST_DATE
 POITEM_PROMISE_DATE

Also removed an incorrect reference to the field tblapproved_po_hdr.creation_date.

PR 10358 Issue with way the sales person data is being saved

APP:RTMS

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PR 10358 Issue with way the sales person data is being saved

Release Notes:

Symptoms:

In RTMS, the Use Salesperson Name and Use Salesperson2 Name preferences were not correctly saving the code when adding a ticket. Instead, the full name would be saved into the fields.

Resolution:

Modifications were made to the delivery ticket header so that the code saved in the tooltip would correctly save to the database instead of the full name when using these preferences.

Please refer to the "Help Files" for more information regarding these features.