

Corporate Services Release Report

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Release Date: 8/28/2009

PR 10585 Overflow error when unposting or loading Ticket

APP:RTMS

Release Notes:

Issue Reported:

When returning an item with a large quantity the customer is getting the following error.

Error

While setting partially posted - spreadsheet mode,in module modQAMD in sub DTReposition,the system reports error number 6 - Overflow

OK

Investigation Results:

In the DTReposition Function the returned used variable is set to an integer. The correct data type for this value should be a double. Investigation reveals the same problem in the Subs doCheckDTRowAction and doDTLeaveCell. Investigation also reveals that this only occurs when displaying a partially posted ticket. (un-posted ticket with some items returned)

Result of this report:

The data type of the TotalReturned variable was changed to Double (Float) to correct the issue.

PR 10600 Customer Maintenance Browse Form

DLL:CustVend

Release Notes:

Issue Reported:

Customer reports that selecting a customer from the customer maintenance browse form does not update the information on the main form.

Investigation Results:

The issue can be replicated locally using the latest software version. Selecting a customer above or below the desired record and then selecting the desired record will change the focus on the main form.

To reproduce:

1. Open customer maintenance
2. Click find/ok
3. Right click on the customer number field
4. Select a customer that is different than which is currently displayed - Notice that the background information did not change
5. Select a different customer - Notice that the background information is updated to reflect the selected customer.

Code investigation reveals that a variable is set during the load of the form to prevent selection. This is turned off after the first selection is made, but only after it skips the first selection. If the user clicks the second time, then the action works.

Result of this report:

Added code to turn off the "Abort Selection Change" variable m_bAbortSelChange to allow 1st click the make a selection change

PR 10610 Deleted invoices return inventory at the rounded cost and not necessarily the true cost

APP:TRAKQUIP

DLL:INVTY

APP:RTMS

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PR 10610 Deleted invoices return inventory at the rounded cost and not necessarily the true cost

Release Notes:

Issue Reported:

Deleted invoices return inventory at the rounded cost and not necessarily the true cost

Investigation Results:

Investigation confirms that the line cost from the invoice record is being used as the return cost

Result of this report:

Added code to derive the actual transaction cost if the item is an actual inventory item.

PR 10604 Issues revealed in Kit Maintenance Rollup calculations

APP:TRAKQUIP

Release Notes:

Issue Reported:

RFM 9999 revealed a problem in the Kit maintenance rollup calculations where when the quantity is changed on the quantity of items on the kit, the rollup multiplies the quantity properly on all of the items except the rollup item where the quantity should not change from the user entry.

Also reported was the fact that last kit item was not automatically selected

Investigation Results:

Investigation reveals that revised query for RFM 9999 rendered the test for rollup item invalid. Investigation reveals that as Multi-Select items are loaded, the row designation was not set before the check box was checked. Therefore the check box was being applied to the previous row leaving the last row un-applied.

Result of this report:

Code Test for Rollup item was revised to render proper results.
Re-located the row assignment to insure that all kit items default to selected.

PR 10598 Newly Purchased Inventory Equipment Report not Sorting By Item

APP:RTMS

Release Notes:

Issue Reported:

The user reports that the custom Newly Purchased Inventory Equipment Report is no longer sorting by item number.

Investigation Results:

The report has never been sorted by item number, but the assets table has been loaded in numeric order so the sort has always been by item. When assets had to be loaded manually, this was not necessarily by item number, so the report's natural sort was no longer numeric.

Result of this report:

Report SQL statement will be modified to include a sort by item number.

PR 10590 Error saving tickets

APP:RTMS

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PR 10590 Error saving tickets

Release Notes:

Customer Reports:

When re-saving older tickets you will get this error: Run-Time error '94': Invalid use of Null

Investigation Results:

This error can be reproduced locally when these conditions are met:

Compatibility list is turned on.

Compatibility list not defined in the header on older tickets.

Add data in the Unit column and then try to save the ticket.

Result of Report:

Fixed the case when the "compatibility_list_name" field is NULL

RFM 10391 Billing logic modifications for pickup day

DLL:BILLG

DLL:PROFL

Release Notes:

Customer Request:

Currently, when evaluating a line item for invoicing, if the start rent date and the stop rent date are on the same day, the system will invoice one full day for that line item. If the start rent date and the stop rent date are different, the system will bill a full day for each day. i.e. If the stop date is one day later than the start date, the system will bill two days, one for the start date and one for the stop date.

The customer would like the above logic to continue to apply when billing the initial term (first billing), but not when billing the rental term (any subsequent invoice). On subsequent invoices, the system should give one day "grace" to allow for picking up the rental item.

Overview and Background:

Client requesting this RFM would like to exclude the Final Stop Date from billing. This is being done because this is the date that items are picked up and are (for this client) not considered a billable day. Client also wishes for there to be no billing when the start of billing cycle and stop date are the same. Client also wishes for this preference to apply only if the ticket has been billed at least once previously.

Proposed Modifications:

- 1. To provide this functionality, a new preference will be added to the INVOICE section named "Treat Stop Date as Free Day".
2. New functionality will be documented and available in the Help Files.
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RFM 10222 Reverse the RFM to relabel item number to serial number

APP:TRAKQUIP

Release Notes:

Customer Request:

RFM 9030 made modifications to label the item number as serial number and sub category as Part Number on the inventory screen. Reverse this modifications so that the item number is labeled item number again.

Proposed Modifications:

Reversed code that relabeled these fields.

RFM 10449 Modify Kit Maintenance

APP:Batch

DLL:BILLG

APP:TRAKQUIP

DLL:PROFL

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RFM 10449 Modify Kit Maintenance

Release Notes:

Customer Request:

In order to meet a Washington State tax requirement, the customer would like modifications to ensure all taxable cost is being included in each kit. Currently, kits are only including direct costs for materials and labor and the indirect costs associated with the manufacturing process are not included. The customer could get taxed for these indirect costs later and they would end up coming off the bottom line. The indirect cost will be based on a percentage considering several factors and then applied to each kit's cost. This percentage will then be included in the taxable cost amount for each kit for both internal and external sales. Indirect costs such as light bulbs, labor-estimating, cleaning, waste material, building, etc. are all considered part of the cost of the manufacturing process, the goal of this new functionality is to create a clean way to get this cost included and passed along to the customers.

Proposed Modifications:

1. Add an Accounting preference for "Kit Manufacturer Overhead." The value should be numeric and the description should be "Enter the percent to use for manufacturer overhead cost on kits."

2. Add an Accounting preference for "Kit Manufacturer Cost Item." The value should be text and the description should be "Enter the inventory item to be used for the manufacturer overhead tax calculation on kits."

The following functionality should only be available when both the "Kit Manufacturer Overhead" and "Kit Manufacturer Cost Item" preferences are set:

3. Add the following new fields to the "MULTI-SELECT LIST" which is displayed when adding a kit to a rental contract with the "Multi-Select Kit Items" preference set:

- a. COST - a column containing the cost of the item from inventory.
- b. SALE - a column containing the daily amount of the item from kit maintenance
- c. KIT COST - a field containing the total cost (cost x quantity) for all selected items (without overhead)
- d. OVERHEAD % - a field containing the percent entered for the "Kit Manufacturer Overhead" preference
- e. OVERHEAD COST - a field containing the Overhead Cost for the kit

4. Calculate the Overhead Cost for the kit as follows: If the kit contains an item which matches the item number specified in the "Kit Manufacturer Cost Item" preference, calculate the Overhead Cost as the total kit cost * the overhead percent. Populate this amount in both the COST and SALE fields on that item on the multi-select form. If the kit does not contain the overhead item, the kit overhead cost should be zero.

5. Add a new field to the rental contract item table to store the kit name for all items added from a kit. Populate this field whenever items are added from a kit. When generating an invoice from a ticket, if an overhead item is found on the ticket, calculate the overhead cost for the items from that kit on the ticket and set the overhead cost as the cost on the overhead line item.

NOTE: The cost displayed when adding the kit to the ticket may differ from the cost actually used when invoiced if the cost of any of the kit components has changed between the time the kit was added to the ticket and the time the invoice was created.

See Help Files for additional information.

RFM 10472 New preference to prevent inactive or missing items from being placed on PO or Fleet work order

APP:Fleet

DLL:MAINT

APP:PO

DLL:PROFL

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RFM 10472 New preference to prevent inactive or missing items from being placed on PO or Fleet work order

Release Notes:

Customer Request:

Provide a preference option to prevent users from adding an item to a Fleet Work Order or a Purchase Order if the item is flagged as missing or inactive. If a user attempts to save a Fleet Work Order or Purchase Order with items marked "inactive" or "missing" provide an error message indicating the item which is inactive or missing and do not allow the user to save the Work Order or Purchase Order.

Proposed Modifications:

For TrakQuip and RTMS:

1. Add a preference option to the "Fleet (Repair)" preference group for allowing missing items on Fleet work orders. When set, do not allow the user to create a work order for an item flagged as missing inventory and do not allow the user to add an item to the work order if the item is flagged as missing in inventory. Provide a message to the user indicating which items should be removed.
2. Add a preference option to the "Purchasing" preference group for allowing missing items on Purchase Orders. When set, do not allow the user to add an item to the purchase order if the item is flagged as missing in inventory. Provide a message to the user indicating which items should be removed.

For TrakQuip Only:

1. Add a preference option to the "Fleet (Repair)" preference group for allowing inactive items on Fleet work orders. When set, do not allow the user to create a work order for an item flagged as inactive inventory and do not allow the user to add an item to the work order if the item is flagged as inactive in inventory. Provide a message to the user indicating which items should be removed.
2. Add a preference option to the "Purchasing" preference group for allowing inactive items on Purchase Orders. When set, do not allow the user to add an item to the purchase order if the item is flagged as inactive in inventory. Provide a message to the user indicating which items should be removed.

NOTE: This should not affect the editing of existing work orders or purchase orders that may have had the items added prior to being marked missing or inactive.

RFM 10473 New permission restriction to prevent editing the purchasing agent

APP:PO

DLL:PROFL

Release Notes:

Customer Request:

Provide a permission restriction to prevent users from changing the purchasing agent on a Purchase Order. When set, the user should be forced to accept the default value for this field as determined by the "Auto populate purchase agent" and "Use Full User Name for Agent" preferences.

Overview and Background:

The concept of this RFM is to provide a way for the administrator to prevent a user from changing the name of the purchasing agent when creating or editing a purchase order.

Proposed Modifications:

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1. A new Purchasing permission "Restricts user from editing the Purchasing Agent field" will be provided.
 2. New functionality will be documented and available in the Help Files.

RFM 10326 Add tax-code field to Work Order Form

APP:TRAKQUIP

DB:CS_SQL_SCRIPTS

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RFM 10326 Add tax-code field to Work Order Form

Release Notes:

Customer Request:

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- 1.) Provide the ability to specify a tax code on the dump services work order form. Provide the standard tax code pick list for selecting the tax code and use the tax code specified when generating a ticket from the work order.
 - 2.) Modify the dump services work order select list, available when right-clicking on the work order number, to always exclude work orders with a status of 3.

Proposed Modifications:

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- 1.) Modifications will be made to the work order to allow the user to specify the tax code desired.
 - 2.) The pick list presented when right clicking in the "Work Order" field will be filtered so that orders that have been used to update tickets (3 TICKET UPDATED) will be excluded from the list.
 - 3.) New functionality will be documented and available in the Help Files.

RFM 10588 New permission to restrict ability to delete a Return Authorization

DLL:PROFL

DLL:RETURNAUTHORIZATION

Release Notes:

Customer Request:

Provide a new permission restriction to control the ability to delete a Return Authorization.

Proposed Modifications:

Implement 3 new permissions for the "Return Authorization" screen - Adding, Editing or Deleting RAs
Document new functionality to be available in the Help Files.