Corporate Services Release Report

Release Date: 1/11/2010

PR 2010010801 **Append to Invoice not working properly**

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

When following the steps below, the system is not appending the multiple ticket to one invoice or even creating an invoice for each ticket. It is only creating an invoice for just the first ticket listed.

Invoice tab - Invoice/Create invoice from rental contract - Choose date range - check the "bill a customer" box - enter or choose customer number - check the append tickets without prompting - click build list - verify all tickets are highlighted - click OK - click yes to the Multiple Tickets Selected.

Investigation Results:

Recent changes to the invoice routine cause the Tick2Invoice form to be unload as soon as the first invoice is created.
The code changes are desirable, but had the un-intended consequence of losing the reference object to append additional invoices.

It was also observed that changes made in 2003 also cause the system to lose the ability to invoice multiple tickets as separate invoices.

Result of Report:

Modifed the code to gather all necessary data prior to un-loading the form.

Release Date: 1/14/2010

PR 2009122901 **Invoice printing issue**

APP:RTMS

This case has been entered to investigate the following:

Client Reports:

When attempting to print an invoice, the system seems to print a section incorrectly as it prints over the labels. Client uses style 5.

See attachment for printing example

Investigation Results:

This could not be replicated locally, but investigation reveals this may happen if the printer is missing or has an error during the startup of RTMS when the system is attempting to determine the printed width of the longest customer location field description.

Result of Report:

Modified the ticket and invoice print logic to check the print width immediately before printing if it was not set during startup. If the system still cannot determine this print width, it will now use a hard-coded value.

PR 2010010401 **For .Net project add fields to TrakQuip database that exist in RTMS**

DB:CS_SQL_SCRIPTS

Release Date: 1/14/2010

PR 2010010401 **For .Net project add fields to TrakQuip database that exist in RTMS**

This case has been entered to investigate the following:

Client Reports:

The following fields need to be added to the table tbl_inv_loc_detail to syncronize with RTMS

Column Name	Data Type	Allow Nulls
locd_inv_gl	nvarchar(50)	Checked
locd_ref_inv	nvarchar(15)	Checked
locd_ref_cust	nvarchar(15)	Checked
locd_ref_transfer	nvarchar(15)	Checked
locd_cer_ref	nvarchar(50)	Checked

Investigation Results:

Result of Report:

Fields added to TQ database baseline

PR 2009123004 **Required Documents Check Box Issue**

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

Checking the "Require Doc" box on an item using the reason subcategory set on the invoice preferences, then saving the item, the check mark is removed.

Locally, an item was created using the reason subcategory set on the invoice preferences, and the required doc box was checked. When the item was saved the require doc box was no longer checked. However; if you do a find on that subcategory and you check the required doc as part of your search criteria, choosing Required Document Records Only, the check mark appears on the records returned. This is the only time you can see that check mark.

This checked box should appear in the same manner as all the other boxes do. If applicable, it's visible.

Investigation Results:

Investigation reveals that code in the reposition event was added to make the check box visible or not visable. Code was not added to assign the value when a record was displayed.

Result of Report:

Added code to display the value of the check box Required Document

PR 2009121101 **Contact restrictions not working properly**

DLL:CustVend

APP:TRAKQUIP

Release Date: 1/14/2010

PR 2009121101 **Contact restrictions not working properly**

Client Reports:

Customer/Vendor Contact Records - Add Edit
Customer/Vendor Contact Records - View/Add/Edit Sales Only

Setting the permission to restrict users for adding or editing contact information is not working. If you click edit on the customer record, and then go to the contact tab, all the action buttons are disabled however; if you do not click edit first, the action button are available and you can add and edit the contacts and notes.

Investigation Results:

It was found that the permission to add or edit contact information was only implemented in our old customer/vendor maintenance form. The permission to view/add/edit Sales Only contacts was working correctly.

Result of Report:

A code change was made to implement Customer/Vendor Contact Records - Add Edit in the enhanced customer/vendor maintenance form.

RFM 10950 **Permission to restrict editing PO Header of a fully received PO**

APP:PO

DLL:PROFL

Client Request:

A permission to be added that will restrict users from being able to modify the PO Header fields once a PO is fully recieved.

Overview and Background:

The reason the client is requesting this modification is that the integration with their accounting package from the PO side requires that the data in the PO Header remain static once a PO has been fully recieved.

Proposed Modifications:
----
1. Add code to disable buttons on po header screen that allow a user to edit or delete a purchase order that has been deleted
2. Add code to restrict a user's ability to use any menu options that would modify the purchase order that has been received

Note: Some menu options that could modify the fully received purchase order should be restricted by their own permission
Examples: Export PO

RFM 10897 **Additional requirements to RA functionality**

DB:CS_SQL_SCRIPTS

DLL:PROFL

DLL:RETURNAUTHORIZATION

Release Date: 1/14/2010

RFM 10897 **Additional requirements to RA functionality**

Client Request:

Add a preference option to populate the office field on a return authorization from Job Maintenance.

When set, the RA logic should determine the office information from the job entered rather than the related tickets.
When the preference is NOT enabled, the RA logic should determine the office based on the related tickets as it does currently with the following change - it should not include tickets that are voided, flagged as no charge, or closed.

NOTE: Initially the customer will leave Job maintenance option un-checked.

Add a permission restriction to prevent the user from saving the RA header when the office field is blank.
When the user is restricted, the user should receive a message "Unable to create RA due to multi-office issue for this job" (or something similar) and the RA process is to be aborted with no header created.

Overview and Background:

With the original modifications for RFM 10657, the office on the RA is populated from the tickets for the selected job. When there are multiple offices on the tickets for the selected job, the system will leave the office code on the RA blank.
During testing, it was found leaving it blank created the following issues:

1.) Any RA with no office code will be excluded when running an RA report by office.
2.) Any RA with no office code will be excluded when printing a range of RAs by office.
3.) A ticket created from an RA with no office code will have no office code.

It has been suggested that rather than forcing the users to use the same office code on all tickets for a job, the RA should use the office code from the job record. The client is not ready to move forward on this suggestion at this time. Adding the preference option will provide that opportunity and changing the criteria for which tickets to include will reduce the number of conflicting tickets.

Proposed Modifications:

1.) Add a preference option to populate the office field on a return authorization from Job Maintenance. When set, the RA logic should determine the office information from the job entered rather than the related tickets. When not set, the RA logic should determine the office based on the related tickets as it does currently with the following changes - it should not include tickets that are voided, flagged as no charge, or closed.

2.) Add a permission restriction to prevent the user from saving the RA header when the office field is blank. When the user is restricted, the user should receive a message "Unable to create RA due to multi-office issue for this job" (or something similar) and the RA process is to be aborted with no header created.

PR 2010011101 **Syntax error when running the Usage Days Report**

DLL:REPORTS

Release Date: 1/14/2010

PR 2010011101 **Syntax error when running the Usage Days Report**

This case has been entered to investigate the following:

Client Reports:

Client reports that they receive the following error when trying to run the Inventory Reports>Usage Days report using a date range and checking any options under the category filter.

While attempting to open recordset, in ADO mode,

SQL->SELECT distinct INV.item, INV.descr as item_descr, INV.totalinvent, INV.cat, INV.sub as subcat, INV.purchase_date, C1.description as cat_descr, C1.groupkey AS group_key, S1.description as sub_descr, start_rent = ISNULL(DL1.orig_start_rent, ISNULL(DL1.ddate, DL1.start_rent)), stop_rent = ISNULL(DL1.stop_rent, DL1.return_date), DH1.tick_type, DH1.posted, DL1.quant, DL1.min_chg, aday = 'NA', adamt = 'NA', bylinetotal = 'NA', ISNULL(DH1.office, INV.office) AS office, DL1.def_bin_loc FROM inventory AS INV WITH (NOLOCK) LEFT JOIN categories AS C1 WITH (NOLOCK) ON INV.cat = C1.category LEFT JOIN subcategories AS S1 WITH (NOLOCK) ON INV.sub = S1.subcategory AND INV.cat = S1.joincat LEFT JOIN deltickitem AS DL1 WITH (NOLOCK) ON DL1.item = INV.item LEFT JOIN deltickhdr AS DH1 WITH (NOLOCK) ON DH1.dticket = DL1.dticket WHERE 1 = 1 AND INV.totalinvent <> 0 AND INV.cat IN ('0010', '0015') ORDER BY INV.item, DH1.office

the system reports error - -2147217900 [Microsoft][ODBC SQL Server Driver][SQL Server]ORDER BY items must appear in the select list if SELECT DISTINCT is specified.

Investigation Results:

Investigation reveals that a bug was introduced via PRs 8994 & 10774 that caused this error in certain databases. It appears the error may only be happening when one or more tickets with a null office code qualify based on the report parameters entered by the user.

Result of Report:

Modified the report base query to always use the same office criteria, in order, by statement, as is used in the query's select statement, specifically, "ISNULL(DH1.office, INV.office) ."

PR 2009123002 **Permissions resorting**

DLL:PROFL

This case has been entered to investigate the following:

Client Reports:

When setting up permissions for the "Customer Vendor Fields", the system resorts the list of restrictions each time you click on a Profile or Database or clicking the permission type "Customer Vendor Fields". The list changes from ascending to descending and then back again.

To get to these permissions: Go to menu option Maintain/Customer-Vendor/Maintain/Maintain Profile then choose a permission profile and go to Customer Vendor Fields.

Investigation Results:

Current use of CSSS_SortCol causes the sorting to toggle - code should be replace with code to force sorting assending every time

Result of Report:

Replaced use of CSSS_SortCol with code to sort spreadsheet SortKeyOrderAscending

PR 2009112401 **Issues found with New Review and Approve logging**

APP:RTMS

Release Date: 1/14/2010

PR 2009112401 **Issues found with New Review and Approve logging**

This case has been entered to investigate the following:

Client Reports:

If an invoice is created, then deleted (let's say there's an issue with it), the status stays at "Invoiced". When attempting to invoice that DT user receives the following message:

"This Ticket is not ready to be billed".

When attempting to invoice a job, the first DT invoices perfectly fine. When the process comes to the second DT the user receives the following message:

"At least one item on Ticket 110379 (000050201) will not be billed complete on this invoice because there are unbilled days before the Billing selected Start Date. Now that one item has been found, this procedure..."

If user answers yes, the DT then changes to "Invoiced" status, but the line items aren't added to the invoice (User tested this theory by answering no then invoicing the DT. The message was received on and it invoiced without any issues).

Investigation Results:

Replicated the result described above.

Result of Report:

Added logic to make sure that we reset the REVAPP status to ready for billing if it is set to invoiced and the invoice was deleted.

RFM 10943 **Create duplicate invoice style with different labels to support approvals**

APP:RTMS

Client Request:

Client would like to create a duplicate style invoice I with the following changes:

Replace the Invoice Title with Approval Ticket, so 'Invoice: 123456' will read 'Approval Ticket: 123456'

Remove the word 'Invoice' from Invoice Date and Invoice To. These will simply read 'Date' and 'To'.

Remove the 'Due Date' line.

Add a signature line at the bottom labeled 'Customer Representative'.

Overview and Background:

The client will be printing both, so either create a new style and use the prompt for invoice style to determine which style or add an option on the print form to print approval ticket.

Proposed Modifications:

Create style IA (invoice style I with approval) using existing style I as a template

RFM 10896 **Add Features to Print Range of Tickets and RA's**

APP:TRAKQUIP

DLL:RETURNAUTHORIZATION

DLL:TICKET

Release Date: 1/14/2010

RFM 10896 **Add Features to Print Range of Tickets and RA's**

Proposed Modifications:

Add the following options to the print ticket range feature added via RFM 10512:

1.) Exclude Tickets Flagged as No Charge
2.) Exclude Voided Tickets
3.) Exclude Invoiced Tickets

Default the above filters to checked.

Modify the print range logic to support these filters when printing a range of tickets.

****Added on 12/29/09 (DD)

For keyname "Client", hide the following filters
- Starting Contract
- Ending Contract
- Starting RA
- Ending RA
- Customer Code

Default Both Print Types to Checked

Also, change the RA date filtering to use the "pickup" date rather than the "creation" date

PR 2010010602 **Syntax error when updating Rig List in ticket header**

APP:RTMS

This case has been entered to investigate the following:

Client Reports:

Client reports that when clicking on the "Update List" button on the rig list header they are receiving the following error:

System Message

-2147217900 - [Microsoft][ODBC SQL Server Driver][SQL Server]Incorrect syntax near 'S'.

OK Cancel

Client reports that they were previously able to save rig directions with a single apostrophe.

Investigation Results:

Found that when the remarks were added, a different method was used to allow saving of longer strings. This method requires code to test for single apostrophe and to change syntax to allow them.

Result of Report:

Modified code to allow all fields to contain single apostrophe

PR 2010010402 **Add nolock options to query to reduce change of timeout when other tables are in use**

DLL:RETURNAUTHORIZATION

Release Date: 1/14/2010

PR 2010010402 **Add nolock options to query to reduce change of timeout when other tables are in use**

This case has been entered to investigate the following:

Client Reports:

Timeout error reported on query to fill RA records

Investigation Results:

It appears that the possibility of a timeout could occur due to record being edited at the same time.

Result of Report:

Modified query to include NOLOCK table hint to reduce chance of this occuring.

RFM 10862 **New preference to default the "Tax Date" to Invoice Date**

APP:RTMS

DLL:BILLG

DLL:PROFL

Client Request:

Client would like a new preference under the Invoice preferences to default the value of the "Tax Date" field to the Original Invoice date On Re-bills.

Overview and Background:

They are using this field to determine the Tax Authority on Credit Memos, and Re-Bill Invoices.

The program will by default populate the Credit Memo with the Invoice Date when creating the credit memo. We do not automatically populate the Re-Bill Invoice header with the Tax Date.

The client is currently having the users go and add the Invoice Date to the Tax Date header prior to creating a Credit Memo and Re-Bill Invoice. They would like to eliminate the need to manually populate the date there and have it default to the Invoice Date on the Invoice creation.

Proposed Modifications:
----
1. Add preference controlling tax date for re-bill invoices - if checked, it will use the date of the source invoice during the clone process.
2. Modify the clsInvoiceClone to be sensitive to this preference
3. Test
4. Document

RFM 10483 **New Order Entry form for Hodges Trucking**

DB:CS_SQL_SCRIPTS

APP:TRAKQUIP

DLL:GFRMS

DLL:OrderEntry

DLL:PROFL

Client Request:

Create custom Order Entry form for client.

Release Date: 1/14/2010

PR 2009061504 **When some users use the Item NEW prefix and others do not, the code can create duplicate items**

APP:RTMS

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.

RFM 10506 **Menu option to enter AFE number data**

DB:CS_SQL_SCRIPTS

DLL:GFRMS

APP:PO

DLL:PROFL

Customer Request:

The customer would like a menu option in the PO module to enter AFE number information. This information would include the AFE Number, Date Created, Date Approved, AFE Amount, Estimated(date field), Completion(date field), Requested By, and Comments(needs at least 150 char).

Would like to be able to right click on the cost code field and pull up the list of AFE Numbers entered.

Overview and Background:

Proposed Modifications:
----
1. Add tables to the database to support AFE information
2. Add a new data entry screen to allow users to enter AFE data
3. Add menu option to maintain AFE list
4. Add new Field to store AFE data on the PO Header form
5. Build logic to allow right click in this field during edit mode to allow user to select from list
6. Add permission to maintain AFE list

PR 2010010702 **Key Customer Field Issue**

DLL:CustVend

Release Date: 1/14/2010

PR 2010010702 **Key Customer Field Issue**

This case has been entered to investigate the following:

Client Reports:

Able to select the drop down in preferences tab and choose a key customer type, but won't allow editing to remove key key customer type for a specific customer.

Investigation Results:

When in the preference tab of customer maintenance a user can add a key customer type using the drop down selection however; once the type has been set there is no way to remove it. You can choose another type but cannot remove the information from the field.

This was replicated locally using the same steps. Original Modification was created on RFM8986

Result of Report:

Added a null record to combo box to allow the user to select a blank record in addition to the key type

PR 2010010701 **Syntax Error when running the UnDistributed PO Report**

APP:PO

This case has been entered to investigate the following:

Client Reports:

This was found during Corporate Services internal testing.

While in the report parameter form, if you choose to filter by PO Number and enter a start purchase order number or only a stop purchase order number you recieve SQL syntax error.

System Message

While attempting to open recordset, in ADO mode,

SQL->SELECT pohdr.ponum, pohdr.podate, pohdr.vendname, SUM(poitem.qty * poitem.price) AS potot FROM pohdr LEFT JOIN poitem ON pohdr.ponum = poitem.ponum WHERE pohdr.PONum BETWEEN 1234 AND AND pohdr.forced_dist = 0 AND ((pohdr.office IN ('03','321321','123','1111','852852','S2','S','789','998877','999666','T1','TESTCO','L','2020','1010','101010','3030','MC','BRAD','1','H')) OR (pohdr.office IS NULL)) GROUP BY pohdr.ponum, pohdr.podate, pohdr.vendname HAVING SUM(poitem.qty * poitem.price) <> 0

the system reports error - -2147217900 [Microsoft][ODBC SQL Server Driver][SQL Server]Incorrect syntax near the keyword 'AND'.

User: bmapp
Computer: BMAPP
Timestamp: 1/7/2010 11:22:46 AM

OK

Investigation Results:

Result of Report:

Corporate Services Release Report

Release Date: 1/14/2010

PR 2010010703 **Let PO Line items control office code for lines**

APP:PO

This case has been entered to investigate the following:

Client Reports:

Internal Testing reveals that office code on the line items is ignored on frmdistibution_details

Investigation Results:

Investigation confirms that current query uses office code in PO Header only

Result of Report:

Modified code to use office code from line item as first choice and only use header if office code on PO Line is null.

RFM 10953 **QuickBooks invoice export modifcation**

APP:TRAKQUIP

DLL:PROFL

Client Request:

Add class to the transaction header line on the QuickBooks invoice export

Overview and Background:

Client is restructuring their GL and reporting procedures beginning 2010. The new procedure calls for a class field to be included on the transaction header line.

Proposed Modifications:
----
1. Add new preference under the Accounting tab to determine if class code will be included in header
2. Add new preference under the Accounting tab to determine source of class code (default = Office)
3. Modify Sub QBCloseOut to test for preference
4. Modify Sub QBCloseOut to include CLASS in the header
5. Test
6. Document

PR 2010010603 **Unposted items appearing on sales/rental history**

APP:TRAKQUIP

Release Date: 1/14/2010

PR 2010010603 **Unposted items appearing on sales/rental history**

This case has been entered to investigate the following:

Client Reports:

If a ticket has been partially returned, upposted, additional items added to the ticket, saved but NOT posted again, those items appear on the inventory sales/rental history form as outstanding items.

See attachment for example replicated locally.

Investigation Results:

This behavior is expected. The goal here is to alert users that an item appears on an un-posted ticket along with some items that have been returned. The expectation is that the ticket will be re-posted to insure that billing are handled appropriately.

It is understandable that a user could become confused by the behavior.

Result of Report:

Added a check box option to allow uses to turn on the display of un-posted, but partially returned tickets