

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 1 of 8

Release Date: 1/19/2010

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

Release Date: 1/22/2010

RFM 8650 **Provide ability to set license limit across TrakQuip and RTMS**

APP:BarCode

APP:CostReport

APP:CRM

DB:CS_SQL_SCRIPTS

DLL:DBMGR

APP:TRAKQUIP

APP:ExcelClose

APP:FI_Conditions

DLL:LOGIN

APP:Material

DLL:OET

APP:PO

DLL:PROFL

DLL:REVAPP

APP:RM_LM

DLL:RMDB

APP:RTMS

APP:Timb

APP:TREPAIR

APP:UPDATE

DLL:WEBUP

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 2 of 8

Release Date: 1/22/2010

RFM 8650 Provide ability to set license limit across TrakQuip and RTMS

Client Request:

Provide the ability to enforce the support maintenance agreement for users across all Corporate Services applications.

Overview and Background:

Currently clients pay maintenance agreements based on the total number of users allowed to access the primary applications (TrakQuip and RTMS). Since limits can only be set per application, a client paying for 60 users but having 60 TrakQuip licenses and 10 PO licenses could potentially use 70 licenses.

There is no logic in place to restrict the total number of users active at any given moment to the number of users specified in the client's maintenance agreement.

Proposed Modifications:

Provide the ability to set the number of supported users in the license file and restrict this across all Corporate Services applications. For the purpose of this restriction, each distinct combination of windows user and windows computer name should be counted as 1 user, regardless of how many different applications or instances of each application the user is running.

PR 2009123001 Changing Database is not changing all preferences

APP:AP

APP:AR

APP:TRAKQUIP

DLL:GFRMS

DLL:LOGIN

APP:RTMS

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 3 of 8

Release Date: 1/22/2010

PR 2009123001 Changing Database is not changing all preferences

This case has been entered to investigate the following:

Client Reports:

When using the feature: File/Change Default Office (Database) - the preferences set for the current database do not update to the new database. For example: Database A and B have different spreadsheet designers assigned in preferences for the Rental Contract tab. When switching from Database A to Database B, the rental tab spreadsheet layout does not change to the one assigned in Database B's preferences.

The same thing happens for the Invoice layout as well. Database A has their Invoice Preference "Job Description Display" set for "1. Invoice Ship Name" and Database B is set at "2. Job - Job Description" however; the invoice display does not reset either.

This issue also happens using the File/Log in or Out of system. In order for all of the preferences to activate a user has to close the program first then re-open and log into the desired database.

This issue has been reproduced locally using the above steps.

Investigation Results:

Investigation reveals that much of the code executed during login is not re-executed during a re-login or office change. Investigation also found issues with the handling of the active license during a re-login, office change, or login validation (RTMS only).

Result of Report:

Modified the re-login and office change login in TrakQuip and RTMS to provide a better transition between databases by fully unloading the main form and executing all start up code during a re-login or office change. Modified return login validation in RTMS to no longer affect licensing. Also made modifications to TrakQuip, RTMS, AR, and AP so that an office change or re-login would keep the same active license rather than starting a new one.

RFM 9949 Invoice Export Specification - PEACHTREE 2003

APP:RTMS

Client Request:

The Peachtree 2003 Invoice Export was changed for one client to export the information that their install of Peachtree expects.

Usage Statement:

The user needs to set their accounting software to Peachtree 2003 and specify an export path.

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

RFM 10880 New column to display Returned To Bin on Delivery Ticket

APP:RTMS

DB:CS_SQL_SCRIPTS

DLL:LOGIN

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 4 of 8

Release Date: 1/22/2010

RFM 10880 New column to display Returned To Bin on Delivery Ticket

Client Request:

Client would like to add a new column to the Delivery Ticket Spreadsheet to display the "Returned To" Bin location. This would be visible directly after the "Bin" column.

Overview and Background:

Client utilizes the preference "Transfer Ticket Items To New Bin Location At Return Time" that allow for the return to a different location than the one from which it was originally delivered.

While the data related to this is stored in the transaction detail record, the final location is not visible to the user without running a query or a report.

Proposed Modifications:

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1. Modify the spreadsheet of the RTMS Rental Ticket screen to include an additional column "Returned To"
 2. This column will only be visible if the preference "Transfer Ticket Items To New Bin Location At Return Time" is turned on
 3. No field will be added to the rental ticket database record since the data to support this transfer is already stored in the transaction detail record.
 4. When the rental ticket is displayed (repositioned), the column will be populated utilizing a query from the transaction record.
 5. A view will be created to display the most recent return location to be used for reporting.

PR 2010011301 Quick Books form shows filtering options, but does not make them visible.

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

Discovered by Corporate Services internal testing.
In reviewing the frmInvcApproval we found that enhancements made for another RFM displayed filter fields, but did not enable them.

Investigation Results:

Result of Report:

Enabled the Filter for use by the QuickBooks closeout

PR 2010011204 SQL Statement produces error when run on MS Access Backup Database

APP:TRAKQUIP

DLL:INVOICE

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 5 of 8

Release Date: 1/22/2010

PR 2010011204 SQL Statement produces error when run on MS Access Backup Database

This case has been entered to investigate the following:

Client Reports:

SQL Error when repositioning the RTMS database

Investigation Results:

While we do not offer support for MS Access, we do allow clients to use MS Access as a backup emergency database. In this case, the query was written in a form acceptable to SQL Server, but not MS Access.

Result of Report:

Modified Query in clsInvoice.GenerateObject() to conform to both SQL Server and MS Access

PR 2010012101 Create Invoice from rental contract not working properly

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

When attempting to "create an invoice from rental contract" by typing or pasting the ticket number, the user receives the following message:

 You must select or type in a ticket to invoice.

In order to generate the invoice, the user must use the customer number feature, build the list, and then choose the ticket.

Investigation Results:

Investigation reveals that this bug was introduced with the recent changes for PR 10982. The system is only testing whether a ticket number was selected from the list.

Result of Report:

Modified the invoicing logic to properly test for a ticket number that was manually entered.

PR 2010011404 Error caused by Price Lookup logic

DLL:PRICELOOKUP

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 6 of 8

Release Date: 1/22/2010

PR 2010011404 Error caused by Price Lookup logic

This case has been entered to investigate the following:

Client Reports:

Internal testing reported an error see attached document

Investigation Results:

Found that the order by string was repeated twice if one parameter was selected

Result of Report:

Removed the second order by string from the query string if one parameter was selected

PR 2009121801 Cloning Inventory Item does not clone custom field tab 2

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

When cloning items, the custom tab 2 fields do not clone. The custom 1 fields do clone.

Investigation Results:

Verified locally that this is true. Also discovered that when only one of the custom fields is involved in the Find that an error would occur if any office restrictions also occurred.

Result of Report:

Modified code to include cloning in the custom fields 2 tab. Corrected query filter.

PR 2010011201 Unposted Closed/Voided tickets appearing as reservations

DLL:INVTY

This case has been entered to investigate the following:

Client Reports:

When voiding a reservation, the ticket is properly voided, however, these voided tickets still appear as reservations.

Investigation Results:

Reservations currently consider unposted tickets whether they are closed or not. The system should not take these unposted, closed tickets into consideration as a reservation.

Result of Report:

Added a check box to hide Voided Tickets - modified code to check the table deltick_void to determine if the ticket was voided.
Added a check box to hide Closed Tickets

RFM 10483 New Order Entry form for Hodges Trucking

DB:CS_SQL_SCRIPTS

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 7 of 8

Release Date: 1/22/2010

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

APP:TRAKQUIP

DLL:GFRMS

DLL:OrderEntry

DLL:PROFL

Client Request:

Create custom Order Entry form for client.

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

APP:RTMS

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 10563 **New Permissions for Review and Approve Pre-Invoice**

APP:RTMS

DLL:PROFL

DLL:REVAPP

DB:CS_SQL_SCRIPTS

Corporate Services Release Report

Printed: 1/25/2010 2:02:05 PM

Page 8 of 8

Release Date: 1/22/2010

RFM 10563 **New Permissions for Review and Approve Pre-Invoice**

Customer Request:

The customer would like to create a new permission that would hide the menu option to print pre-invoices. This would only allow the user to print the Pre-Invoice using the review and approve screen.

The customer would also like to add an additional Review and Approve feature to be able to specify per user what review and approve status they are allowed to print the pre-invoice. The user may be allowed to print the pre-invoice for one status or multiple statuses.

Overview and Background:

Proposed Modifications:

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1. Add permission to control printing of pre-invoices
 2. Add logic to restrict printing activity based on new permission
 3. Review and Approve
 - A. Add a column for each level status required to allow user with permission to print
 - B. Modify logic to maintain roles
 - C. Implement logic at the printing event to control printing.