

Corporate Services Release Report

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Release Date: 2/8/2010

RFM 10864 **Remove printing of custom specs on partial return lines**

APP:RTMS
DLL:TICKET
DLL:VIEW

Client Request:

When printing a delivery ticket with partially returned items, do not repeat the custom specs for every instance of the line item.

Overview and Background:

When printing the client's custom X style delivery tickets, there is logic in place to include the custom specs for each inventory item on the ticket. When an item is partially returned, a new line item is created and when the ticket is printed again the custom specs are repeated for each instance of the item. This unnecessarily increases the amount of pages needed to print a ticket.

Proposed Modifications:

- 1.) Add a field on the delivery ticket items to indicate whether the line was created by a partial return. Set this field accordingly when a partial return is performed.
- 2.) Modify the print logic to only include the custom specs on ticket line items that were not created by a partial return.

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RFM 9874 **WolfePak Accounting Interface**

APP:PO
DLL:PROFL
APP:RTMS

Modified the current WolfePak Accounting specification to meet current generation requirements, including adding a PO export.

PR 2009100801 **Inventory Summary Report is not considering database prefixes**

APP:TRAKQUIP

Customer Reports:

When user attempts to run the 'Inventory Summary' report, no categories are available.

Investigation Results:

Investigation revealed that the client is using categories from another database. Local investigation confirmed that the report is not considering the database prefix, when using the filters. The report needs to be corrected to do so. While in code, please check the other filters to make sure the prefix is considered.

Result of Report:

Modified report parameters form to use the shared category and subcategory pick list logic which automatically applies the appropriate table prefixes.

PR 2009103001 **Customer ID field length from Customer Maintenance to AP**

APP:AP

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PR 2009103001 Customer ID field length from Customer Maintenance to AP

This case has been entered to investigate the following:

Client Reports:

Client Reports they have a Vendor ID of "VTR-MS VENDO" in Customer/Vendor Maintenance. When right clicking in "Vendor No" on the Invoice Maintenance tab in AP and selecting vendor it populates as "VTR-MS VEN". Then when right clicking in the Invoice Number field the "Vendor Name" label is populated with "INVALID VENDOR". The customer has a work around. They shortened the vendor name to be ten characters since this is all we are populating in the "Vendor No".

Investigation Results:

The customer number field on the invoice maintenance tab in AP has the max length specified at 10 characters.

Result of Report:

Increased the max length of the customer number field on the invoice maintenance tab in AP to match the database field length of 50.

PR 2010012102 Returning items from repair tickets ignores custom functionality

DLL:PROFL

APP:RTMS

Client Reports:

Returning items from a repair ticket (delivery ticket type R) does not transfer the flagged item to a new repair ticket.

Investigation Results:

Able to reproduce locally using client's keyname. New code added via PR 10656 was entered to uncheck the repair flag during the return process for inter-office transfers and repair tickets where the inventory auto-repair flag is true. While this may not be the exact cause, it would be a good place to start debugging. In addition, manually checking the 'rep' flag does not trigger the functionality.

Result of Report:

This functionality was removed on another case. Some customers do not wish to have a new repair ticket created when returning a repair ticket. It was decided a new preference, "Send Repair Items to Repair" would be created. If this preference is checked a new repair ticket will be created on return. The value of this preference will be defaulted to on for the customer reporting this PR and off for all other customers.

PR 2009110402 Invoice Report total wrapping after 9 digits

APP:TRAKQUIP

Client Reports:

Client reports that when running the Invoice Report if the total exceeds 9 digits the remaining digits are wrapping to the next line.

Investigation Results:

The total column is not large enough to handle 10 digits or more.

Result of Report:

A code change was made to decrease the item description column and increase the total column.

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RFM 10947 **Print Invoice Style DEF with words DRAFT INVOICE if not Approved**

APP:RTMS

DLL:PROFL

Client Request:

Add the words DRAFT INVOICE to Invoice style DEF if the "Approved" checkbox on the Invoice header form is not checked.

Overview and Background:

Client will begin using the Invoice preference 'ONLY USE APPROVED INVOICES IN VI CLOSEOUT' to control which invoices can be sent to accounting system. This will allow the user to send an "un-approved" invoice draft to the customer for approval. Upon approval, the invoice will be marked as approved and can be re-issued as a full invoice and closed using the VI accounting export.

Proposed Modifications:

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1. Modify Invoice style DEF to recognize when the invoice header "approved" field is not set, print "DRAFT INVOICE" as the document header. If the "approved" field is set, print "INVOICE" as the document header.
 2. Add a preference 'Print DRAFT INVOICE on Invoice if Not Approved?' to control this feature. Preference should only show if the Invoice Style preference is "DEF".

PR 2010020102 **Conflict in Logic related to email authorization logic**

APP:PO

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PR 2010020102 Conflict in Logic related to email authorization logic

This case has been entered to investigate the following:

Client Reports:

A conflict exists between preferences when the Email Authorization Logic is in use with the preference to hide the PO number until the PO is authorized.

Investigation Results:

RFM 8924 - September 2008 - This RFM hides the assigned PO number from users until the PO is authorized. This prevents users from verbally providing a valid PO Number to a vendor until the PO is authorized.
RFM 9394 - May 2009 - This RFM added Email Approval Logic that was developed for the client to allow authorization by email.

At the time this was developed, the logic was such that if the user had an authorization limit, clicking the Authorize button would authorize the PO up to the users limit. If the user's limit was exceeded then the logic would select the manager with a limit necessary to authorize the PO, construct the email and send it to the manager. In addition, an authorization with a zero limit was forced to email rather than approved.

The client reported that the logic would not perform for those user's assigned a zero authorization limit (un-limited). It was desired that the most senior managers could approve a PO without using the Email Process. This was changed on CASE 2009102301.

The change made to accomodate the Un-Limited users produced another issue reported here:

In order for the user to be able to use the Authorize Button, the user must have permission to Authorize a Purchase order. If the authorization limit is set to 0, then the user has permission to authorize a PO of any size. Setting the authorization limit to .01 prevents the user from authorizing a PO with a larger limit forcing the Email Logic to take over.

However, the .01 limit does leave a "hole", the user can authorize a purchase order for zero dollars which is normally not a problem except when a client does not want the user to be able to see the assigned purchase order number until the PO is authorized (RFM 8924). The problem with the .01 limit is that a user can create and authorize a zero dollar PO in order to reveal the PO number.

Result of Report:

In order to resolve the conflict, code changes have been made to make the Authorize button visible to a user when the user lacks authority to approve a PO, but the Email Approval Logic is turned on. Under these circumstances, the user is only allowed to generate Email Requests for approval.

To assist the user in understanding the status, the label on the button is changed from "Authorize" to "Email Request"

Revised Rules for the Email PO Logic.

1. Users that lack permission to Authorize purchase orders will see a button to "Email Requests" rather than the "Authorize" button.
2. Users that lack permission to Authorize purchase orders will not be allowed to email a request for authorization when the amount of the PO is zero.
3. Users with permission to Authorize purchase orders will follow the existing rules
User can authorize a zero amount purchase order
If the amount of the purchase order is not zero, then the user will be limited to his/her authorization limit
If the amount of the purchase order is > 0 then if the amount exceeds the authorization level, the email logic will be invoked.

PR 2010020902 Error Message closing Invoices to Great Plains

DLL:INVOICE

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PR 2010020902 Error Message closing Invoices to Great Plains

This case has been entered to investigate the following:

Client Reports:

Client reports the following error message when trying to close Invoices out to Accounting using the "Great Plains Dynamics" closeout:

While in CalculateTax (Calling GetTaxInfo_Summ on line item), the system reports error - 457 This key is already associated with an element of this collection.

Investigation Results:

Investigation reveals this is occurring because more than one invoice in the export does not have tax data in the tax calculation tables. The tax data should not be missing from these invoices, but the export should be able to handle this situation. It is expected that one or more users creating the invoices are running an older version of the program.

Result of Report:

Modifications were made to the tax calculation logic to properly process taxes when more than one invoice is missing tax data.

RFM 11053 Modify Return Ticket and Ticket With Logo Printing Function for Auto-Email Capability

DLL:VIEW
DLL:PROFL
APP:RTMS
DLL:TICKET

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RFM 11053 Modify Return Ticket and Ticket With Logo Printing Function for Auto-Email Capability

Client Request:

RTMS needs the ability to create the ticket with logo (plain paper feature) in PDF format for auto-emailing regardless of which format the users selected to print.
RTMS needs the ability to automatically print the return ticket to a PDF for auto-emailing even if the user elects not to print the return ticket after returning items.
Change the auto-email message subject from just 'ticket_number.PDF' to (ticket field names specified)

Jobnum_name_loc6_loc5_dticket.PDF

Overview and Background:

These are changes to the original auto-email request that we have decided to modify while in testing.

Proposed Modifications:

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1. Modify the auto-email code at ticket print time to generate a second print job that is always using the X4 'Plain Paper' parameter for purposes of creating the PDF (so if the user prints to logo paper the PDF that gets sent always has the logo on it)
NOTE: Added new preference option "Override Pre-Print Option on Archive" to control this. Defaulted to on for client.
 2. Modify the Return 'OK' click process to automatically print a return ticket style X4 to PDF (so if the user returns items without printing the return ticket, it will auto-create the return PDF and email.
NOTE: Added logic for client to apply this logic for all X style tickets
 3. Change both the ticket and return ticket auto-email message subject from just 'ticket_number.PDF' to (ticket field names specified) 'Jobnum_name_loc6_loc5_dticket.PDF' (so the user getting the email can identify the customer and job location without having to open the ticket file).

Added 2/3/10:

4. Only send the auto-email when the ticket is posted

Added 2/4/10:

5. Only send the email when printing type D or T tickets

PR 2010012103 User receiving invalid warnings of inadequate inventory

APP:TRAKQUIP

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PR 2010012103 User receiving invalid warnings of inadequate inventory

This case has been entered to investigate the following:

Client Reports:

When saving a rental contract, the user receives a warning on sales item 18821 that "inventory is inadequate to meet all needs" yet it appears that there is exactly enough inventory available for that item to satisfy the ticket and the item is not out on any other ticket.

On the other hand, for sales item 46652, there is not sufficient inventory to satisfy the ticket and no warning is received.

Investigation Results:

Investigation reveals that item 18821 was backordered on ticket 24335 and appears on that ticket as out with a quantity of 1 but the itype is a comment itype. Since comment itypes do not affect inventory, comment items should not be considered for the sake of this warning.

Investigation reveals that item 46652 only appears on the ticket currently being saved and the warning logic is only applied when the item is also being sold on other tickets. Although this is consistent with the original intention of this feature, we may want to consider expanding this feature to test for adequate inventory in this situation.

Result of Report:

RFM 10483 New Order Entry form for Client

DLL:PROFL
DB:CS_SQL_SCRIPTS
APP:TRAKQUIP
DLL:GFRMS
DLL:INVTY
DLL:OrderEntry

Client Request:

Create custom Order Entry form for client.

RFM 11012 Create a new custom style Invoice for RTMS

APP:RTMS

Client Request:

The client currently has a custom Invoice printout (style X) for TrakQuip and would like to use the same style for printing invoices in RTMS.

Overview and Background:

The client uses both RTMS and TrakQuip and the invoice data is printed onto a pre-printed form.

Proposed Modifications:

Create an RTMS invoice printout (style X) for the client which is identical to the client's TrakQuip invoice printout (style X).