Corporate Services Release Report

Release Date: 2/26/2010

PR 2009110201 **Cannot delete items from Repair tag if quantity is zero**

APP:Fleet

This case has been entered to investigate the following:

Client Reports:

When an item/part needs to be deleted from a repair tag it does not delete if the quantity is zero. Once you place a quantity of one or more and save the item you can then delete the row.

Investigation Results:

To prevent users from deleting rows that had already been allocated we prevented them from deleting the quantity even if it was zero.

Result of Report:

Removed the restriction of zero quantity.

RFM 10992 **Additional Comments for specific item codes**

DB:CS_SQL_SCRIPTS

APP:TRAKQUIP

DLL:GFRMS

DLL:INVOICE

DLL:PROFL

DLL:RETURNAUTHORIZATION

DLL:TICKET

Release Date: 2/26/2010

RFM 10992 **Additional Comments for specific item codes**

Client Request:

Add a check box to the inventory tab "allow printable comment"
- In relation to printable comments functionality. Provide a flag on the inventory form to indicate whether an item is eligible for a printable comment. When checked and that item is entered on a delivery ticket, the user chooses the new menu option (indicated below). Only the items with this flag will appear as allowing a freelance printable comment.

Add a Menu option to create printable freelance comments (should work something like this)
- After the user has selected and saved all items and quantities for that order/spreadsheet, the user will then choose this new menu option.
- A form will appear with a list of the "Eligible items" and descriptions on that ticket. "Eligible items" are flagged as allowing printable comments
- User will choose an item or items to add a printable comment, by typing in the comment in the space or form provided. Then repeat this process for each item.
- Once all comments have been entered, user will then click save and the form will close. The system should then insert a comment line under the item selected in the form, insert the item number as the item/reference number, and insert the comment and check the print box.

These comments should only print on the ticket, RA, initial invoice and renewal invoice. Do not print the reference number just the comment.

When creating a transfer to new location/renewal, these comments should transfer to the new ticket automatically.
- The item number that contains a comment and the comment itself should appear on the ticket/invoice/RA and located directly under the actual item.

Restrict certain users from editing or deleting these comments after ticket has been invoiced.

- In the event that an item which has an associated comment is deleted, the comment should automatically delete as well when user deletes item on the spreadsheet. This should then update the comment table upon save of the delivery ticket.

- In the event that a comment only needs to be removed, user will use delete function on that line which then will remove the comment from the table and all references as well. This should then update the comment table upon save of the delivery ticket.

- In the event that the comment needs to be edited prior to the ticket being invoiced, allow the user to edit the comment directly on the line. This should then update the comment table upon save of the delivery ticket.

- Once the ticket has been invoiced only authorized users will have the ability to edit or delete them

When grouping invoices and RA's, items that have printable comments attached to them should be considered as part of the grouping criteria.

Comments should be stored in a separate table, with its associated ticket, item and reference item. If the comment is deleted on the ticket spreadsheet, it should delete it from the table, if a comment is changed on the ticket spreadsheet, it should save the last changed comment.

Ticket style X & XC will need to be changed in order to include item number on comment

Overview and Background:

Currently client does not allow freelance comments to print on the DT or Invoice. Only comments created on the inventory tab are allowed to print. There are some cases where it is not feasible to create a comment on the inventory tab, as it would not be a common or repetitious statement. Client does not allow the users to alter descriptions, therefore, a user could not alter a comment description either. Client also hides the print check box on the DT spreadsheet in order to avoid a user from accidentally un-checking the print flag of an item that needs to print or checking a comment that does not. Therefore, client would like the ability to choose the freelance comments that can print without giving the users the ability to use the print check box located on the DT spreadsheet.

Proposed Modifications:

Existing comment methodology will continue as is and the standard comments visible on the screen will continue to be considered un-printable

1. Add a new permission restriction to control creation of printable free lance

RFM 10992 **Additional Comments for specific item codes**

comments
2. Add a new permission restriction to control editing of printable free lance comments
3. Add a new permission restriction to control deletion of printable free lance comments
4. Add a new permission to prevent editing of printable free lance comments on the ticket after it has been invoiced (row will be locked) once invoiced
5. Add a preference to allow a check box to appear on the inventory screen labeled "Allow Comments"
    This preference will be used to control all of the remaining logic described below
6. Add a new field to the database and inventory screen to allow user to check the inventory item as eligible for printable comments
7. Add a new database table tbldeltick_comments to store the comments with the following fields
    dticket
    ucounter
    item
    comment (NVarChar(1000)
    creation date
    last modified date
    user_login
    auto_counter (primary key)
    Add index for dticket, ucounter
8. Only one comment will be associated per line, but the comment can be up to 1000 characters in length
9. Add a new form to offer the user the opportunity to enter/edit printable freelance comments
    Add logic to build a list of existing items and descriptions on ticket that are eligible for comments (see 5 above)
    Add logic to determine if comments should be replaced, deleted or supplemented when edited
10. Modify Documents to print these comments without the item number (user allows item numbers to remain)
    Modify logic on Rental Ticket styles (X and XC)
    Modify logic on Return Authorization (RA)
    Modifiy Invoice Printing
        Apply logic only on Initial and renewal invoice
        Grouping Rules
            Items without associated comments will be grouped as currently defined
            The printable free lance comments will be appended to the description of associated line Items and therefore will be grouped by the current grouping rules.
11. The printable free lance comments will not be stored with the invoice or the RA, but when an invoice or an RA references the diticket, ucounter and item, the comments will be printed
12. Modify Transfer logic to insure that comments associated with transferred item numbers are transferred with item numbers when Ticket Transfers occur.
13. Modify the rental ticket screen logic to ensure that if a line is deleted that related comments are also deleted.
    DELETE FROM table tbldeltick_comments
    WHERE dticket = 123456
    AND auto_counter
    NOT IN (SELECT auto_counter
    FROM tbldeltick_comments AS DC1
    INNER JOIN deltickitem AS DT1
    ON DC1.dticket = DT1.dticket
    AND DC1.ucounter = DT1.ucounter
    WHERE DT1.dticket = 123456
14. Test
15. Document

RFM 10920 **Printing changes for Tickets and invoices**

DLL:INVOICE

DLL:PROFL

DLL:TICKET

Release Date: 2/26/2010

RFM 10920 **Printing changes for Tickets and invoices**

Client Request:

Make the following changes to the client's custom Rental Ticket printout (style X):

-1- No longer print the line under "quantity delivered"
-2- For Inside Salesperson, instead of printing the User ID, print the user's first name only. The name should be taken from the first name field in the rm_lm table pref_user.
-3- Change the tag name "Deposit" to "COD Payment Received"

see attachment for examples

Make the following changes to the client's custom Invoice printouts (styles X & XC):

-4- Print the Inside Salesperson on the "initial" term invoice. Tag and name should not print on invoice otherwise. Print the user's first name, taken from the "first name" field in the rm_lm table pref_user.
-5- The tag "COD Payment Received" should only print when a payment has been received otherwise it does not print.
-6- When an invoice generates for a ticket that is Special Event, print the Job Type. For example, the job type is "02 - Special Event", print only the portion after the dash, in the example omitting the "02 -". This is to be printed in the body after all lines have printed.

see attachment for examples

Make the following changes to the client's custom Invoice printouts (styles X & XC):

-7- Change grouping criteria for line items in (client specific) category. When all of the grouping criteria are met except for he monthly rate, we would like the invoice to still group however calculate the line as indicated below

Item XX - Quantity 100 - Rate .50 - Extended $50.00
Item XX - Quantity 533 - Rate .25 - Extended $133.25

The total for both is 183.25 (50.00 + 133.25) then divided it by the total qty of 633 (100 + 533) which then gave an each price of 0.289494 and rounded it to 2 decimals which then equals 0.29

Appears on invoice as

Item XX - Quantity 633 - Rate .29 - Extended $183.25

Overview and Background:
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1) removed from request
2.) The invoice grouping logic is customized for the client and applies to non-initial term invoices only. Grouping is disabled on initial term invoices.

3.) The following fields are included in the invoice grouping logic:

a. Description
b. Itype
c. Min Charge
d. Additional Amount
e. Start Date
f. Stop Date
g. Discount
h. Taxable
i. Month Charge

Proposed Modifications:

Make the following changes to the client's custom Rental Ticket printout (style X):

1.) Remove the blank lines from the Qty Delivered column

2.) For the Inside Salesperson, rather than printing the user ID, print the user's first name from the in the rm_lm table pref_user.

Release Date: 2/26/2010

RFM 10920 **Printing changes for Tickets and invoices**

3.) In the totals section, change the label "Deposit" to "COD Payment Received"

See attachment for clarification.

Make the following changes to the client's custom Rental Invoice printout (styles X & XC):

1.) When printing an initial term invoice, include the first name of the Inside Salesperson below the ticket number in the ticket header. Do not include the label or the name if the invoice is not an initial term invoice. The first name should be taken from the in the rm_lm table pref_user.

2.) In the totals section, print the label "COD Payment Received" only when a payment has actually been received.

3.) When the invoice was generated from a ticket that is a special event (Job Type = "02 - Special Event") print the words "Special Event" in the invoice body blow the line items section.

See attachment for clarification.

Make the following changes to the client's custom Rental Invoice printouts (styles X & XC):

1.) On non-initial term invoices, for items with a "client specific" category, exclude the monthly rate from the grouping criteria. All other grouping criteria should be kept in place and items that do not have a "client specific" category should continue grouping per the current logic.

2.) Rather than printing the monthly rate for the first item in a group, calculate the rate based on the total quantity and total amount as indicated in the following example:

Item XX - Quantity 100 - Rate .50 - Extended $50.00
Item XX - Quantity 533 - Rate .25 - Extended $133.25

The total for both items is 183.25 (50.00 + 133.25). Divide the total amount by the total qty of 633 (100 + 533) for an average unit price of 0.289494. Round the average unit price to 2 decimals for a rate 0.29.

On the invoice, print the grouped line as follows:

Item XX - Quantity 633 - Rate .29 - Extended $183.25

NOTE: Due to rounding, multiplying the resulting rate by the quantity of the grouped line may not always equal the extended amount exactly, but the correct extended amount will always be reported.

PR 2010021601 **Inventory out of sync after returning some unreturned sale items**

APP:RTMS

Release Date: 2/26/2010

PR 2010021601 **Inventory out of sync after returning some unreturned sale items**

This case has been entered to investigate the following:

Client Reports:

The client was unable to return certain items unsold from a ticket that had been previously returned and unreturned. The item did not show out in inventory, but also did not show returned on the ticket.

Investigation Results:

Investigation reveals that the items could not be returned because the unreturn did not properly affect the inventory out quantity and there was not enough out of some items to allow an additional return. Further investigation revealed that some items had actually been returned twice, due to the item's quantity out on other tickets. Update queries were executed to correct the returned data on the ticket in question. Upon investigation of other tickets with the same items, it was found that there was pattern of items being returned twice after an attempted unreturn. It was eventually found that this is happening because the "unreturnable" count on returned line items is being reset to zero when the ticket is saved. It was clear in the cases investigated that items had been added or item quantities had been changed after the initial return.

Steps to Replicate:

1.) Post the same quantity of a single sale item out on two different tickets
2.) Return the item sold or unsold from one of the tickets
3.) Save the ticket
4.) Unreturn the item from the ticket (At this point, the items are still "returned" in inventory, but do not appear to be returned on the ticket)
5.) Return the item from the ticket again.

At this point, an attempt to return the other ticket will fail because the items were returned twice from the first ticket.
If the ticket is never saved again after the return, the unreturn will work properly.
If the item is not "out" on any other ticket, the second return will fail.

Result of Report:

Modifications were made to properly preserve the unreturnable count and return billing option information on returned line items when the ticket is edited and saved. Additional modifications were made to the unreturn function to handle a variety of cases more correctly.

RFM 11080 **Invoice Printing Modifications.**

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Client Request:

Modify the client’s custom style X and XC invoice printouts to only print payments and payment information on initial term invoices. All other invoices should never include payments or payment information.

Overview and Background:

Currently, the client only uses the payment functionality as a notation to the initial delivery and invoice. The actual payments (and overpayments) are processed in their accounting package and they would like to have the system only show the payments and payment information on the initial term invoice.

Proposed Modifications:

On the client’s custom style X and XC invoice printout, only show payments and payment information if the invoice is an initial term invoice.

PR 2010012902 **To condition and Condition status labels are not aligned correctly on form**

APP:RTMS

Release Date: 2/26/2010

PR 2010012902 **To condition and Condition status labels are not aligned correctly on form**

This case has been entered to investigate the following:

Client Reports:

Client reports that in the Inventory screen the "Kit Code" field is overlapping the "Can be used on job due to condition" field label. Also the field label of "Condition Status" is not properly aligned with the field.

Investigation Results:

The "Can be used on job" part of the label was hidden under the kit item field on the main tab.

Result of Report:

Modified the layout of the condition fields and labels so that the entire label is displayed.

PR 2009110601 **Cash receipts journal prints additional pages**

APP:AR

Client Reports:

When printing cash receipt journal in A/R it prints a lot of blank pages within the report.

See attachment for report criteria and report results.

Investigation Results:

Investigation reveals this will happen when an insufficient bottom margin is defined in preferneces.
Setting the Accounts Receivable "Reports Bottom Margin" preference to 2 will correct this problem.

Result of Report:

Modified the code to enforce a bottom margin of at least 2 lines.

PR 2009122902 **Customer code and ship via are not displayed in yellow when required by preferences**

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

When using the Rental Ticket preference options "Require Valid Customer Code" and "Require Valid Ship Via Method" the corresponding fields on the ticket header form do not display in yellow as some of the other fields do to indicate that entry is required.

Investigation Results:

The logic to color these fields yellow when the corresponding preferences are set was never implemented.

Result of Report:

Implemented logic to color these fields yellow when the corresponding preferences are set.

Release Date: 2/26/2010

PR 2009121702 **Long Reason Note on PO causes OLE DB Error**

APP:PO

This case has been entered to investigate the following:

Client Reports:

Client reported that when marking a PO as "Not Issued" they were receiving the following error message.

Error

-2147217887 - Multiple-step OLE DB operation generated errors. Check each OLE DB status value, if available. No work was done.

OK

The client was entering a Reason note that wrapped for 3 lines. When testing locally, I was able to replicate by entering reason code that wrapped for 3 lines.

Investigation Results:

Result of Report:

PR 2009120301 **Error received when adding Maintenance Procedure**

APP:Fleet

This case has been entered to investigate the following:

Client Reports:

User receives the following error when saving a new maintenance procedure:

While saving maintenance procedure, the system reports error - -2147217887 Multiple-step OLE DB operation generated errors. Check each OLE DB status value, if available. No work was done.

Investigation Results:

It appears that this message is received when a Request Description is not entered. The field tblprevent_main_request.pm_request does not allow nulls, so we should add an error message for clarity.

Result of Report:

Added logic to provide a warning message and prevent the user from attempting to save a maintenance procedure without a description.

PR 2010020801 **Clone invoice also clones Closed to Cost Point Flag**

DLL:BILLG

Release Date: 2/26/2010

PR 2010020801 **Clone invoice also clones Closed to Cost Point Flag**

Client Reports:

When cloning an invoice the "Closed to Cost Point" flag is also cloning.

Investigation Results:

Replicated locally cloning an invoice that has already been closed to cost point.

Result of Report:

Modified clone logic to not clone the "Closed to Cost Point" flag.

PR 2010020501 **Physical Counts not affected by Office Restrictions**

DLL:INVTY

Client Reports:

If a user is restricted from specific offices and they open Physical Counts, not only are they able to see the inventory in the restricted office but they can change the inventory counts as well.

Investigation Results:

Replicated locally by restricting all but one office in permissions, and then from the inventory tab open Physical Counts, no entry of a profit center or location code, click on build list. All inventory for all offices appear and I was able to update the inventory for an office I was restricted from.

Result of Report:

The office restrictions were added to the query.

PR 2010021102 **SQL Query Error on Usage Days Report**

DLL:REPORTS

Release Date: 2/26/2010

PR 2010021102 **SQL Query Error on Usage Days Report**

This case has been entered to investigate the following:

Client Reports:

Client reports that they are receiving the following error when running the Usage Days report with a Start and Stop date filter only.

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.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 (((inventory.item IN (SELECT tbl_inv_loc_summary.item_id FROM glperoffice AS T1 WITH (NOLOCK) INNER JOIN (tbl_inv_locations WITH (NOLOCK) INNER JOIN tbl_inv_loc_summary WITH (NOLOCK) ON tbl_inv_locations.loc_dblcode = tbl_inv_loc_summary.loc_dblcode) ON T1.pc_id = tbl_inv_locations.pc_seg WHERE ((T1.office IN ('S')) OR (T1.office IS NULL))) OR (inventory.non_invent <> 0))) OR (inventory.item NOT IN (SELECT item_id FROM tbl_inv_loc_summary WITH (NOLOCK)))) AND INV.totalinvent <> 0 ORDER BY INV.item, ISNULL(DH1.office, INV.office)

the system reports error - -2147217900 [Microsoft][ODBC SQL Server Driver][SQL Server]The multi-part identifier "inventory.item" could not be bound.

Investigation Results:

Recent corrections to the Usage Days report added table aliasing for the inventory table. The table aliasing was not applied to office restrictions. This is only a problem for users with office restrictions.

Result of Report:

Modifications were made to remove the table aliasing so that the office restriction logic can be applied properly.

RFM 11110 **Re-Label "MFR Unit #" field on inventory screen**

APP:TRAKQUIP

Client Request:

Client would like to re-label the "MFR Unit #" field on the inventory screen to "Model #".

Overview and Background:

The standard label for this field is "Model number"
On a previous RFM 8033, the client requested that the label be changed to "MFR Unit #"
txtTabOne(15).Tag = "MFR Unit #"

Proposed Modifications:
----
1. Remove code added on RFM 8033 to reset this label in the sub frmMain.Form_Load

PR 2010021003 **Deleting invoice is not re-setting all associated tickets**

APP:TRAKQUIP

Release Date: 2/26/2010

PR 2010021003 **Deleting invoice is not re-setting all associated tickets**

This case has been entered to investigate the following:

Client Reports:

When deleting an invoice created by batch, for a specific job, all associated invoices are not re-set properly. Only the ticket that appears in the invoice header is reset correctly. All remaining tickets have only some of the information re-set.

See attachment for ticket examples.

Investigation Results:

Investigation reveals that when deleting an invoice that contains line items from multiple tickets, after correctly updating the first ticket on the invoice, the system clears the last invoice information from all other ticket line items associated with the invoice. This prevents the system from correctly updating any remaining ticket line items.

Result of Report:

Modified the invoice deletion routine to move the logic that clears any remaining ticket references to the invoice to after all tickets on the invoice have been processed rather than after the first ticket on the invoice has been processed. This allows the deletion routine to properly update all tickets included on the invoice.

PR 2010011902 **Issue with General ledger Permissions**

DLL:BILLG

APP:RTMS

This case has been entered to investigate the following:

Client Reports:

Issue discovered by Corporate Services Internal Testing.

TrakQuip
With the following restriction set, a user is still able to add, edit or delete a GL Code.
Permissions - General - General Ledger Chart Of Accounts - Add Edit Delete

RTMS
The follwoing permission does not seem to work. User is able to open GL Codes form to view as well as edit.
Permissions - General - General Ledger Chart Of Accounts - View

The following permission removes the Maintain - GL Codes menu option, so user is unable to view the codes.
Permissions - General - General Ledger Chart Of Accounts - Add Edit Delete

Investigation Results:

Investigation revealed the permission to view GL codes was never implemented in RTMS and the permission to add, edit, and delete was flawed.

Result of Report:

Code changes were made to correct the inconsistencies with the GL code permissions.

PR 2010011401 **User able to Create Invoice for Restricted Office**

APP:AP

Release Date: 2/26/2010

PR 2010011401 **User able to Create Invoice for Restricted Office**

This case has been entered to investigate the following:

Client Reports:

Discovered by Corporate Services internal testing.

A user is able to create an Accounts Payable invoice for a restricted office. Once the invoice is created, the invoice cannot be viewed by the user (because he is restricted). He should not be able to create the invoice.

Investigation Results:

This was tested against the Office Restrictions under preferences and permissions.

Result of Report:

The logic was modified to ensure a valid office has been entered when saving AP invoices.

PR 2010022201 **RA population of Office code does not work properly**

DLL:RETURNAUTHORIZATION

This case has been entered to investigate the following:

Client Reports:

RA population of Office code does not work properly.

Investigation Results:

RA population of Office code does not work when the user does not tab through job number textbox.

Result of Report:

Added logic to reload the office code combobox everytime we change the job number.

PR 2010021202 **Corrupt Invoice created through Manager Approval**

APP:TRAKQUIP

Release Date: 2/26/2010

PR 2010021202 **Corrupt Invoice created through Manager Approval**

This case has been entered to investigate the following:

Client Reports:

PR 10885 Was trying to fix the issues we are still having with Manager Approval...This PR was released week of 12-18-09 and was included in our encapsulated release 12-25-2009, which has already loaded to production.

The attached e-mail , shows the message client received while in manager approval. Client was called to discuss exactly what steps were taken. After cleint hit ok on this message, client got another message. This message was different because it was "yellow" and client does not remember what it said. Client then pressed ok on that message, and got another one that said to contact system administrator and something else it but client not sure. Client pressed ok.

Issue still exists. Client was asked to forward all the print message in the future.

In this case, it produced the invoice with only one of the three line items it should have billed and did not close it to accounting. Deleted it and the user is now able to continue as instructed below:

It was found that the system produced an invoice but did not close it to accounting.

Investigation Results:

Was not able to reproduce error, but simulated the unique index violation in code and discovered the system is not deleting the botched invoice due to a concurrency error that is recieved prior to the deletion attempt.

Result of Report:

Added logic to refresh the concurrency date on the botched invoice prior to attempting the delete.

PR 2010011501 **Inconsistent capitialization on Ship to and Bill To labels**

APP:TRAKQUIP

This case has been entered to investigate the following:

Client Reports:

Client reported that the "Bill To" information label and the "Ship to" information label on the rental contract header form is not consistent. Would like to have both read as "Bill To" and "Ship To". (capitalizing the "T" in to on the "Ship to" label.

Investigation Results:

Custom coding for another client inadvertantly set the capitalization of the "Ship To Information" label to all lower.

Result of Report:

Corrected the capitalization of the "Ship To Information" label on the ticket header.

RFM 10729 **New filter for QuickBooks 2001 Accounting export**

APP:RTMS

Release Date: 2/26/2010

RFM 10729 **New filter for QuickBooks 2001 Accounting export**

Customer Request:

Customer would like the ability to only close invoices that have been approved. They would like a new filter to Include Approved Invoices only. They are currently exporting to QuickBooks 2001and exporting and importing that file to Navision.

*ADDED 1/5/2010 - Would like to have the ability to close the invoices for specific office codes. The user would like the ability to choose one or more office codes to close.
*ADDED Levron - 1/20/10 - Add the ability to use the invoice pick list screen instead of frmGetReportInfo, and add an option to show only approved invoices.

Overview and Background:

Sub QB2001Closeout() as customized for "Client" 11/04/2008 - RFM 9057 - Added cust number and job number for "Client" only

The Closeout is currently filtered by the form frmGetReportInfo using ScreenVersion = "CLOSE" which presents the user with the following filters:

Start and End Date
Start and End Invoice Number

The "approved" flag is presumed to be the field invoicehdr.approved

A check box (chkApproved) labeled "Approved Invoices Only" exists on this report filter form and is currently only used when the screen version is set to ScreenVersion = "TAXSCHED" which is used by the Tax Schedule Report.

Proposed Modifications:

----

1. Replace the current invoice number/date filter screen (frmGetReportinfo) with the invoice pick list form (frmPickInvc).
2. Add an option to frmPickInvc to 'Show Only Approved Invoices?'
2. Modify the code in Sub QB2001Closeout() to recognize the invoice pick list filter screen.
3. Modify the SELECT statement generation code to recognize and use the filter for approved invoices only.
4. Test
5. Document Change

RFM 11106 **Additional field to the "Repair Requested" spreadsheet in Fleet**

DB:CS_SQL_SCRIPTS

APP:Fleet

DLL:MAINT

DLL:PROFL

Release Date: 2/26/2010

RFM 11106 **Additional field to the "Repair Requested" spreadsheet in Fleet**

Client Request:
----
1. Client requests an additional column in the "Repairs Requested" spreadsheet on Fleet Work Order.

This column will be labeled "Service Due Date".

Needed column can be added to end of the spreadsheet, client does not require a specific placement.

Would like this column to be populated by the PM Scheduler based on the system calculated due date (days until) when using the "Schedule Preventative Maintenance Work Orders" menu option on the inventory screen and be required on the Work Order.

Client will be using the meter option to calculate projected readings for items on rent.

When more than one service for an item is generated on the Work Order would like the "due date" to reflect the calculated due date for each individual service.

Client will be generating their own "In house" reports to report on this additional data.

Overview and Background:

The concept here is to allow the service manager to generate schedules for the future and to use this date as an aid in dispatching.

Proposed Modifications:
----

1. Add a preference to use the Service Due Date logic
2. Modify the Repair Request spreadsheet to accomodate the new column
3. Modify the database baseline to include this new field
    a. Modify the View of this table to also include the data field
4. All logic to the scheduler to use the DateDiff() function and the Days Until column to calculate the date when the service should be rendered and to populate the new column
    b. If the date is negative, we will still put the past date as the date the service was due
5. Modify Fleet work order code to display this column
6. Modify Fleet work order to allow users to search on this new column
7. Modify Fleet work order to save this field when the work order is edited
8. Add a permission option to determine whether the Service Due Date is editable
9. Test
10. Document